

The Cost of Performance Management: How to Do More with Less

Speakers:

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Prince George's County

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City of Rock Hill, SC

April 14, 2010
2:00 – 4:00 EDT



The Government Finance Officers Association

The Case for Performance Management

What's driving the need for performance management?

- ❑ The need to focus the organization on results that are important to stakeholders
- ❑ The need to improve results within resource constraints
- ❑ The need to gain and keep the public's trust and confidence



Performance Management

- *...an ongoing, systematic approach to improving results through evidence-based decision making, continuous organizational learning, and a focus on accountability for performance. Performance management is integrated into all aspects of an organization's management and policy-making processes and transforms an organization's practices so that they are focused on achieving improved results for the public.*



Why Performance Management –

- Management's desire to improve
- Stakeholders' demands and expectations
- A response to fiscal stress



Why Implement Performance Management ?

Demonstrate:

- Effective stewardship of public funds
- Effective decision-making processes

Demonstrate:

- Understand strategies that work in specific communities
- How strategies can be effectively applied
- Understand broader application

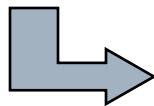


Proven through:

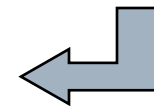
- Consistent data
- Transparent processes
- Regular reporting

Proven through:

- Qualitative and quantitative evaluation methods
- Diverse research tools



Resulting in:
Improved Outcomes



Expected Benefits

- Better results for the public through
 - Better information
 - Decisions better informed by evidence
 - Accountability for results is foremost
- A transformed organization in which
 - Management processes are aligned under performance management umbrella
 - Organizational smokestacks are subordinate to organization-wide and citizen interests
 - Measures are used for improvement



Also, a better way to survive fiscal hardship

- Performance management enables better focus on services and results that are most important
- Provides a rational alternative to across-the-board cuts
- Helps everyone, across the organization, to stay aligned with delivering key results, even in the face of revenue gaps



THE COST OF PERFORMANCE MANAGEMENT: HOW TO DO MORE WITH LESS

PRINCE GEORGE'S COUNTY MARYLAND



GFOA Audio Conference

April 14, 2010



About Prince George's County

- FY 2010 General Fund budget of \$2.6 billion
- Population of approximately 821,000
- Full service county (operates traditional municipal and county services)
- 27 cities/towns with varying services
- 485 square miles
- County Executive system (strong mayor)
- Bond ratings (Standard and Poor's/Moody's/Fitch): AAA/Aa1/AA+
- Home of the University of Maryland, Andrews Air Force Base, Washington Redskins, and National Harbor

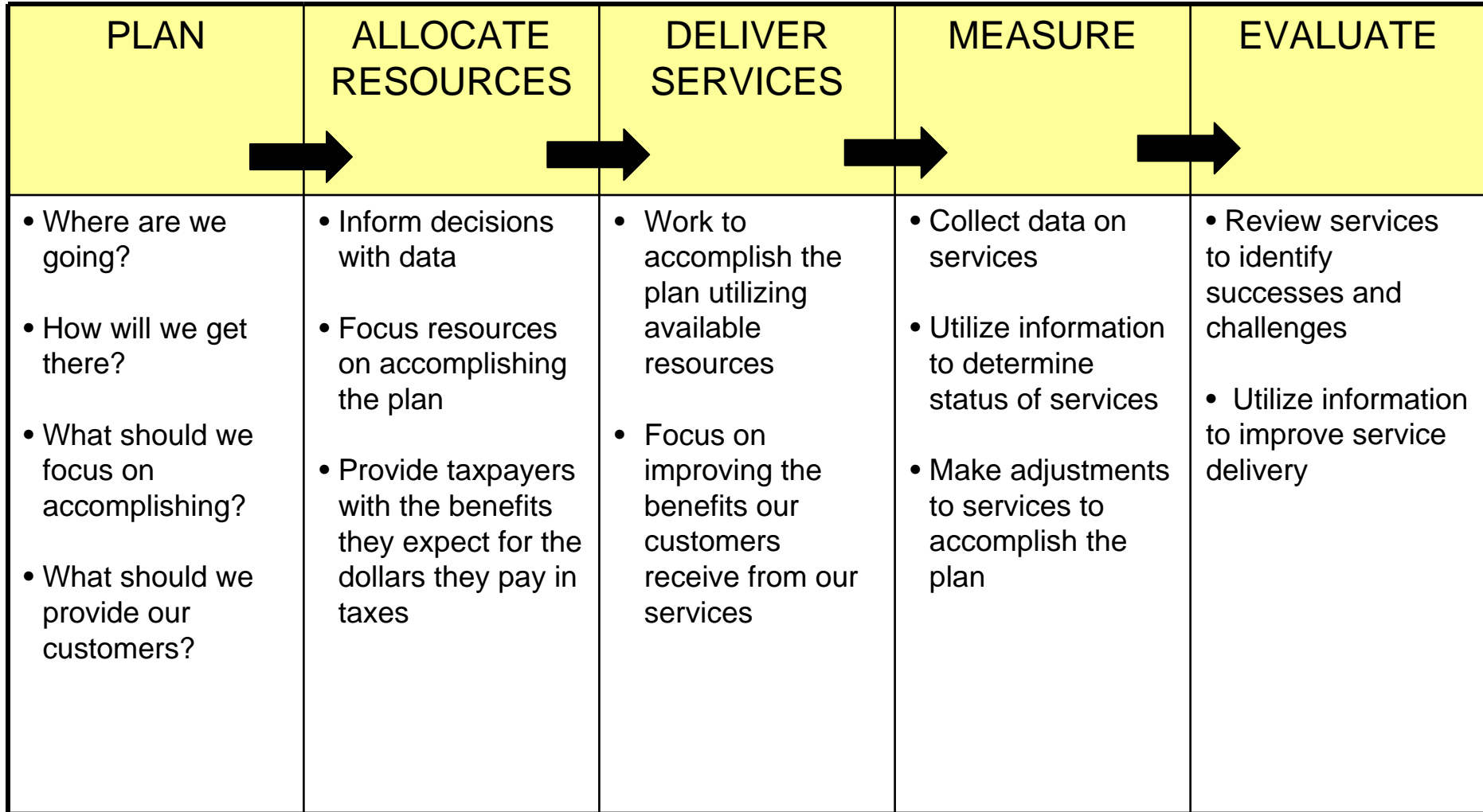


Questions to be Addressed

- What is Prince George's County's performance management system?
- What resources (staff, technology) are required to operate Prince George's County's performance management system?
- What have been Prince George's County's successes and challenges?
- What lessons has Prince George's County learned?



Overview



Plan Components

Component	What does it tell me?
Countywide Vision	<ul style="list-style-type: none">• Countywide direction• Countywide focus
Mission	<ul style="list-style-type: none">• Purpose• Departmental alignment with the vision• Core services• Customers• Outcomes
Goals	<ul style="list-style-type: none">• One core service's customer(s) and outcome
Objectives	<ul style="list-style-type: none">• The measurable targets and timeframe to accomplish the goal's outcome
Strategies	<ul style="list-style-type: none">• How to accomplish the objective



Plan - Department of Environmental Resources

Mission - The Department of Environmental Resources provides animal management, building and property sustainability services, solid waste management and stormwater management to the County's citizens, residents and businesses in order to provide safe communities and a clean environment.

The agency's mission supports accomplishing the countywide vision by:

- Working for safe communities
- Working for a clean environment

Goal - To provide animal management services to county residents and citizens in order to ensure animals do not pose a threat to the community.

Objective - Reduce the number of nuisance animal incidents from 452 per 100,000 households in FY 2008.

