

CITY OF NEWTON

IN BOARD OF ALDERMEN

LONG RANGE PLANNING COMMITTEE REPORT

WEDNESDAY, APRIL 30, 2008

Present: Ald. Hess-Mahan (Chairman), Vance (Vice Chair), Albright, Freedman, Johnson and President Baker
Absent: Ald. Linsky, Danberg, Parker
Also Present: Ald. Sangiolo, David Olson (Clerk of the Board), Jeremy Solomon (Director of Policy and Communication)

The meeting was called to order at 7:00 p.m.

1. **Aldermanic Communications: efforts to increase and improve communications by Board to the public**

Aldermanic Website. David Olson updated the committee on improvements to the aldermanic website and provided a demonstration. Mr. Olson reported that he met with Ann Cornaro and Joe Mulvey in the Information Technology Department and worked on implementing various recommendations to improve the aldermanic website. He noted that the scroll box on the Aldermanic website now includes links to current events. Mr. Olson and Jeremy Solomon are currently collecting information and documents relating to the Newton North High School construction project to post on the website.

Mr. Olson also demonstrated the new search engine provided by Blossom. The search engine allows the public to search the entire site or just ordinances using keywords. He demonstrated a search using the keyword “noise” in the ordinance database, which retrieved all of the documents relating to the noise ordinance. He also noted that users can search by docket number to retrieve all agendas, reports, and board actions relating to a specific docket item. Blossom provides weekly reports on user searches and results.

Mr. Olson also demonstrated the “News from the Aldermen” link, which links to calendars, current events, news, press releases, and upcoming meetings on topics of interest such as the Newturf proposal. The Newturf link opens a webpage which contains the current plan and study of the project. He also opened up the budget discussion webpage, which contained a calendar of budget related meetings and documents.

Ald. Vance asked whether users had been asked for their input. Mr. Olson said that no survey had been done on suggested improvements but that he had kept track of contacts and comments he had received regarding the website. Ald. Johnson asked whether there was a docket index. Mr. Olson said that an index was not needed because Blossom allows users to search by docket number, and retrieve all documents relating to the corresponding docket item. He noted, however, that Board Orders are not yet available online.

Mr. Olson noted that he was working with other city departments to obtain a software package that would allow users to access all documents. He said that Inspectional Services, the Clerk's Office and the Assessor's Office are working on a "laser fiche" archiving system that would allow each department to have access to records. Initially, the system will only allow documents to be shared internally.

Mr. Olson updated the committee on changes to the Aldermen's webpages. Each alderman has a webpage with a picture, contact information, committee assignments and other information. Some of the aldermen's webpages contain short videos, which were recorded by NewTV, in which they talk about their roles on the Board of Aldermen. The video link requires users to download QuickTime to open and view the videos.

Communications with Mayor's Office. Jeremy Solomon updated the committee on some improvements in communications between the Mayor's Office and the Board of Aldermen. He noted that the Mayor's Office had begun to email information to the Clerk for distribution to the Board of Aldermen more frequently to speed up communication. Ald. Johnson noted this improvement and thanked Mr. Solomon.

The committee wanted to discuss how to communicate information that the Mayor presented at his weekly press conference. Mr. Solomon noted that a hard copy of the Mayor's prepared comments at the press conference. He noted that answers to media questions did not generally appear in the prepared remarks and that there was not always a report to disseminate. The committee discussed whether the Mayor's press conference could be posted on the city website.

Ald. Sangiolo asked about the possibility of NewTV streaming online video of the Mayor's press conference. Mr. Solomon said online streaming of NewTV's video would require authorization.

President Baker noted the improved communications between the Mayor's Office and the Board of Aldermen and thanked Mr. Solomon for his efforts.

