



Texas Comptroller Leadership Circle

Score Introduction

Reporting the good news about local government transparency.

The Comptroller of Public Accounts is pleased to roll out the Texas Comptroller Leadership Circle program to recognize local governments across Texas that are striving to meet a high standard for financial transparency online. We are spotlighting local governments that are opening their books to the public; providing clear, consistent pictures of spending; and sharing information in a user-friendly format




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that lets taxpayers easily drill down for more information.

We have developed a free, self-scoring process that will be verified by our Local Government Assistance Division.

The “Gold” designation highlights those entities that are

setting the bar in their transparency efforts, “Silver” encourages those who are making progress, while “Bronze” inspires those who are just beginning their transparency efforts.

Financial transparency is an ongoing goal for any government entity. Receiving a  “Bronze” or  “Silver” designation paves the way for achieving greater transparency and attaining a  “Gold” designation in the future.

We will award Leadership Circle designees with a certificate reflecting your Circle Award level: Gold, Silver or Bronze. We’ll spotlight you on our Texas Transparency Check-Up Web site at www.window.state.tx.us/comptrol/checkup/.

We’ll also send you a digital “Texas Comptroller Leadership Circle” seal reflecting your Award level that you can post on your Web site. Once awarded, the Leadership Circle designations last for one year from the date our office approves them. Entities will need to resubmit their score sheets annually to requalify for Leadership Circle designation.





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Instructions

Instructions for Scoring Leadership Circle Award Level

1. **Section A:** place a check next to each financial document that is posted on the entity's Web site.
2. **Section B:** place a check next to each financial transparency feature offered on the entity's Web site.
3. **Section C:** tally the number of points for **Section A** and **Section B**.
4. Compare point totals to the Leadership Circle Award Levels. At a minimum, Gold requires 3 points for **Section A** and 8 points for **Section B**. Silver requires 2 points for **Section A** and 7 points for **Section B**. Bronze requires 2 points for **Section A** and 5 points for **Section B**.
5. At the top of the **Contact** page, enter the name of the entity being scored, the primary point of contact and the entity's Web site, phone, e-mail and mailing address.





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Section A

Financial Documents Available Online

You can earn one point for each one of the following documents you have posted online:

- Budget** (1 point)
- Financial Report** (1 point)
- Check Register** (1 point)

Total Points

(Max 3 points)

Definitions for Section A

Budget: A budget serves as the financial plan for the city, county or governing body. It shows proposed spending and revenue, typically for a one-year period, in broad categories by office/department and by account type, such as salary, transportation or supplies. A more detailed budget may show data by month.

Financial Report: A financial report demonstrates how well the city, county or governing body managed within the proposed budget and plan. It includes a comparison of budgeted to actual expenses and revenues, typically for a one-year period, shown in the same broad categories and account types as the budget. Monthly financial or treasurer's reports are typically shown in summary only.

Check Register: A check register is a listing of line-item expenses showing the date, amount, to whom the payment was made, account type and purchase order number where applicable. Some check registers are searchable by vendor name and/or account type.





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Section B

Financial Transparency Features

You can earn one point for having each of the following features on your entity's Web site:

- Budget posted is for the current fiscal year *(1 point)*
- Financial report posted is for the most current year *(1 point)*
- Check register posted is for the current fiscal year *(1 point)*

Does your Web site have the following features?

- Date, Payee and Amount on check register? *(1 point)*
- Check register in a searchable format *(1 point)*
- Navigation tab or graphic guides readers to page with all financial documents: budget, financial report and check register *(2 points)*
- Easy to access documents – (can access in three clicks or less from the home page) *(1 point)*
- Creative use of charts or visual images to make data more understandable *(1 point)*
- Instructions on how to submit a public information request *(1 point)*
- Local government contact information available on home page *(1 point)*
- Names and contact information for current local elected officials *(1 point)*

Financial Transparency Feature Total Points

(Max 12 points)






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Section C


Total Leadership Circle Tally Points

Total points for Section A	<i>(Max 3 points)</i>
Total points for Section B	<i>(Max 12 points)</i>
Total Section A and B combined points	<i>(Max 15 points)</i>

Leadership Circle Award Levels

 = 3 points for Section A, at least 8 points for Section B

 = 2 points for Section A, at least 7 points for Section B

 = 2 points for Section A, at least 5 points for Section B



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Contact

Name of entity

Web site address

Primary point of contact for entity

Phone

E-mail

Mailing address

Signature of authorized signer for entity: *(Judge for county, mayor or their designee for city, superintendent for independent school district, general manager for river authority).*





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Submission

Leadership Form Submission Options

Choose an option for submitting your Leadership Circle Score Sheet.*

Mail: Fill in the PDF form electronically, print it, then send to

Texas Comptroller of Public Accounts

Attn: Robert Wood, Director

Local Government Assistance & Economic Development Division

P.O. Box 13528

Austin, TX 78711-3528

Fax: Fill in the PDF form electronically, print it, then send by fax at (512) 475-0664.

Mark your cover sheet, Attn: Robert Wood, Director, Local Government Assistance
& Economic Development Division

E-mail: If you are using Adobe Professional, you can fill in the PDF form electronically,
save, and then send it to Robert.Wood@cpa.state.tx.us.

If you have questions, please contact the Local Government Assistance Division at
(800) 531-5441, ext. 3-4679.

*Note: Please keep a hard copy for your records. The filled-in PDF cannot be saved electronically unless you are using Adobe Professional.





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Local Government Assistance &
Economic Development Division
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