Strategies to Accomplish the Objective -

- License and vaccinate animals that come into the animal management facility
- Patrol and respond to calls for dangerous, stray, and dead animals twenty-four hours a day
- Utilize the Department of Correction's inmates to serve as dog walkers and groomers
- Enable citizens and residents to adopt animals that are found
- Remove dead animals from county roadways and communities
- Provide education on the humane treatment of animals to county citizens and residents



Allocate Resources - Performance Based Budgeting

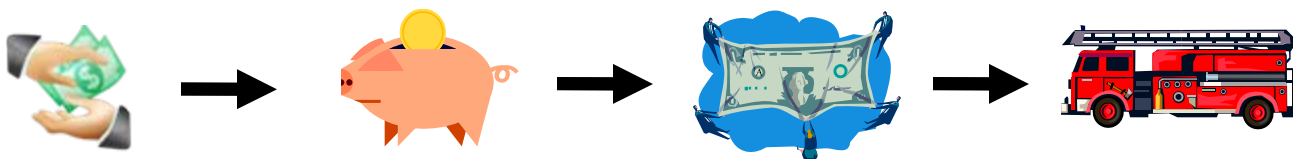
- **Purpose**

- Understand the impact budget changes have on service delivery performance and inform decision making
 - The public expects budget decisions to be made in the context of accomplishing a plan, facilitating performance, and focusing on core, high-priority services
 - Divide ***limited*** resources thoughtfully

- **The County's approach is incremental budgeting** which means developing the next year's budget using the current year as the base

- **Performance information is used to explain and justify budget changes which is accomplished by:**

1. Detailing budgetary changes and their impact
2. Reviewing and evaluating budgetary changes' impact
3. Adjusting the budget and performance measures
4. Presenting the information to decision makers



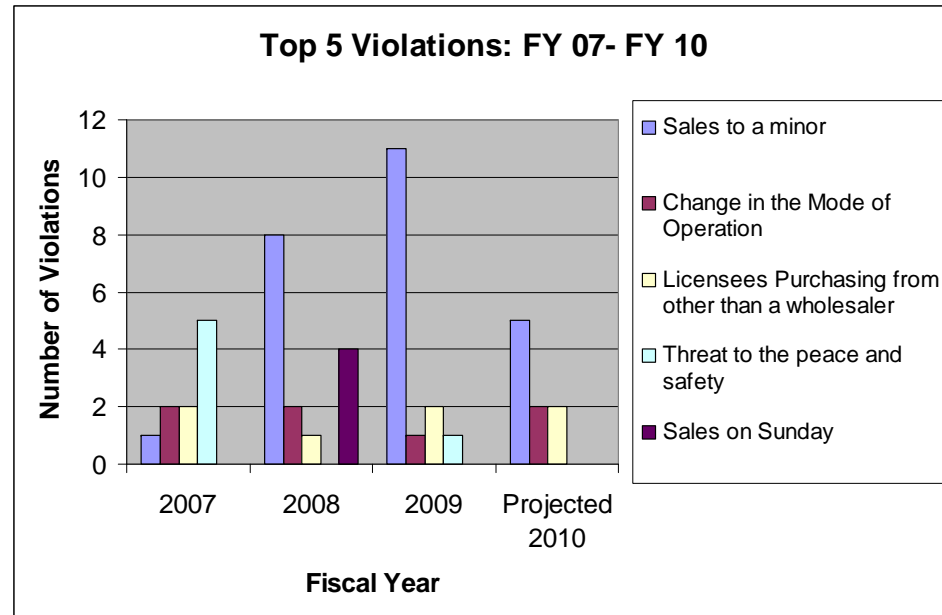
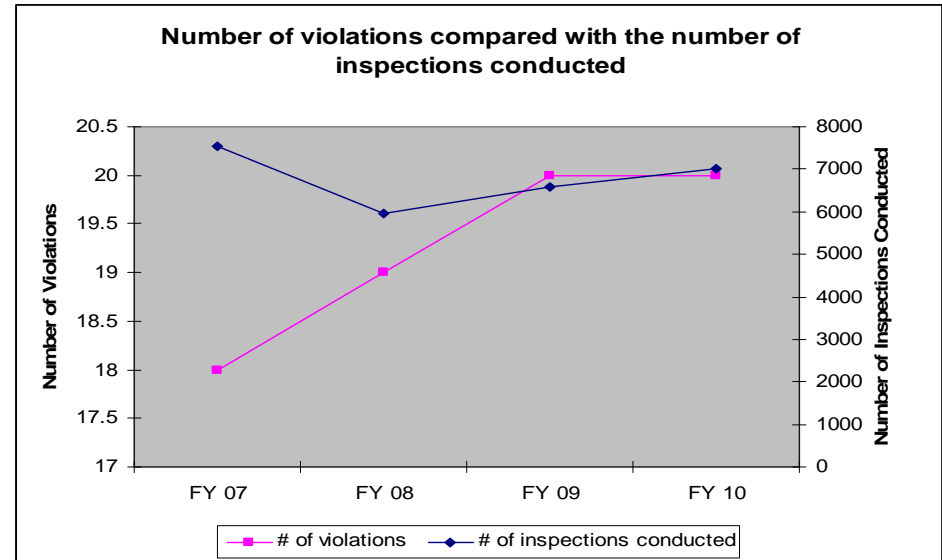
1. Detailing Budget Changes and their Impact

ACCOUNT	BUDGETARY CHANGE DESCRIPTION	AMOUNT OF CHANGE OMB RECOMMENDED FROM FY 2010 FOR FY 2011	WHAT IMPACT WILL THIS CHANGE HAVE ON THE OBJECTIVE'S PERFORMANCE?	PERFORMANCE IMPACT EXPLANATION
521501	Reduce mileage costs by inspecting establishments quarterly in FY 2011 instead of monthly; which will not increase alcohol beverage violations (objective 1.1) because the data suggests inspection frequency does not impact violations	-\$65,400	No Impact	The change is recommended because the data shows that the majority of the violations are with sales to minors. Focusing on reducing these violations will assist the agency with reducing the number of alcohol violations in the County.
521699	Reduction of the Board's discretionary allowances not spent in	-\$600	No Impact	Reduction of Board's Allowances
521299	Reduction of the size of Board's hearing advertisements in newspapers	-\$1,000	No Impact	Reduction in Advertising
522104	Reduction to legal contract due to the renegotiation of the hourly rate	-\$16,500	No Impact	Reduction to Legal Contract



2. Reviewing & Evaluating Budget Impacts

- How do we know that reducing inspections will not impact performance?
 - Number of inspections does not seem to drive the number of violations
 - Largest violation is sales to minors – which is not found through inspections
 - Need to focus on other initiatives



2. Reviewing & Evaluating Budget Impacts

- How do we know that reducing inspections will save the County money?

Mileage Reimbursement Calculation	
(A) FY 10 Budget Mileage Reimbursement	\$99,900
(B) Rate for reimbursement	0.36
<i>A/B= FY 2010 Funded Mileage Total (C)</i>	277,500
Average number of miles traveled per inspection	
(D) Number of inspections in FY 2010	7,543
<i>C/D = Average Mileage Per Inspection (E)</i>	36.79
Number of Proposed Inspections in FY 2011 (F)	
	2,605
Proposed Fiscal Year 2011 Mileage Calculation	
F x E = Proposed Total Mileage for FY 2011 (G)	95,833
(H) Reimbursement Rate (see B)	0.36
<i>J x K= FY 2011 Mileage Reimbursement (I)</i>	\$34,500
A - L = Cost Savings	
	\$65,400



3. Adjusting the Budget and Perf. Measures

- Budget

Account	Account Name	FY 2010 Budget	FY 2011 Budget	Change
521501	Mileage Reimb.	\$ 99,900	\$ 34,500	\$ (65,400)

- Performance measures

Measure Name	Measure Category	FY 2007 Actual	FY 2008 Actual	FY 2009 Actual	FY 2010 Estimated	FY 2011 Projected
Number of inspections	Output	7,528	5,947	6,575	7,198	2,260
Number of event and special inspections	Output		219	343	345	345
Number of alcoholic beverage violations	Outcome	18	19	20	18	18
Number of establishments that have more than one violation a year	Outcome	3	1	1	1	1



4. Presenting to Decision Makers



Charter for Change Supplemental Package

BOARD OF LICENSE COMMISSIONERS

FY 2011 Budget | Chief Administrative Officer Meeting | January 27, 2010

PERFORMANCE AND BUDGET SUMMARY

Objective	Current Status	Trend	Budget Impact
Percent of licensed businesses refusing to sell to underage volunteer operatives (objective 1.1)	■	Data is Unavailable	No Impact

- This budget supports the Board of License Commissioners conducting inspections at 343 special events and inspections at all licensed facilities approximately 4 times per year
- Comparison between Montgomery County and Prince George's County: Sales to Minors

	FY 2008	FY 2009
Montgomery County	33%	20%
Prince George's County	1.3%	1.8%

(Source: Montgomery County Data- Liquor Inspectors Find Underage Sales, Gazette, January 6, 2010.)