2. Financial/Strategic Planning initiatives: internal control evaluation of City operations

Somerstat. Ald. Hess-Mahan reported that he had spoken with Stephanie Hirsch, Executive Director of the Somerstat program in Somerville, about arranging visits from City personnel and Aldermen. According to Somerville's website, The Somerstat program facilitates very regular forums in which key City decision-makers meet to study financial, personnel, and operational data to understand what is happening within departments. In these forums, the Somerstat analysts and department staff identify opportunities for improvement and over time, track implementation of plans. The meetings have become an ongoing conversation among City leaders on where the City should be headed, with each meeting allowing City managers to better understand how the City can work better. Ald. Hess-Mahan said he felt that a performance

management, budgeting and reporting system like Somerstat could improve the delivery of city services in Newton.

Visitors may make appointments to sit in on Somerstat meetings with various departments, which occur on a weekly, bi-weekly, or monthly basis depending on the department. Ald. Hess-Mahan encouraged committee members to contact him about setting up visits to Somerstat over the next few months. He distributed materials relating to the Somerstat program which are also available on its website.

The meeting was adjourned at 8:00 p.m.

Respectfully submitted,

Alderman Ted Hess-Mahan, Chair



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ResiStat Groups

- Brickbottom
- Davis Square
- East Broadway
- Magoun Square
- Perry & Lincoln Parks
- Prospect Hill
- Quincy Street
- Ten Hills
- Winter Hill East
- Somerville Parents
- Young Somerville
- Español
- Kreyòl
- Portuguese

SomerStat

As one of his chief goals for the City, Mayor Curtatone promised to implement management initiatives that would enable the City to deliver the best services possible with very limited resources. Like most other municipalities in the state, Somerville faces severe budget constraints. Because Somerville relies so heavily on state aid, recent cuts in state aid have hit the city hard. State aid represented 42.5 percent of the City's revenue base in FY 2000, but only 34.1 percent by FY 2006. At the same time, while revenue growth has fallen, fixed costs and employee benefits have continued to rise. While many Massachusetts municipalities have struggled, Somerville is among the leanest, with the lowest total receipts per capita in FY06 of all MA municipalities with populations of 40,000 or higher.

Strategy:

To survive in this fiscal environment, the Mayor believed, Somerville needed the best possible management. This, he thought, required having data to make decisions and the ability, through forums and analysis of the data, to use it to make decisions. Each of the management initiatives advances this goal in different ways. They have, in fact, enabled the City to not just survive, but to implement a large number of innovations. See the attached [SomerStat Overview](#) for more information on each.

The SomerStat program facilitates very regular forums in which key City decision-makers meet to study financial, personnel, and operational data to understand what's happening within departments. In these forums, we identify opportunities for improvement and over time, track implementation of plans. The meetings have become an ongoing conversation among City leaders on where the City should be headed, with each meeting allowing City managers to better understand how the City can work better.

The ResiStat Program brings SomerStat into the community, to extend the SomerStat problem-solving discussion to Somerville residents. The ResiStat program is funded by grants from [The Boston Foundation](#) and the [National Center for Civic Innovation](#). The goal of ResiStat is to hold 20 bi-monthly meetings, most in neighborhood groups and a few for specific populations. At these meetings, residents give their feedback to SomerStat staff and elected officials about their experience of living in Somerville and receiving City services. Suggestions and comments are recorded and brought back to City staff, and status updates are given at subsequent meetings. Also, residents can request SomerStat data relevant to their neighborhood, which are brought to subsequent meetings.

The Program-Based budget complements the SomerStat program by integrating financial information with data on operations and performance in an annual review of operations. While the SomerStat program is an ongoing conversation, the Program Budget is an opportunity to set goals that will be tracked throughout the year and to make changes to the budget to have the City's budget reflect ideas for change that have been uncovered in SomerStat meetings throughout the year. See the [FY07 Program Based budget page](#) for more information and a copy of the budget.

311 Call Center: Finally, the 311 Call Center rounds out the management reform effort by establishing a direct line to residents allowing them to provide real-time feedback on how well the city delivers its services. Data from the 311 center are regularly studied in SomerStat meetings and serve as a backbone for the program-based budget, which requires data on departmental output (e.g. number of trees trimmed). Visit [311](#) to learn how it can serve you.

