

## **ROLE 4: ENCOURAGE OR ASSIST MANAGEMENT**

***Practice 4b. Assist management: Assist management in designing, improving, or maintaining performance management systems, or build the capacity of management to do so.***

**Portland, Oregon, City Auditor** ([www.portlandonline.com/auditor](http://www.portlandonline.com/auditor)): Since 1992, the City Auditor's Office has, from time to time, provided technical assistance to city agencies to help them improve aspects of performance measurement and management, including improving performance measures (see 3a). More recently, since issuing its December 2002 Managing for Results recommendations (see 4a), the City Auditor's Office has been advising city management officials on ways to design a more coherent entity-wide system to manage for results. For example, the City Auditor's Office has been advising the Office of Management and Finance (under the Mayor) on ways to develop guidelines intended to create alignment among citywide and agency goals and objectives, agency and program performance measures in the budget, and service efforts and accomplishments (SEA) measures reported to the public in annual SEA performance reports (see 5b). The Auditor's Office will also provide performance measurement training to support implementation of the new managing for results process. The Auditor's Office is coordinating with Management and Finance to ensure the training will align with and support program budgeting goals and requirements. At the same time, the City's Planning Bureau is developing a high-level strategic planning process for the City government, which will result in a citywide mission and goals set by the Mayor and City Council. The Director of Audit Services (from the City Auditor's Office), the head of the Division of Financial Planning (from Management and Finance), and the Assistant to the Director of the Planning Bureau have been meeting from time to time to coordinate the three office's efforts in developing the new managing for results process.

In the new process, all performance measures—whether in the SEA Report, the budget, or separately reported by agencies—will be aligned with agency and City goals (increasing relevance), and compiled in more uniform ways for better data management (increasing reliability). All measures developed and reported by City bureaus will be subject to review by the City Auditor's Office, which will devise some approach for determining which measures to test each year. The plan is to make Fiscal 2005 a transition year, emphasizing strategic planning and development of new goals and measures, and to have the new process fully in place for Fiscal 2006. The intentions of the new process are:

- For relevant, reliable performance information from all agencies, and on a citywide strategic level, to be reported to decision makers at the front end of the budget process each year;
- For agency managers to use performance information to improve operations and achieve desired results;
- For public performance reports to report results consistent with measures used for planning and budgeting;
- For the audit and evaluation function to become more efficient and effective due to the availability of more relevant, reliable performance information.

The following reports are available as “publications” from the City Auditor’s website ([www.portlandonline.com/auditor](http://www.portlandonline.com/auditor)) or as “audit reports” from the Audit Services Division home page ([www.portlandonline.com/auditor/auditservices](http://www.portlandonline.com/auditor/auditservices)):

- *Managing for Results: A Proposal for the City of Portland*, December 2002
- *Service Efforts and Accomplishments for Fiscal Year 2002-03*, November 2003, and earlier years’ *Service Efforts and Accomplishments* reports.