



Office of Mayor Sam Adams
City of Portland

April 18, 2011

INTEROFFICE MEMORANDUM

TO: Financial Planning
Commissioner Fish
Commissioner Fritz
Commissioner Leonard
Commissioner Saltzman
Auditor Griffin-Valade

FROM: Mayor Sam Adams

SUBJECT: Office of the City Attorney FY 2010-11 Spring Budget Monitoring Report

This report provides details about the City Attorney's Office FY10-11 spring forecast and includes updates on the current year Service Improvement Plan. The office will not require adjustments to the budget during the Spring Budget Monitoring Process this year.

Expense Monitoring

Expenses for the City Attorney's Office are comparable to prior year-to-date and are appropriate for budget.

▪ **Personal Services**

The current forecast indicates that the Personal Services budget will be sufficient this year. The office has had several vacancies due to retirements and deferred hiring for those positions. Over the past year and a half, four long-term employees with top-of-grade compensation rates have retired. Two of these positions have been vacant for longer than expected; one specialized attorney position required a national recruitment and another required an extended interviewing process due to the high number of qualified applicants. Additionally, a Financial Analyst position was under-filled while the office analyzed its changing staffing needs. These temporary vacancies and rehiring at lower compensation rates have resulted in savings.

- **External Materials & Services**

Spending in External Materials & Services is appropriate for current budget. For the past several years, the office has required a transfer of funds from External Services into Personal Services for law clerk expenses and other temporary staffing needs. Savings in the Personal Services category has greatly reduced that need this year. Additionally, the office has made temporary reductions in out of town travel, education and legal publications. All of these factors contribute to an expected surplus in this category.

- **Internal Materials & Services**

Spending in Internal Materials & Services is appropriate for current budget. The office may overspend its Technology Services and Facilities budgets by very small amounts but a greater savings in Printing and Distribution costs should compensate for this.

Revenue Monitoring

There are no changes expected to revenues.

Service Improvement Plan Update

- **Provide timely responses to inquires**

The office initiated a 24-hour goal for initial responses to legal inquiries and continues to maintain that goal. When immediate answers cannot be provided, attorneys and staff will work with the client to agree on the timetable for response. The office is in its second year of the reorganization into practice groups. This has assisted attorneys in giving timely responses by providing additional back-up attorneys through information sharing and cross training. The office implemented its practice management system in August 2009 which will simplify information retrieval and help attorneys provide timely responses. Progress will be measured through future customer service surveys.

Status: Underway

Est. Date of Completion: Ongoing.

Summary: The 24-hour response time goal for initial inquires was implemented in 2008. The office conducts customer service surveys every two years and incorporated this goal into the survey to measure progress. In 2008 and 2010, over 80% of customers rated initial timeliness satisfaction at high or very high. Although 80% is commendable, the office would like to improve in this area. The respondents that rated timeliness as neutral or low have the option to comment and/or contact the City Attorney to discuss ideas for improvement. The City Attorney also meets with bureau directors to review the results for each bureau. Finally, as recommended in the FY12 Budget review, the office intends to work with Financial Planning to develop ways to track this goal as a performance measure.

- **Provide consistent legal advice throughout bureaus and Council offices**

The office is in its second year of the reorganization into practice groups. The purpose of the practice groups is to take advantage of the expertise of attorneys in the office and provide opportunities for sharing that knowledge. The groups meet monthly and discuss legal issues and projects generated by the City bureaus providing additional resources and better consistency for bureaus. The use of the practice management system is providing information resources that are accessible to everyone in the office. As the system progresses, information will be more easily and quickly accessible to attorneys and staff, and will facilitate consistent responses to inquiries. Progress will be measured through the customer service survey.

Status: Underway

Est. Date of Completion: Ongoing.

Summary: Chief Deputy City Attorneys hold monthly practice group meetings to discuss legal issues and City projects. Although difficult to measure, it is expected that this additional internal communication will provide for more consistent legal advice. In addition, the new Practice Manager software is beginning to be embraced by staff members and should provide quicker access to the office knowledgebase. With a comprehensive software implementation such as this, it is estimated that at least an additional year will be needed to get necessary information into the database and get staff accustomed to the change. The office's change management team is continuing to develop best practices and to train staff on how to use the system to its full potential.

- **Continue providing training to bureaus and Council offices**

The office continues to provide high quality legal advice and trainings to guide bureaus and officials and avoid risk. The plan is to increase trainings in ethics, public records and meetings, employment, construction, tort liability and other areas. The office will continue to increase the use of technology and easily accessible media to provide training to bureaus and council offices on matters of general government. The office recently created a link on its website for City employees to access training materials; the site will continue to grow.

Status: Underway

Est. Date of Completion: December 2011; with ongoing updates.

Summary: The office exceeded its training goal by providing over 300 hours of training in FY10. This is a 62% increase over FY09. The office is on track to provide about 340 hours of training this year. The office is working on an improved training program for City bureaus and council offices and will continue to keep training a high priority. Additionally, the City Attorney's Office website now contains basic training materials and information and is in the planning stages for future development. Once an updated training program is in place and materials are completed, materials will be placed on the City

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Attorney website for access by City employees. Having current training materials available in various media formats will be highly beneficial for the City and its employees. The office is considering using a consultant to help move this project forward.

- c. Linda Meng
Kim Sneath
Crystine Jividen

Business Area Projection Report

	Spring BuMP Revised Budget	FY 2010-11 YTD Actuals Thru AP8	Spring BuMP Year-End Projection	% of Projected Actuals to Revised Bud
Office of City Attorney				
EXPENDITURES				
Personal Services	\$7,602,124	\$4,854,225	\$7,458,925	98%
External Materials and Services	\$510,463	\$212,803	\$374,665	73%
Internal Materials and Services	\$731,572	\$471,170	\$720,424	98%
TOTAL EXPENDITURES	\$8,844,159	\$5,538,198	\$8,554,014	97%
REVENUES				
Charges for Services	\$0	\$1,078	\$1,278	0%
Interagency Revenue	\$4,523,704	\$2,591,671	\$4,523,704	100%
General Fund Discretionary	\$1,781,135	\$0	\$1,604,135	90%
General Fund Overhead	\$2,539,320	\$0	\$2,539,320	100%
TOTAL REVENUES	\$8,844,159	\$2,592,749	\$8,668,437	98%

Bureau Projection Narrative

Expenses for the City Attorney's Office are comparable to prior year-to-date and appropriate for current budget.