

A rustic wooden gate made of weathered logs and planks, set against a cloudy sky. A bull's head with large horns hangs from a log above the gate. The scene is outdoors, with a field and trees in the background.

REPORT BRANDING

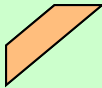

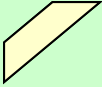
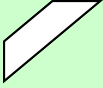
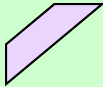


HELLO!

I am Erin Kenney

I am here because I love to give presentations.

The Road to Report Branding

- **Branding** 
- **Color, Graphics, Sidebars, and Headings** 
- **Content** 
- **Usability (Test)** 
- **Summary** 

Report Branding – September 2018

Branding

What is “*Branding?*”



Report Branding – September 2018

Branding

- Having a consistent look
- Something easily identifiable as *yours*
- Using logos

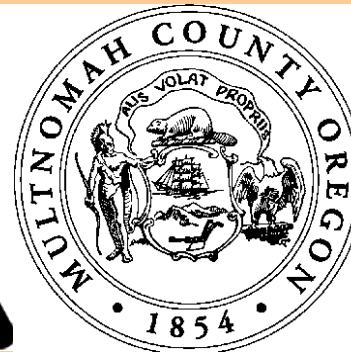
Branding

Easily Identifiable

- Using Logos to Identify you



Branding



Report Branding – September 2018

Branding

Benefits of Branding

- Makes it clear your work comes from you
- Focuses attention where you want it:
 - Report **Title**
 - Report **Contents**
- Reinforces your Reputation

Branding

Some Considerations

- Department, City, County Standards
- Office Standards
- Users



Branding

Back at the Ranch



Goal: *Develop our "Brand"*

Step 1

Identify official standards and requirements.

Step 2

Consider the political climate. What does the boss want or like?

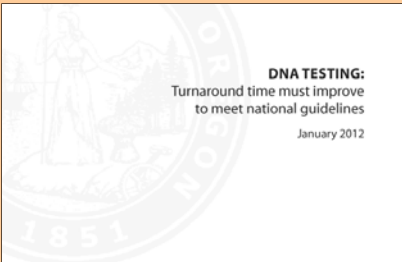
Step 3

Determine what you could use to identify your work as being from your office

Step 4

What looks good – what is eye catching?

Branding



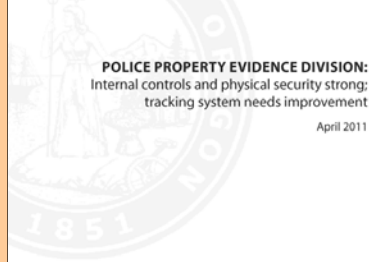


DNA TESTING:
Turnaround time must improve
to meet national guidelines
January 2012

LaVonne Griffin-Valade
City Auditor

Drummond Kahn
Director of Audit Services

Ken Gavette
Principal Management Auditor

Office of the City Auditor
Portland, Oregon






POLICE PROPERTY EVIDENCE DIVISION:
Internal controls and physical security strong;
tracking system needs improvement
April 2011

LaVonne Griffin-Valade
City Auditor

Drummond Kahn
Director of Audit Services

Ken Gavette
Principal Management Auditor

Office of the City Auditor
Portland, Oregon



SPAN OF CONTROL:
Although numbers are reported,
bureaus lack organizational structure goals
August 2011



LaVonne Griffin-Valade
City Auditor

Drummond Kahn
Director of Audit Services

Alexandra Fercak
Management Auditor

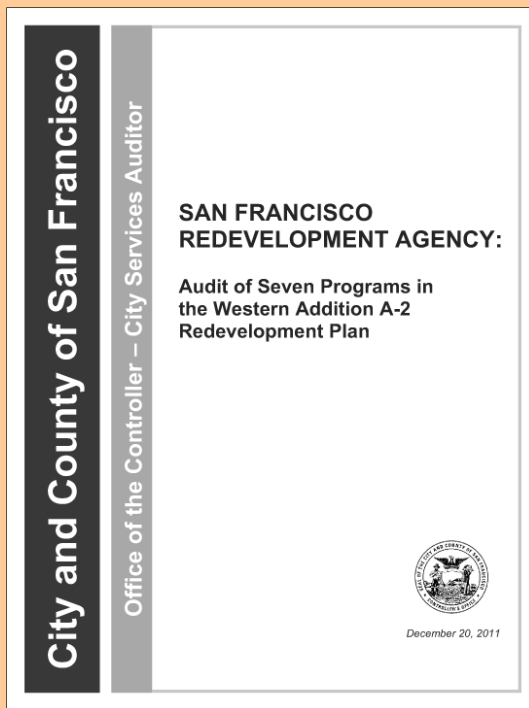
Fiona Earle
Principal Management Auditor

Office of the City Auditor
Portland, Oregon



Report Branding – September 2018

Branding



A Consistent Look

Report covers can catch your eye, and focus on the title and contents

Report Branding – September 2018

Branding

How do readers read reports?