Key

● Meeting target	◆ Within 10% of target	■ Not within 10% of target
<i>Current Status</i> – Comparison of FY 2009 actual with the FY 2010 target		
<i>Trend</i> – Comparison of the first year of actual data with FY 2009		
<i>Budget Impact</i> – Summary of the impact the budget is anticipated to have on the objective's performance		

TABLE OF CONTENTS

BUDGET ANALYSIS	2
AGENCY PLAN AND MEASURES	5
FY 2010 TO-DATE DATA	8
CHARTER FOR CHANGE RATING	9
REQUEST FOR INFORMATION	14



4. Presenting to Decision Makers

FY 2010 APPROVED BUDGET	\$1,208,200
Align resources to transition from monthly establishment inspections to quarterly inspections	-\$65,400
Increase funding for Liquor Inspector positions (includes fringe benefits)	\$40,300
Anticipated savings from vacancies (includes fringe benefits)	-\$43,800
Reduction in furlough from 80 to 64 hours (includes fringe benefits)	\$4,400
Fringe benefit rate change from 30.0% to 34.2%.	\$8,700
Various operating expenditures	-\$6,200
FY 2011 PROPOSED BUDGET	\$1,146,200



Measure

Category	Definition	Example(s)
Input	Agency's resources	-Dollars spent -Staff hours
Output	Work to be completed (demand for service) and the work produced	-Applications processed -Number of calls for service -Number of customers served
Efficiency	Amount of work to be completed or produced (output measure) per resource (input measure)	-Number of plans reviewed per reviewer -Cost per appraisal -Cost per ton of refuse collected
Quality	-Degree to which customers are satisfied with a program -How accurately or timely a service is provided	-Complaints per 1,000 collection points of refuse -Percent of applicants processed within 3 days -Percent of applications processed with errors
Outcome	The impact a service/program is designed to affect	-Number of fire deaths per 1,000 fires -Percent of job trainees who hold a job for more than six months



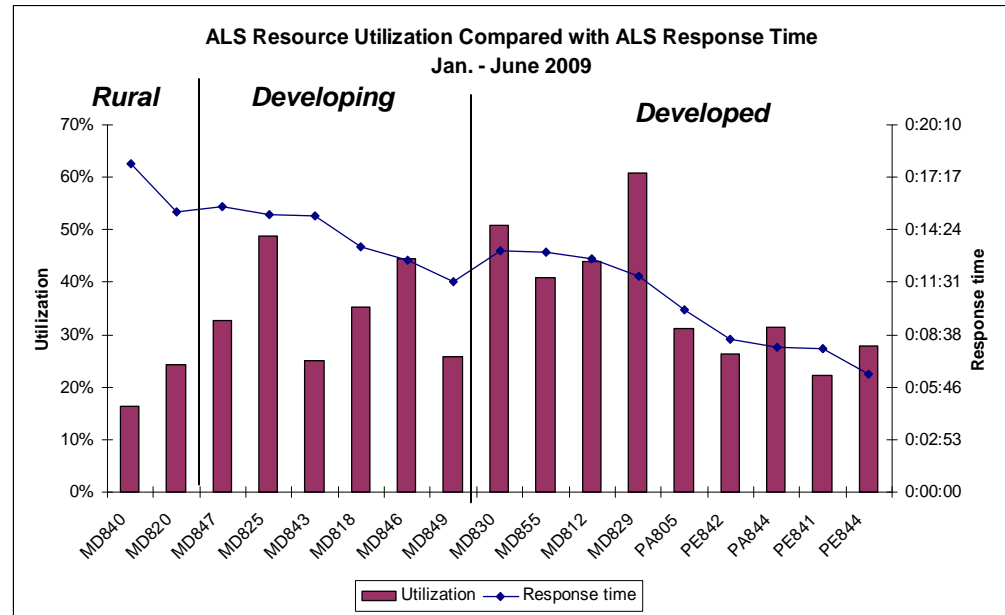
Measure

Measure Name	FY 2007 Actual	FY 2008 Actual	FY 2009 Actual	FY 2010 Estimated	FY 2011 Projected
<i>Resources (input)</i>					
Number of child and family services staff		40	40	40	40
<i>Workload, Demand and Production (output)</i>					
Number of child abuse and neglect allegations and cases received		5,228	6,385	6,400	6,500
Number of child abuse and neglect referrals investigated		3,543	3,800	3,900	4,000
Number of adoptions	31	22	25	25	25
<i>Efficiency and Quality</i>					
Average number of child abuse and neglect allegations and cases received per staff member		130.7	159.6	160.0	162.5
Number of children with a reoccurring claim of child abuse within six months of first claim (valid or invalid)		79	78	76	74
<i>Impact (outcome)</i>					
Number of child fatalities caused by neglect and/or abuse		15	12	10	9



Evaluate

- **Executive Management Assessment Program (EMAP)**
 - Review data to improve service delivery
 - Selected agencies are regularly reviewed
 - Collaborative effort with the agency
 - Past EMAP meetings have focused on:
 - Improving ambulance response time
 - Reducing violent crime in the County
 - Mitigating inmate assaults in our correctional facility
 - Repairing roadways



Evaluate

- **Bi – monthly reporting and review of performance measures**
 - Agency reports all performance data bi-monthly
 - Budget office and agency review the data to ensure accuracy and understand issues
- **Management analysis (program evaluation)**
 - Past has focused on deployment of 911 call takers and overtime



Resources and technology used to operate Prince George's County's performance management system



Overview

- **Size of Prince George's County's system**
 - 25 participating agencies
 - 77 agency objectives
 - More than 1,000 performance measures (about 40 per agency) in FY 2011 (in FY 2008 it was 295)
- **Resources to operate Prince George's County's system**
 - Staff
 - Rely heavily on the budget office and agency coordinators
 - Technology
 - Plans and performance measures
 - Current “system” built by the Performance Management Unit using Microsoft products
 - Performance based budgeting and analysis
 - MS Word, MS Excel, SPSS
 - Currently investigating the feasibility of an in – house built system

