

BROADWAY BRIDGE



1925 SELLWOOD BRIDGE



HAWTHORNE BRIDGE

FY 2013

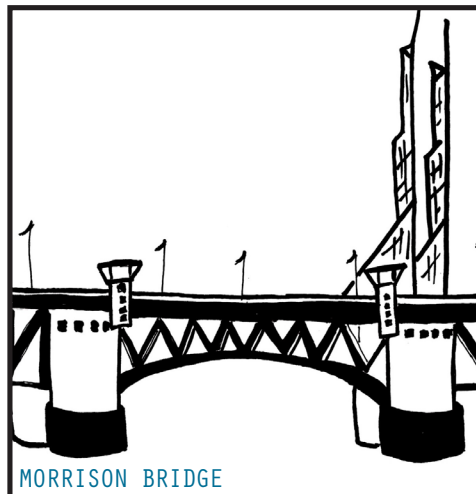
BUDGET SURVEY

Multnomah County

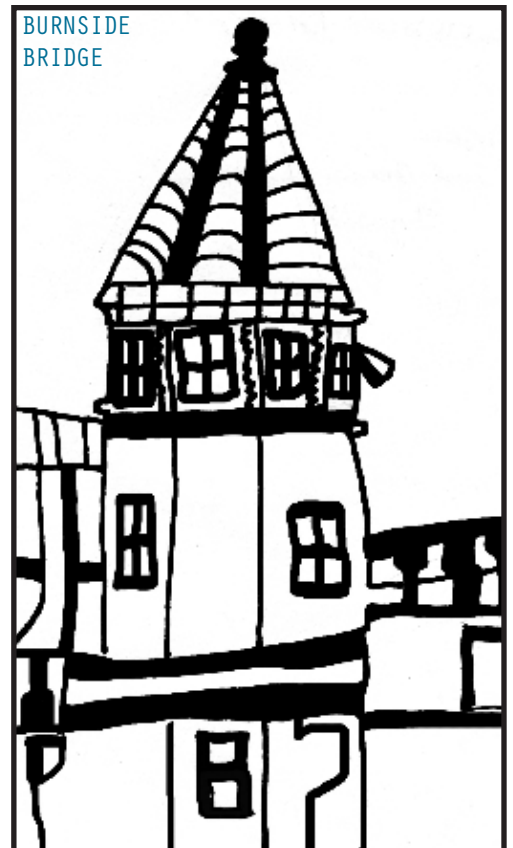
BIG & AWESOME BRIDGES of MULTNOMAH COUNTY
 ARTWORK BY STUDENTS OF THE SABIN/ACCESS ART PROJECT



SAUVIE ISLAND BRIDGE



MORRISON BRIDGE



BURNSIDE BRIDGE

About our cover

Local elementary school students in the Sabin/ACCESS Art Project created the art on the cover. These and other drawings are featured in *The Big & Awesome Bridges of Portland & Vancouver—A Book For Young Readers*. The book, by Sharon Wood Wortman and Ed Wortman, and edited by Edith Fuller, will be used to teach about bridges in our region.

The artists are Anna Dreher, age 8 (Broadway Bridge), Susan McHarris, age 8 (Burnside Bridge), Emrie Langfeldt, age 8 (Morrison Bridge), Youki limor, age 10 (Hawthorne Bridge), Jessica Yang, age 11 (Sellwood Bridge), and Molly Peterson, age 9 (Sauvie Island Bridge).

For more information, visit www.pdxbridgefestival.org and/or <http://www.bridgestories.com>.

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Introduction

Every year, the Budget Office surveys participants in the budget process to see how satisfied they were with the previous year and to elicit recommendations for how to improve the process. This year's budget process was completed on May 31, 2012. The annual budget survey was launched on September 4, 2012.

The data analysis and reporting was done by the Department of Community Justice's Quality Systems and Evaluation Services Unit.