- People are very visual



Branding

How do readers read reports?

- They follow intended and unintended directions



Branding

How do readers read reports?

- Can be lead to water (and to audit messages)

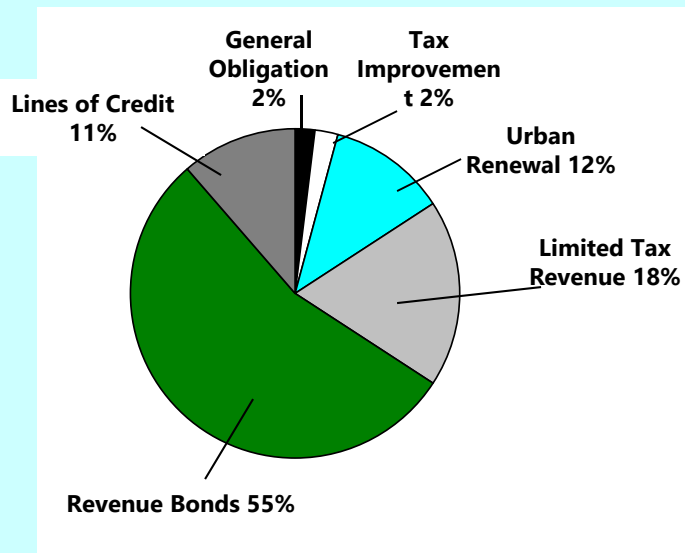


Color , Graphics,

S
I
D
E
B
A
R
S

... and Headings

Color – charts, graphs



- Emphasizing **large sections** or large concepts, as opposed to small.
- Color can be used online even if not in print.
- Many organizations distribute **50 - 100 times** more reports online than in print.

Color – in the report

Status of Recommendations

DONE	21	Fully implemented
IN PROGRESS	6	In progress or partially implemented
OPEN	14	Unresolved
TBD	10	Pending scheduling

Color – in the report

Stop

Proceed with
caution

Go



Report Branding – September 2018



Metropolitan King County Council
King County Auditor's Office
Cheryle A. Broom, King County Auditor
King County Courthouse
516 Third Avenue, Room W1033
Seattle, WA 98104-3272
206.296.1655 Fax 206.296.0159
TTY 206-1024
www.kingcounty.gov/operations/auditor.aspx

MANAGEMENT LETTER

DATE: April 19, 2011

TO: Metropolitan King County Councilmembers

FROM: Cheryle A. Broom, King County Auditor

SUBJECT: Follow-up on Implementation of Recommendations from 2009 Performance Audit of Transit

This memorandum provides the results of a follow-up review of our 2009 Performance Audit of Transit. Recommendations were scheduled for implementation over a three-year period. Although all recommendations are included in this memo, some are not scheduled for implementation until 2012. Overall, Transit has made significant progress toward addressing the recommendations of the 2009 performance audit and capturing the audit's estimated savings. Transit has developed a framework to ensure that implementation of audit recommendations is assigned to the appropriate staff person, the approach to implementation approved, and status monitored regularly by Transit leadership.

Background

In 2009, the auditor's office completed a comprehensive performance audit of Transit that included six areas of focus: financial and capital planning; service development; staffing; paratransit; vehicle maintenance; and ridership data and emergency communication.

We found that the ways that Transit pursued its mission contributed to higher costs – a situation exacerbated by the fact that in the two years prior to the audit, and continuing today, Transit's economic environment has resulted in dramatically reduced revenues, and in some areas, increased costs. Our audit focused on providing information that would result in cost savings and analyses that decision-makers could utilize when making policy decisions.

Summary of Findings

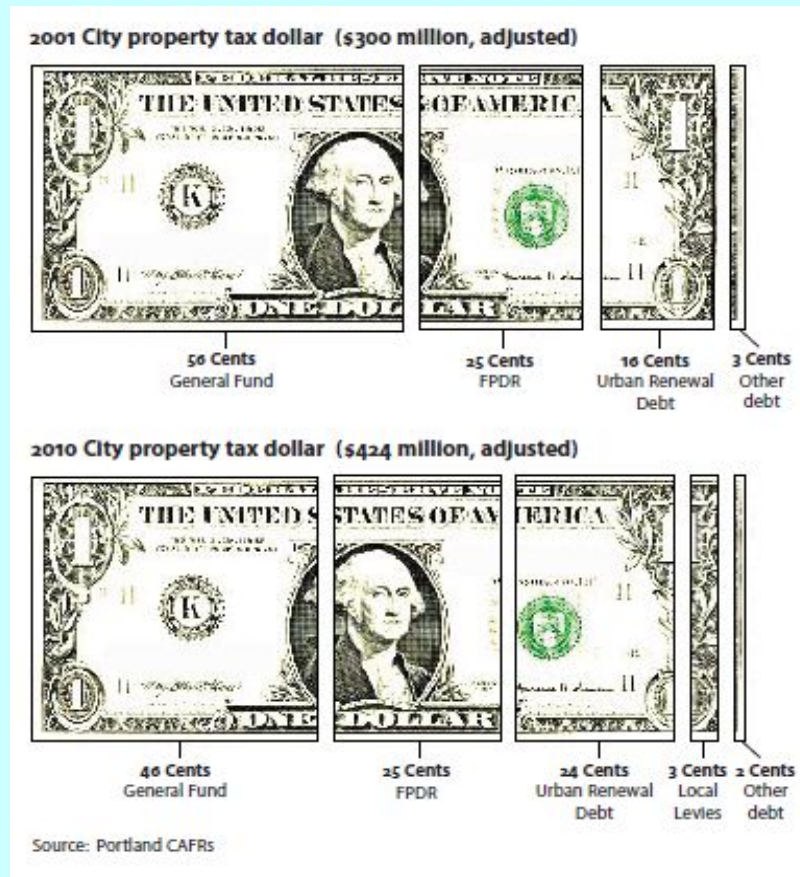
Of the audit recommendations:

DONE	21	have been fully implemented
PROGRESS	6	are in progress or partially implemented
OPEN	14	remain unresolved
	10	are not yet scheduled to be completed

Graphics

To illustrate the increase of debt for which property tax dollars are expended

City of Portland: 2001 and 2010

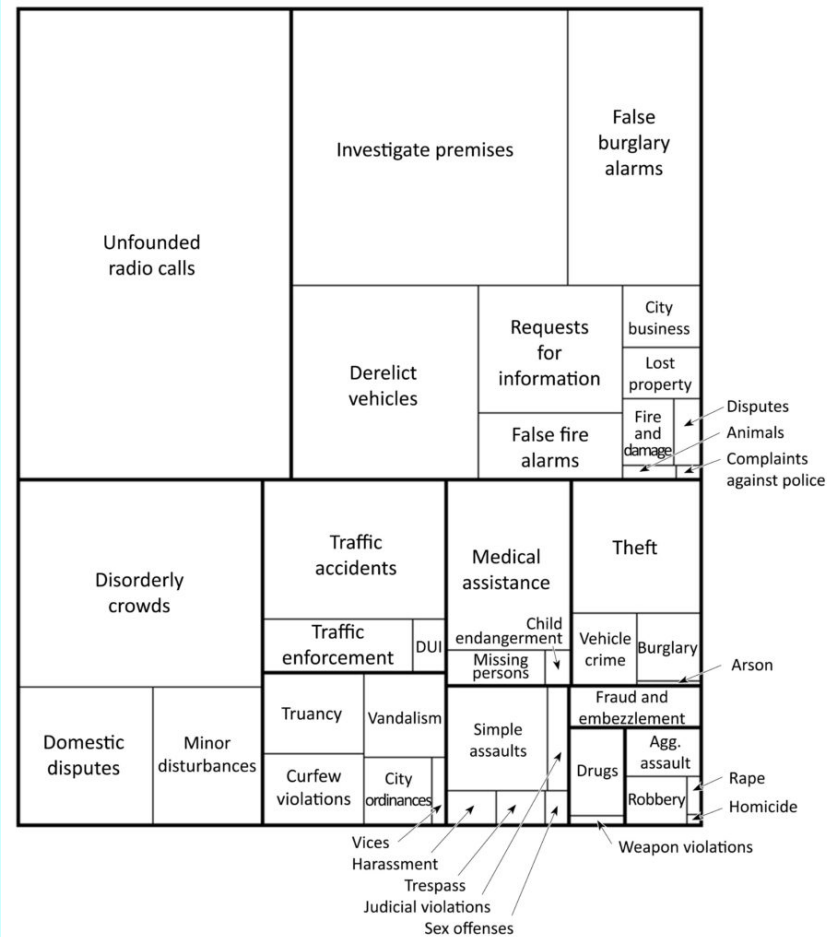


Graphics