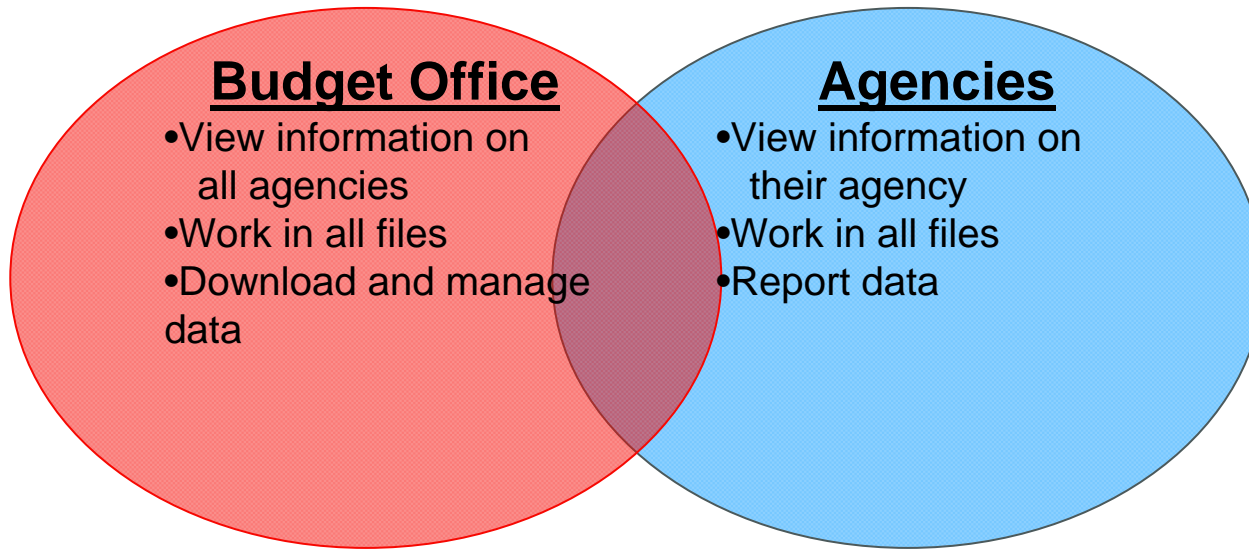


Staff Resources

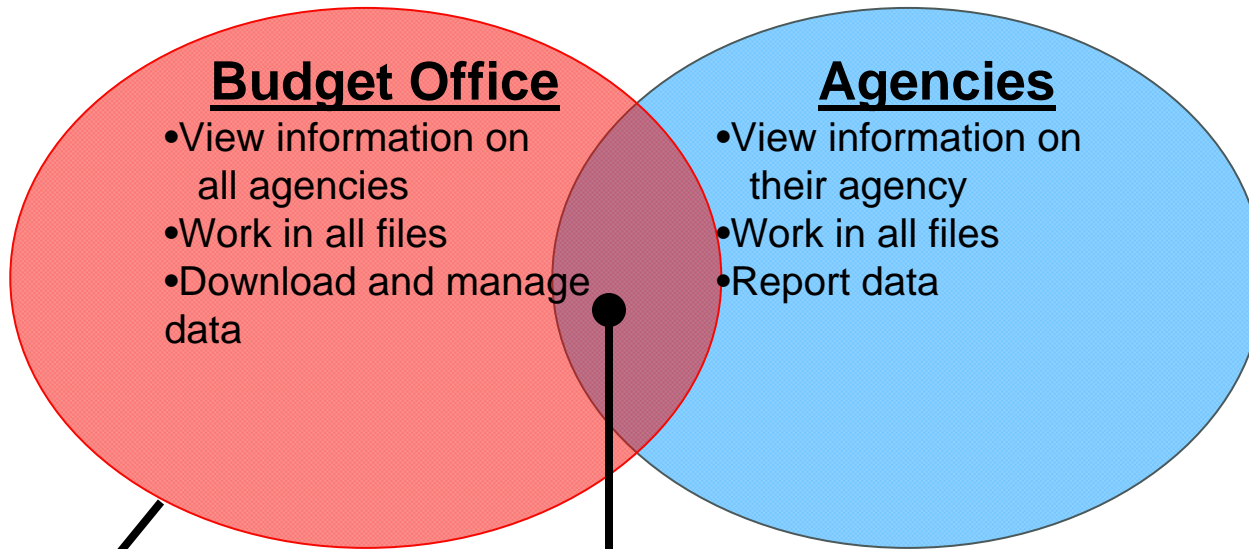
POSITION	NO.	Brief Description of Responsibilities in the Performance Management System
COUNTY EXECUTIVE'S OFFICE		
Chief Administrative Officer (CAO)	1	<ul style="list-style-type: none"> Leads the system Has final authority on all decisions
BUDGET OFFICE		
Budget Office Director	1	<ul style="list-style-type: none"> Manages the system in collaboration with the CAO and within the office
Performance Management Unit	2	<ul style="list-style-type: none"> Coordinates budget analysts and agency staff Responsible for daily operations of the system Primary analyst for EMAP and program evaluation Reviews and ensures quality of all information Reports performance information and analysis to decision makers Trains all staff
Budget Management Analysts	10	<ul style="list-style-type: none"> Works with their assigned agency and conducts analysis and recommendations for performance based budgeting, data reporting, responses to performance based questions
DEPARTMENTS		
Directors	25	<ul style="list-style-type: none"> Leads, coordinates, and manages the system for their department
Performance Management Contact (usually fiscal coordinators)	25	<ul style="list-style-type: none"> Submits strategic plans, performance measures, data reporting, and any and all other performance information to the Department Director and ultimately to the budget office Collects data
Division Staff	Unknown	<ul style="list-style-type: none"> Assist in the coordination, development, and collection of information for the department





Technology – Plans and Measures



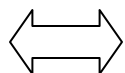
Technology – Plans and Measures






Databases



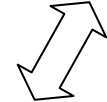
Monthly Data - Database Annual Data Database



SharePoint (intranet)



Agency Monthly Data Agency Annual Data Agency Plan



SharePoint

Our Internal Livable Community > Sites > Charter for Change

Documents

Shared Documents

Lists

Contacts

Tasks & Due Dates

Discussions














Post a Question

Sites

People and Groups

Shared Documents

New ▾ Upload ▾ Actions ▾ Settings ▾

Type	Name	Modified	Modified By
	FY09 Data Reporting Files	9/10/2009 3:47 PM	Jones, Rushane M.
	10	3/29/2010 11:05 AM	Jones, Rushane M.
	12	3/31/2010 2:24 PM	Hall, Laurinda Denise
	13	2/3/2010 1:30 PM	Jones, Rushane M.
	16	4/6/2010 2:50 PM	Diggs, Tanya
	20	3/17/2010 1:32 PM	Markomanolakis, Kelly E.
	21	3/19/2010 9:14 AM	Sutton, Lisa M
	22	3/29/2010 2:23 PM	Jones, Rushane M.
	23	2/12/2010 10:31 AM	Jones, Rushane M.
	25	3/31/2010 1:56 PM	Banks, Daneen M.
	26	3/23/2010 9:26 AM	Sandlin, Debra A.
	3	10/26/2009 10:59 AM	Jones, Rushane M.
	31	3/31/2010 11:00 AM	Thompson, Kim L.



Capturing the Plan

- All performance information text is saved in MS Word by the agency
- Space is available to paste MS Excel information into the document

MISSION AND SERVICES

Mission - The Police Department provides patrol, emergency police response and investigative services to county citizens, residents and visitors in order to protect lives and property.

The agency's mission supports accomplishing the countywide vision by:

- | | |
|---|---|
| <ul style="list-style-type: none"> ▪ Working for safe communities ▪ Working to support families and individuals in need | <ul style="list-style-type: none"> ▪ Working for economic vibrancy |
|---|---|

Core Services –

- Patrol, including responding to calls for service
- Emergency police response
- Investigative services, including identifying and apprehending persons suspected of criminal acts

SERVICE DELIVERY PLAN AND PERFORMANCE

GOAL 1 - To provide uniform patrol services to the County's citizens, residents and visitors in order to mitigate crime.

Objective 1.1 - Reduce the number of violent crime incidents from 7.4 per 1,000 residents in calendar year (CY) 2008.

Targets	Long Term Target Compared with Performance
<ul style="list-style-type: none"> ▪ Short term: By CY 2010 – 6.7 ▪ Intermediate term: By CY 2013 – 6.5 ▪ Long term: By CY 2016 – 6.3 	

Performance Measures -

Performance Measures Explanation – Violent crime includes homicides, rapes, robberies, carjacking and assaults. Violent crime has steadily declined since 2005 and is anticipated to continue to do so in the data illustrated above. The department projects that it will better its short term goal of 6.7 violent crime incidents per 1,000 residents in 2011. Data is reported on a calendar year basis to correspond with the FBI's Uniform Crime Reporting standards. Please note that violent crime numbers for 2009 are estimated. Data for all measures, for all years is not available at this time.

Strategies to Accomplish the Objective –

- **Strategy 1.1.1** – Partner with citizens, residents and visitors to mitigate crime
- **Strategy 1.1.2** – Hold statistical review meetings with county, municipal, State and Federal law enforcement partners to discuss how to achieve and improve toward the agency's objective
- **Strategy 1.1.3** – Concentrate police and probation resources on the most violent offenders who are highly likely to commit future violent crimes
- **Strategy 1.1.4** – Utilize the EXILE program combining law enforcement, prosecution and community action to combat gun crime which if a person is convicted requires mandatory Federal prison sentences



Editing the Plan

- Space is available to paste in MS Excel information
- To update, edit, revise – agency uses track changes

MISSION AND SERVICES

Mission - The Police Department provides patrol, emergency police response and investigative services to county citizens, residents and visitors in order to protect lives and property.

The agency's mission supports accomplishing the countywide vision by:

<ul style="list-style-type: none"> Working for safe communities Working to support families and individuals in need 	<ul style="list-style-type: none"> Working for economic vibrancy
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Core Services –

- Patrol, including responding to calls for service
- Emergency police response

SERVICE DELIVERY PLAN AND PERFORMANCE

GOAL 1 - To provide uniform patrol services to the County's citizens, residents and visitors in order to mitigate crime.

Objective 1.1 - Reduce the number of violent crime incidents from 6.6 per 1,000 residents in calendar year (CY) 2008.

Targets	Long Term Target Compared with Performance
<ul style="list-style-type: none"> Short term: By CY 2010 – 6.5 	
<ul style="list-style-type: none"> Intermediate term: By CY 2013 – 6.4 	
<ul style="list-style-type: none"> Long term: By CY 2016 – 6.2 	

Performance Measures -

Performance Measures Explanation – Violent crime includes homicides, rapes, robberies, carjacking and assaults. Violent crime has steadily declined since 2005 and is anticipated to continue to do so in the data illustrated above. The department projects that it will better its short term goal of 6.7 violent crime incidents per 1,000 residents in 2011. Data is reported on a calendar year basis to correspond with the FBI's Uniform Crime Reporting standards. Please note that violent crime numbers for 2009 are estimated. Data for all measures, for all years is not available at this time.

