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February 15, 2000

TO: Vera Katz, Mayor  
Jim Francesconi, Commissioner  
Charlie Hales, Commissioner  
Dan Saltzman, Commissioner  
Erik Sten, Commissioner  
Charles Jordan, Director, Bureau of Parks & Recreation

SUBJECT: Audit of the Portland Bureau Parks and Recreation, Report #261

Attached is Report #261, an audit of the Portland Bureau of Parks and Recreation. The study was conducted at the request of Commissioner Francesconi, and was included in our annual Audit Schedule published in February of 1999.

As a follow-up to our recommendations, we will conduct a brief review of progress in six months. We also ask that the Bureau prepare a detailed status report on the steps taken to address the recommendations in one year. This status report should also be distributed to the Audit Services Division and the Commissioner in Charge of Parks & Recreation.

We appreciate the cooperation and assistance we received from staff in the Bureau and the Commissioner's Office in conducting and preparing the report.

*Gary Blackmer*  
GARY BLACKMER  
City Auditor

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# Table of Contents

<b>Summary</b>		<b>i</b>
<b>Chapter 1</b>	<b>Introduction</b>	<b>1</b>
	Objectives, Scope, and Methodology	1
<b>Chapter 2</b>	<b>Managing for Results: Setting a Course, Measuring Performance</b>	<b>7</b>
	Recommendations	25
<b>Chapter 3</b>	<b>Stewardship: Maintaining Park Buildings</b>	<b>33</b>
	Recommendations	44
<b>Chapter 4</b>	<b>Internal Communication: Listening and Conveying Information</b>	<b>47</b>
	Recommendations	58
<b>Chapter 5</b>	<b>Public Involvement: Connecting with Citizens and Park Users</b>	<b>63</b>
	Recommendations	67
<b>Appendices</b>		
A	Barney & Worth, Inc. report	
B	Bureau Mission, Goals, and Performance Measures	
C	Summary of Findings and Recommendations from "Commitment to the Cost of Ownership"	
<b>Responses to the Audit Report</b>	Commissioner Jim Francesconi ✓ Charles Jordon, Director, Bureau of Parks and Recreation	

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# Summary

Government agencies are responsible for using public resources efficiently and effectively. Organizations should strive to achieve desired objectives, provide services at a reasonable cost, and safeguard and protect public assets. Good management helps provide reasonable assurance that these objectives will be achieved.

An important part of good management involves creating a structure of methods and systems to guide and control the activities of the organization. These systems are intended to help the entity achieve goals and objectives, control and monitor operations, and report on accomplishments.

At the request of the Bureau's Commissioner and in consultation with Bureau staff, we evaluated some of the management systems identified as critical to the Bureau's success. Specifically, we evaluated the methods used to:

- ✓ - monitor and report on performance
- ✓ - maintain buildings, and
- ✓ - communicate with employees and the public.

We worked closely with the Bureau to identify current practices and to assess strengths and weaknesses. We compared the systems used by the Bureau to those recommended by experts, proposed by national bodies and industry standards, and used by other organizations. We also spent time with managers and staff to develop practical solutions to problem areas.

**Current strengths and weakness in management systems**

We found both strengths and weaknesses in the Bureau's management systems. The Bureau compares favorably with other city parks organizations and has made significant efforts to improve the delivery of parks and recreation services. In fact, in many instances the Bureau has systems which are equal to, or better than, the cities we surveyed in our field work.

We found **strengths** in the following areas:

- developing strategic plans, mission statements, and program goals,
- ① recognizing the importance of building maintenance efforts,
- ① committing significant resources to parks maintenance,
- instilling employees with a good understanding of the Parks mission,
- implementing commonly used internal communication tools, and
- ① improving and refining public involvement techniques.

*if these are the strengths we are in trouble what happened?*

We also found a variety of weaknesses that affect the ability of the Bureau to meet its priority goals and objectives. While the Bureau is a national leader in many areas, opportunities exist to continually improve the management and performance of the organization.

We found weaknesses in the following areas:

- focusing efforts on an achievable list of priority goals and performance measures,
- gathering reliable and consistent performance data,
- ① using performance information for accountability and decision-making,
- developing reliable information on building inventory, condition, and maintenance spending,
- ① devoting sufficient resources to maintain parks buildings,
- helping employees be heard, improving communication flow, and
- ① developing a clear and consistent strategy to involve the public in decisions.

*1 No ~~Reorganization~~ analysis - They are now constructing something to respond to my request for cost benefit out!*

**Actions needed to address system problems**

In order to address the problem areas we identified in our review, we developed a number of recommended actions in consultation with Bureau management and employees. In brief, we recommend that the Bureau:

1. Develop a clear framework for performance measurement and a set of performance measures that are supported by reliable sources of management data.
- ② Develop a more structured building maintenance system that contains complete information on inventories, physical characteristics, maintenance condition, and annually spending.
- ③ Request and reallocate sufficient resources to maintain existing parks and recreation buildings.
- ④ Develop and implement a communication plan that recognizes current communication problems and establishes a strong commitment to improve internal communication.
- ⑤ Implement an annual employee satisfaction survey to identify problem areas and track improvement.
- ⑥ Pursue and complete a public communications strategy that involves park stakeholders in Bureau planning and decision-making.

The public has repeated this message over & over →

See employee survey 05 + 06

We still do not have one as it would be so inconvenient to involve the public

These recommendations should be considered in context with the current Parks 2020 planning effort. The Bureau initiated Parks 2020 in the fall of 1999 to develop plans for the future delivery of parks and recreation services in Portland.

