



Business Planning 2016 Overview

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Today's Agenda

- Business Planning Overview
 - Managing for Results Philosophy
 - Business Planning Process
- FY 2016 Business Planning Deliverables
- Budget Office Intranet – Business Planning site
- SharePoint – Business Planning site
- QUICK eCOMBS Measure Module Refresher
 - How to enter and change data
 - How to print business plan deliverables
- Questions?

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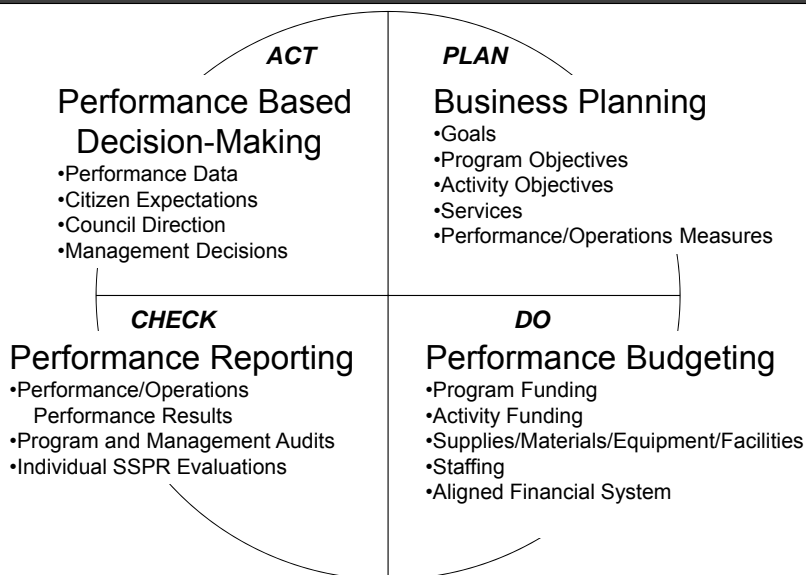
Managing for Results

- What is Managing for Results?
 - A business system that links resources (people, dollars) to results
 - A way to show the public how and why we allocate resources to the services they want
 - A way to show the public what we did with their money
 - A way to show if we are accomplishing our goals
 - Shifts focus from “What We Do” to “What Customers Get”
- Why Measure Performance?
 - To establish credibility and regain trust
 - To be clear about what you are doing & how much it costs
 - To help make decisions and allocate scarce resources
 - To demonstrate if and how you are achieving your goals
 - To have the information you need to tell your story

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Managing for Results



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Business Plan Structure

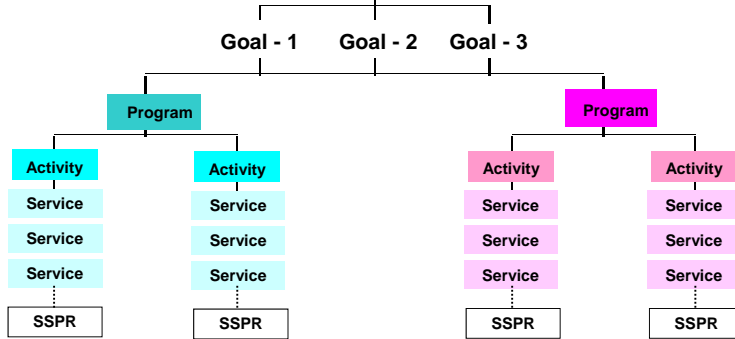
City Mission: We want Austin to be the best managed city in the country.

City Vision

We want Austin to be the most livable city in the country.

Department Vision

Department Mission



SSPR = Employee Evaluation

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Business Planning Process

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Steps to Develop Business Plans

- The specific planning steps that you take to arrive at the deliverables are at your department's discretion.
- MFR Recommendations:
 - Include as many people in the department as possible
 - Develop strategies for employee input
 - Focus on "What Customers Get" (not "what we do")
 - Assess Prior Results; Performance Gaps
 - Environmental Scan (Horizon Issues)
 - Goals and Mission
 - Services, Activities and Programs
 - Measures and Key Indicators
- Deliverable: Business Planning Process (SharePoint)

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Assessment of Prior Results

- Review performance trend data for past 5 years
- Did goals, key indicators, measures achieve targets?
 - Why? Why not?
- Were decisions made throughout the year based on the performance information?
 - Do you have the right data to make decisions? Are you tracking what's important?
- Will your business plan change after reviewing prior results?
- Deliverables:
 - Assessment of Prior Results for all FY 2015 key indicators that have 2014 actuals & Director's Message
 - Performance Gaps; Performance Verification/Variance