Strategies to Accomplish the Objective –

- Strategy 1.1.1 –** Partner with citizens, residents and visitors to mitigate crime
- Strategy 1.1.2 –** Hold statistical review meetings with county, municipal, State and Federal law enforcement partners to discuss how to achieve and improve toward the agency's objective
- Strategy 1.1.3 –** Concentrate police and probation resources on the most violent offenders who are highly likely to commit future violent crimes
- Strategy 1.1.4 – Utilize gun shot detection cameras**

Objective 1.2 - Reduce the number of property crime incidents from 44.4 per 1,000 residents in CY 2008.

Targets	Long Term Target Compared with Performance

Annotations:

- Deleted: <#>Investigative services, including identifying and apprehending persons suspected of criminal acts
- Deleted: 7
- Deleted: 4
- Deleted: 7
- Deleted: 5
- Deleted: 3
- Formatted: Bullets and Numbering
- Deleted: <#>Strategy 1.1.4 – Utilize the EXILE program combining law enforcement, prosecution and community action to combat gun



Agency Performance Measures - Annual

- Each Excel workbook has three tabs: “1”, “Graphs”, “Dashboard”
- Tab naming consistency allows you to aggregate information by linking each tab into one MS Excel workbook

TAB: 1

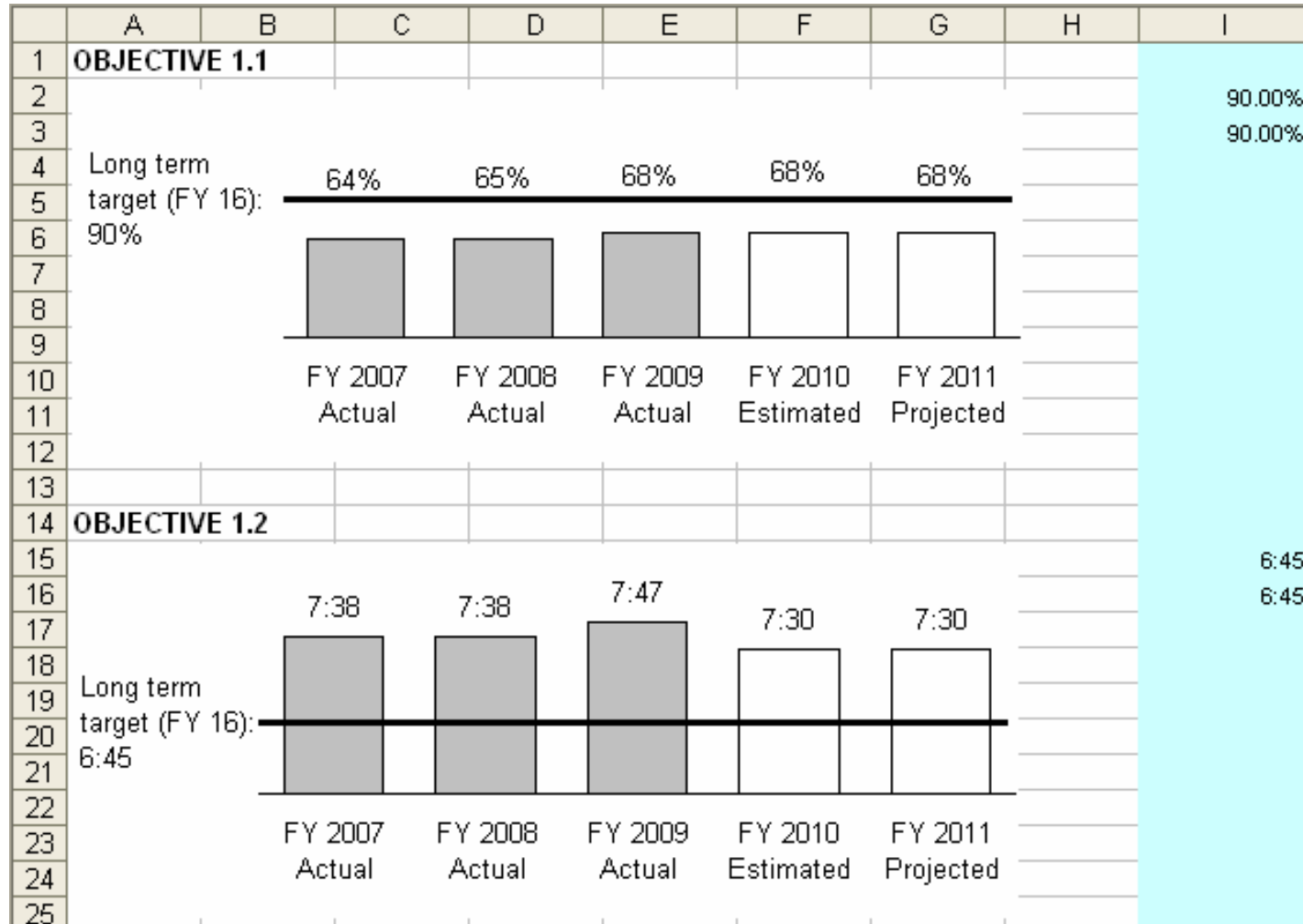
	A	B	C	D	E	F	G	H	I	J	O	P	Q	R
1	Objective	Presentation Measure	Measure Name	Measure Category	Objective's Measure	Strategy's Measures	Methodology	Favorable Trend (+/-)	Data Source	Reporting Frequency	FY 2008 Actual	FY 2009 Actual	FY 2010 Estimated	FY 2011 Projected
15	1.1	No	Percent of students becoming certified ALS providers within 1 year	Output		1.1.5	divide the number of students enrolled in training program by number of students becoming certified ALS providers	Increase+	AEMS	bimonthly	16%	62%	74%	88%
17	1.1	Yes	Average number of ALS calls for service per ALS ambulance and ALS capable fire engine	Efficiency		1.1.5	Divide # of ALS calls for service by # of ALS ambulances and engines	Increase+	CAD	bimonthly	2,552.9	2,562.2	2,676.5	2,555.6
21	1.1	Yes	Percent of ALS ambulance responses arriving within 10 minutes	Outcome	Yes	1.1.7	% of time an ALS resource arrives on scene within 10 minutes	Increase+	CAD Analyst	bimonthly	65%	68%	68%	68%

- Updating by agency requires using track changes
- Data back to FY 2004 is in the workbook but not illustrated



Agency Performance Measures - Annual

TAB: GRAPHS



Agency Performance Measures - Annual

TAB: DASHBOARD

	A	B	C	D
1	Objective	Current Status	Trend	Budget Impact
2	Percent of ALS ambulance responses arriving within 10 minutes (objective 1.1)	◆	Improving	None
3	Average BLS response time (objective 1.2)	◆	Not Improving	None

- To gather and present this information automatically from other tabs, we use several MS Excel functions including:
 - Match
 - If statements
 - Indirect
 - Symbols
 - Conditional formatting



Agency Performance Measures – Bi-Monthly

	A	B	P	Q	R	S	T	U	V	W	X
	Objective (not to be shown)	Measure Name	July FY 2010	August FY 2010	September FY 2010	October FY 2010	November FY 2010	December FY 2010	January FY 2010	February FY 2010	March FY 2010
37											
38	3.1	Expenditures for transit services	\$1,581,236.61	\$1,315,951.21	\$1,657,223	\$1,424,910	\$1,408,448	\$1,432,559	\$1,400,874	\$1,218,775	
39	3.1	Number of transit vehicles	92	92	92	92	92	92	92	92	
40	3.1	Number of transit drivers	156	156	170	177	177	186	186	191	
41	3.1	Number of vehicles required to ensure routes are covered daily	66	66	66	66	66	66	67	67	
42	3.1	Number of in-service hours	17,279	15,788	15,806	16,498	15,013	16,530	15,030	11,628	
43	3.1	Number of bus routes	26	26	26	26	26	26	26	26	
44	3.1	Number of in-service miles	224,499	205,056	205,287	215,427	195,104	214,700	196,332	157,694	

- One tab in a workbook
- Updated at the end of the year with new measures and data from the annual MS Excel file
- Requires locking columns each reporting cycle
- Not illustrated above: all the months in the fiscal year and annual data (FY04-FY10)