The FY 2013 Budget Overview

The FY 2013 budget was balanced by bringing ongoing spending in balance with ongoing revenues and by limiting the use of one-time General Fund resources for ongoing programs. The FY 2013 budget maintains the County's long-term fiscal position by fully funding reserves and maintaining a Business Income Tax (BIT) reserve.

Even in the face of a projected uneven economic recovery, the County's General Fund fiscal position is stabilized, but only relatively speaking. There is still much ambiguity around the impacts of the State and Federal healthcare transformation initiatives. State and Federal revenues and grants continue to decline while demands for services for the most vulnerable in our community continue to grow. And, the County's healthcare and retirement costs continue to grow faster than our revenues.

The budget reduces the County's workforce from 4,526.51 full time equivalents (FTE) last year to 4,472.87 FTE in FY 2013, a reduction of 53.64 FTE or 1.2%. Of these FTE, 43.25 are in the Library, which translates into 8.8% of the Library's FTE.

The FY 2013 budget was balanced in part through a cost of living adjustment freeze by agreement of the County's largest union, AFSCME Local 88. This wage freeze saved a total of \$6.4 million (\$2.8 million in the General Fund and \$3.6 million in other funds). Local 88 did receive a step and COLA adjustment in FY 2012 when management and executive employees did not.

Executive Summary

- The satisfaction with the budget process rating decreased compared to last year (7.16 for FY 2013 compared to 7.68 for FY 2012).
- Over half of the respondents found there to be no difference in the budgeting process as compared to last year. Twenty-two percent found the process better and 6% found the process to be worse. Last year, 30% found the process better and 9% found the process worse
- Respondents had higher levels of satisfaction in regards to the clear posting of milestone delivery dates and the clarity of the instructions in the Budget Manual. Satisfaction regarding Internal Service Rates was higher than the past two years but still lower than in 2010.
- Respondents were more satisfied with the level of cooperation and the completeness of the documents they received from the Budget Office in 2013 than they were in 2012. Respondents were as satisfied with the amount of information they received from the Budget Office in 2013 as they were in 2012. In the other four areas, respondents were less satisfied in 2012 compared to 2011.

Methodology

The annual budget process survey was launched on September 4, 2012 and was open for four weeks, closing on October 2. There were 95 responses, representing a response rate of 47% for the 202 people surveyed. Last year's response rate was 31%.

The survey was the same as last year, with the addition of another open-ended question. The first set of questions asked respondents to rate their level of agreement (from 1 to 4) with three **Training and Preparation** issues. There was also an open-ended question where respondents could explain why they ranked any of the three Training and Preparation issues as "disagree" or "strongly disagree."

The second set of questions asked respondents to rate their level of satisfaction (from 1 to 3) on the amount of **Effort** received from the Central Budget Office in various areas, including cooperation, timeliness and communication.

The last set of questions asked respondents to rate their **Overall Satisfaction** with the budget process, to compare this year's process with prior years overall and to explain why this year's process was better or worse. Respondents were also asked what functional area of government they represented (Health and Human Services, Public

