



CITY OF

**PORTLAND, OREGON**

**Dan Saltzman, Commissioner**  
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DATE: January 14, 2011

TO: OMF Financial Planning Division

CC: Jane Braaten, Business Operations Division

FROM: Dan Saltzman, Commission of Public Affairs *Don*

SUBJECT: Commission of Public Affairs FY 2010-11 Winter BMP Submission

Please accept the Commission of Public Affairs Winter BMP submission for FY 2010-11.

The attached documents detail a request for the following type of adjustment(s):

- Technical Adjustment (EMS to IMS) \$0

Additionally, the submission package provides information about any previous add packages or budget notes. Current year spending is projected to come in at budget.

I have reviewed the enclosed documents and support the submission package.

Please contact Brendan Finn or Lyne Martin from my staff, or Business Operations Financial Analyst Crystal Castruita, with any questions.

Thank you

Enc:  
Budget Amendment Request Report  
Business Area Projection Report  
Decision Package Status Updates

## BUDGET AMENDMENT REQUEST

Commissioner of Public Affairs

PERIOD Winter BuMP

FISCAL YEAR FY 2010-11

### PA\_004 - Comm. Public Affairs - BTS and P&D IA increase

This request increases the interagencies with BTS and P&D. The external materials and services category will be decreased to balance the request.

Dollar Amount: \$0

Type: Technical Adjustment

Resources: Internal Transfer

## Business Area Projection Report

|                                       | Winter BuMP<br>Revised<br>Budget | FY 2010-11<br>Year to Date<br>Actuals | Winter BuMP<br>Year-End<br>Projection | % of Projected<br>Actuals to<br>Revised Bud |
|---------------------------------------|----------------------------------|---------------------------------------|---------------------------------------|---|
| <b>Commissioner of Public Affairs</b> |                                  |                                       |                                       |   |
| <b>EXPENDITURES</b>                   |                                  |                                       |                                       |   |
| Personal Services                     | \$976,800                        | \$383,153                             | \$909,358                             | 93%   |
| External Materials and Services       | \$1,461,950                      | \$215,407                             | \$1,309,918                           | 90%   |
| Internal Materials and Services       | \$146,678                        | \$58,768                              | \$146,678                             | 100%  |
| <b>TOTAL EXPENDITURES</b>             | <b>\$2,585,428</b>               | <b>\$657,329</b>                      | <b>\$2,365,954</b>                    | <b>92%</b>                                  |
| <b>REVENUES</b>                       |                                  |                                       |                                       |   |
| General Fund Discretionary            | \$1,400,687                      | \$0                                   | \$1,281,784                           | 92%   |
| General Fund Overhead                 | \$1,184,741                      | \$0                                   | \$1,084,170                           | 92%   |
| <b>TOTAL REVENUES</b>                 | <b>\$2,585,428</b>               | <b>\$0</b>                            | <b>\$2,365,954</b>                    | <b>92%</b>                                  |

### Bureau Projection Narrative

**Fund 100:** The Commissioner's Office is on track to spend within their current level of appropriation.

## Business Area Projection Report

|                                       | Winter BuMP<br>Revised<br>Budget | FY 2010-11<br>Year to Date<br>Actuals | Winter BuMP<br>Year-End<br>Projection | % of Projected<br>Actuals to<br>Revised Bud |
|---------------------------------------|----------------------------------|---------------------------------------|---------------------------------------|---|
| <b>Commissioner of Public Affairs</b> |                                  |                                       |                                       |   |
| <b>EXPENDITURES</b>                   |                                  |                                       |                                       |   |
| External Materials and Services       | \$225,000                        | \$6,750                               | \$225,000                             | 100%  |
| <b>TOTAL EXPENDITURES</b>             | <b>\$225,000</b>                 | <b>\$6,750</b>                        | <b>\$225,000</b>                      | <b>100%</b>                                 |
| <b>REVENUES</b>                       |                                  |                                       |                                       |   |
| Intergovernmental Revenues            | \$225,000                        | \$0                                   | \$225,000                             | 100%  |
| General Fund Discretionary            | \$0                              | \$0                                   | \$0                                   | 0%  |
| <b>TOTAL REVENUES</b>                 | <b>\$225,000</b>                 | <b>\$0</b>                            | <b>\$225,000</b>                      | <b>100%</b>                                 |

### Bureau Projection Narrative

**Fund 217:** The Gateway Domestic Violence Center is on track to spend within their current grant level of appropriation.