Agency Performance Measures - Database

C	Q	R	S	T	U	V	W
Measure Name	July FY 2010	August FY 2010	September FY 2010	October FY 2010	November FY 2010	December FY 2010	January FY 2010
Average ALS response time	8:42:00	8:45:00	8:47:00	8:49:00	8:51:00	8:56:00	0
Percent of ALS ambulance responses arriving within 10 minutes	67%	67%	67%	66%	66%	65%	0
Number of basic life support (BLS) capable ambulances	39	39	39	39	39	39	0
Number of BLS calls for service	5285	5333	5109	5658	5027	5270	0
Average number of BLS calls for service per BLS ambulance	136	137	131	145	129	135	0

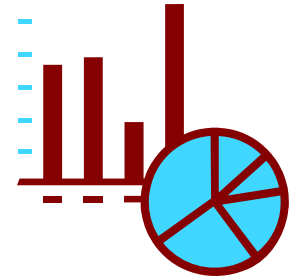
- Two files: (1) bi-monthly reporting and (2) annual data
- Includes all fields and all agencies (showing a small sample above)
- Simple link to each agency's MS Excel file
- For monthly reporting; we remove links once all data is final



Performance Based Budgeting & Analysis

- **Performance based budgeting**

- MS Word and MS Excel
- Submission is through email
- Requires copying / pasting
- Includes:
 - Detailed analysis
 - Budget analysis
 - Supplemental package
 - Budget pages



- **Analysis**

- MS Excel can be a very powerful analytic tool
 - Find and align information using excel functions
 - Conduct basic regression, correlation analysis
 - Trend and demand analysis
 - Review large sets of data and condense it into meaningful summary tables
- SPSS
 - Statistical analysis tool
 - Able to perform more complex evaluations with larger sets of data than MS Excel



Detailed Analysis

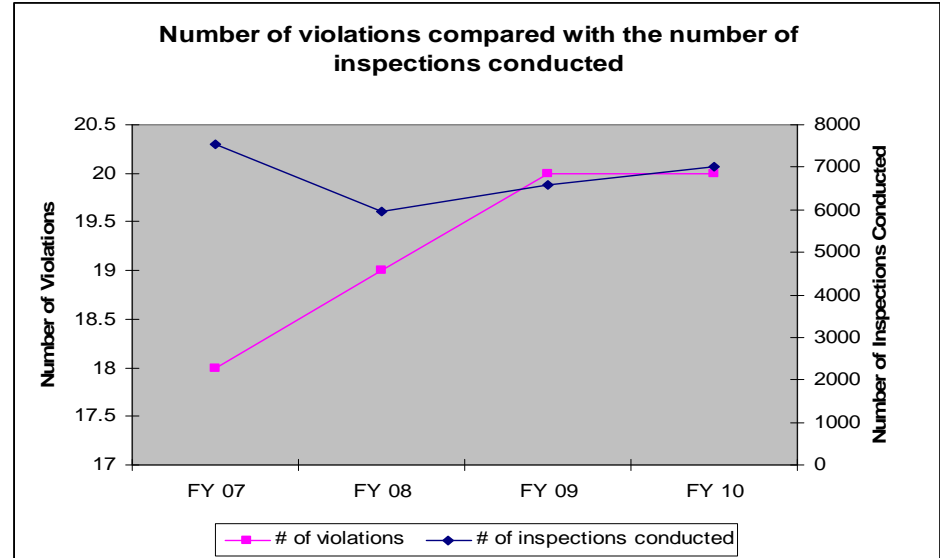
ACCOUNT	BUDGETARY CHANGE DESCRIPTION	AMOUNT OF CHANGE OMB RECOMMENDED FROM FY 2010 FOR FY 2011	WHAT IMPACT WILL THIS CHANGE HAVE ON THE OBJECTIVE'S PERFORMANCE?	PERFORMANCE IMPACT EXPLANATION
521501	Reduce mileage costs by inspecting establishments quarterly in FY 2011 instead of monthly; which will not increase alcohol beverage violations (objective 1.1) because the data suggests inspection frequency does not impact violations	-\$52,100	No Impact	The change is recommended because the data shows that the majority of the violations are with sales to minors. Focusing on reducing these violations will assist the agency with reducing the number of alcohol violations in the County.
521699	Reduction of the Board's discretionary allowances not spent in	-\$600	No Impact	Reduction of Board's Allowances
521299	Reduction of the size of Board's hearing advertisements in newspapers	-\$1,000	No Impact	Reduction in Advertising
522104	Reduction to legal contract due to the renegotiation of the hourly rate	-\$16,500	No Impact	Reduction to Legal Contract

- Manually inputted
- Information must match our budget system



Budget Analysis

- MS Excel
- A great tool: Dr. David Ammons's Tools for Decision Makers
- Copied and pasted into the supplemental package



Mileage Reimbursement Calculation	
(A) FY 10 Budget Mileage Reimbursement	\$99,900
(B) Rate for reimbursement	0.36
A/B= FY 2010 Funded Mileage Total (C)	277,500
Average number of miles traveled per inspection	
(D) Number of inspections in FY 2010	7,543
C/D = Average Mileage Per Inspection (E)	36.79
Number of Proposed Inspections in FY 2011 (F)	
	2,605
Proposed Fiscal Year 2011 Mileage Calculation	
F x E = Proposed Total Mileage for FY 2011 (G)	95,833
(H) Reimbursement Rate (see B)	0.36
J x K= FY 2011 Mileage Reimbursement (I)	\$34,500
A - L = Cost Savings	
	\$65,400



Supplemental Package



Charter for Change Supplemental Package

BOARD OF LICENSE COMMISSIONERS

FY 2011 Budget | Chief Administrative Officer Meeting | January 27, 2010

PERFORMANCE AND BUDGET SUMMARY

Objective	Current Status	Trend	Budget Impact
Percent of licensed businesses refusing to sell to underage volunteer operatives (objective 1.1)	■	Data is Unavailable	No Impact

- This budget supports the Board of License Commissioners conducting inspections at 343 special events and inspections at all licensed facilities approximately 4 times per year
- Comparison between Montgomery County and Prince George's County: Sales to Minors

	FY 2008	FY 2009
Montgomery County	33%	20%
Prince George's County	1.3%	1.8%

(Source: Montgomery County Data- Liquor Inspectors Find Underage Sales, Gazette, January 6, 2010.)

Key

● Meeting target	◆ Within 10% of target	■ Not within 10% of target
<i>Current Status</i> – Comparison of FY 2009 actual with the FY 2010 target		
<i>Trend</i> – Comparison of the first year of actual data with FY 2009		
<i>Budget Impact</i> – Summary of the impact the budget is anticipated to have on the objective's performance		

TABLE OF CONTENTS

BUDGET ANALYSIS	2
AGENCY PLAN AND MEASURES	5
FY 2010 TO-DATE DATA	8
CHARTER FOR CHANGE RATING	9
REQUEST FOR INFORMATION	14



Budget Pages

MISSION AND SERVICES

Mission - The Department of Public Works and Transportation provides roadway infrastructure, litter control, mass transportation and stormwater management to all users in the County in order to ensure a safe and aesthetically pleasing transportation system.

The agency's mission supports accomplishing the countywide vision by:

- Working for safe communities
- Working for economic vibrancy
- Working for a clean environment

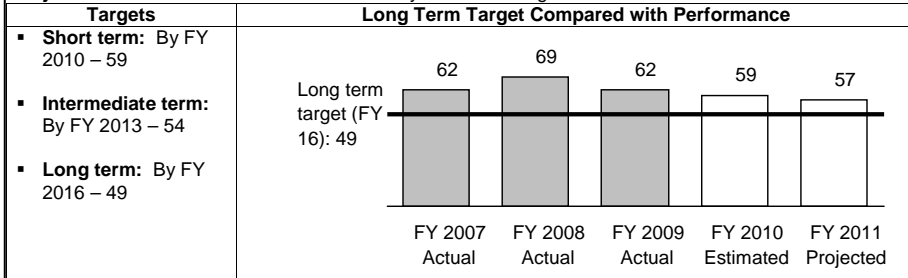
Where the Money Goes –

FY 2010 APPROVED BUDGET	\$11,215,400
Adjustments in compensation including fringe benefits	(\$1,562,500)
Decrease in recoveries from special revenue funds	\$610,600
Reduction in fuel expenses	(\$329,300)
Increased cost for purchase of ten replacement buses and paratransit vehicles	\$200,000
Reduction in furlough from 80 to 64 hours (including fringe benefits)	\$148,400
Automatic vehicle locator technology (see objective 3.1 and strategy 1.1.7)	\$91,000
Increase the number of and cost of highway maintenance contractors (see strategy 1.1.3)	\$50,000
Various operating expense adjustments	(\$29,700)
Purchase manual litter pick-up devices (see objective 2.1)	\$5,500
FY 2011 PROPOSED BUDGET	\$10,399,400

SERVICE DELIVERY PLAN AND PERFORMANCE

GOAL 1 - To provide roadway infrastructure and maintenance services to the traveling public in order to have safe county roadways.

