Performance Audit Presentation
City Council Meeting - October 1, 2019

Tigard, Oregon

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Performance Audit Task Plan

- **Task 1 –** Organizational Profile
- **Task 2 –** Employee Survey
- **Task 3 –** Public Survey and Community Meeting
- **Task 4 –** Best Practices
- **Task 5 –** Organizational, Operational and Staffing Analysis
- **Task 6 –** Draft / Final Report

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Performance Audit Key Themes

- Strong customer service focus
- Generally high service levels
- Strong inter-departmental cooperation
- Lean staffing in many departments and greater reliance on part-time / reduced hour full-time positions
- Limited ability to fully access all available existing data
- Limited resources to analyze existing data
- Some integration issues between existing software

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Performance Audit Key Findings

- Departmental chapters focus on operational, process and staffing recommendations to increase efficiency, effectiveness or implement best practices.
- Overall, minor changes in staffing recommendations in most departments.
- Greatest number of recommendations address operational practices.
- Implementation will require multi-year timeframe to accomplish with existing workloads and resources allocated.

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City Manager's Office

	Recommendation	Priority	Timeframe
1	The Annual Workplans for each department should be guiding documents that are considered a part of performance evaluations and developed in alignment with the overall City Strategic Plan.	High	2020
2	The Senior Management Analyst position should be charged with overseeing the development and implementation of the City's performance management program.	High	2020
3	The City should expand on their existing performance measures by identifying and adopting additional performance and workload measures to enlighten the public regarding the Department's performance and accomplishments.	High	2020 (with budget)

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Human Resources

	Recommendation	Priority	Timeframe
4	The Department should develop a methodology for predicting upcoming retirements based on age and years of service of employees and update it at least annually to anticipate which employees and skills will need to be replaced.	Medium	2020
5	The Department should prioritize efforts to expand the diversity of applicant pools to enable it to work toward a City workforce that is reflective of the community.	Medium	2021
6	The City should update the performance evaluation tool and implement a compensation approach that more closely ties pay increases to individual performance.	Medium	2021
7	Additional staffing resources, in the range of .5 to .75 FTE, should be allocated to the Human Resources Department.	Medium	Next budget cycle

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Central Services

	Recommendation	Priority	Timeframe
8	The City should utilize internal and external customer surveys to determine satisfaction and effectiveness of web content.	Low	2020
9	The City should utilize a work order system for all requests for web content modification.	Low	2021
10	The City should develop a written communication strategic plan.	High	2020
11	The Graphics Design division staff should meet with stakeholders before beginning work on large project design requests.	Medium	2020
12	The Court should adopt a written strategic plan to guide future decision making for operations and employee performance expectations.	Medium	2020
13	The court should maintain staffing levels, so workload demands are within 10% of annual productive hours per employee.	Medium	Ongoing

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Central Services

	Recommendation	Priority	Timeframe
14	Fleet maintenance should perform analytics and random verification of fuel purchases	Medium	Ongoing
15	The City should ensure that its asset management system is meeting the needs of fleet and facilities maintenance staff.	High	2020
16	Property Management should regularly assess amounts spent on vendors for specialty services to determine if in-house staff should perform those functions.	Medium	2021
17	Property Management should implement a proactive building preventive maintenance program to prevent reactive maintenance issues as much as is reasonably possible.	High	2020

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Central Services

	Recommendation	Priority	Timeframe
18	Fleet & Facilities should conduct spot inventory checks to mitigate the inherent risk of asset misappropriation.	Medium	2021
19	Fleet & Facilities should maintain staffing levels in the general range of one (1) employee for every 35,000 – 45,000 square feet of facilities under management.	High	2020
20	Project managers should receive project management certification.	Medium	2021