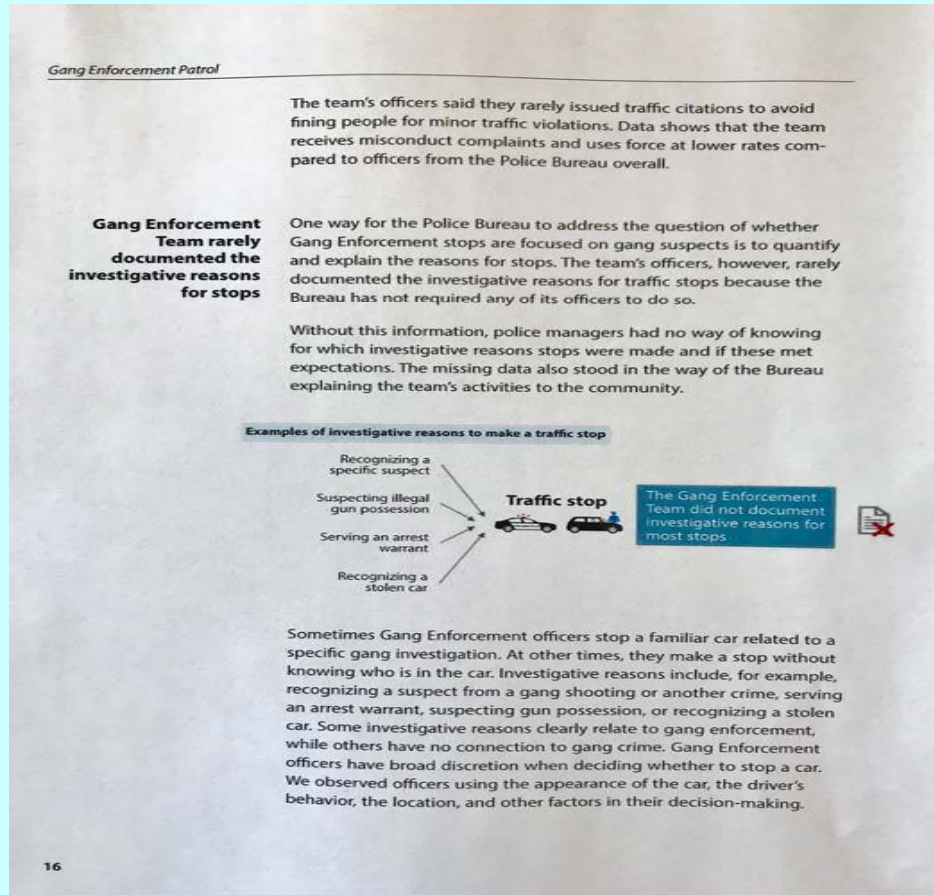
To illustrate the concept that Policing is a social service.

The area of each box represents the volume of incidents in 2015 in the City of Philadelphia (about 1.5m in total) handled by the Philadelphia Police Department.*

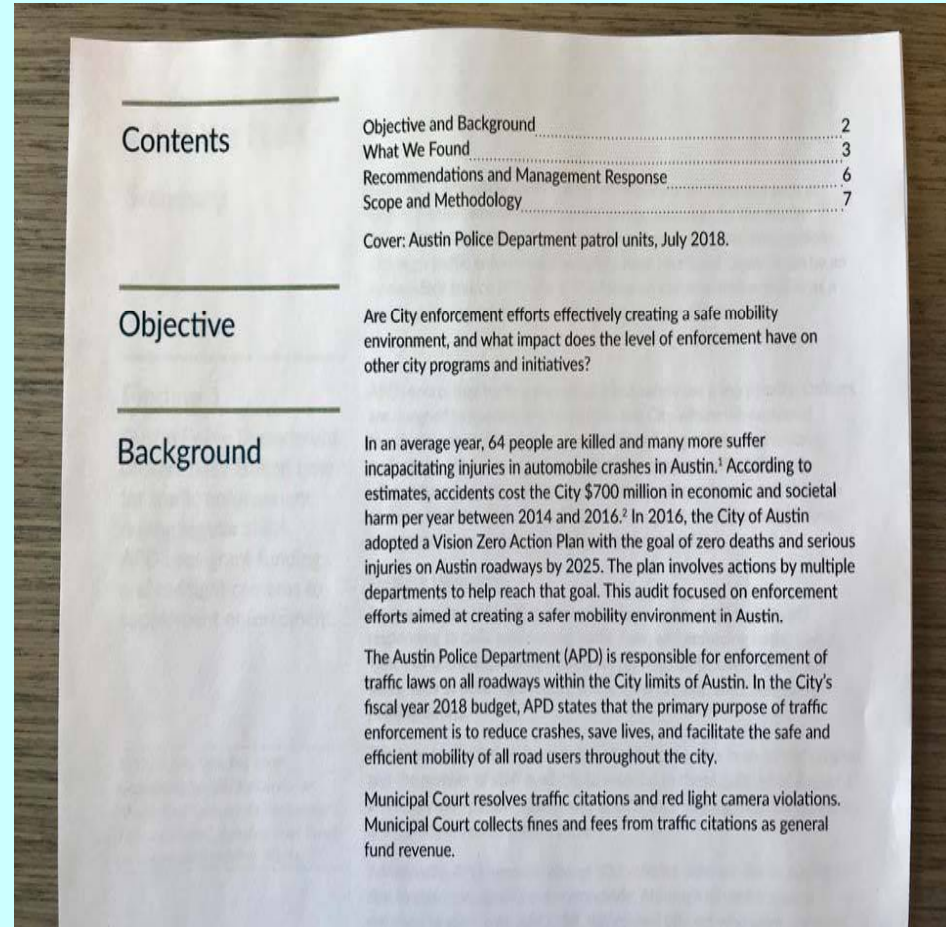
*Source: *Intelligence-Led Policing* by Jerry Ratcliffe,