Objective 1.1 - Reduce the number of roadway vehicle damage claims from 69 in FY 2008.



Performance Measures –

Measure Name	FY 2007 Actual	FY 2008 Actual	FY 2009 Actual	FY 2010 Estimated	FY 2011 Projected
Workload, Demand and Production (output)					
Number of trees trimmed	17,148	26,771	16,256	17,800	19,600
Number of service request calls	3,138	3,057	3,120	2,600	2,600
Number of resolved service request calls	2,571	2,309	2,296	2,000	2,000
Number of miles of county roadways	1,804	1,818	1,818	1,825	1,830
Number of potholes repaired	1,766	1,330	4,446	4,200	4,400
Number of snow events		12	15	10	10
Number of linear feet of roadways stripped	486	543	178	178	185
Number of signs installed	2,500	6,000	5,029	5,200	5200
Miles of roadways resurfaced	33	30	30	25	25
Efficiency and Quality					
Average maintenance cost per roadway mile	\$2,725.45	\$1,926.82	\$1,652.48	\$1,856.27	\$1,850.66
Percent of service calls resolved	81.9%	75.5%	83.3%	77.0%	77.0%
Impact (outcome)					
Number of roadway damage claims	62	69	62	59	57

Performance Measures Explanation – The department maintains all county roadways. The increased number of county maintained roadway miles since FY 2007 is the result of acceptance of developer built roads into the County inventory. The increased number of roadway signs is a result of the expansion of data records to include not only new roadway signs, but also the replacement of signs with low reflectivity. The department anticipates the ability to repair more potholes in FY 2010 and FY 2011. In some cases historical data is unavailable.

Strategies to Accomplish the Objective –

- **Strategy 1.1.1** – Deploy five work crews to fill potholes within 72 hours of a service request
- **Strategy 1.1.2** – Operate a customer service center to respond to service requests, prioritize requests and deploy staffing appropriately to resolve requests
- **Strategy 1.1.3** – Ensure roadways are passable after minor and major snow and ice events through plowing, salting and other techniques coordinated by an emergency operations center
- **Strategy 1.1.4** - Regularly assess roadway conditions within the County
- **Strategy 1.1.5** – Trim trees based on a regular schedule utilizing contractors



Utilizing Microsoft Office

- **Need a working understanding of MS Word and MS Excel**
 - Key knowledge / skills
 - Basic operation of a system
 - Linking files
 - Copy / paste between files
 - Can be a more advanced system
 - Pivot tables
 - VBA – Macros
 - Formula functions: index, match, if statements
- **Advantages**
 - Flexible
 - Good initial “system” to start performance management and understand how you want processes and procedures to work for a future system
- **Disadvantages**
 - Can become unwieldy
 - You are the “system administrator”
 - MS Office is not built to support this type of work



Successes and Challenges



Successes

PERFORMANCE

- Of the 77 quantified objectives, 62% are improving

AGENCIES' USE

- Improvement in agency understanding, presentation, and use of performance information

COMPONENT	FY 2008 Budget Process	FY 2011 Budget Process
Viable strategic plans	8	17
Viable performance measures	1	13 *
Viable performance based budgeting submissions	1 (FY09)	12

**adjusted to be comparable*



Ongoing Challenges

- Using plans and measures
 - Budgeting
 - Regular decision making
- Employee and agency buy – in
- Resources: technology and staffing
- Focusing on outcomes (plans and performance measures)
- Receiving accurate and useful data



Successful Strategies

- Standardized requirements including formulaic approaches to write plans (Fairfax County, VA)

The **agency's name** provides/produces **core services**
 to **customers** in order to **outcome**

The agency's mission supports accomplishing the countywide vision by:

- Accomplishing the LCI**

- Rate and award agencies

Rating	The mission is included	All required components are included (Note 1)	The mission is written in the formula's format	All reasonable accomplishing the LCI items have been included (based on the mission's outcome)	The mission's outcome has a significant impact on the identified customers
0					
1	✓				
2	✓	✓	✓	✓	
3	✓	✓	✓	✓	✓

Note 1: The required components must align with their definition.

- Began to use strategic plans and performance measures – even if agencies were not ready



Thank You!

Website:

<http://www.goprincegeorgescounty.com/Government/AgencyIndex/OMB>

Contact Information:

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301-952-3535

Guseem@co.pg.md.us





Performance Management in Rock Hill, SC

Steven Gibson, Administrative Services Director

MAYOR
Doug Echols

CITY COUNCIL
John A. Black, III
Susie B. Hinton
Osbey Roddey
Kathy Pender
James Reno, Jr.
Kevin Sutton





City of Rock Hill, SC

 68,000 Population

 Within the Charlotte, NC MSA

 Local Government Services, additionally Water, Sewer, and Electric Utility

Featured Performance Measurement Initiatives

-  Mayor and Council Strategic Planning Efforts
-  Performance Management Plan/Reporting
-  Performance Dashboard
 - Interactive
 - Comprehensive
 - Demonstrates performance alignment with Strategic Initiatives
-  Financial Dashboard
 - Interactive
 - Transparent
 - Provides an easy to use visualization of financial information
 - Dashboards built using SAP Business Objects Xcelsius

Strategic Planning

- 🌸 Mayor and Council Strategic Planning
 - 🌸 Annual Off-Site
 - 🌸 Each year for the last 9
 - 🌸 Annual Updates to Strategic Plan
 - 🌸 Each 3rd Year Revision following National Citizen Survey Results

- 🌸 Council Determines Initiatives
 - 🌸 Staff Develops Performance Plan

- 🌸 Update on Progress at Retreat

- 🌸 Semi-annual Reporting
 - 🌸 Mid-Year Report
 - 🌸 Improved Monthly Reporting

Strategic Planning Costs

- 🌸 Mayor and Council Planning Retreat
 - 🌸 Contracted Facilitator \$7,000

- 🌸 National Citizen Survey
 - 🌸 \$15,000 every 3 Years

- 🌸 Initiative Planning Teams (6)
 - 🌸 Average Project Team:
 - Assistant City Manager
 - Budget Office Financial Analyst
 - 4 Department Directors
 - 2/3 meetings per Initiative Team to develop Performance Measures

- 🌸 Budget Office/Assistant City Manager Support



ROCK HILL
SOUTH CAROLINA

Strategic Plan

FY2010 - FY2012



INTRODUCTION

PURPOSE

The Strategic Plan is a methodical way to go about achieving the vision and goals set by the Mayor and City Council. This document is a comprehensive listing of the objectives, tasks, and performance targets the City will strive to meet to assist with bringing the Mayor and City Council's vision to life.




Biannually the City will conduct a formal evaluation to assess its progress at meeting the performance targets discussed in this Strategic Plan.

"A proven formula for success is to plan accordingly, act appropriately, and evaluate continuously."

—Carey F. Smith, City Manager

DIMENSIONS OF THE STRATEGIC PLAN

The Strategic Plan includes three types of measures and tasks, those that relate to planning, acting, and evaluating.

-  **Plan accordingly**— These measures relate to our ability to plan for the future. They often precede any actions and may involve gathering information. While these activities can be challenging to measure, they are important because they lay the foundation for future success. (e.g., collaborating and meeting with partners, conducting master planning for infrastructure improvements)
-  **Act appropriately**— These measures relate to our ability to meet desired achievement and service levels. They often involve implementing elements from the planning phase. These activities are important because they have tremendous impact on whether tasks or projects will have successful outcomes. (e.g., police response time, revising incentives for business recruitment)
-  **Evaluate continuously**— These measures relate to the effectiveness of both our planning and actions. These measures are important because they let us know whether our planning and actions are producing the desired outcomes. (e.g., reduction in crime, job creation, customer satisfaction)

Plan

Act

Evaluate

PERFORMANCE MEASUREMENT

While there are limitations to benchmarking, survey results, and setting goals in areas where there are external influences, performance measurement provides data to complement decision making, improve performance, communicate progress, and provide accountability.