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Community Development

	Recommendation	Priority	Timeframe
21	The Department should ensure that in-house staff have the ability to produce workload and performance reports from Accela.	High	2020
22	The Department should generate routine reports on workload and level of service performance measures in order to gauge effectiveness in meeting established benchmarks.	High	2020
23	The Department should distribute an electronic customer satisfaction survey to all customers at the conclusion of their application and compile responses as a performance measurement tool.	Low	2020
24	The Department should implement expedited permit application reviews as a fee-based option for customers.	Medium	2021

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Community Development

	Recommendation	Priority	Timeframe
25	The Department should designate a second position as an Accela power user and require that the management responsibilities of that system be shared.	High	2020
26	The Department should ensure that the system which replaces Springbrook can be integrated with Accela to eliminate the need for duplicate entries.	High	Immediate
27	The Department should monitor inspector staffing levels to ensure that they remain appropriate for the required workload.	High	Ongoing
28	The Department should maintain an online library of standard conditions of approval for land use permits, which is shared with staff and the public.	Medium	2020

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Finance & Information Systems

	Recommendation	Priority	Timeframe
29	With appropriate staffing, the Finance Department should perform regular data analysis on its data to help detect any financial irregularity or non-compliance with financial policies.	Medium	Ongoing
30	Provide cross training so that critical functions for each finance position have at least two people who can complete them and require the employee performing the critical task as a backup to complete the function at least twice annually.	High	2020
31	Complete an annual fraud risk assessment.	Low	2021
32	Management should conduct regular audits of purchases to detect and deter asset misappropriation.	Medium	2020
33	Determine if automatic notification of payroll changes is possible within the City's payroll/financial software system.	Medium	2020

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Finance & Information Systems

	Recommendation	Priority	Timeframe
34	The City should assign a second employee to provide verification checks of garnishment data entered into the payroll system.	High	2020
35	The City should ensure that its asset management system fully integrates with its financial software system and has the capabilities necessary to foster an efficient, transparent, and data-centric approach to fixed asset management.	High	2020
36	With available time, the City should proactively research and seek buying discounts in addition to State bid discounts.	Medium	2020
37	The City should install and operate adequate software to monitor IT logs and detect any attempt at system intrusion.	Low	2021
38	The City should ensure GIS staff spend at least 10% of their time working to proactively introduce GIS technology into every department in the City.	Medium	2020

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Finance & Information Systems

	Recommendation	Priority	Timeframe
39	The City should create an information technology committee that meets at least quarterly.	High	2020
40	The City should reduce its internal phishing campaign employee clickthrough rate to no more than 5%.	Medium	2021
41	The City should hire one (1) additional FTE into an IT support position.	High	2020

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Library

	Recommendation	Priority	Timeframe
42	The Library should reduce service hours to between 62 – 64 hours per week, either through elimination of some evening hours or an earlier closing for all evenings. Closing at 8pm each night should be implemented, the hour after which visits decline markedly.	High	2020
43	Develop a comprehensive marketing plan encompassing traditional print and advertising and social media components. Use this opportunity to brand the Library as consistently as possible to the community. Finally, make one person responsible for the coordination, development and posting of social media while continuing to seek the input of other staff. The lead person should be the Communications Coordinator. Then management team should set direction and develop a review process.	High	2020
44	The new Director needs to continue the recent focus on furthering team building and open communication among Library staff.	High	2020
45	Create an internal team to research, develop and present to the City a Library Information Technology Needs Assessment and Long-Range Plan.	High	2020

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Police

	Recommendation	Priority	Timeframe
46	Maintain current Administration staffing levels.	n/a	n/a
47	Add 8 additional Officers to maintain higher minimum staffing to achieve stated goal of 5 minute response to priority 1 and 2 calls for service. Staffing should be 4 Officers on Day Shift, 5 Officers on Afternoon Shift and 4 Officers on Night Shift.	High	2020
48	Maintain current staffing of two K9.	n/a	n/a
49	Minimum Staffing should be Sergeant on duty at all times.	n/a	n/a
50	Fill 2nd CSO position for a total of two CSOs.	Medium	2021
51	Maintain current staffing for traffic unit.	n/a	n/a