S I D E B A R S

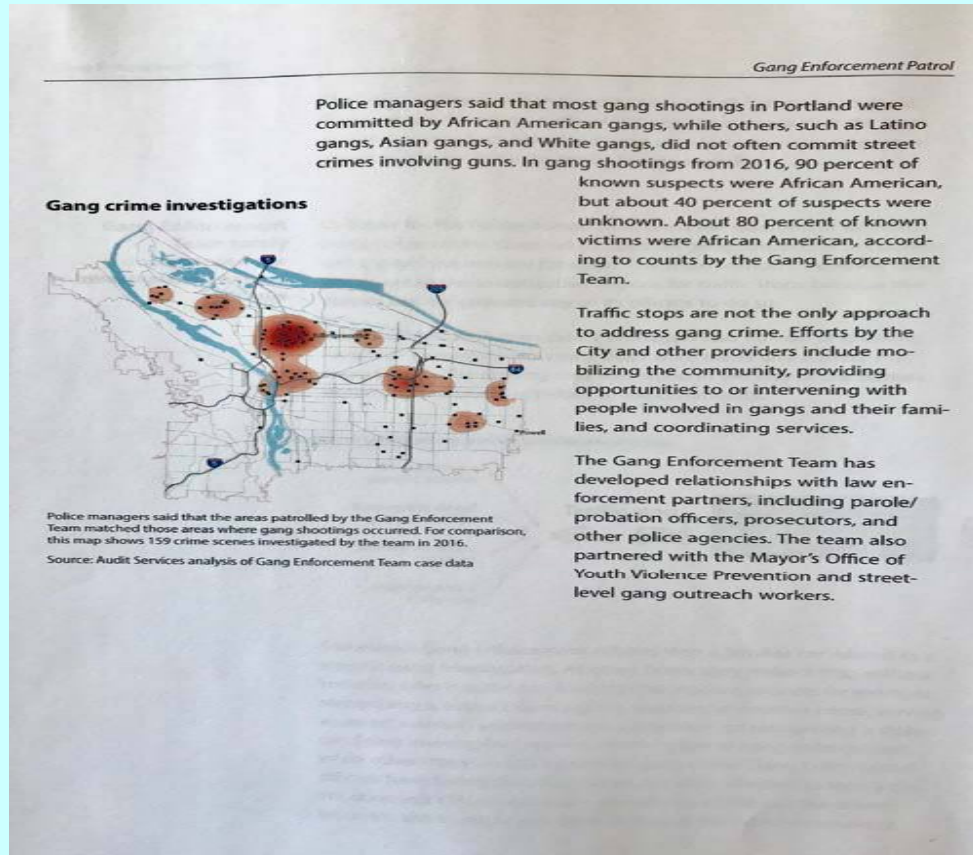


S I D E B A R S



Report Branding – September 2018

S I D E B A R S



Headings

How do readers read reports?

- People read reports the way they read anything
 - Left to right
 - top to bottom
 - **bold** to non-bold
- Important to less important (what is perceived as)
- Photos, graphics, and other illustrations should enhance not distract

Headings


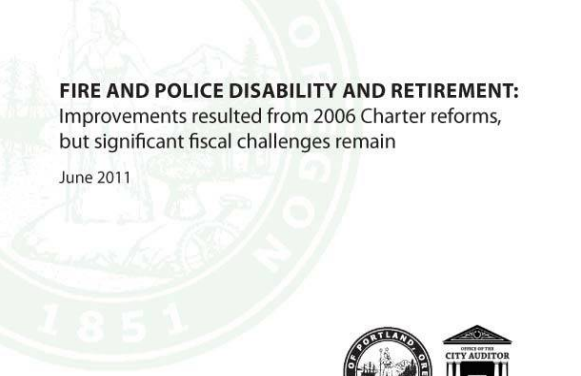
How do readers read reports?

- Can be distracted and may lose the point of the audit



Headings and Reader Flow

FIRE AND POLICE DISABILITY AND RETIREMENT:
Improvements resulted from 2006 Charter reforms,
but significant fiscal challenges remain
June 2011



LaVonne Griffin-Valade
City Auditor


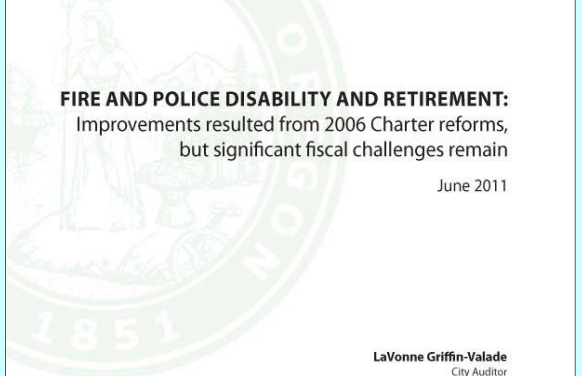
Drummond Kahn
Director of Audit Services