As these components grow, they will continue to complement one another and provide a more and more robust picture of how the City works. While other cities have spearheaded these initiatives, we believe Somerville is unique in its aggressive implementation of all these related efforts. Also, we are able to provide a model of implementation in a medium-sized city and in the Northeast.

SomerStat Overview

Download this document for an overview of SomerStat, 311, and the Program-Based Budget.



City of Somerville

Massachusetts

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ResiStat Groups

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- Davis Square
- East Broadway
- Magoun Square
- Perry & Lincoln Parks
- Prospect Hill
- Quincy Street
- Ten Hills
- Winter Hill East
- Somerville Parents
- Young Somerville
- Español
- Kreyòl
- Portuguese

SomerStat

We welcome visitors to SomerStat meetings, with prior arrangements. Please contact Stephanie Hirsch, shirsch@somervillema.gov if you would like to sit in on an upcoming meeting. Meetings are monthly or bi-weekly as follows:

Office of Strategic Planning and Economic Development (OSPCD)	Weekly	Mondays, 2:00 p.m.
Personnel	Monthly	First Tuesday, 1:00 p.m.
OSPCD: Inspectional Service Division	Monthly	First Wednesday, 10:00 a.m.
Capital Projects	Monthly	First Wednesday, 1:00 p.m.
Traffic and Parking	Monthly	Second Tuesday, 2:30 p.m.
Fire	Monthly	Second Wednesday, 10:00 a.m.
Department of Public Works	Twice-Monthly	Second & Fourth Wednesday, 3:30 p.m.
Police	Monthly	Second Thursday, 3:00 p.m.
Recreation and Youth	Monthly	Third Monday, 10:00 a.m.
Health	Monthly	Third Monday, 1:00 p.m.
Information Technology	Monthly	Third Thursday, 10:00 a.m.
Office of Sustainability and the Environment	Monthly	Fourth Monday, 10:00 a.m.
Constituent Services	Monthly	Fourth Thursday, 10:00 a.m.
Library	Monthly	Second Wednesday, 2:30 p.m.
Finance (new)	Monthly	Fourth Tuesday, 10:00 a.m.

Budgeting for Results: a Webinar

Learn how government leaders are linking taxpayer dollars to performance measurement to **deliver better value to citizens**. Join Jonathan Walters for a special online seminar, **Budgeting for Results**, on Tuesday, June 19, at 1 p.m. ET/10 a.m. PT.

[CLICK HERE TO REGISTER](#)

Posted June 1, 2007

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Citizens and Performance

DOLLARS AND RESULTS

Data-Driven Decisions

A movement is afoot to help legislators and city council members link budget dollars more closely to results.

By **JONATHAN WALTERS**

In the late 1990s, as an alderman in Somerville, Massachusetts, Joseph Curtatone was perpetually frustrated by the budgets his local legislature was supposed to be helping shape and approve. "Budget time really used to get me," he recalls. "It was a straight line-item budget. There might be a small paragraph for each department briefly describing what they do, but there was nothing that told you how much we spent on what — no inputs, outputs or outcomes."

It was classic best-guess budgeting, coupled with a typical tactic: Any department that had any money left in its account at year's end was guaranteed to get a budget cut. "If you're the DPW director and you have \$15,000 left in your account, then that's how much we cut your budget for the next year," Curtatone recounts. "So the message to all our departments was, 'Spend down your budget.' "

While this was one of the most significant points of aggravation, Curtatone also was nettled by how the city managed its decisions in general. "Here we



Suggestions? Comments?
E-mail [Heather Kleb](#)

Community Models

LOCAL RESOURCES

Somerville, Massachusetts

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Mayor Joseph Curtatone

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were, a multimillion-dollar operation with absolutely no real-time information on even the most basic services. We weren't measuring anything. How many potholes were we filling? How were we filling them?"

