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## Office of Management and Budget

*Anchorage: Performance. Value. Results.*

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### **Mission**

Implementation of sound fiscal and management policies through development and administration of municipal budgets

### **Core Services**

- Administer development, implementation, and monitoring of the general government and utility operating and capital budgets
- Establish and enforce policy for budget documentation format and content
- Review and process budget transfers, Assembly documentation, project set-up forms, grant-related documentation, and personnel changes
- Facilitate a city-wide performance measure/accountability program

### **Accomplishment Goals**

- Improve the quality of budget-related information provided citizens and decision-makers by attaining the “Distinguished Budget Presentation Award” from Government Finance Officers Association (GFOA) by 2013
- Improve accuracy of Assembly documents prepared by departments
- Implement the Mayor’s “Performance. Value. Results” performance-based management initiative
- Improve departments understanding of Intra-governmental charge (IGC) system
- Ensure departments are satisfactorily served

### **Performance Measures**

Progress in achieving goals will be measured by:

<b><u>Measure #1:</u> Receipt of Government Finance Officers Association (GFOA) Budget Award in 2013.</b>
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Office of Management and Budget submitted the 2013 approved budget to GFOA in January for evaluation in meeting Distinguished Budget Presentation criteria. We received the award on May 21, 2013.

**Measure #2: Percent of department-prepared Assembly documents rejected due to formatting and accounting errors.**

Year to Date Change in Percent of Rejected PACE Documents

Department	2011 Total % Rej'd	2012 Total % Rej'd	2013 1st Qtr # Rec'd	2013 1st Qtr # Rej'd	2013 1st Qtr % Rej'd	2013 2nd Qtr # Rec'd	2013 2nd Qtr # Rej'd	2013 2nd Qtr % Rej'd	2013 3rd Qtr # Rec'd	2013 3rd Qtr # Rej'd	2013 3rd Qtr % Rej'd
AWWU	33%	30%	4	0	0%	1	0	0%	10	3	30%
Chief Fiscal Officer	0%	0%	13	4	31%	5	0	0%	2	0	0%
Community Development	14%	27%	2	0	0%	8	2	25%	10	0	0%
Employee Relations	8%	0%	0	0	0%	3	1	33%	5	0	0%
Finance	20%	0%	0	0	0%	1	0	0%	1	0	0%
Fire	50%	38%	5	1	20%	2	0	0%	7	0	0%
Health	16%	31%	0	0	0%	10	1	10%	17	2	12%
Information Technology	0%	0%	0	0	0%	0	0	0%	0	0	0%
Internal Audit	0%	0%	0	0	0%	0	0	0%	0	0	0%
Library	15%	35%	2	0	0%	0	0	0%	7	0	0%
Management & Budget	10%	9%	0	0	0%	5	0	0%	4	0	0%
Mayor	50%	0%	0	0	0%	0	0	0%	0	0	0%
Merrill Field	0%	0%	1	0	0%	0	0	0%	0	0	0%
Municipal Light & Power	0%	0%	0	0	0%	0	0	0%	2	0	0%
Municipal Attorney	0%	7%	2	0	0%	0	0	0%	0	0	0%
Municipal Manager	0%	30%	2	1	50%	2	0	0%	2	0	0%
Parks & Recreation	16%	22%	5	2	40%	6	0	0%	7	2	29%
Police	23%	20%	2	0	0%	2	0	0%	1	0	0%
Port	40%	33%	8	3	38%	0	0	0%	1	0	0%
Public Transportation	38%	32%	16	11	69%	1	0	0%	3	1	33%
Public Works	21%	32%	22	9	41%	11	3	27%	3	1	33%
Purchasing	0%	0%	0	0	0%	0	0	0%	0	0	0%
Real Estate	40%	20%	19	5	26%	5	0	0%	6	1	17%
Solid Waste Services	0%	0%	1	0	0%	0	0	0%	0	0	0%
Totals	21%	24%	104	36	35%	62	7	11%	88	10	11%

