

## Management by Data:

### Tamarac Scorecards Aligned with the Strategic Plan

#### Alliance for Innovation Awards

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**Project name and brief description:**

Management by Data: Department & Division Scorecards Aligned with the Strategic Plan

The City of Tamarac developed and implemented division and department Scorecards as a tool to address the changing needs of our growingly diverse population. The development process empowered employees from all levels of City staff to participate in determining the performance measures that would be used in their departments. This inclusive process ensured buy-in and confidence in the end product. The color-coded Scorecards provided a streamlined approach to “Management by Data,” and served as a tool for decision-making.

**Description of jurisdiction and history of the situation(s) which gave rise to the innovation’s need and other underlying factors:**

The City of Tamarac is committed to excellence...always. 340 City of Tamarac employees provide municipal services to over 60,000 residents and businesses. These services include police, fire, water, sewer, permitting, parks and recreation services, and more.

Like many municipalities, over the past few years the City of Tamarac has faced the challenge of decreasing revenues and increasing costs. Beyond that, our city is 99% built out, and our demographics have changed rapidly and dramatically over the past ten years – for example, our population has increased while our median age has decreased. What this means for us is that the needs of our residents and businesses have changed – and that we were faced with the challenge of not only doing more with less, but also identifying the changing needs of our residents and how to address them. Our vision statement is dedicated to leading the nation in services and programs, and our mission statement focuses on achieving results and making a difference – one way we continue to accomplish this is through the development of division and department Scorecards.

**Description of the innovation’s importance, internal impact, and community benefits:****Importance & Community Benefits:**

Perhaps the most important aspect of Scorecards is that they provide for “management by data”. Employees identify who their customers are, what their needs are, and how to measure if we are meeting those needs. Scorecards are reviewed on a monthly and quarterly basis; this ensures that we are providing programs and services that meet the needs of our entire population.

For example, the Parks and Recreation Department Scorecard tracks the percent of attendance toward capacity for the fitness classes offered at the City’s Aquatics Center and other facilities

(see *Attachment 1, Parks & Recreation Department Scorecard FY 2011*). This measure is determined by the actual number of people that attend each class, versus the maximum capacity of the class. Collecting this measure has allowed the department to identify which classes are under-utilized by residents. This is useful when making decisions about scheduling of classes, and has even been tied to instructor evaluations. From this measure we have found that it may not be necessary to offer the same class three times a week, if for example, very few people attend the Wednesday night class. This has resulted in better service delivery to our residents because decisions we make are based on their needs.

We also conduct transactional surveys at the end of each interaction to assess our customer service and the level of customer satisfaction (see *Attachment 2, FY 2011 Parks & Recreation Transactional Survey Data*). This data is linked to division and department Scorecards so that we can measure customer satisfaction at each of our facilities and make decisions based on that data as well.

#### Internal Impact:

Our Scorecards are linked to both our strategic planning and budget processes, ensuring organizational alignment. Having a central place for performance measurement tracking has allowed our City to streamline data collection activities and in doing so, we were able to eliminate many of the previous measures departments were collecting separately but not actively using. We were also able to streamline data reporting mechanisms. For example, our Fire Department creates a report each month detailing the training hours that each shift of firefighters have completed. We built a training scorecard that allows them to track the measures they determined to track, but also rolls up into a pre-built monthly report. By doing this, each month the report is populated with the correct data and all that is left to do is print it out (see *Attachment 3, Fire Rescue Training Scorebook 2011 and Monthly Training Report-August 2011*).

Additionally, the measures used on division and department Scorecards were created by the actual staff that would be then tracking the data and making decisions on the information. They benchmarked with other cities so that we could compare our performance against that of other high performing organizations. This has led to operational improvements. For example, the department of Public Works measures the percentage of work orders completed on time (see *Attachment 4, Public Works Scorecard*). Through benchmarking, one of the division managers realized that another municipality was reporting higher levels of performance for this measure, and this manager took it upon himself to call the organization to discuss what they were doing differently. This information helped our Public Works department to improve their process, which resulted in higher performance on their part.

### **How is it a quantum leap of creativity?**

There are several reasons our Scorecards are a quantum leap of creativity. First, the process we used is different from what other municipalities usually use. Instead of hiring a consultant to tell us what to measure, and instead of having senior leaders use a “top-down” approach, the City of Tamarac involved employees from all levels to initially build this process and determine what was important to measure. We met with staff of all levels to determine success factors and worked with them to build the Scorecards from the bottom up. This ensured the measures rolled from division, to department, to city-wide. It also ensured buy-in and employee empowerment.

Another leap of creativity is that this process allowed for the integration of Scorecards with the budget and strategic planning processes. This integration created organizational alignment. Our budget and strategic plans’ performance measures are pulled directly from the Scorecards, and the monthly and quarterly reviews ensure the relevancy of the measures and that decision are being made based upon the data.