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Police

	Recommendation	Priority	Timeframe
52	Review case screening process.	Medium	2020
53	If all workable cases are currently assigned, the department should eliminate two detective positions.	Medium	2021
54	Maintain current staffing but use the recommended benchmarks to re-evaluate staffing on an annual basis to determine when more property/evidence staff is needed.	High	Ongoing
55	Maintain current staffing for records management.	n/a	n/a
56	Add an additional analyst in the next 1 to 3 years.	Medium	2022
57	Maintain current Administrative Specialist staffing levels.	n/a	n/a
58	Maintain current SRO staffing but add one additional SRO in the next 1 to 3 years.	Medium	2022 – 2023

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Public Works

	Recommendation	Priority	Timeframe
59	The Department should establish a routine cycle of measurement, review, and action based on their selected performance metrics.	High	Ongoing
60	Performance measures and their results should be published each year in the annual budget.	High	Ongoing
61	The City should ensure that the selected asset management system replacing the existing work order system has the capabilities necessary to foster an efficient, transparent, and data-centric approach to infrastructure maintenance and workload management.	Medium	2021
62	The Department should track all field work – proactive and reactive – using work orders within the asset management system.	Medium	2021

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Public Works

	Recommendation	Priority	Timeframe
63	The Department should develop a preventive and routine maintenance calendar for the Parks Maintenance Division in the asset management system and use this tool as the basis for calculating staffing needs.	Medium	2021
64	The City should ensure that the system which replaces Springbrook has a robust project management module or invest in a separate software specifically designed for capital project management.	High	2020
65	The Department should seek to update each system master plan once per six years on a rotating basis.	High	Ongoing
66	The Department should include some strategic discussion in the master plans of the systems' purpose for the community and how the plan supports the goals of the Department and the City.	High	Ongoing

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Public Works

	Recommendation	Priority	Timeframe
67	The Department should provide development review backup for the Principal Engineer, including the use of other P.E.'s in the Engineering Division.	Medium	2020
68	The Department should adjust the organizational structure to narrow the Parks Supervisor's span of control and allow more effective oversight of seasonal staff.	Medium	2021
69	The Department should adjust the organizational structure to narrow the City Engineer's span of control and provide oversight assistance to project management staff.	Medium	2021

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Performance Standards

- The development of performance measures, using national and locally defined measures helps an agency achieve both efficiency and effectiveness targets and understand current performance.
- Performance standards need to balance the information needs of the community with the most effective use of resources to collect, analyze and report the data.
- Performance measures may change over time as data becomes available and the City can refine and enhance measures utilized.
- Full implementation of the performance measurement program will span several years to enable data collection for measures where data is not currently available.

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Performance Metrics (1)

- Limited use of “workload measures” and greater focus on “outcomes” of service delivery.
- Some data limitations that need to be considered and addressed:
  - Availability of relevant data,
  - Accuracy of available data,
  - Access to and analysis of data (currently an impediment)
  - Ease of calculation of performance measures, and
  - Method for presenting data.

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Performance Metrics (2)

- Key considerations:
  - Linkage to Council Goals (ideally a primary focus)
    - Performance metrics should flow from or tie to overall goals where feasible.
  - Willingness of the organization to adopt “performance standards”,
  - Number of performance measures per department / functional area should be limited,
  - Some service areas do have have easily defined “outcomes”,
  - Robust performance measurement program will need to be phased in over time:
    - As data becomes available,
    - To minimize workload / staff effort, and
    - To provide early insights and develop more robust measuring as data becomes available.