<b>Measure #3: Department performance measures that are reporting data.</b>
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<b>Departments</b>	<b>Total Measures</b>	<b>Data Reported</b>	<b>No Data</b>	<b>% Data Reported</b>	<b>Date</b>
Anchorage Water & Wastewater	6	6	0	100.00%	10/16/2013
Community Development					
Development Services	14	14	0	100.00%	10/16/2013
Planning	2	2	0	100.00%	10/16/2013
Employee Relations	7	7	0	100.00%	10/16/2013
Equal Rights Commission	4	4	0	100.00%	10/16/2013
Finance					
Controller	5	5	0	100.00%	10/15/2013
Property Appraisal	3	3	0	100.00%	10/17/2013
Public Finance	4	4	0	100.00%	10/15/2013
Treasury	9	9	0	100.00%	10/16/2013
Fire	6	6	0	100.00%	10/7/2013
Health & Human Services	7	7	0	100.00%	10/22/2013
Information Technology	13	13	0	100.00%	10/21/2013
Internal Audit	4	4	0	100.00%	10/1/2013
Library	5	5	0	100.00%	10/16/2013
Management & Budget	5	5	0	100.00%	10/22/2013
Merrill Field Airport	6	6	0	100.00%	10/16/2013
Municipal Attorney	11	11	0	100.00%	10/16/2013
Municipal Light & Power	10	10	0	100.00%	10/16/2013
Municipal Manager	1		1	0.00%	10/22/2013
Emergency Mgmt	1	1	0	100.00%	10/15/2013
Equal Opportunity	1	1	0	100.00%	10/21/2013
Risk Management	2	2	0	100.00%	10/16/2013
Transportation Inspection	2	2	0	100.00%	10/18/2013
Parks & Recreation	10	10	0	100.00%	10/16/2013
Police	11	11	0	100.00%	10/15/2013
Port	3	3	0	100.00%	10/16/2013
Public Transportation	10	10	0	100.00%	10/18/2013
Public Works					
Project Mgmt & Engineering	8	8	0	100.00%	10/16/2013
Maintenance & Operations	9	9	0	100.00%	10/16/2013
Traffic	3	3	0	100.00%	10/16/2013
Purchasing	3	0	3	0.00%	
Real Estate	2	2	0	100.00%	10/22/2013
Heritage Land Bank	2	2	0	100.00%	10/22/2013
Solid Waste Services	3	3	0	100.00%	10/22/2013

**Measure #4: Percent of departments that provide a satisfactory rating regarding timeliness, responsiveness, helpfulness.**

Question #1: Please rate the following aspects of OMB's work:

	2013 *			2012 **			2010 ***		
	Strongly Agree or Agree	Neutral	Disagree or Strongly Disagree	Strongly Agree or Agree	Neutral	Disagree or Strongly Disagree	Strongly Agree or Agree	Neutral	Disagree or Strongly Disagree
OMB clearly communicates directions, expectations, and timelines	54.0%	29.8%	16.2%	75.0%	17.8%	7.2%	45.5%	27.3%	27.3%
Turnaround time on documents is timely	27.8%	33.3%	38.9%	61.6%	15.4%	23.0%	50.0%	31.8%	18.1%
OMB team is very knowledgeable and helpful	56.7%	27.1%	16.2%	75.0%	14.3%	10.7%	69.7%	20.9%	9.3%
Responsiveness to questions or issues is handled quickly and efficiently	43.2%	24.4%	32.4%	57.1%	25.0%	17.9%	60.5%	20.9%	18.6%
Are the training and reference materials provided by OMB useful and relevant	40.0%	48.6%	11.4%						

Question #2: Overall, how do you rate the quality of services OMB provides?

Excellent or Good	37.8%	60.8%	48.9%
Adequate	43.2%	32.1%	37.2%
Poor	18.9%	7.1%	14.0%

Question #3: Overall, is OMB's performance . . .

Getting better / much better	36.2%	65.4%	37.2%
Staying at about the same level	41.7%	30.8%	55.8%
Getting worse / much worse	22.2%	3.8%	7.0%

Question #5: Are there budget topics you would like OMB to offer training?

Yes	32.3%	56.5%
No	67.7%	43.5%

\* Survey taken March 2013; 37 respondents; responses were anonymous

\*\* Survey taken March 2012; 28 respondents; responses were anonymous

\*\*\* Survey taken July 2010; 44 respondents; responses were anonymous

Next survey to be taken in 2014 1<sup>st</sup> quarter

**Measure #5: Change in departments' understanding of Intragovernmental Charges (IGCs).**

Data will be reported in 4th quarter of 2013.

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**Performance Measure Methodology Sheet  
Office of Management and Budget  
Finance Department**

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<b>Measure #1: Receipt of Government Finance Officers Association (GFOA) Budget Award in 2013</b>
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**Type**

Effectiveness

**Accomplishment Goal Supported**

Attain the "Distinguished Budget Presentation Award" from Government Finance Officers Association (GFOA) by 2013 to ensure MOA's budget communicates quality budget information to citizens and decision makers.

**Definition**

The Distinguished Budget Presentation Award is presented for recognition of exemplary budgeting practices. Preparing for the award will result in clear, understandable, and complete budget documents.

**Data Collection Method**

Using GFOA's check list, identify areas of current budget documents that do not meet criteria.

**Frequency**

Every year review budget information to determine which documents need improvement prior to preparation of new budget.

**Measured By**

GFOA provides criteria guidelines that contain section types. OMB will assign each section with a point value. Then a percentage of completion will be calculated.