## Commission of Public Affairs

### Decision Package Updates:

| PA_01   | Hold Position Vacant |                        |
|---|----------------------|------------------------|
| This decision package reduces Personal Services by \$9,228 to achieve the 1% one-time General Fund reduction. This package holds a position vacant for approximately 3 months. Commissioner Saltzman's office will redistribute the workload among other staff to minimize the impact on services. The impact on service is expected to be minimal because the position will be vacant for only a short period of time. |                      |                        |
| <b>Status for Winter Performance Report:</b><br>Our office has completed the vacancy hold and will evaluate the position requirements for the new hire.   |                      | <b>Status Complete</b> |

| PA_02   | Ongoing EM&S reduction |                       |
|---|------------------------|-----------------------|
| This decision package reduces External Materials and Services by \$27,684 to achieve the 3% ongoing General Fund reduction. This package reduces the Miscellaneous Services category. This cut in Miscellaneous Services reduces the ability to support programs. |                        |                       |
| <b>Status for Winter Performance Report:</b><br>Expense monitoring and strategic decisions are being made to ensure expenditures come in under budget.  |                        | <b>Status Ongoing</b> |

| PA_03   | OMF IA Reduction Savings |                        |
|---|--------------------------|------------------------|
| <b>Status for Winter Performance Report:</b><br>This is a pass-through reduction. |                          |                        |
|   |                          | <b>Status Complete</b> |

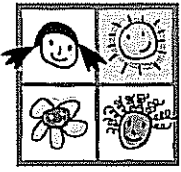
| PA_04   | Transfer Youth Violence/Police IA to Mayor |                        |
|---|--|------------------------|
| <b>Status for Winter Performance Report:</b><br>All system changes and funding mechanisms have been put into place to account for the positions and resources involved. |  |                        |
|   |  | <b>Status Complete</b> |

### Non-Technical Fall BMP Requests Updates:

| PA_001   | Encumbrance Carryover |                       |
|--|-----------------------|-----------------------|
| This request carries over \$334,759 in encumbrances related to the Gateway Center for Domestic Violence.   |                       |                       |
| <b>Status for Winter Performance Report:</b><br>These multi-year contracts were approved by Council and will be carried over or encumbered until their conclusion in FY 2013-14. |                       | <b>Status Ongoing</b> |

| PA_002  | Program carryover request |                       |
|---|---------------------------|-----------------------|
| This request is for Gateway Center for Domestic Violence program carryover of \$768,900. These agreements were signed and approved by Council 5/19/10 and are valid through FY 2013-14. |                           |                       |
| <b>Status for Winter Performance Report:</b><br>These multi-year contracts were approved by Council and will be carried over or encumbered until their conclusion in FY 2013-14.        |                           | <b>Status Ongoing</b> |

|   |   |                            |
|---|---|----------------------------|
| <b>PA_003</b>   | <b>Appropriate funding for awarded grants</b> |                            |
| This request is to appropriate budget to the grant fund to the two grants awarded to the Gateway Center for Domestic Violence.  |   |                            |
| <b>Status for Winter Performance Report:</b><br>Goods and services are being procured as appropriate and report requirements are being met as directed by the grant language. |   | <b>Status<br/>Underway</b> |



portland  
children's  
levy

Commissioner Dan Saltzman

Date: January 10, 2011

To: Mayor Sam Adams

From: Commissioner Dan Saltzman

Subject: **Executive summary for the FY 2010-11 Winter BuMP**

The Portland Children's Levy Fund FY 2010-11 Winter BuMP Report includes no requests for budgetary changes. At this time, we anticipate expenditures to remain within the Approved Budget.

The required budget narratives are included.

If you have any questions regarding this report, please contact Lisa Pellegrino at 3-2939.

cc: Lisa Pellegrino, Portland Children's Investment Fund Program Director



# Fund Projection Report

|                                   | Winter BuMP<br>Revised<br>Budget | FY 2010-11<br>Year to Date<br>Actuals | Winter BuMP<br>Year-End<br>Projection | % of Projected<br>Actuals to<br>Revised Bud |
|-----------------------------------|----------------------------------|---------------------------------------|---------------------------------------|---|
| <b>Children's Investment Fund</b> |                                  |                                       |                                       |   |
| <b>EXPENDITURES</b>               |                                  |                                       |                                       |   |
| Unappropriated Fund Balance       | \$0                              | \$0                                   | \$1,413,052                           |   |
| Personal Services                 | \$431,613                        | \$181,951                             | \$431,613                             | 100%  |
| External Materials and Services   | \$15,766,928                     | \$3,438,728                           | \$15,766,928                          | 100%  |
| Internal Materials and Services   | \$35,230                         | \$15,302                              | \$35,230                              | 100%  |
| Fund Transfers - Expense          | \$25,000                         | \$10,417                              | \$25,000                              | 100%  |
| Contingency                       | \$2,430,479                      | \$0                                   | \$0                                   | 0%  |
| <b>TOTAL EXPENDITURES</b>         | <b>\$18,689,250</b>              | <b>\$3,646,397</b>                    | <b>\$17,671,823</b>                   | <b>95%</b>                                  |
| <b>REVENUES</b>                   |                                  |                                       |                                       |   |
| Budgeted Beginning Fund Balance   | \$4,875,468                      | \$0                                   | \$4,875,468                           | 100%  |
| Taxes                             | \$13,813,782                     | \$92,505                              | \$12,746,355                          | 92%   |
| Miscellaneous                     | \$0                              | \$17,164                              | \$50,000                              |   |
| <b>TOTAL REVENUES</b>             | <b>\$18,689,250</b>              | <b>\$109,669</b>                      | <b>\$17,671,823</b>                   | <b>95%</b>                                  |

## Fund Projection Narrative

Projected revenues were reduced by City Economist in January 2011.



