

**Minutes Attachment
for the 11/8/16 Meeting of the
Coalition of Gresham Neighborhood Associations**

Potential Progress Reporting Framework for the Gresham City Council to consider for its 2017 Council Work Plan.

Work Item Title: Progress Reporting Framework

Work Item Text: Publish on the City's web site the City's high level framework by which the Council Work Plan items and other significant initiatives consuming City resources are monitored and managed. For all current initiatives considered active and for new initiatives going forward, provide current status and periodic progress updates.

Specifically:

1. Enumerate the three to five underlying City goals that are typically used to justify the majority of significant initiatives and projects. These might be things like **Fiscal and Human Resource Efficiency Gains, Environmental Stewardship, Livability and Safety, Facilitating Development Opportunities, etc.**
2. Tabulate existing significant initiatives with baseline attributes such as the following: **Start Date MMY, Initial Small/Medium/Large Size Estimate, Relevant City Goals.**
3. For those projects and initiatives intended to have a beginning, middle and end, also tabulate **Current Estimated Progress Percent** to the nearest 10%.
4. For those projects having a beginning/middle/end, annually (suggested periodicity) tabulate two more attributes of **Current Year Size Estimate** and **Current Year Estimated Progress Percent.**
5. Retain (vs. overwrite) prior years' Size and Progress Estimates.
6. Ensure the technical approach to publishing and maintaining this framework can accommodate changes and expansion to the framework (such as additional metrics and/or additional reporting views) without requiring rework.
7. The City Council should exercise its judgment in determining what constitutes a "significant" project, and what constitutes a Small/Medium/Large work effort or monetary expenditure. We suggest that, if an initiative is big enough to require Council approval to gain resources, then it is a "significant" project.

Work Item Justification and Explanatory Notes:

The City of Gresham considers, prioritizes and launches many initiatives and projects each year, expending both monetary and human resources in order to fulfill a variety of goals and obligations. Currently, it is difficult at best for Coalition members and residents to understand how those initiatives and projects are progressing, whether they are worthy of continued investment, and therefore whether the City's goals and obligations are being attained. This framework is intended to be a first iteration at creating a City-wide view of that progress.

The additional managerial effort to populate and maintain this framework is intended to be very small. An initial effort to set the baseline, and then an annual update of merely two estimated metrics:

1. Has the size of the project changed up or down, and
2. For those projects that have a defined set of project completion criteria, what percentage complete is the project.

The initial questions this framework will answer are intended to be very high level; this framework does not replace existing project-level management methods or systems of record for project-level statistics.

Some projects have no beginning, middle and end, and they can be hard to quantify. There will not be any **Estimated Progress Percent** tracking done for these projects, just **Size Estimate** tracking. However ... for those projects that promise to save money and/or time for the City and all those doing business with the City ...

this framework is envisioned to be a stepping stone to eventually be able to ask ... Have we realized the gains that this project promised when it began?

Here are a few example questions and insights this framework should produce:

Question: We started initiative XYZ five years ago, and it was initially estimated to be a Small effort (taking less than P person-hours or less than D dollars). Is this project making year by year progress, or is it stuck at 30% complete for the last three years?

Insight: We started initiative XYZ five years ago, and it was initially estimated to be a Small effort. The Size Estimate has increased from Small to Medium two years ago, and has been increased again from Medium to Large last year.

Insight: The City's plan highlights the goal of facilitating economic development opportunities with an eye to improving the City's tax base. However, out of the N currently active projects and initiatives, just three of them specifically tie their project justification back to this particular goal, and all three of them appear to be struggling to make forward progress.

Insight: Looking at all the project initiatives currently called active that are time-bound with a beginning/middle/end, we have a steadily increasing number of such projects being opened, and a steadily decreasing number of such projects being closed/finished.