Environmental Scan

- What are the Strengths, Weaknesses, Opportunities, and Threats of the department? How will your business plan change to address these?
- Comprehensive Plan Analysis
 - Are there goals and targets in Imagine Austin that will be your department's responsibility to achieve? Are there obstacles or issues that may impact achievement?
- Deliverable:
 - Horizon Issues (SharePoint)

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Goals and Mission

- Do goals reflect where the dept. wants to be in 3 - 5 years?
- Do the goals reflect the major business service areas?
- Are the goals customer-focused?
- Are goals measurable with targets and timeframes?
 - Are the goals linked with performance measures?
- Do the goals support the department mission?
- Note the Managing for Results template:
 - The mission of department is to provide services to customers so that desired benefit/result.
- Deliverable:
 - Update Goals & Mission in eCOMBS; eCOMBS report

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Services

- Review services for each activity
- Do any services need to be added or deleted?
- Do the services represent an “end product” or “delivered service”, rather than an action? aka NOUNS
 - Should be expressed without qualifiers (i.e. “excellent”)
 - Should not be steps in a process (i.e. “casework filing”)
- Are the services classified into Core, Semi-Core, or Other?
 - Refer to the Business Planning Guide for specific instruction on these classifications
 - In general, Core: Critical; Semi-Core: Not quite critical
- Deliverable:
 - Update Services in eCOMBS (Business Planning section)

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Activities and Programs

- Review current programs and activities
- Do programs reflect major areas of the department?
- Are activities robust enough to endure possible funding fluctuations? (In general, 5 FTEs and/or \$500K budget)
- Are the activity history and responsible employee sections complete in eCOMBS?
- Note the Managing for Results template for objectives:
 - The purpose of activity/program is to provide services to customers so that desired benefit/result.
- Deliverables:
 - Update Activities, Programs and their objectives and histories in eCOMBS (Business Planning area); “Tree Page” report
 - Program/Alignment crosswalk by unit (if needed)

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Performance Measures

- Review current measures
- Do measures support the activity objectives? goals?
 - Is there a measure for the desired result/benefit of the objective? Goal?
- Do the measures tell a compelling story for the activity?
 - When a council member or citizen reads an activity page in the budget document, will he or she have enough information to understand 1) why the activity is important and 2) how the activity is performing?
- Deliverables:
 - Update measures in eCOMBS, **including measure definitions**
 - Identify key indicators in eCOMBS (Screen Print)
 - Change Matrix (eCOMBS report)

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Performance Measurement

- Performance Measure Standards
 - Have a clear relation to the activity
 - Understandable to a general audience
 - Reliable and verifiable
 - Able to track progress over time
 - Should help determine whether goals are being accomplished
 - Measure what matters
 - ALSO: Have some measures that can be benchmarked
 - Types of Measures
 - Demand (citizen requests, need)
 - Output (count)
 - Efficiency (cost)
 - Result (percentage)
- Family of Measures.*
*Not all required for each activity, but each activity requires a **variety of measures that can tell a meaningful story.***

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Performance Measurement

- Layers of reporting for measures
 - Dashboard
 - Key Indicators
 - Performance Measures
 - Operational Measures
 - Internal Measures
- Measure Definitions
 - Description – Why is the measure important?
 - Data Source – Where is the information from?
 - Calculation – What are the measure components?
 - Data Limitations – Vulnerabilities of the measure
 - Reporting Frequency
 - Staff contact

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FY 2015-16 Business Plan Deliverables & Intranet, SharePoint, eCOMBS

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Business Plan Deliverables

- Due to Budget Office on **Monday, December 15, 2014**
 - Signed business plan submission checklist (Director, BP Contact)
 - Assessment of Prior Year Results (2015 Key Indicators with 2014 results) Key Indicator sheets and Department Director's Message for the 2013-14 Annual Performance Report
 - Program/Activity alignment "crosswalk" (*only if unit movement*)
 - 2016 Mission and Goals (Measurable! with measures in eCOMBS)
 - 2016 Key Indicator measures (no more than 8)
 - 2016 Program and Activity alignment report
 - Change Matrix for measures
 - Business Planning Activity Pages (eCOMBS report)
 - SharePoint deliverables – 1. Business Planning Process; 2. Performance Gaps, 3. Horizon Issues, 4. Performance Measure Verification and Variances
 - *Make sure that all measures have meaningful definitions in eCOMBS*