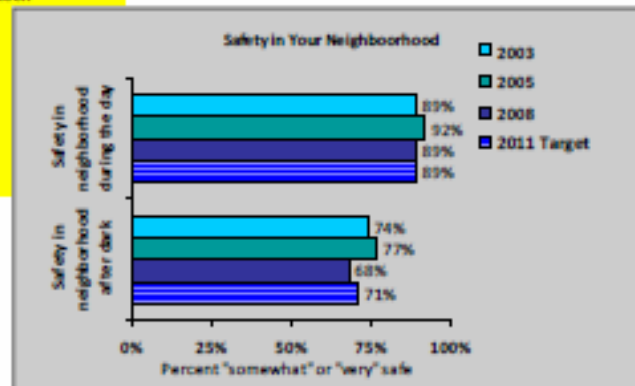
PUBLIC SAFETY

Objective: Monitor the effectiveness of operational activities and their effect on reducing crime and improving public satisfaction

Tasks (in bold) and Performance Indicators	Plan	Act	Evaluate	Target
Evaluate crimes against persons and exceed nations standards in performance benchmarks Reduce violent crime per capita from three year trend			○	2% annually FY2010 goal- 11.8
Exceed the national clearance rate averages for crimes against persons (national rates follow a calendar year)			○	2 percentage points above
Increase the percentage of customers who feel who feel "somewhat" or "very" safe from violent crime by 3 percentage points over a three year period			○	64%
Evaluate crimes against property and exceed national standards in performance benchmarks Reduce property crime per capita from three year trend			○	2% annually FY2010 goal- 50.1
Exceed the national clearance rate averages for crimes against property (national rates follow a calendar year)			○	2 percentage points above
Increase the percentage of customers who feel "somewhat" or "very" safe from property crimes by 3 percentage points over a three year period			○	53%
Provide effective and efficient Police Services Reduce the number of collisions in the City's Top 5 Collision Areas			○	5% reduction FY2010 goal- 169
Respond to Priority 1 calls within 5 minutes		○		80%
Increase the overall perception of safety and public satisfaction Maintain the percentage of customers who feel "somewhat" or "very" safe in their neighborhood during the day over a three year period			○	89%
Increase the percentage of customers who feel "somewhat" or "very" safe in their neighborhood after dark by 3 percentage points over a three year period			○	71%
Increase the percentage of customers rating police services, crime prevention, and traffic enforce- ment as "good" or "excellent" by 3 percentage points over a three year period			○	Police services- 74% Crime prevention- 68% Traffic enforcement- 60%

Rock Hill's Top 5 Collision Areas

1. Cherry Rd & Mt. Gallant
2. Dave Lyle & John Ross/Springsteen
3. Celanese & Mt. Gallant
4. Celanese & Riverchase
5. Celanese & India Hook





ROCK HILL
SOUTH CAROLINA

Strategic Plan

FY2010 - FY2012
Year I

FY2010 Mid-Year Report

Prepared January 2010



STRATEGIC INITIATIVES OVERVIEW

TABLE OF CONTENTS	
I.	Strategic Initiatives Overview.....7
II.	Public Safety.....8
III.	Short and Long Term Economic Development.....14
IV.	Old Town Revitalization.....19
V.	Ensure the Provision of Quality Public Services.....25
VI.	Sustainable Growth.....32
VII.	Quality of Life.....36

Public Safety— provide high quality services to residents and visitors to the City of Rock Hill which protect life, health, and property by providing highly trained personnel with excellent equipment to prevent police and fire incidents where possible and respond quickly and effectively when the incidents occur.

Short and Long Term Economic Development— strengthen the City’s role as a place for economic activity through job creation, business location and expansion, redevelopment, and tourism.

Old Town Revitalization— strengthen and enhance the neighborhoods and business centers of Old Town, the City’s urban core.

Ensure the Provision of Quality Public Services— provide the public with high quality service levels and demand service standards to ensure adequate maintenance and growth of City service levels and the entire City infrastructure. This will be accomplished through a comprehensive and long-range planning approach to the delivery of municipal services and funding of capital improvements—one that balances the need to prioritize services, maintain service levels, and fund capital improvements.

Sustainable Growth— provide for growth that meets the needs of the present, without compromising the ability of future generations to meet their own needs. This includes quality in physical planning and design, efficiency through integrated land use and transportation, and the fostering of environmentally responsible development practices.

Quality of Life— provide high quality leisure services and amenities that make Rock Hill a great place to work and live.

PUBLIC SAFETY

Tasks (in bold) and Performance Indicators	Target	Mid-Year Actual	Annualized Projection	Quick View	Comment(s)
Implement operational procedures in support of the Police Staffing Study Conduct Patrol Beat Analysis annually	By 1/1	December 2009	N/A		As a result of the analysis, staff concluded that the number of patrol zones needed to increase from six zones to eight zones. This change will occur during the third quarter of 2010.
Evaluate civilianizing the Forensics positions and present recommendation to City Management	By 1/31/2010		N/A		On track to meet target.
Revise patrol schedule	By 7/6/2009	7/6/2009	N/A		The patrol schedule was revised to a four days on/four days off schedule. Every other month, each shift has training, court, and directed patrol worked into the schedule.
Implement computerized ticketing system	By 1/1/2010	Goal Not Met	N/A		The SC DMV has purchased the E-Ticketing solution and is currently in the testing stage. It is expected that the E-Ticketing product will be made available to local agencies during the 2010 calendar year. The City has grant funding available for the 2010 calendar year to purchase hardware (printers) and to provide for the implementation costs, including the connectivity to the department's Records System.
Update jail cost analysis	By 6/30/2010		N/A		On track to meet target.

Objective: Monitor the effectiveness of operational activities and their effect on reducing crime and improving public satisfaction

Evaluate crimes against persons and exceed national standards in performance benchmarks Reduce violent crime per capita from three year trend	2% annually FY2010 goal–11.8	5.5	11.1		366 incidents
Exceed the national clearance rate averages for crimes against persons (national rates follow a calendar year)	2 percentage points above		N/A		The 2009 Uniform Crime Report has not been released by the FBI. A preliminary report, which did not provide clearance rate data, was released on December 21, 2009.
Evaluate crimes against property and exceed national standards in performance benchmarks Reduce property crime per capita from three year trend	2% annually FY2010 goal–50.1	25.0	49.9		1,651 incidents
Exceed the national clearance rate averages for crimes against property (national rates follow a calendar year)	2 percentage points above		N/A		The 2009 Uniform Crime Report has not been released by the FBI. A preliminary report, which did not provide clearance rate data, was released on December 21, 2009.
Provide effective and efficient Police Services Reduce the number of collisions in the City's Top 5 Collision Areas by 5%	FY2010 goal–169	89	178		The annualized projection is within 10 accidents of the goal.
Respond to Priority 1 calls within 5 minutes	80%	48%	N/A		The revisions to patrol zones and the addition of 12 new Police Officers will allow for improvement in response times.

Performance Dashboard

Financial Dashboard

Strategic Planning Reporting Costs

- 🌸 Strategic Plan Report
 - 🌸 Performed in-house by Budget Office

- 🌸 Mid-Year Report
 - 🌸 Performed in-house by Budget Office

- 🌸 Performance Dashboard
 - 🌸 Outside Developer \$11,000
 - 🌸 No annual recurring fees (maintenance, hosting, etc.)

- 🌸 Financial Dashboard
 - 🌸 Developed in-house by Budget Office
 - 🌸 using SAP Business Objects Xcelsius
 - 🌸 No annual recurring fees (maintenance, hosting, etc.)

Conclusions and Lessons Learned

- You can get started with simple statements, metrics, and Microsoft Office
- To be successful with performance management you must develop processes and requirements that encourage (and even require) the use performance information to guide decisions
- Prince George's County's experience has found that success implementing and utilizing a performance management requires:
 - Patience and determination
 - Strong leadership and support from decision makers
 - Structure to ensure performance management information is used
 - Continuous improvement
 - Vision



For more information

- ❑ <http://www.goprincegeorgescounty.com/Government/AgencyIndex/OMB>
- ❑ <http://www.ci.rock-hill.sc.us/dashboard.html>
- ❑ www.pmcommission.org
- ❑ www.gfoa.org/pm
- ❑ Email: perform@gfoa.org