Training and Preparation

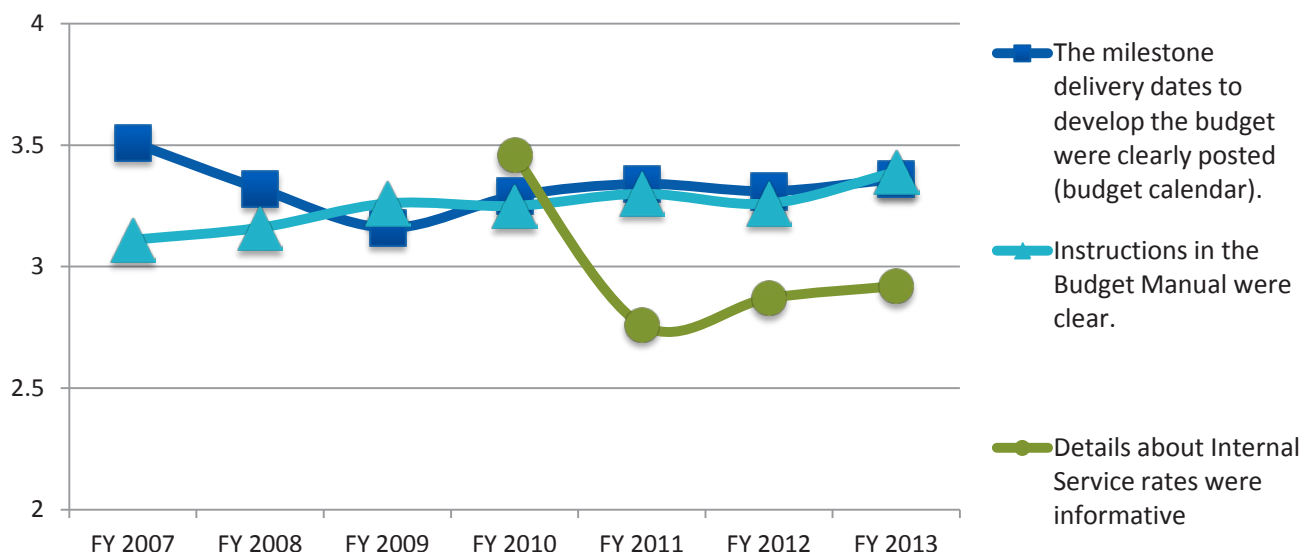
Safety, General Government or other) and what role they played in the process (for instance, Board Member or Finance Manager).

This report analyzes the data from this survey, including a summary of the comments received, and the Appendix lists each question along with the number of respondents, average response, and standard deviation which measures how similar responses were to each other.

Respondents had higher levels of satisfaction in regards to the clear posting of milestone delivery dates and the clarity of the instructions in the Budget Manual. Satisfaction regarding Internal Service Rates was higher than the past two years but still lower than in 2010.

As in previous years, the main theme that emerged from the answers to the open-ended question: "If you ranked any of the previous training components as disagree or strongly disagree please explain why," concerned Internal Service rates. One respondent said, "Internal rates are always late. They don't have a consistent format for all rates. It is a problem year after year."

