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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 June 9, 2011. The annual budget survey was launched in October 2011, later than normal due to the State Rebalance which occurred during August and September.

This year, the data analysis and reporting was done by the Department of Community Justice's (DCJ's) Quality Systems and Evaluation Services Unit.

We have substantially shortened the survey to focus on the Budget Office products and performance for a variety of reasons including the focus on the State Rebalance process during August and September and the development/purchase of a new budget system.

In addition, we are currently working with DCJ to create a survey that better captures and differentiates between the Countywide budget process and budget processes that are internal to each department.

The FY 2012 budget was marked by some interesting events including:

COLA/Wage Freeze for Management and Executive Employees - the FY 2012 budget was balanced in part through a wage freeze for management and executive employees that saved a total of \$3.4 million (\$1.5 million in the General Fund and \$1.9 million in other funds). The County is currently negotiating several labor contracts and is seeking a wage freeze from represented employees as part of those negotiations.

State Rebalance - When the Oregon Legislature adjourned in June, it approved a state budget with large reductions, including cuts to services that we deliver in Multnomah County. Multnomah County was facing \$12.4 million and over 61.5 FTE in reductions. The Board used \$1.8 million of ongoing General Fund, \$2.0 million of one-time-only General Fund and \$4.1 million of one-time-only Other Funds to restore State funding, leaving \$4.2 million of State reductions.

The FY 2012 Budget Process

Executive Summary

- There were 57 responses representing a 31% response rate for the 185 people surveyed. Last year's response rate was 55%.
- The overall satisfaction rating improved 11% compared to last year (7.68 for FY 2012 compared to 6.92 for FY 2011).
- Over half of the respondents found there to be no difference in the budgeting process as compared to last year. Thirty percent found the process better and 9% found the process to be worse. This is very similar to the findings in last year's report.
- Respondents had lower 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 last year but still lower than in 2010.
- Respondents were more satisfied with the amount of information they received from the budget office in 2012 than they were in 2011.
- In the other six areas (cooperation, completeness, communication, timeliness, quality and professionalism), respondents were less satisfied in 2012 compared to 2011.

Methodology

The annual budget process survey was launched on September 27, 2011 and was open for two weeks, closing on October 11. There were 57 responses, representing a response rate of 31% for the 185 people surveyed. Last year's response rate was 55%.

The survey was considerably shorter this year compared to previous years. 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