Kari Guy
Senior Management Auditor

Martha Prinz
Management Auditor

Office of the City Auditor
Portland, Oregon

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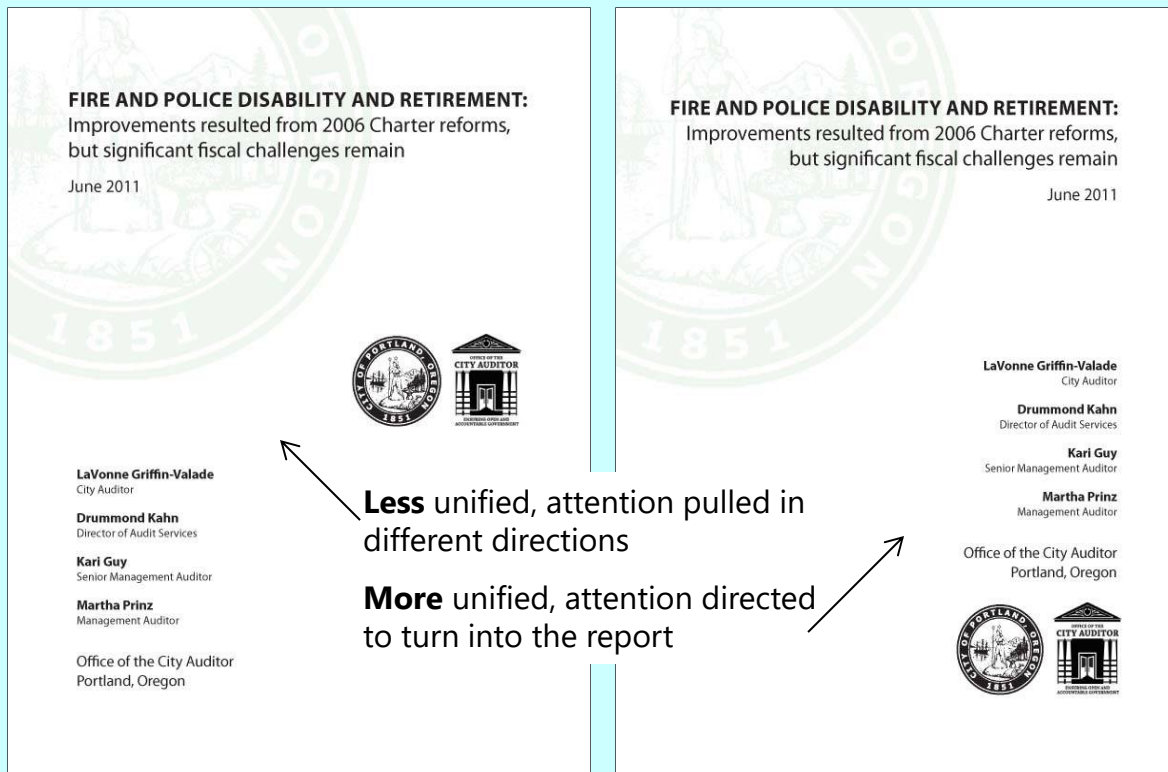
LaVonne Griffin-Valade
City Auditor

Drummond Kahn
Director of Audit Services

Kari Guy
Senior Management Auditor

Martha Prinz
Management Auditor

Office of the City Auditor
Portland, Oregon



Less unified, attention pulled in
different directions

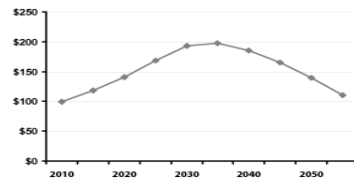
More unified, attention directed
to turn into the report

Report Branding – September 2018

Headings and Reader Flow

Fire and Police Disability and Retirement

Figure 4 Estimated pay-as-you-go pension costs (millions, not adjusted)



Source: Audit Services' graph of data in FPDR July 2010 Actuarial Valuation (Mercer)

Retirement system audit recommendations implemented

In July 2008 FPDR staff discovered an error in calculating pension benefits, resulting in overpayments to members of almost \$3 million. After consulting with the Internal Revenue Service, the FPDR Board opted to recover the overpayments from FPDR members. Although not required by the Charter changes, the Board requested a performance audit of the retirement program. FPDR hired an external consultant to complete the assessment of the policies, procedures, and data collection tools used by FPDR. The assessment identified both strengths and weaknesses of the retirement program. The highest risk recommendations focused on FPDR's outdated computer system.

As of January 2011, most of the recommendations in the retirement system assessment had been implemented, with implementation of most of the remaining recommendations tied to the FPDR computer system. In January 2011 the FPDR Board voted to replace the existing database, which FPDR staff stated will resolve the remaining audit recommendations.

12

Disability claims management now professional and independent

By shifting claims decisions from the FPDR Board to a qualified Fund Administrator, FPDR's disability claims management process changed considerably. The Fund Administrator hired staff analysts with disability expertise in line with that required to work under Oregon Workers' Compensation standards.

Beneficiaries are now required to appeal FPDR's claims decisions to a Hearings Officer, rather than to the FPDR Board. The Hearings Officer is required by Charter to be a member of the Oregon State Bar with relevant disability training and expertise, and FPDR contracted with State of Oregon Administrative Law Judges to serve in this capacity.

