



Office of Mayor Sam Adams
City of Portland

October 1, 2012

INTEROFFICE MEMORANDUM

TO: Yung Oyang, Financial Planning
Commissioner Nick Fish
Commissioner Amanda Fritz
Commissioner Randy Leonard
Commissioner Dan Saltzman
Auditor LaVonne Griffin-Valade

FROM: Mayor Sam Adams

SUBJECT: Office of the City Attorney FY 2012-13 Fall Budget Monitoring Report

Attached is the City Attorney's Office's Fall Budget Monitoring Report for FY2012-13. This report provides details about the office's prior year reconciliation and includes updates on performance measures and the office's Service Improvement Plan. The only budget adjustment this period is the required vacancy savings.

Encls.

c. James H. Van Dyke
Kim Sneath
Crystine Jividen

BUDGET AMENDMENT REQUEST

Office of City Attorney

PERIOD Fall BuMP

FISCAL YEAR FY 2012-13

AT_001 - Vacancy Savings

The City Attorney's office has one vacant Assistant Program Specialist position. The position will remain vacant for three months to generate the required savings.

Dollar Amount: (\$13,546)

Type: Mid-Year Reductions

Resources: General Fund Discretionary

Prior Year Business Area Reconciliation Report

	FY 2011-12 Revised Budget	FY 2011-12 Year-End Actuals	Percent of Actuals to Revised
Office of City Attorney			
EXPENDITURES			
Personnel Services	\$8,149,019	\$8,003,606	98%
External Materials and Services	\$628,946	\$384,179	61%
Internal Materials and Services	\$764,454	\$740,168	97%
TOTAL EXPENDITURES	\$9,542,419	\$9,127,954	96%
REVENUES			
Charges for Services	\$0	\$4,451	0%
Interagency Revenue	\$5,049,593	\$5,049,593	100%
Miscellaneous	\$0	\$6,367	0%
General Fund Discretionary	\$1,686,115	\$0	0%
General Fund Overhead	\$2,806,711	\$0	0%
TOTAL REVENUES	\$9,542,419	\$5,060,411	53%

Bureau Reconciliation Narrative

Overall expenditures were 4% under budget. Personal Services spending was less than 2% under budget due to temporary vacancies. External Materials and Services was under-spent by 39% because certain technology projects were delayed, expenses related to an increase in office space have been delayed, and law clerks and other temporary staff expenses were paid from Personal Services budget savings. Internal Materials and Services expenses were within 3% of budget.

City Attorney's Office
FY 2011-12 Decision Packages – Status Update
Fall 2012-13 BMP

OMF Interagency Adjustments

Description: The package reflected a net decrease of \$5,092 in interagency costs resulting from decision packages approved in OMF's Adopted Budget.

Status: An adjustment to the bureau's General Fund Discretionary allocation was made to balance the decreased costs.



CITY OF
PORTLAND, OREGON
OFFICE OF THE CITY ATTORNEY

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SERVICE IMPROVEMENT PLAN UPDATE
Fall Budget Monitoring Process
October 1, 2012

▪ **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 third 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 is intended to 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.

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

The office is organized into practice groups 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

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that this additional internal communication will provide for more consistent legal advice. In addition, the new Practice Manager software is being utilized by staff members and should provide quicker access to the office knowledgebase. With a comprehensive software implementation such as this, time is 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 2013; with ongoing updates.

Summary: The office has been consistently reaching or exceeded its training goals. However, considering budget cuts and the elimination of one attorney position in FY11, the office is expected to provide about 200 hours of training this year as opposed to 300 hours in previous years. 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 Attorney website for access by City employees. The office was considering using a consultant to move this project forward. However, with the change in technology support to the office, it is likely that City staff will be able to accomplish this goal.

Office of the City Attorney

Performance Measures

Performance Measure	Type	FY 2010-11	FY 2011-12	FY 2012-13	FY 2013-14	FY 2013-14
		Year-End Actuals	Year-End Actuals	Revised Budget	Performance No Dec Pkg	Performance With Dec Pkg
AT_0001 - Litigation Cases	WORKLOAD	2,121	1,433	1,500	0	0
AT_0003 - Hourly Rate	EFFICIENCY	\$144	\$150	\$160	\$0	\$0
AT_0004 - Contracts Review and Approval	WORKLOAD	6,668	8,187	7,200	0	0
AT_0006 - Training hours provided by City Attorney staff to other City staff	WORKLOAD	350	323	200	0	0

Performance Measure Variance Descriptions

Litigation cases handled for the year were as expected with the exception of collection matters. Due to a change in practice, most collection matters are handled by a collection agency and only certain matters are now targeted for litigation. At its peak in FY08, the City Attorney's office handled over 1,000 collection matters; the FY12 level was near 100 matters.

The actual hourly rate was slightly lower than anticipated due to expenses coming in under budget.

The number of contract documents reviewed was significantly higher than target. Although the City Attorney's office has no control over the number of contracts that come through the office for review, the office has been able to handle the increase with available resources.

The number of training hours provided was on target due to the high priority the office has placed on training. One thing to note, however, is that budget reductions at the Police Bureau eliminated one attorney position in FY11. This resulted in legal training for that bureau to be reduced by about 25% each year.