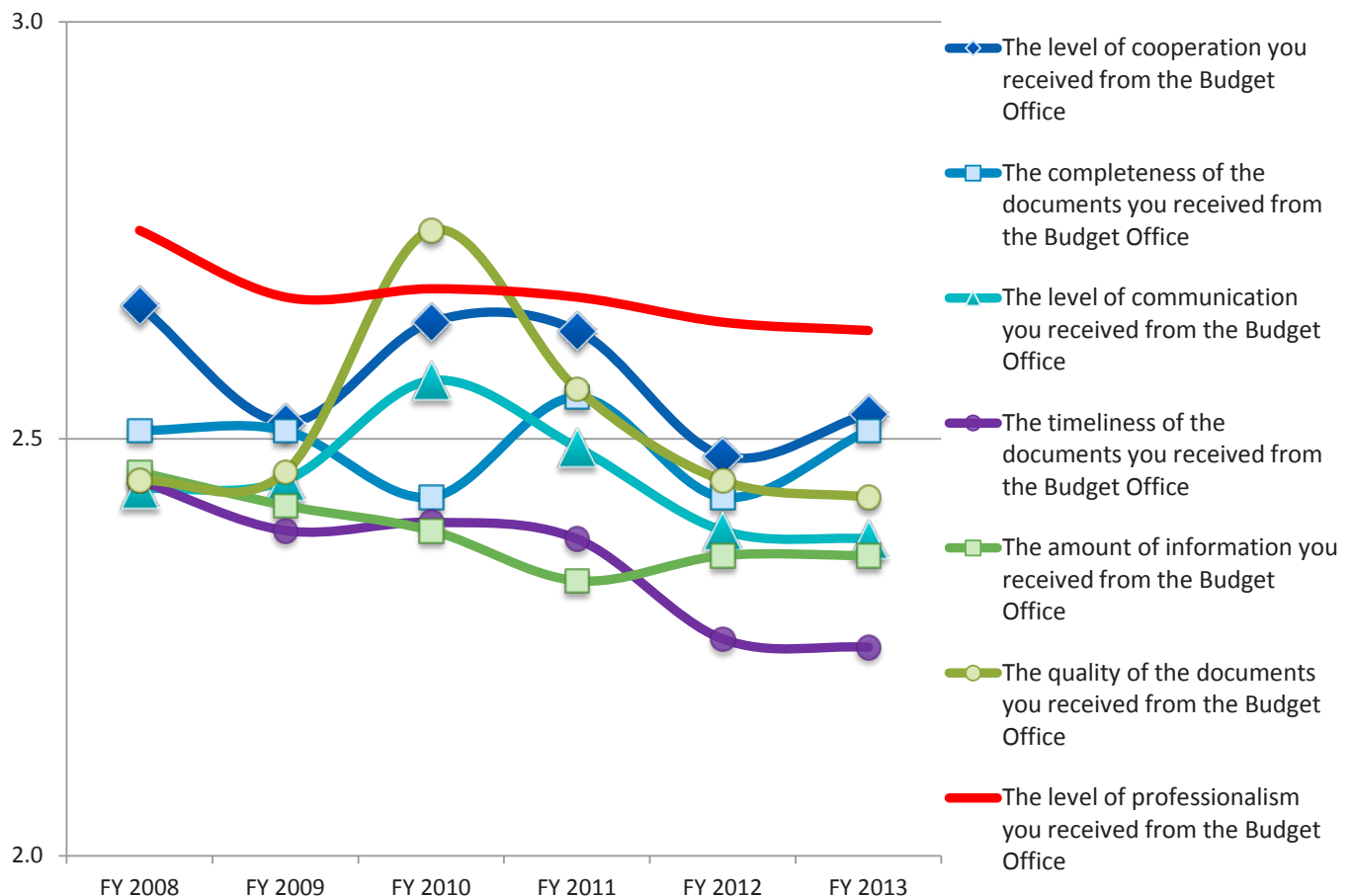
Another problematic area was the late release of the Internal Service rates. Respondents stated, "the (ISR) rate model changed at the last minute...Created lots of issues with departments that could have been avoided" and, "the internal service rates were not distributed timely, and were incomplete."