If the disputed claim is not resolved by the Hearings Officer, any subsequent appeals are now heard by an independent panel, which must also consist of members of the Oregon State Bar with relevant disability training and experience.

Claims processing audits find improvements, although not all issues resolved

The Charter amendment specified that an independent expert in disability systems conduct an initial audit of the disability system within nine months of January 1, 2007, with a subsequent audit to be completed 12 months later. The City hired Marsh, which issued a series of reports in 2008 and 2009. In its reports, Marsh noted that FPDR was unusual in being separate from Workers' Compensation, at a point that had been made by other consultants and reviewers in the past.

Marsh conducted an initial baseline audit that identified problems with FPDR's pre-reform disability claims management. Some of the claims Marsh reviewed in this report took place after Charter reforms were in place. Examples of problems were the timeliness of claims decisions, a lack of investigation of claims or focus on costs, a lack of follow-up on outside employment information, and a lack of tracking of third party payments, such as from an insurance company. Marsh also found FPDR's record keeping to be inconsistent and confusing.

Subsequent reports compared FPDR to peer entities and assessed FPDR's compliance with best practices. Marsh noted that FPDR had a very low claim denial rate compared to peer entities and, among

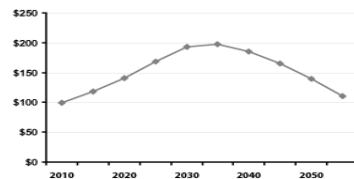
13

Readers are drawn into the text by the flush-right (ragged left) side head

Headings and Reader Flow

Fire and Police Disability and Retirement

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13

Subheads help break up gray text, and are appropriate next level to the side heads

Headings and Reader Flow

Fire and Police Disability and Retirement

Figure 4 Estimated pay-as-you-go pension costs (millions, not adjusted)

Year	Estimated Cost (Millions)
2010	100
2020	140
2030	190
2035	200
2040	180
2050	100

Source: Audit Services' graph of data in FPDR July 2010 Actuarial Valuation (Mercer)

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Subsequent reports compared FPDR to peer entities and assessed FPDR's compliance with best practices. Marsh noted that FPDR had a very low claim denial rate compared to peer entities and, among other things, recommended that FPDR adopt the same threshold as

Claims processing audits find improvements, although not all issues resolved

13



Flush left side heads pull attention away, and sub-level sideheads compete with more major headings for attention

Color, Graphics, Sidebars, and Headers

Back at the Ranch



Goal: *Find ways to use Color, Graphics, Sidebars, and Headers*

Step 1

Try a few styles for each.

Step 2

Don't worry about cost for online distribution.

Step 3

Less is more (don't overdo).

Content

Reports should be

- Objective
- Concise
- Scannable

Content

The content of any truly professional report should be objective, concise, and scannable.

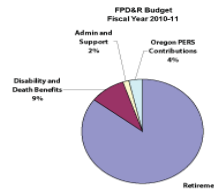
Content

**Reader
Design:
Good**

Chapter 2 Pension changes reduce costs in the long term

FPDR administrative structure changes completed

In some cases, these rule and procedure changes have increased costs of the Fund. For example, changes made to how final pay is determined in pension calculations may affect both members' retirement decisions and long-term costs to the FPDR fund. In another example, the Board adopted a standard for determining whether a disability claim should be approved that is more generous than Workers' Compensation programs. This practice was cited by FPDR staff as the reason FPDR continues to have relatively low claim denial rates, even post-Charter reform. FPDR staff did not estimate the costs of these changes for the Board to consider when making decisions.



New employees moved to funded pension plan

All police officers and firefighters sworn on or after January 1, 2007 are enrolled in the Oregon Public Employees Retirement System (PERS). PERS is a funded plan, which sets aside and invests funds each year to pay for future retirements. Shifting new FPDR members to the PERS funded plan reduces long-term costs to the City due to decreased benefit levels and the potential for investment earnings. As of June 30, 2010 there were 3,257 members and beneficiaries covered by FPDR under the old pay-as-you-go system,

13

Content

Appropriate size, font and boldness for chapter number and title, side heading, and subheads

Design feels unified, is easy to follow and read, and directs reader flow

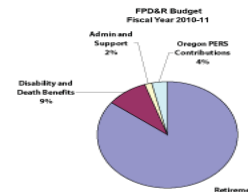
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Chapter heading starts you off, leads you to the main (side) heading, then to the subhead

Pie chart enhances, and doesn't distract from other parts of the page

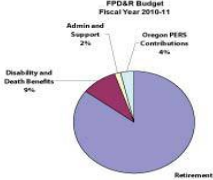
Content

**Reader
Design:
Less than
Good...**

Fire and Police Disability and Retirement



Pension changes reduce costs in the long term



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F P D R
administrative
structure changes
completed

10

Report Branding – September 2018

Content


Subject of photo is looking off the page - directing the reader's eye off the page

Bold headline grabs attention, but maybe too much

Pie chart way out into the margin

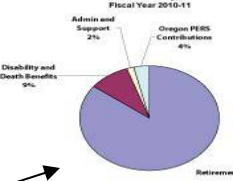
Shaded box is too much, text spacing is a problem

Fire and Police Disability and Retirement



Pension changes reduce costs in the long term

FPDR Budget Fiscal Year 2010-11



New employees moved to funded pension plan

F P D R administrative structure changes completed

10

Where are the margins?