**Reporting**

Each year, the completed budget book must be submitted to GFOA 90 days from the date when the budget was proposed or adopted. GFOA will grade the budget book documents by using the criteria guideline worksheet and determine achievement of award.

**Used By**

Citizens, employees, and any other person that would be interested in the MOA budget documents.

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**Performance Measure Methodology Sheet**  
**Management and Budget**  
**Finance Department**

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<b>Measure #2: Percent of department-prepared Assembly documents rejected due to formatting and accounting errors</b>
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**Type**

Effectiveness

**Accomplishment Goal Supported**

Reduction in the number of formatting and accounting errors in department-prepared Assembly documents

**Definition**

Measures the quality of the guidance provided by OMB and the responsiveness of the departments by tracking the accuracy of Assembly documents as they go through the Assembly document review process (PACE)

**Data Collection Method**

The data collected will be by recording the PACE Workflow History (via Search/Document Number) of all Assembly documents reviewed by OMB, after identifying them on the Action Agenda after each Assembly meeting. A count of the number of documents and number of rejections will be recorded.

**Frequency**

The measurement will be tallied monthly and reported quarterly.

**Measured By**

The OMB analyst will pull and record the PACE Workflow History of all Assembly documents that are reviewed by OMB after their introduction at an Assembly meeting. The record will be maintained in Excel and will list the document numbers, PACE actions and action dates and will specifically note rejections and the reason for the rejections.

**Reporting**

The OMB analyst will create and maintain a report in Excel from the data recorded. The information will be displayed numerically.

**Used By**

The division managers and department directors will use the information to see how many rejections are occurring. OMB and CFO will use the information to provide additional information and support to departments with higher error rates.

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**Performance Measure Methodology Sheet  
Office of Management and Budget  
Finance Department**

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<b>Measure #3: Percent of department performance measures that are reporting data</b>
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**Type**

Effectiveness

**Accomplishment Goal Supported**

Implement the Mayor's "Performance. Value. Results" performance-based management system

**Definition**

Each department has performance measures that report progress in achieving their respective Accomplishment Goal(s).

**Data Collection Method**

OMB will tally the number of measures by department that are and are not reporting data. From this information a percentage will be calculated for each department.

**Frequency**

Data will be reported quarterly and annually.

**Measured By**

OMB will tally data in by counting the numbers of measures reporting data.

**Reporting**

An OMB analyst will create and maintain an annual report in Excel. The information will be displayed numerically by department.

**Used By**

OMB to identify each department's progress in complying with the Mayor's initiative

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**Performance Measure Methodology Sheet  
Office of Management and Budget  
Finance Department**

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<b>Measure #4: Percent of departments that provide OMB with a satisfactory rating regarding timeliness, responsiveness, and helpfulness</b>
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**Type**

Effectiveness

**Accomplishment Goal Supported**

Ensure departments are satisfactorily served by OMB.

**Definition**

Measure how effective the department is in communicating directions, expectations regarding the budget process, and its timeliness and responsiveness to departments' questions, paperwork and concerns.

**Data Collection Method**

Customer Satisfaction Survey from departments/divisions

**Frequency**

Baseline survey was taken in July 2010. Subsequent surveys will be taken each July.

**Measured By**

Comparing the scores from prior surveys to current survey results

**Reporting**

The department will create and maintain an excel document showing the results by total and by department.

**Used By**

The department will use the information to gain an understanding of what areas need additional work in order to meet customer expectations including adjustments to priorities or work flow.



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**Performance Measure Methodology Sheet**  
**Office of Management and Budget**  
**Finance Department**

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<b>Measure #5: Change in departments' understanding of Intragovernmental Charges (IGCs).</b>
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**Type**

Effectiveness

**Accomplishment Goal Supported**

Advance departments understanding of Intra-governmental charge (IGC) system.

**Definition**

This will measure the effectiveness of communication by OMB of the concepts and procedures associated with the IGC system by testing key employees understanding of the system.

**Data Collection Method**

Surveys will be done pre- and post-training, and annually in which key employees are asked questions related to the concepts and procedures of the IGC system. The number of questions answered correctly will be divided by the total number of questions asked to derive a percentage that can be used to compare IGC understanding between years.

**Frequency**

The survey will be conducted once before OMB initiates training on the IGC system, once after the initial budget preparation process (mid-October), and annually after that.

**Measured By**

The budget analyst tasked with maintaining the IGC system will create the survey, distribute it, and compile and collect the data when the responses are received.

**Reporting**

Survey results will be reviewed following each test to learn areas in which department knowledge and training can be improved. Otherwise, overall results will be reported annually.

**Used By**

This information will be used by OMB to gauge the effectiveness of OMB training.