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Business Planning Intranet Site

Direct link to Intranet:

<http://budgetoffice.ci.austin.tx.us/index.cfm?sub=planning>

cityspace
city of austin online

Home News Events EAccess Directory **Departments** Services

You are here: home

CITY PHOTO GALLERY FEATURE ARTICLES

NAVIGATION **CITY OF AUSTIN DEPARTMENTS**

ACPP
Agenda Office
AFD
APD
Austin Energy
Austin Water
Aviation
Budget Office

Corporate Intranet Sites

[Agenda Office](#)
[Capital Planning Office](#)
[Communications and Public Information Office](#)
[Controller's Office](#)
[Integrity Office / City Ethics Portal](#)
[Purchasing](#)

Budget Office
[City Manager's Office](#)
[Communications and Technology](#)
[Human Resources / HR Calendar](#)
[Office of the City Auditor](#)

Department Intranet Sites

[Austin Police Department](#)
[Austin Public...](#)

Or access through cityspace

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Business Planning Intranet Site

Direct link to Intranet:

<http://budgetoffice.ci.austin.tx.us/index.cfm?sub=planning>



Home
Budget Calendar
Business Planning
Financial Forecast
Annual Budget
CIP
Budget Staff
Links
Web Applications
Archives

The Budget Office provides the following information to City departments, management and Council so they can make informed decisions:

Annual Budget - This includes an analysis and documentation of the annual financial plan which is comprised of the Proposed and Approved Budget Documents, the Draft Policy Budget, the 5-Year Forecast, Council Presentations, Revenue and Expenditure Forecasting, and Council budget question and answers.

Capital Improvements Program (CIP) - The Capital Improvements Program Plan is a planning document for the City of Austin that assists management with the proper allocation of resources to sustain the infrastructure necessary for the safety, well-being and recreational use of the citizens of Austin. The Capital Improvement Program Plan is reviewed by the Planning Commission annually to provide a basis for prioritization and adoption of the Capital Budget by the City Council

Financial Monitoring and Evaluation - The Budget Office is responsible for the analysis of revenue, expenditures and business operations and the preparation of related Performance Reports.

Managing for Results - Business planning and performance measure collection, monitoring and reporting is coordinated through the Budget Office.

Click on Business Planning link on the left-hand menu



Business Planning Intranet Site

Many useful resources posted on this site including:

- Instruction letter
- Training materials
- Submission Checklist and Signature Sheet
- Distribution forms for Performance Gaps, Horizon Issues, & Business Process
- Links to SharePoint, eCOMBS, ePerf, Citizen Surveys, Annual Reports, Horizon Issues
- Sample deliverables

Business Planning

Current Information

Description	Type
2014-15 Measure Assessment Memo	PDF
2015-16 Business Planning Memo	PDF

Current Information Links

[Business Plan Checklist and Signature Sheet](#)
[Business Planning SharePoint Site](#)
[TRAIN](#)
[eCOMBS](#)

Measure Assessment Resources

Description	Type
Measure Self Assessment Guide	PDF
Performance Measures Self-Assessment Review Checklist -- Appendix A	Word
Sample Process Flow Chart	Word

Resources

Description	Type
2014-15 Business Planning Training	PDF
Annual Performance Report Sample Director's Message	Word
Annual Performance Report Sample Page	Word
Business Planning Process Distribution Form	Word
Horizon Issues Distribution Form	Word
Imagine Austin Overview Training	PDF
MFR Resource Guide	PDF
Performance Gaps Distribution Form	Word
Program Activity Crosswalk Example	Excel
eCOMBS Performance Measure Module Guidebook	PDF

Resource Links



Business Planning SharePoint Site

Access: <http://coaspweb1.coacd.org/sites/Budget/BusinessPlanning/default.aspx>

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Business Planning SharePoint Site

Click on New to make entries (must have been granted permissions to do this)

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eCOMBS Measure Module

eCOMBS Access: <https://ecombs.ci.austin.tx.us/login>

Measure ID	Measure Name
Court Judiciary	
Central Booking	
2431	Percent of release to appear cases to the number of class C cases prepared
2432	Cost per jail case magistrates/arraigned
2433	Number of Class C misdemeanor cases arraigned
2434	Number of cases magistrates/arraigned
2435	Number of emergency protective orders issued
2436	Number of higher charges cases magistrates
2437	Number of personal bonds approved

Must have Department Admin rights or have been assigned as a responsible employee for a measure in order to make changes to measures in eCOMBS.



eCOMBS Measure Module

You must first click on the Measures tab before you will see these on your left-hand menu.