The simple fact that Curtatone harbored such frustration, though, made him an unusual breed of elected legislator. Nationally, those who follow budgeting and managing for results in the public sector note that his impatience with a lack of information about what the city was trying to accomplish, and whether it was getting important jobs done efficiently, set him apart from most legislators — at the local and state levels. Even in states with results-based budgeting and management legislation on the books, and even in cities where mayors are preaching performance, the last public officials who seem to tune in are state legislators and city council members.

Those in the trenches agree. When asked to comment on the average city council member's familiarity with the concepts surrounding performance measurement, Jackie Nytes, an eight-year veteran of the Indianapolis City Council, lets out a long sigh. "Theoretically, if I ask city council members if they're in favor of using data to make decisions, they'll say, 'Of course.' But a lot of that is just lip service. A lot of council people are part timers, and the fact is that making budget decisions based on information about results is just harder."

But if her counterparts around the country are going to deal effectively with delivering services in times of tight resources, she thinks the way to do that is elevate the conversation. "If we're really going to get a handle on budgeting, then the question shouldn't be, do we have enough money for this many jail beds? The question should be, do we have the programs in place so that we don't need so many jail beds? If legislatures are acting responsibly, then they should be focusing on those kinds of outcomes."

Nytes is preaching that ethic not only locally but nationally. She's part of an effort being sponsored by the National League of Cities, aimed at tuning in elected officials to a much more performance-based view of government programming and budgeting. As chair of the City Futures Finance Panel at NLC, Nytes is part of a team of local elected officials who are working with performance-measurement guru Harry Hatry of the Urban Institute to produce a manual and other materials by this fall. The aim is to help local elected officials to start focusing on the bigger, performance-informed picture.

SomerStat

SomerStat is a program that helps Somerville deliver the best possible services with limited resources. The program regularly brings together city decision makers to study financial, personnel and operational data to help them understand what happens within various city departments. SomerStat aids these officials in identifying and tracking needed improvement.

[Click here](#)

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Budget Office

[Click here](#)

Indianapolis City-County Council

[Click here](#)

Jackie Nytes

[Click here](#)

jackie@jackienytes.com

Maryland

Legislating for Results

Managing for Results (MFR) is a future-oriented process that focuses on the needs of Maryland's customers and stakeholders and seeks to emphasize meaningful and measurable results.

[Click here](#)

2004 Status Report on MFR

The 2004 audit of MFR was conducted to determine whether the program had become a part of statewide decision-making.

[Click here](#)

StateStat

StateStat is a program currently being implemented statewide in Maryland as a replacement for Managing for Results. StateStat will help the governor target problem areas in state government.

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Department of Budget and Management

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The partnership is similar to one in which Hatry was involved a few years ago with the National Conference of State Legislatures. The result of that collaboration was "Legislating for Results," a basic primer that walks legislators through the fundamentals of data-driven decision making. According to Judy Zelio, who follows fiscal affairs for NCSL, there has been an uptick of interest in legislating for results in the wake of the book's publication. She also credits the buzz around work done in the field in states such as Louisiana, Oregon, Texas and Washington.

Mike Marsh, deputy director of the Oregon Department of Transportation, says it historically has been a mixed bag when it came to what legislators wanted to focus on when his department presented data on goals and outcomes. This year, however, in preliminary discussions with the chairs of the House and Senate budget committees in Salem, officials from his department were told to be ready to link dollars and outcomes. "They also said that if requests for additional money weren't related directly to key performance measures, don't even bother asking," Marsh adds.

Meanwhile, the committee chairs seem to be holding their own folks accountable for familiarizing themselves with ODOT's facts and figures on costs and accomplishments before they come to the budget hearings, Marsh notes.

VERIFIABLE RESULTS

Getting legislators to really buy in to legislating for results has never been easy. Even as Texas was being touted as a model of performance-based budgeting back in the late 1990s, legendary lawmakers and budget wranglers such as Lieutenant Governor Bob Bullock were referring to those efforts as "window dressing." In his view, the legislature knew from experience which agencies were doing a good job and which weren't.