Right hand margin is violated, breaking up continuity

Different fonts, justified and also ragged right and centered

OVERALL:

Too many things going on, all grabbing for attention

Report Branding – September 2018

Content

Where do you want the focus? Select your “Guiding Principles” ...

- Optimize for busy decision-makers
- Optimize for online reading
- Provide information just-in-time
- Use color but message accessible in b/w
- Goal – less than 15 pages
- Make key points with visuals



Content

Back at the Ranch



Goal: *Set Guiding Principles*

Step 1

Gather team

Step 2

**Determine Guiding Principles options
(see prior slide for examples)**

Step 3

Set Guiding Principles

Step 4

Draft, refine, test, refine

Report Branding – September 2018

Usability

- User-centered design? Not my job.
- We already understand users.
- Users aren't that diverse.

Usability

User behavior challenges:

- How much supporting information?
- What level of technical language?
- Where to make the report available?
- What tone to take in the writing?

Usability



Meeting User expectations

- Creates efficiency
- Reduces cognitive load
- Satisfying
- Enjoyable

Usability

Usability Test

Tell user they are required to review this report for their work and provide the report.

- What do they look at first?
- What do they skip? 
- What are they most interested in? 
- Time the review.
- Ask the user what they took away from the review.

Usability

Back at the Ranch



Goal: Administer Usability Tests

Step 1

Select "Users" to participate in the Usability Test.

Step 2

Administer test to Users one by one.

Step 3

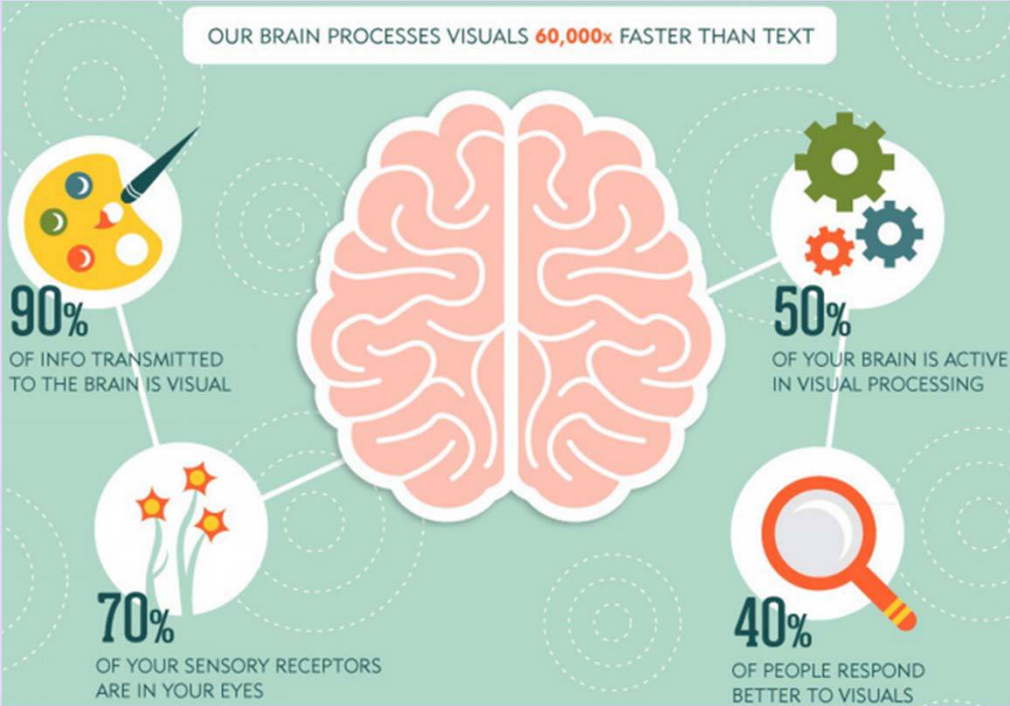
Observe and Document answers.

Step 4

Compare results, analyze, and consider design revisions.

Summary

Visual Creatures



Summary

Back at the Ranch



- *Commit Resources*
- *Identify your Brand / Logos*
- *Color, Graphics, Sidebars, Headings*
- *Develop Usability Tests*
- *Have Fun!*

Report Branding – September 2018

Summary

Committing Resources

I have only made this letter longer because I have not had the time to make it shorter.

Blaise Pascal



THANKS!

Any questions?

You can find me at @erin.kenney@lafpp.com

Report Branding – September 2018