Finally, our scorecards were created in-house using Microsoft Excel software. While this might not sound like a quantum leap of creativity, staff was able to utilize several not-often-used features to create Scorecards with measures that “roll-up”. This was done through the use of linkages, color-coding, and conditional formatting. The use of these features provides the ability for upper management to see how their department is performing *at a glance*. Cells associated with certain measures automatically turn red, yellow, or green based on the level of performance that is being reported in relation to the target for that measure. Measures that appear red, for example, are a concern and need to be addressed; whereas measures that appear green are on track or meeting their target.

### **Who has benefited from the innovation?**

The residents of the City of Tamarac have benefited tremendously from the creation of Scorecards. Through the use of Scorecards the City has been able to better provide the services that residents need, and at a higher level. “Management by data” has allowed our City staff to be more responsive to residents’ needs by identifying when changes in the performance measures occur.

All levels of City staff have benefited from the development of Scorecards. These performance measures are utilized in the budget process, and assist in determining city-wide strategic initiatives and budgeting. At the highest level, it has created a City-wide dashboard for the City Manager that allows for him to know, in an instant, how the City is meeting the goals set out in the Strategic Plan. The department directors and other senior staff benefit from having a similar

view for the operations of their departments. They are able to identify concerns and use the Scorecards to drill down into specific division's activities, which allow them to address these concerns with their staff. The continuous monitoring and reviewing of their performance measures helps ensure that their department/division is working effectively to achieve the overall goals of our City.

### **How was the innovation initiated and implemented?**

The City Manager recognized that need to "do more with less" and tasked a cross-functional team of employees from all levels of City staff to address this. The group decided to go department by department and build division Scorecards from the bottom up. Each department was met with to identify its key activities and what data was currently being collected. This team of employees worked with staff of all levels to identify relevant measures, and performance measures were selected based on departmental feedback and collaboration. Research was conducted to determine best practices and benchmarks of other high performing cities throughout the country such as Phoenix, AZ; Austin, TX; and Bellevue, WA. Also, resources such as the International City/County Management Association, Alliance for Innovation, and Florida Benchmarking Consortium were used by staff during this process. Working together they were able to successfully create and implement division and department Scorecards that roll-up to the city-wide Scorecard.

### **What risks were associated with planning and developing the innovation?**

Achieving buy-in from each department was critical to creating meaningful Scorecards. Although it is clear to see the benefits in measuring performance, we had to gain the confidence of employees and show them that these measures were useful and intended to assist them in their job, not create more work. Furthermore, we had to gain buy-in from the directors, which included monitoring and reviewing performance measures so that they could utilize them as a tool to celebrate their successes, as well as identify opportunities for improvement. This is why we went department by department when creating the Scorecards. This allowed us to identify lessons learned while working with each department so we were able to make improvements to the process as needed.

### **What was the environment in which the innovation was created and sustained?**

The Scorecard process was created in an environment of empowerment and innovation. Staff were encouraged to think outside of the box, encouraged to look at best practices, and empowered to design Scorecards that fit their division needs. The process has been sustained because the measures are relevant, and that is a testament to the process we went through to create the Scorecards.

### **What were execution costs and savings?**

The City of Tamarac made the decision early on to utilize the City's most valuable assets, our employees, to create Scorecards. Scorecards were created in-house by staff utilizing Microsoft Excel software. There were no additional costs to the City – as a matter of fact, the use of Excel saved the City more than \$50,000 for what it would have cost to purchase performance management software.

### **What lessons were learned that could be shared with other local governments?**

We learned several lessons during the process of creating and implementing division and department Scorecards. Some of the lessons include:

- **These results were achieved through teamwork.** Each Scorecard was created by a team that is composed of employees from all levels within the department. This system allows for maximum input, empowered employees, improved communication, and breaking down department silos.
- **Management serves on teams, too.** Senior staff worked with employees of all levels to develop their division and department Scorecards. Potential solutions are regularly brought up at Executive Team meetings to gain input and support before moving forward. This has the added benefit of furthering communication efforts, as well as showing our employees their suggestions are valued by management.
- **Give your teams the guidance and tools they need to be a team.** Throwing a group of employees together and calling them a team without some guidance on how to run effective team meetings, how to brainstorm, how to research best practices, will only set your team up for failure. We provided guidance from internal performance management “experts” who facilitated the staff meetings to maximize productivity.
- **Communicate.** Communicate the process, communicate the actions, and communicate the results.
- **Recognize.** Don't forget to recognize those who invested the time, effort, and courage into getting involved, getting outside their comfort zone, and trying to make a difference. You'll have their support the next time you ask for it if you do.