Certainly some legislators have enough institutional memory and familiarity with their agencies to make informed judgments about performance. But especially in an era of term limits, and as departments become more technically adept at measuring what they do, advocates of data-driven government argue that something more than an agency's reputation for good or bad work ought to go into the spending equation.

There are some legitimate reasons why legislators might be uncomfortable using data to make big-

Baltimore

CitiStat

CitiStat is Baltimore's accountability tool that allows the mayor run the city on a week-to-week basis. It provides information that helps develop and implement strategies, hold managers accountable and measure results.

[Click here](#)

Oregon

Department of Transportation

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Kansas City

Performance Audits

Kansas City's audit Web site provides a searchable database of audits conducted since 1999.

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NATIONAL RESOURCES

Urban Institute

The Urban Institute is an economic and social policy research organization that seeks to promote policy and public debate on national priorities. The Institute gathers and analyzes data, conducts policy research, evaluates programs and services, and educates the public on critical issues and trends.

[Click here](#)

Legislating for Results

A joint effort of the National Conference of State Legislatures and the Urban Institute which provides state legislators and their staffs with information aimed at increasing their understanding of the potential use of performance measurement information, particularly the use of "outcome" information in the legislative process.

[Click here](#)

National League of Cities

The National League of Cities is the oldest and largest national organization representing

dollar decisions, however. The most prominent among them: They don't trust agencies to honestly and accurately report what's going on.

In 1997, Maryland embarked on its "Managing for Results" process. "MFR was introduced to agency leadership as a strategic-planning process to help officials set goals, objectives and performance measures for programs and to assess the results of those programs," says a 2004 legislative auditor's status report.

The auditor's report, which was undertaken at the request of the chairs of the Senate and House budget and appropriations committees, noted some key reasons why the program might not be as effective as it could be. For one thing, the number of measures reported to the Department of Budget and Management was closing in on an astounding 9,000 for 64 state agencies. At the same time, the audit report pointed out that the Governor's Office itself had been doing a routinely poor job of linking budget requests with agency goals and results. Most significant, the report found that almost two-thirds of agency-reported data simply was not verifiable.

Despite such problems, Maryland Senator P.J. Hogan, who serves on the budget and tax committee, contends that he and his fellow committee members do pay close attention to the link between money and key results when they make budget decisions. "I find that MFR works very well for me as a budget person. I can look at an agency's budget and look at their goals and see how they're doing and make a better judgment as far as whether we're getting the right amount of bang for the buck," says Hogan. "Take a measure like infant mortality rates. Under our MFR guidelines, we can look and see what it was in the four previous fiscal years and at least see trends — hopefully going in the right direction. And if not, then we can say, 'Hey, this program is not working, let's pull the funding.' "

Meanwhile, the executive side of Maryland government is promising to tighten up its MFR act under newly elected governor — and former Baltimore mayor — Martin O'Malley. Not surprisingly, O'Malley is taking the principles and tactics he practiced in creating and administering Baltimore's much-vaunted CitiStat and applying them to Maryland through "StateStat."

While legislation was pending to make StateStat official this session, O'Malley was already pushing it in three key agencies: corrections, juvenile justice and social services. Hogan doesn't see StateStat as

municipal governments across the United States. It seeks to strengthen and promote cities as centers of opportunity, leadership and governance. In cooperation with state municipal leagues, the NLC lobbies for cities and towns, provides programs and services for local leaders, keeps leaders informed of critical issues, helps build and strengthen leadership skills, awards municipal achievements and provides networking opportunities for local governments.

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City Futures Finance Panel

As part of the CityFutures Program at NLC, the Public Finance Panel's mission is to identify the challenges and possible solutions for a viable future public finance system for cities. The program seeks to create a public discourse regarding the need for the reform of current financial systems and provides guidance to city officials dealing with financial challenges.