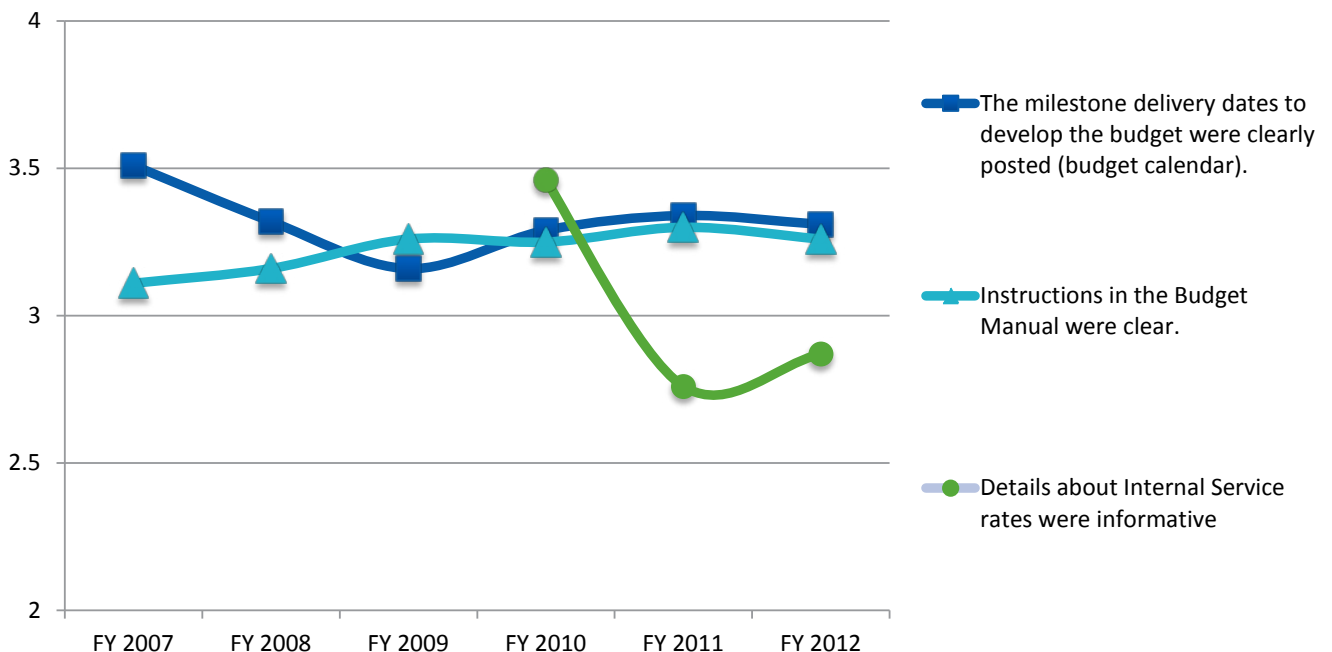
Training and Preparation

better or worse. Respondents were also asked what functional area of government they represented (Health and Human Services, Public 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.

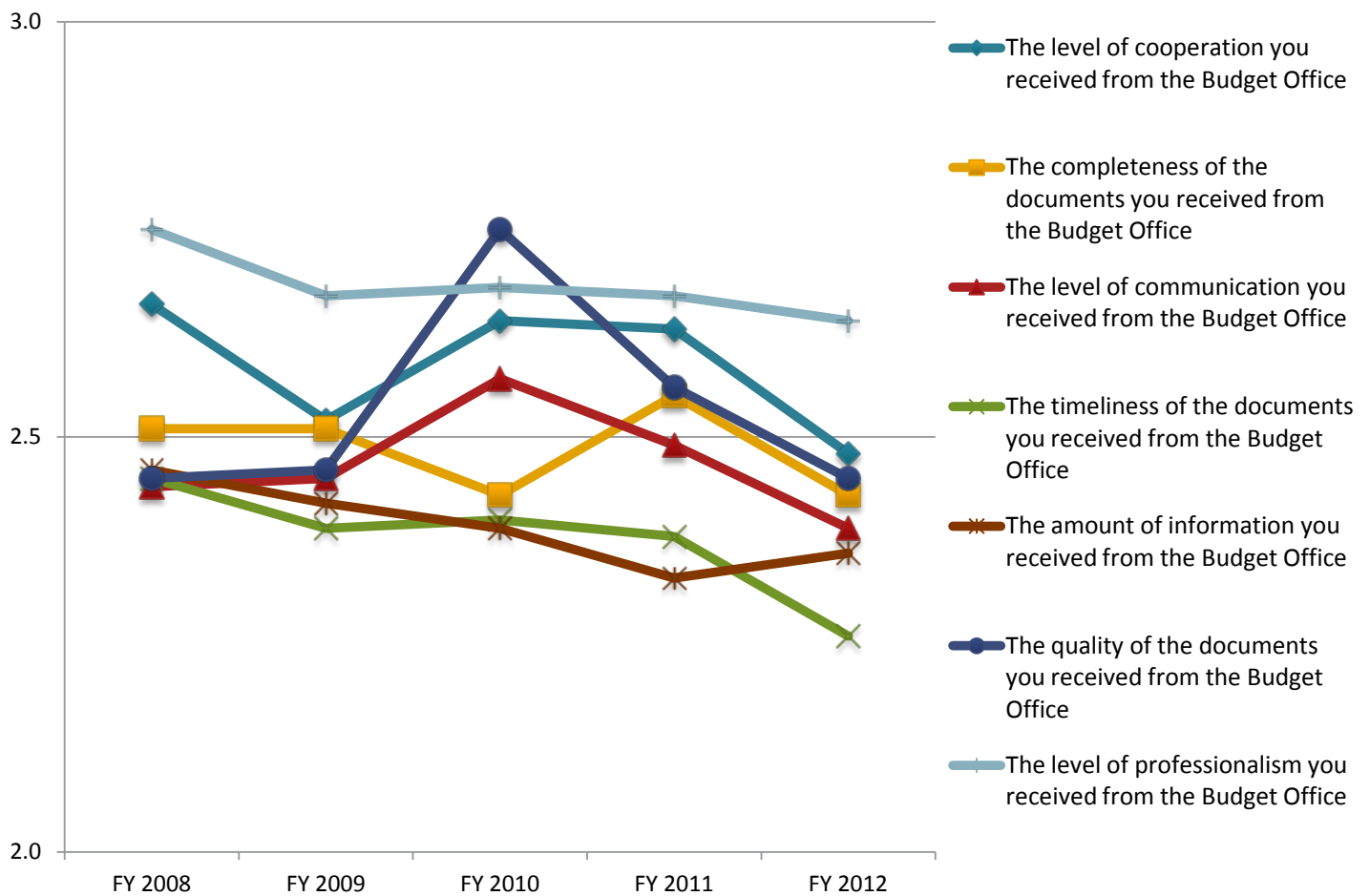
Respondents had lower levels of satisfaction in regards to the clear posting of milestone delivery dates and the clarity of the instructions in the Budget Manual. Satisfaction regarding Internal Service Rates was higher than last year but still lower than in 2010.