### **Which department and/or individuals championed the innovation?**

As previously mentioned, the Scorecard process was championed by the City Manager and the entire Executive Team (senior leaders). They were able to see the benefits of the process (empowerment, “Management by Data”, and alignment) and helped create the environment for employees at all levels become part of the decision making process.

**Parks Recreation Department Scorecard  
FY 2011**

<b>P&amp;R</b>		Oct	Nov	Dec	Jan	Feb	Mar	April	May	June	July	Aug	Sept	YTD	FY11 TARGET
	% of attendance towards capacity	78%	76%	41%	67%	75%	85%	87%	100%	81%	85%	80%	76%	78%	≥75%
	% of time active space (ball fields, mtg rooms) in use	69%	66%	72%	64%	66%	67%	66%	69%	65%	66%	64%	60%	66%	≥60%
	# volunteer hours	374.75	488.75	383.03	476	576	814.85	916.75	762.55	673.5	513.5	834.15	995.25	7809.08	>8000
	# of occupied seats per hour on the Broward County route-based transit system	7.6	8.1	7.4	8.2	8.2	9	9.4	10.79	10.9	10.61	12.83	13.1	9.68	≥8/HR

<b>P&amp;R COLOR-CODING</b>	% of attendance towards capacity	≥75%	≥75%	65%-74%	<65%
	% of time active space (ball fields, mtg rooms) in use	≥60%	≥60%	50%-59%	<50%
	# volunteer hours	8000	≥8000	7000-7999	<7000
	# of occupied seats per hour on the Broward County route-based transit system	≥8/HR	≥8	7-7.9	<7

## FY 2011 Parks and Recreation Transactional Survey Data

# surveys

	131	91	74	90	75	73	92	88	234	156	139	124
	Oct	Nov	Dec	Jan	Feb	Mar	April	May	June	July	August	Sept
<b>Customer Service</b>	<b>95%</b>	<b>96%</b>	<b>96%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>97%</b>	<b>97%</b>	<b>98%</b>	<b>95%</b>	<b>96%</b>	<b>95%</b>
P	97%	98%	96%	100%	99%	100%	100%	98%	99%	97%	98%	99%
A	95%	92%	99%	100%	99%	100%	97%	94%	99%	96%	97%	97%
R	96%	93%	100%	100%	100%	100%	99%	95%	99%	96%	96%	99%
T	93%	92%	95%	100%	100%	100%	97%	95%	100%	97%	99%	97%

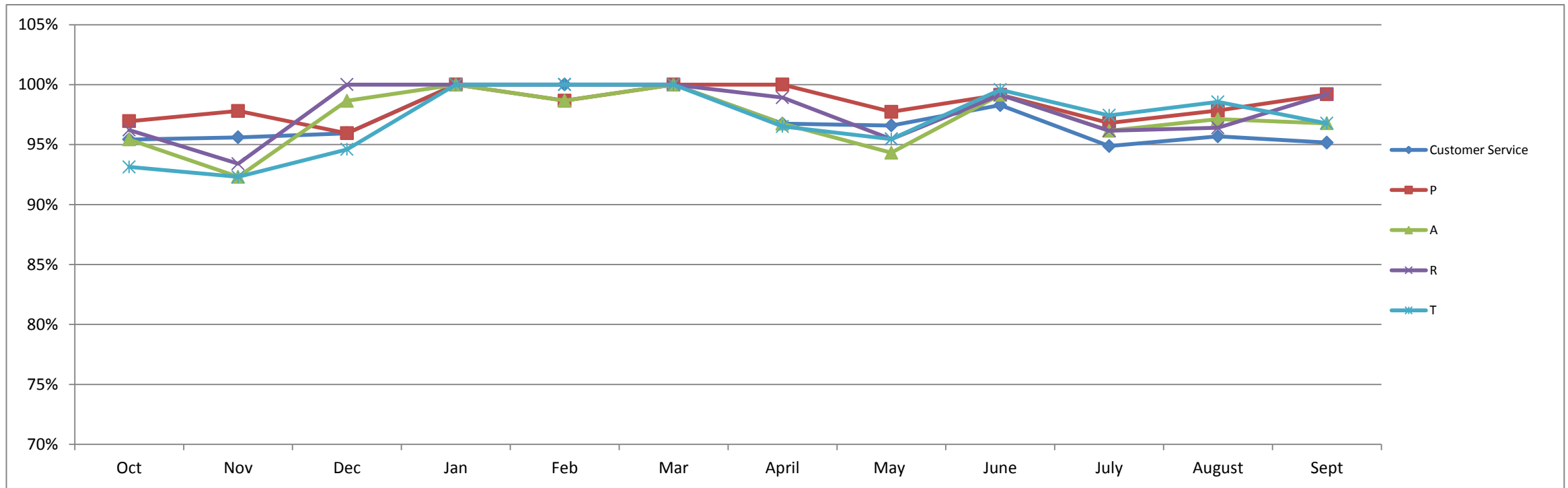
**Our goal is “Customer Service, Second to None”. Did we meet your expectations?**

Were we professional and courteous?