Important Features of the Left-hand Measures Menu

- Measures
- My Measures
- Department (Callout: Modify Mission & Goals here)
- Program
- Activity
- Add Measure (Callout: Add New Measures and Descriptions here)
- In Progress Meas
- Approval Queue
- Rejected
- Certification
- Self-Assessment
- Business Planning (Callout: Add/Modify Programs, Activities, Objectives, History & Services here)
- Grant Planning
- Budget Planning
- Change Matrix (Callout: Print Change Matrix here)



eCOMBS Measure Module

Modifying Mission and Goals:

Click on Department on left-hand menu

Click on Department Description tab

Click Edit Department Description button

Make changes, CLICK Update Button

Department Measures - Government Relations

Proposed 2015	Approved CFY 2014	Department Description
---------------	-------------------	-------------------------------

Department Description

Goals

Support, promote, initiate and monitor legislation that strengthens and protects the City's interests.

- The City will have an 85% success rate for key bills during the Legislative Session.

Mission Statement

The mission of the Government Relations Office is to communicate and promote the interests of the City of Austin to other local governments, to the State of Texas, and to the Federal Government of the United States.

Change Requirements

Edit Department Description



eCOMBS Measure Module

Mission Statement	Department Description	Objectives	Change/Requirements
--------------------------	-------------------------------	-------------------	----------------------------

Mission Statement:
The mission of the Human Resources Department is to engage, attract, develop, support, and retain the best workforce in the country to serve the citizens of Austin.

Update (Don't forget to click after making changes)

Department Goals

Add Goals

Order: Sub-Step: Goal Header: **Leave Blank**

Description of Goal: **Enter New Goal Here**

Add Goal

Edit Goals

1	Percentage of quality assurance recommendations that management agrees to implement maintained at 80% or better	<input type="text"/>	<input type="text"/>
2	80% of Human Resources Information System (HRIS) project milestones are achieved on schedule	<input type="text"/>	<input type="text"/>
3	Issue a Total Rewards summary for the workforce annually	<input type="text"/>	<input type="text"/>

Click on "E" to edit existing goals



eCOMBS Measure Module

Add Measure:

Measure Information

Department: Human Resources

FY: **2016**

Category: **Choose Activity, Program, Department or Component**

Measure Name:

Measure Units:

Add Measure

After measure is added, select it from the main measures view or through a search to edit reporting info and measure description. Add a responsible employee first to be able to edit it.

Bottom of the View Measure screen

Edit Measure **Add Responsible Employees** **Add Component Measure**

Benchmark **Directions** **Self-Assessment**



eCOMBS Measure Module

Editing measures: Click on the Measure ID to get into the View Measure screen.

You can search for measures through the search function or choose from the main list in the Measures Module.

Only Department Admins or Responsible Employees can edit measures

View Measure

Measure ID: 2975 Status: Approved

Measure Name: Average safety rating for pools

Measure Units:

Entered By: CONVERSION (03/16/2009) Last Updated: Kormanik, Trish (05/30/2010)

2016 2014 2013 2012 2011 2010 2009 2008 2007 2006 2005 2004

Category: Activity

Department: Parks and Recreation

Program: Community Services

Activity: Aquatics

Make sure that you are working on the 2016 tab

Amended	Approved	Proposed	CYE	Actuals
No Data	No Data	No Data	No Data	No Data

Edit Data **Click here to change program or activity alignment**

Reporting Information

Cumulative: Non-Cumulative Frequency: Annually

Measure Type: Result Active: Active

Level: Performance Key Performance Indicator:

ICMA Measures: Dashboard Indicator:

Graphed Measure: Program Page:

Supports Goal: Self-Assessment Queue:

Internal Measure: Viewable to the public Self-Assessment Date: Not Self-Assessed

Edit Reporting Info **Click here to change above reporting elements**



eCOMBS Measure Module

Description Information

Description: This is a comparison of how many hours of sick leave hours are utilized for every 1,000 hours scheduled (excludes vacant positions and scheduled overtime hours).

Data Source: "The Human Resources Department trackss this information and reports it quarterly. Sick leave hours and number of scheduled hours are taken from BANNER."

Calculation: Total number of sick leave hours taken for the City divided by (total number of scheduled hours for the City divided by 1,000)

Rationale:

Responsible Employees

Anthony, Chris (10000509)
Chen, Sarah (10003889)

Click here to edit measure name and description.