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RECENT BOOKS AND ARTICLES

Legislating for Results

National Conference of State Legislatures and the Urban Institute, 2004

Exactly what am I getting for the money I'm paying? That's a question that is perpetually on the minds of taxpayers. Legislating for Results tells how to use performance information to determine the solid achievements of government programs for the money spent on them. This publication gives policy makers the tools to ask the right questions; encourage good management; gather vital information; identify areas for budget reductions or increases; link appropriations to actual services; improve oversight; enhance planning; and clearly show what works and what

either bolstering or overriding MFR. "I see it as complementing it," he says.

Meanwhile, Hogan concedes that most other legislators in Maryland have only passing familiarity with the whole MFR regimen, because they are less focused on the budgeting side of legislating and are more into "establishing new programs."

NEW DIRECTIONS

Despite the continuing state of general ignorance or indifference when it comes to using data to make important decisions, the ranks of governments that are turning to more results-based programming and budgeting seems to be slowly adding up, frequently because one or two people, such as Curtatone or Nytes or O'Malley, become frustrated enough to try moving government in a new direction.

For Curtatone's part, he took the most direct route possible to that position of influence: running for Somerville mayor. Upon taking office in January 2004, Curtatone promptly organized a series of field trips to Baltimore with top staff. The result was "SomerStat," which he says is now standard practice in his city. "For the first year, our aldermen were saying, 'Oh yeah, SomerStat. Explain that to me again.' " His early budgets had both line items and performance-related costing to ease them into the program. Now, using data to discuss budgeting has become standard operating procedure within his local legislature.

What hasn't happened in Somerville yet, Curtatone says, is taking the information being collected on government performance and results and pushing it out to citizens so that they can be more tuned in to what's being accomplished with their tax dollars. That's the city's next big step.

Some elected legislators think that is the best reason of all for making a clear connection between dollars and results. "Revenues are getting tighter and tighter, and we're not going to micromanage our way through this," Nytes says. "We have to reframe the discussion with the taxpayer. This isn't about looking for fluff in budgets, for waste. We're already efficient. The question is, are we efficient at the right things? So this is about what we want to budget for: What are our priorities and what do those cost, and then explaining to citizens the tough choices. If you want all these services, then you may need to increase taxes to pay for them."

Meanwhile, there is evidence that pushing performance — and transparency in government — can actually have significant political payoffs. Kansas City auditor Mark Funkhouser parlayed his reputation as a tough protector of taxpayers' interests into a successful mayoral run, winning a close election against a popular incumbent city councilman in March. Funkhouser's high-profile and tough performance audits were frequently so nettling to the

does not.

[Click here](#)

Interview with Mark Funkhouser

Katherine Barrett and Richard Green (Governing Management Letter, January 2007)

An exclusive interview with former auditor and current mayor of Kansas City, Mark Funkhouser, on auditing and working with the government.

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Managing Performance

Since 1997, Governing has convened an annual conference on the subject of Managing Performance. The reports from those events over the years provide examples of the way in which state and local government leaders have developed performance measurement and performance management initiatives over the last decade.

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(Note: Descriptions of some of these resources are adapted from the organizations' and publishers' Web sites and other materials supplied by them.)

mayors he worked for that he was directly threatened with being fired if he didn't back off. He ran on a campaign of government transparency and accountability.

And in Somerville, Curtatone says he ran for mayor on a straight platform of "performance-based budgeting and costing out and measuring activities and results." He adds with a laugh that a certain mayor just across the Charles River in Boston "doesn't believe in all this Activity-Based Costing stuff — yet." But in Somerville, citizens were certainly ready to support a mayor who knows his ABCs.

These articles are part of a continuing series on public performance measurement focusing on citizen involvement. Support has been provided by [the Alfred P. Sloan Foundation](#). Although the Sloan Foundation may assist some of the programs described in these articles, it had no control or influence over the editorial content, and no one at Sloan read the material prior to publication. All of the reporting and editing was done independently by *Governing* staff.

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