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Performance Metrics – Proposed

- City Management:

Measure	Target
% of respondents feeling City is well-managed	80%
Annual work plans developed for each department with quarterly reviews conducted	100%

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Performance Metrics – Proposed

- Human Resources

Measure	Target
Annual turnover rating	<10%
% of recruitments completed within established targets	<45 days – entry; <60 days professional; <90 days executive
% of recruitments with recruitments with qualified applicants from underrepresented groups.	>95% positions filled
% of employees still employed 1 year after hire.	>95%
% of Staff rating training courses as providing valuable content.	>90%
Workers' Compensation Modification Factor	<1

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Performance Metrics – Proposed

- Central Services – Design and Communications

Measure	Target
Percent of social media followers who identify their primary language as other than English.	>3%
Communication's published written material without error.	>98%
Social Media with tracking ability (Facebook, etc.) shows an increase in people liking or otherwise following the city's posts.	>5% annual increase
Number of articles published about the City's Strategic Plan.	>12 publications
Percentage of design projects completed by the agreed upon deadline.	>80%

- Central Services – Municipal Court

Measure	Target
Defendants' successfully comply with court orders prior to a suspension being issued.	>85%
Case clearance rate	>97%
Case load aging	>60% cases cleared within 90 days

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Performance Metrics – Proposed

- Central Services – Property Management

Measure	Target
Workorder completed as scheduled	>80%
Number of re-work workorders required.	<5%
Percentage of outsources maintenance work to in-house work	<10% outsourced

- Central Services – Fleet Maintenance

Measure	Target
Number of preventative maintenance tasks performed on schedule	>95%
Fleet workorder “rework” percentage rate	<5%

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Performance Metrics – Proposed

- Community Development

Measure	Target
% residential building plan reviews completed within 15 business days	>95%
% commercial building plan reviews completed within 20 business days	>95%
Percent of submittals received electronically	50%
Percent of Type I applications closed within 30 days	>90%
Percent of Type II and III applications closed within 90 days (date of complete application received to date of decision, excluding appeals)	>90%
Percent of inspections completed within 1 business day of request	>98%
Average number of address stops per inspector workday	15
Percent of “satisfied” and “very satisfied” responses to customer survey	>80%

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Performance Metrics – Proposed

- Finance

Measure	Target
Credit rating	AA1 / AA+
General Fund Reserve	>16.67%
Fund balance - budget versus actual	<5%
Purchase orders under $1,000 are made with a rebate p-card or credit card.	>80%
Server intrusion identification	<24 hours (priority) <3 days (all others)
Internal Phishing campaigns clickthrough rates	<5%
Helpdesk ticket response times	<4 hours
Average cycle time for open IT workorder tickets	<3 days

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Performance Metrics – Proposed

- Library

Measure	Target
Collection turnover	> 5 times
Proportion of collection replaced per year.	>5%
Getting new materials into circulation.	3 days
Programs attended do not decline in attendance	Varies
% of programs provided to underserved patrons	>10% of programs (initially)
% of participants indicating satisfaction with the program.	>80%

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Performance Metrics – Proposed

- Police

Measure	Target
Average response time to calls for service (by priority)	Will depend on staffing adopted
Annual Proactive Time	60%
Case Clearance Rate	Adopt standard for measurement

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Performance Metrics – Proposed

- Public Works

Measure	Target
Development Review:	
Percent of engineering plan reviews meeting established cycle times	>95%
Percent of engineering inspections completed within 2 business days of request	>98%
Parks:	
Percentage of parks receiving a score of “good” or “excellent” in an annual parks condition assessment	90%
Percentage of households living within ½ mile of a park.	85%
Park acres per 1,000 residents equals or exceeds national average.	10
Proportion of total work orders (or labor hours) spent on routine tasks and preventive maintenance rather than service requests	70%

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Performance Metrics – Proposed

- Public Works

Measure	Target
Recreation	
Percentage of residents who consider the City's recreation programs to be "good" or "very good"	>75%
Percent of recreation programming costs recovered through user fees	TBD
Percent of recreation programs meeting minimum enrollment	>80%
Capital Program:	
Percent of CIP projects which are completed within 90 days of their initially planned completion date	>80%
Percent of CIP projects which are completed within the initially planned budget	>85%
Percent of CIP projects with change orders totaling less than 15% of the initially planned budget	>85%

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Questions / Discussion?

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