Effort Rating

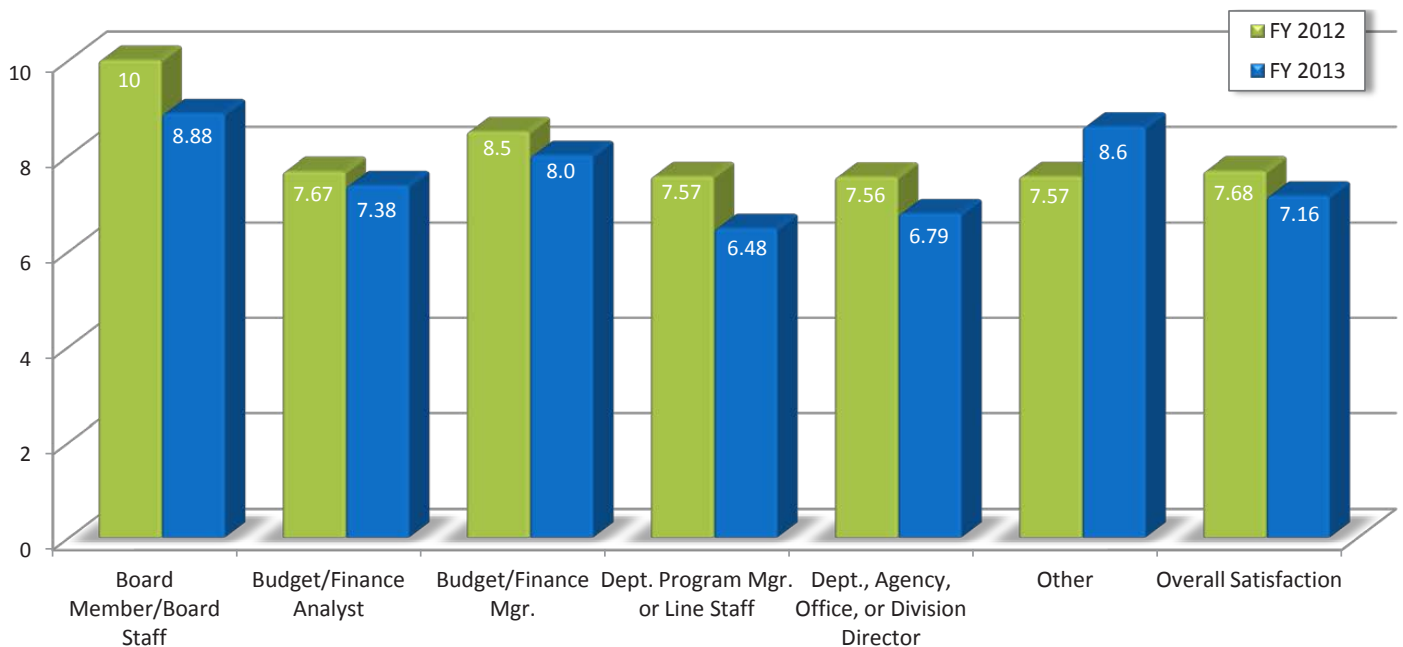
Respondents were asked to rate their level of satisfaction in each area by selecting “needs improvement” (1), “satisfactory” (2), or “excellent” (3).

Respondents were more satisfied with the level of cooperation and the completeness of the documents they received from the Budget Office in 2013 than they were in 2012. Respondents were as satisfied with the amount of information they received from the Budget Office in 2013 as they were in 2012. In the other four areas, respondents were slightly less satisfied in 2013 compared to 2012. Over the last two years, the satisfaction among respondents regarding the quality of documents received from the Budget Office has continued to decline.

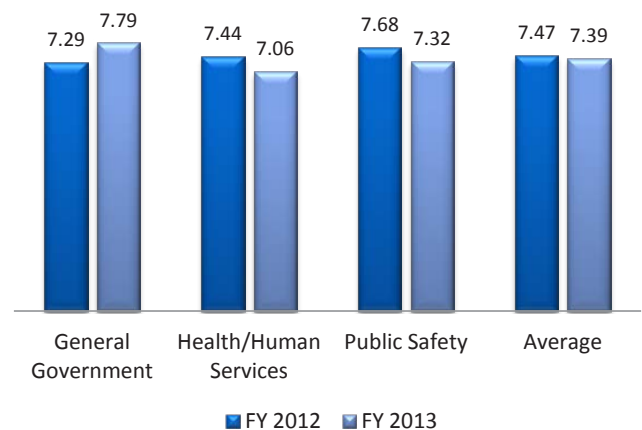


Overall Satisfaction

The satisfaction rating declined compared to last year (7.16 for FY 2013 vs. 7.68 for FY 2012 on a scale of 1 to 10). The satisfaction rating focuses on the budget process (see the next page for Budget Office satisfaction rating). The measure uses the seven questions about cooperation, quality, professionalism, etc., averaging the percentage of people who answer “satisfactory” or “excellent.” There was some variation between different respondents. Board Members or Board Staff and Budget/Finance Managers had the highest satisfaction rating followed by Budget/Finance Analysts.



Another type of variation was between the functional area of government for respondents. Those identifying themselves as General Government rated the process with greater satisfaction than Public Safety, Health and Human Services, and Other.