Two main themes 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." First, as in previous years, there were complaints about Internal Service Rates. One respondent said, "Internal service rate information is perennially difficult to access and get accurately." The second theme that was generated by the responses was about communication difficulties. Respondents complained about communication troubles with Telecom: "Telecom still cannot figure out what they are doing, much less communicate."



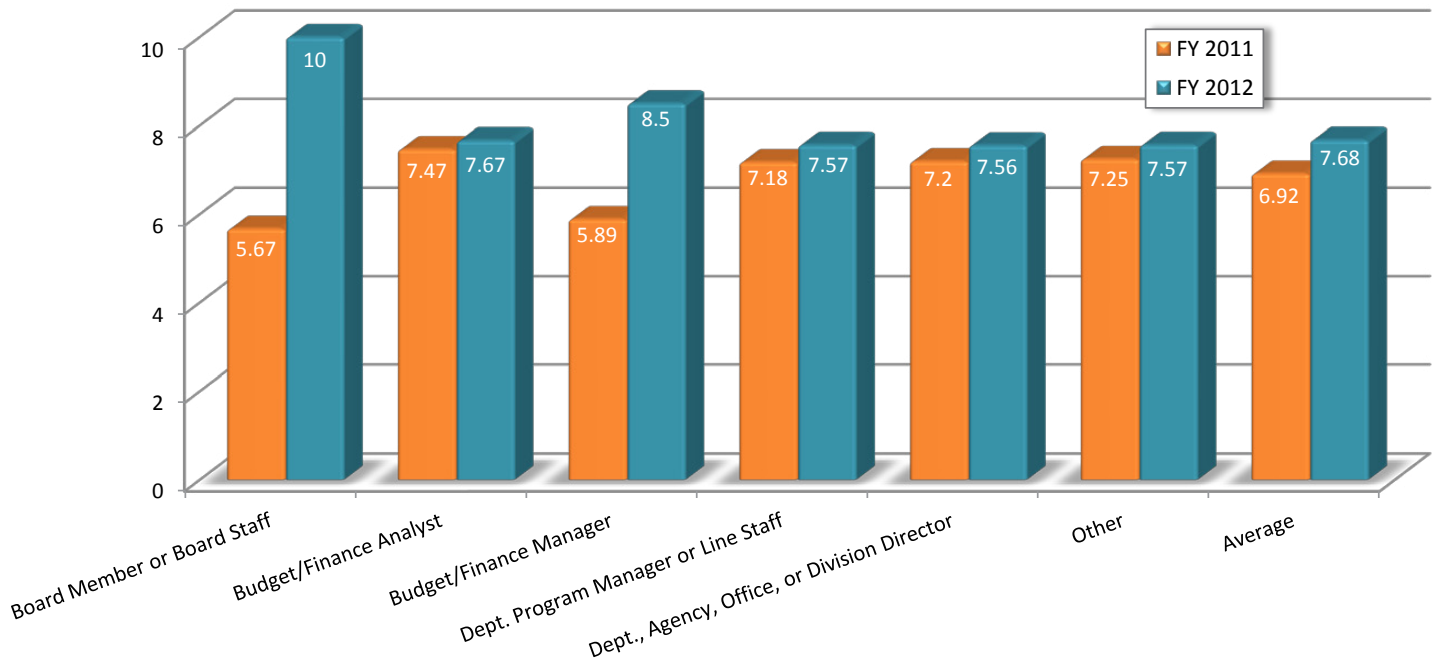
Effort Rating

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 amount of information they received from the budget office in 2012 than they were in 2011. Respondents also maintained their rating for the “level of professionalism” they received from the Budget Office. In the other six areas, respondents were less satisfied in 2012 compared to 2011.