Were we attentive and helpful?

Were your questions addressed promptly and completely?

Did we respond in the timeframe promised?







		Oct	Nov	Dec	Jan	Feb	Mar	April	May	June	July	Aug	Sept	YTD	FY11 TARGET	FY12 TARGET	
<b>PROFESSIONAL DEVELOPMENT</b>	A Shift # Staffing	26	26	23	24	24	23	25	24	25	25	25	25				
	A Shift - avg # hours of professional development training per firefighter per ISO (n=240/firefighter/yr)	40	31	29	23	20	31	53	41	36	51	42	32	432	240/YR		
	B Shift # Staffing	26	24	25	23	23	24	24	23	24	26	26	26				
	B Shift - avg # hours of professional development training per firefighter per ISO (n=240/firefighter/yr)	23	19	24	31	34	38	39	31	38	36	43	40	397	240/YR		
	C Shift # Staffing	25	25	24	25	26	25	24	24	24	25	23	23				
	C Shift - avg # hours of professional development training per firefighter per ISO (n=240/firefighter/yr)	38	39	33	36	37	42	56	49	33	49	54	41	505	240/YR		
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	<b>CENTRE LEARN</b>	FIRE A Shift	90%	96%	78%	93%	96%	100%	14%	100%	85%	100%	100%	81%	86%	80%	
		FIRE B Shift	89%	96%	92%	100%	96%	96%	24%	88%	100%	100%	100%	92%	89%	80%	
FIRE C Shift		80%	83%	70%	74%	100%	88%	17%	100%	88%	85%	100%	75%	80%	80%		
<hr/>																	
EMS A Shift		83%	89%	74%	89%	93%	100%	79%	100%	85%	100%	100%	81%	89%	80%		
EMS B Shift		85%	92%	88%	92%	88%	96%	64%	80%	100%	100%	100%	93%	90%	80%		
EMS C Shift		80%	78%	70%	70%	96%	88%	58%	92%	83%	79%	100%	75%	81%	80%		
<hr/>																	
A Shift Training Hrs		1045.4	803.16	678.08	561.9	483	712.2	1334.2	992.2	905.75	1265.82	1061.7	812.2	887.97	700		
Wellness	160.34	130.41	119.54	94.4	56	151.5	191.17	116	166	170.78	166	126					
Vehicle Maintenance	72.5	61.5	58	48.25	37.5	61	82	52.5	84	95	91	73.5					

**PUBLIC WORKS SCORECARD  
FY 2011**

<b>PUBLIC WORKS DATA</b>		Oct	Nov	Dec	Jan	Feb	Mar	April	May	June	July	Aug	Sept	YTD	FY11 TARGET	FY12 TARGET	
	**% work orders/ inspections completed on time (grounds, stormwater, fac, eng, streets)	99%	99%	99%	100%	100%	100%	100%	99%	100%	100%	100%	100%	100%	100%	≥95%	
	**% development review committee packages reviewed within 10 days	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
	*/**average # of pounds recycled per capita (116=10.2/mo)	8	9.42	9.44	8.2	8	9.7	8.12	8.85	7.82	6.8	8.24	7.85	100.44	>122		
	**% facilities routine repairs completed in 5 days or less (B)	100%	100%	100%	100%	100%	99%	96%	96%	100%	100%	99%	98%	99%	>93%		
	**% total units (cars, light/med/heavy trucks) in service	100%	100%	100%	100%	100%	100%	100%	100%	99%	100%	100%	100%	100%	>99%		
	**% of all PW citizen requests addressed within specified timeframes (stormwater, streets, grounds)	100%	100%	99%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%		

\* items included in Strategic Plan  
 \*\* items included in city-wide dashboard  
 (B) items included in budget

**PUBLIC WORKS SCORECARD  
FY 2011**

PUBLIC WORKS COLOR-CODING		FY10 TARGET	GREEN	YELLOW	RED
	% work orders/ inspections completed on time (grounds, stormwater, fac, eng, streets)	≥95%	≥95%	90%-95%	<90%
	**% development review committee packages reviewed within 10 days	100%	100%	95%-99%	<95%
	average # of pounds recycled per capita (116=10.2/mo)	≥10.2/ mon	≥10.2	8-10.19	<8
	**% routine repairs completed w/i 5 working days (facilities)	≥93%	≥93%	90%-92%	<90%
	**% total units (cars, light/med/heavy trucks) in service	≥99%	≥99%	95%-99%	<95%
	**% of all PW citizen requests addressed within specified timeframes (stormwater, streets, grounds)	100%	100%	95%-99%	<95%

\* items included in Strategic Plan  
 \*\* items included in city-wide dashboard  
 (B) items included in budget