We also believe that other areas in the Bureau warrant additional analysis: parks grounds maintenance, recreation programming and costs, and workload and staffing analysis.

**Capacity to change** In order to address these recommendations, the Bureau needs leadership, commitment, and follow-through. Experience has shown that the Bureau has not always been successful in implementing recommendations from previous audits and internal improvement initiatives. To help support the Bureau's capacity to change, we believe help is needed in several areas:

- technical assistance to develop asset maintenance systems and to simplify performance measurement methods,
- staff training on the development and use of performance information,
- organizational development to address and improve internal communication, and
- additional resources to upgrade building maintenance efforts and initiate a public involvement strategy.

The Bureau should seek help to improve their capacity to change from the Audit Services Division, the Bureau of Human Resources' Organizational Development Manager, and the Bureau of Financial Management.

In coordination with Commissioner Francesconi, we will closely monitor the progress toward implementing the recommendations of this report and addressing the identified system weaknesses. We will issue a six-month monitoring report on implementation progress. We will also ask the Bureau to prepare a detailed status report one year from the release of this report.

*Where is the progress  
follow up reports?*

"She handed out a form and I wrote 'Don't cut any trees.'" Soon thereafter, this person was asked to help the city select design consultants for the project.

Initial mailings around the park seemed to reach a broader circle. One neighborhood leader confessed that she and her group were ignorant of the project and grew upset upon hearing of the plan to cut trees. "Why wasn't I notified?" she asked. Parks staff showed her the mailings she had been sent and she recognized them. "I had to go back to my group and tell them, 'Hey guys, we are wrong on this one.'"

Outreach was aided because, as one official pointed out, "the community center was already there." This meant that the changes proposed at the site were not going to be as dramatic as building a new community center from scratch. Also, for purposes of outreach, an existing community center already has customers to be easily contacted for early involvement.

Perhaps due to this preliminary outreach, it was felt membership on the Project Advisory Committee was reflective of the broader community. "They cast a very wide net," reports one committee member.

#### 4. Flexibility to Address Unforeseen Issues

In any public outreach process, issues arise that are unexpected. Nothing was more of a surprise to numerous members of the Project Advisory Committee than when they found themselves in the position to be contemplating removing trees from the park. "I never dreamed I would be talking about that," one committee member stated, recalling her desire to protect the trees was what drove her initial involvement.

When surprising issues arise like this, it may be time to pause and add additional outreach activities to the public involvement program. That is exactly what the bureau did in the case of Mt. Scott. The bureau added a public open house on the tree removal issue. This meeting allowed that Project Advisory Committee members could hear the views of more people and retrace for people the series of decisions that was leading them to favor a pool location that would remove over 20 trees.

Taking this extra time further ensured that committee members would take the lead, not the bureau, in defending their plan when fellow citizens advocating for not cutting the trees attempted to garner media attention.

#### **CASE STUDY 4:**

#### **MT. TABOR PARK MASTER PLAN AND PHASE ONE IMPLEMENTATION – 1998 to 1999**

##### Public Outreach:

Improvements to Mt. Tabor totaled \$2.3 million of the 1994 Parks Improvement Bond measure. A master plan for the park was to be developed, and from that plan a list of improvements.

The bureau seems to have been sensitive to the challenge of forming a citizens advisory committee for Mt. Tabor. First, the park is deemed a regional or metropolitan park, so stakeholders extend well beyond the immediate park neighbors. Indeed, for another regional

park project at Washington Park, the bureau shelved the advisory committee idea and relied instead on open houses and focus groups of key regional and local park stakeholders.

The Mt. Tabor community also had the additional controversy regarding an on-again, off-again off-leash dog area, leaving some stakeholders on edge.

For these and other reasons, the bureau hired an independent facilitator to run the citizens advisory group. The bureau director selected the 20-member citizens advisory committee, comprised of neighborhood representatives and park user groups.

In addition to the advisory committee meetings, the bureau held three well-attended and interactive open houses where the broader public could comment on hundreds of ideas for improvements to the park. Project newsletters were widely distributed with mail back surveys on possible features for the park.

*Completed 1999*

In the end, the committee working with the city and its consultants produced agreement on a master plan that is a 20-year vision for the park and also contains a framework for making decisions about the future of the park. In addition, a package of Phase One improvements was settled upon. A new "Friends of Mt. Tabor Park" was created to serve as stewards for the master plan.

Public Process Issues:

1. Use of Independent Facilitator

When a past project has created some pockets of distrust, it is beneficial for a public agency to hire an outside, independent facilitator to coordinate public discussions. The decision to do so with Mt. Tabor is subject to mixed reviews internally. One Parks staff member described it as an "experiment" that was "spurred by concerns raised by the off-leash dogs issue." Another bureau official recalls it was the neighborhood association who requested the step be taken.

Did the experiment work? Inside the bureau and City Hall, reviews are mixed. "Some people want to credit that things went well because we had a facilitator," one high ranking bureau manager stated. "If they want to believe that, that's fine, but we did the same things at Mt. Tabor we did at Mt. Scott and Southwest Community Center." Another official thought hiring a facilitator for the project was "overkill."

Others sensed a concern that the facilitator was not well integrated into the design team, and at times focused the committee on less important issues than faced decision-makers for a regional park.

To the community, the results are less ambiguous. Hiring a facilitator signaled seriousness, reports one community leader. Parks was going to do things differently and was really going to listen.

It may well have been the assistance of the facilitator that allowed the bureau early on to spell out a ten-month-long schedule of advisory committee meetings and open houses that allowed the public to understand the decision-making process and timeline for the project.

*notes on 20 vision*  
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