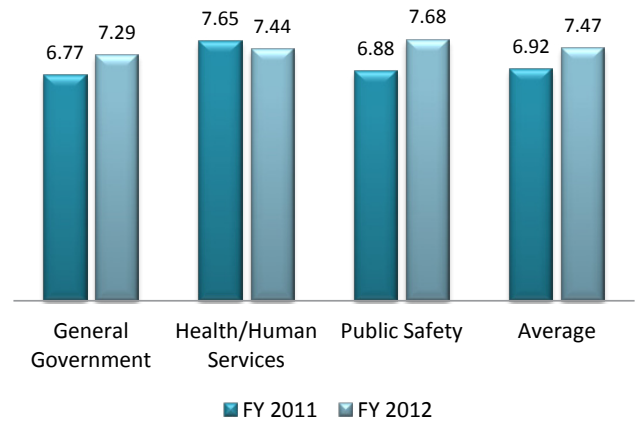


Satisfaction

The satisfaction rating improved 11% compared to last year (7.68 for FY 2012 vs. 6.92 for FY 2011). Those identifying themselves as Board Members or Board Staff had the highest satisfaction rating following by Budget/Finance Managers.



Another type of variation was between the functional area of government for respondents. In each functional area Public Safety, Health and Human Services, and General Government respondents rated higher satisfaction than in FY 2011.



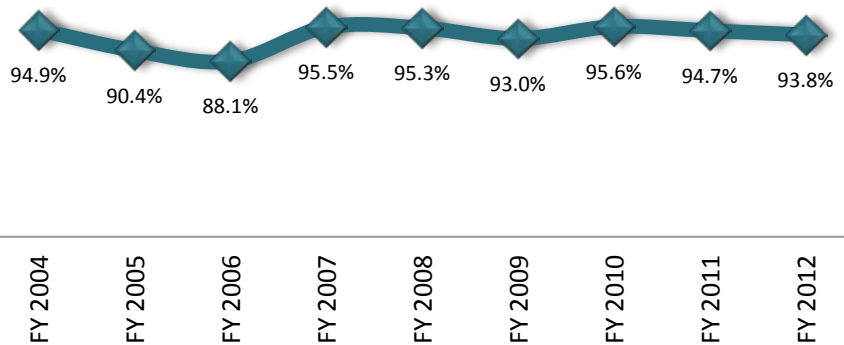
Overall

60% of the respondents found there to be no difference in the budgeting process as compared to last year.

30% found the process better.

9% found the process to be worse (missing 1%).

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



Respondents were asked to explain why they checked this year's process as Better or Worse. The primary theme that arose was about communication, both positive and negative. One respondent said, "Communication increased and information was easier to understand." Another respondent said, "I received better communication and documentation of changes I had submitted." But a third respondent said, "Almost non-existent communication made it challenging."

Other comments included:

- "Streamlined process, fewer add ons that created extra work made for a better process. But almost non-existent communication made it challenging."
- "It seemed that we had less changes during the process."
- "I understood more of the process, I received better communication and documentation of changes I had submitted."
- "The primary difference was due to external factors outside of the control of the County. County did a good job of managing the process in a difficult situation."
- "I attended Budget Tool Training. It seemed like we had more or quicker info on training sessions."
- "It was worse because the due date to turn everything in to the budget office was a lot sooner this year compared to last year. That put a tremendous amount of pressure on the program and gives off the impression that the amount of time needed by the program to complete the work is overlooked by the budget office."
- "It was a more efficient process."

Appendix

Question	N	Mean	Standard Deviation
The milestones and delivery dates to develop the budget were clearly posted (budget calendar).	54	3.31	0.543
The instructions in the Budget Manual were clear.	50	3.26	0.600
Details about Internal Service Rates were informative.	47	2.87	0.924
The level of cooperation you received from the Budget Office.	52	2.48	0.577
The completeness of the documents you received from the Budget Office.	53	2.43	0.572
The level of communication you received from the Budget Office.	54	2.39	0.627
The timeliness of the documents you received from the Budget Office.	53	2.26	0.655
The amount of information you received from the Budget Office.	55	2.36	0.620
The quality of the documents you received from the Budget Office.	53	2.48	0.574
The level of professionalism you received from the Budget Office.	53	2.64	0.591

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