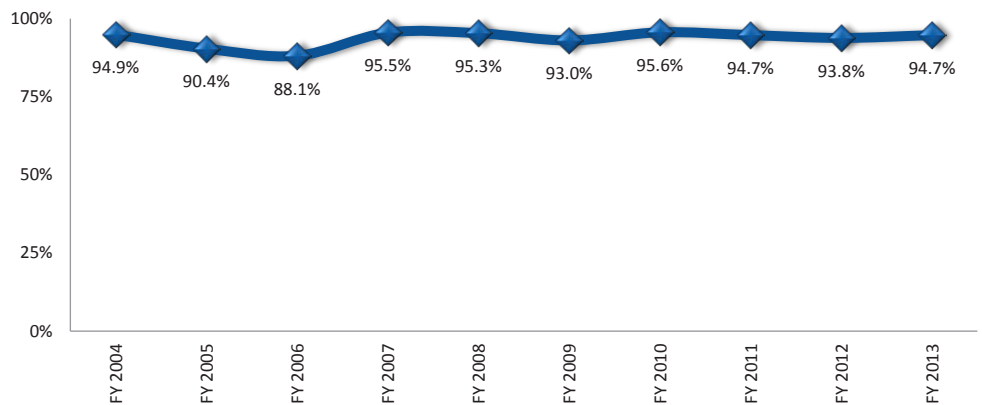
Overall Customer Satisfaction

57% of the respondents found there to be no difference in the budgeting process as compared to last year.

22% found the process better.

6% found the process to be worse (missing 15%).

The customer satisfaction rating for the Budget Office held constant at around 94%.



Respondents were asked to explain why they checked this year's process as Better or Worse. The primary theme that arose was about timeliness. Some respondents said that there was less time to work on the budget as compared to previous years. One respondent said, "Rated it 'worse' because of time compression—needed information from the Budget Office came later than usual." This was an expected reaction due to the lateness of the Internal Service Rates which affected the timeliness of other related information like General Fund constraints.

Other comments included:

- "Better: good budget tool. Worse: General Fund constraint and internal services information was very late."
- "There were more last-minute changes this year than last, especially in Internal Service and Indirect rates."
- "Condensed time frame and predetermined format of all submittals required as well as format consistency for all budget meeting presentations was helpful and reduced the level of anxiety in trying to figure out what was wanted and needed by the Chair's Office."
- "More familiarity with the process as we continue to use the same process. Thus, each year allows learning from before"
- "Internal services information/data was late and had errors. High level budget decisions were not communicated/shared with all parties, internal deadlines were not adhered to. Information/decisions were not transparent."
- "Professionalism, communication and level of technical expertise in the Budget Office has significantly declined in the past few years and seems to continue to go downhill."
- "Better communication of details and instructions to allow timely completion of budget."

Appendix

| Question | N | Mean | Standard Deviation |
|--|----|------|--------------------|
| The milestones and delivery dates to develop the budget were clearly posted (budget calendar). | 91 | 3.36 | 0.548 |
| The instructions in the Budget Manual were clear. | 84 | 3.39 | 0.538 |
| Details about Internal Service Rates were informative. | 71 | 2.92 | 0.788 |
| The level of cooperation you received from the Budget Office. | 77 | 2.53 | 0.552 |
| The completeness of the documents you received from the Budget Office. | 78 | 2.51 | 0.575 |
| The level of communication you received from the Budget Office. | 80 | 2.38 | 0.582 |
| The timeliness of the documents you received from the Budget Office. | 77 | 2.25 | 0.691 |
| The amount of information you received from the Budget Office. | 76 | 2.36 | 0.559 |
| The quality of the documents you received from the Budget Office. | 80 | 2.43 | 0.591 |
| The level of professionalism you received from the Budget Office. | 78 | 2.63 | 0.537 |

For each question, N is the number of respondent

Mean is the average response ratings

Standard Deviation is the level of variation between responses - a high standard deviation = high variation