# BUDGET AMENDMENT REQUEST

## Customer Service Advisory Committee

**The Customer Service Advisory Committee was created in September 2006 to assist all City bureaus in working collaboratively with their employees to improve customer service. Building a culture of customer service will ensure that the City government is seen, both internally and externally, as a reliable partner and steward in running the City.**

In 2005 the Bureau Innovation Project #7 was charged with developing recommendations for improving customer service policies and procedures across all City bureaus. In adopting the BIP #7 recommendations, the City Council endorsed an ongoing process of customer service improvement, beginning with clearly defining a culture of customer service, then ensuring employees have the tools to meet those expectations, then surveying customers to assess the effectiveness of improvement efforts.

The Customer Service Advisory Committee (CSAC) has prepared guidance and collected examples in the three priority areas of **defining the culture of customer service, workforce development, and customer service surveying**. That information can be found in the Customer Service Toolkit page of the CSAC webpage:

<http://www.portlandonline.com/index.cfm?c=44197>

During the FY 2007-2008 budget process, the Mayor asked all bureaus to report on implementation of the BIP #7 recommendations. Each year going forward, the CSAC is requesting a status report on customer service efforts in the three priority areas. The intent is to gather information from bureaus on their activities during the current program year, for an annual report to Council. The status report template is attached.

The CSAC intends to be an ongoing resource to assist bureaus in customer service improvement efforts. Bureaus should feel free to contact any member of their committee site team for assistance. A current list of site team members can be found at

<http://www.portlandonline.com/index.cfm?c=44198>

**Questions?** Please contact Committee Chair John Dutt, Office of Neighborhood Involvement at (503) 865-2625

## Customer Service Improvement Status Report

**Bureau:** Children's Levy/Investment Fund  
**Staff Contact:** John Kelly  
**Phone:** 503.823.2980  
**Date:** January 14, 2011

**Bureau Mission and Goals:** Please attach copies of your bureau's mission, goals, and any workplans or other policy documents that specifically address customer service improvement efforts. Please describe how your strategic plans include customer service, and any plans for improvement.

*See attached budget documents with bureau mission and goals (performance measures). See attached Customer Services Practices document.*

**Customer Service Assessment:** Please attach a copy of your most recent customer service survey and survey results. Please indicate how your bureau assesses timeliness, accuracy, helpfulness, expertise, and available information. If you do not currently survey bureau customers, please explain any future plans.

*We have not done any customer service surveys. See attached Customer Services Practices document.*

**Workforce Development:** Please describe any efforts you have made to develop customer service competency within your workforce in the areas of recruitment, training, and evaluation. Please share any details you can provide regarding progress in these areas over the past year (training program information, key bureau contacts, recruitment/evaluation material examples, etc.)

*We have no specific efforts to develop customer service competency in our staff. See attached Customer Services Practices document.*

## Portland Children's Levy/Investment Fund Customer Service Practices

Our primary customers are:

- The nonprofit organizations who receive grants from the Fund (Grantees).

Our other customers are:

- The general public who may have an interest in how their tax dollars are being invested by the Fund;
- Nonprofit agencies who are not currently receiving funds but who have an interest in receiving grants.

In service to our Grantees, we have the following specific methods of ensuring high quality customer service:

1. Grantees are provided with direct phone numbers and email for the staff contacts responsible for their grants.
2. The Fund office is open weekdays from 8:30 am until 5:00 pm.
3. The Fund website is maintained with up-to-date information on Grantee reporting requirements.
4. The Allocation Committee (Oversight Board of the Fund) holds public meetings where all decisions regarding funding are made.

In service to the general public, we have the following specific methods of ensuring high quality customer service:

1. The Fund website is maintained with up-to-date information on the activities of the Fund. The public can contact the staff and receive various reports through our website.
2. The Allocation Committee (Oversight Board of the Fund) holds public meetings where all decisions regarding funding are made.

In service to nonprofit agencies who would like to receive funding from the Fund, we have the following specific methods of ensuring high quality customer service:

1. The Fund website includes information on how to apply for grants.
2. The Allocation Committee (Oversight Board of the Fund) holds public meetings where all decisions regarding funding are made.