- Edit Measure
- Add Responsible Employees
- Add Component Measure
- Benchmark
- Directions
- Self-Assessment

Note: For EXISTING Measures, make name and description changes for clarification only. This is in order to keep the integrity of prior reported data. If the calculation of the measure is changing from prior years, ADD A NEW MEASURE RATHER THAN MODIFY AN EXISTING ONE.



eCOMBS Measure Module

Business Planning

Code	Activity Name	Active?	FDU
1HRM	Human Resources Management Services	Yes	
1ELR	Employee and Labor Relations	Yes	<input type="checkbox"/>
2WPS	Workforce Planning and Support	Yes	<input type="checkbox"/>
3TCP	Total Rewards	Yes	<input type="checkbox"/>
6PCS	Risk Management	Yes	<input type="checkbox"/>
8CMS	Community Services	Yes	<input type="checkbox"/>
9MGT	Support Services	Yes	
9ADM	Departmental Support Services	Yes	<input type="checkbox"/>
9TRQ	Transfers & Other Requirements	Yes	
9REQ	Other Requirements	Yes	<input type="checkbox"/>

Click on purple program or activity names to view and make changes

- Add Program
- Add Activity

Click buttons to add programs or activities



eCOMBS Measure Module

Edit Activity

Activity Name: Employee and Labor Relations

Objective: The purpose of the Employee and Labor Relations activity is to develop and enforce appropriate standards so that human resources are managed effectively.

Activity Contact: Carla Scales, 512-974-1356

Program Name: Human Resources Management Services

Activity Mandate: Both Employee Relations and Civil Service Management are core services and mandated by City Charter. Quality Assurance was established in FY 2010 to ensure increased consistency and HR

Activity History and Description: In 2012, the Employee Relations, Quality Assurance and Civil Services Management activities were grouped under the new Employee and Labor Relations activity under the program Human

Core Services: Development; Administration and Compliance; Quality assurance reviews; Citywide vulnerability assessment; Follow-up on implementation of recommendations; Examination/Assessment

Semi-core Services: Technical assistance; Veteran Services

Other Services:

Status: Active

Submit

Click down arrow to reassign activity to another program.

Make sure that all sections are filled out completely. Especially Activity Contact, which is published in the budget document

Don't Forget!



eCOMBS Measure Module

Performance Measures Change Matrix

Parks and Recreation Select Dept

Export to XLS FY 2015 Exportable for easier review

Dept Cd	Status	Prog Cd	Program	Act Cd	Activity	Measure ID	Measure Name	KPI	Internal	Category	Measure Level	Measure Type	Frequency	Rationale for Change	De
PR	Active	10PL	Parks, Planning, Development & Operations	4PRP	Park Ranger Program	6830	Number of educational events held	0	Public	Activity	Performance	Output	Annually	To be able to conform with Park Ranger Mission.	
PR	Active	10PL	Parks, Planning, Development & Operations	4PRP	Park Ranger Program	6831	Percent of citizens who feel safe in their parks	0	Public	Activity	Performance	Result	Annually	Park Ranger safety mission goal.	
PR	Active	10PL	Parks, Planning, Development & Operations	5CEM	Cemetery Operations	8047	Cemetery Operations accounts receivable average collection period (in days)	0	Department	Activity	Performance	Output	Monthly	Data used provides a measurement of how quickly receivables are being collected for City of Austin Cemeteries.	
PR	Active	10PL	Parks, Planning, Development & Operations	5CEM	Cemetery Operations	8048	Citizen satisfaction of City of Austin cemetery grounds	0	Public	Activity	Performance	Output	Quarterly	Data will provide feedback on the condition and appearance of the City of Austin cemeteries. By tracking the amount	

Programming Quirk: Years are Reversed for Measure Name Changes



eCOMBS Measure Module

How to find department key indicators

Search

- FDU
- Task Order
- Personnel
- Measures**

Measure Search

Enter Search Criteria

FY: **2016** | Category: Select

Measure ID: | Measure Name: |

Department: Parks and Recreation | Frequency: Select

Program: |

Activity: |

Level: Select | Measure Type: Select

Approval Status: Select | Measure Status: Select

Internal: Select |

ICMA Measure: | **Key Performance:**

Graphed Measure: | Supports Goal:

Program Page:

Reset **Search**



eCOMBS Measure Module

How to bulk edit FY 2014 periodic data

Measure Search Results

74 records matched your search criteria.

ID	FY	Frequency	Category	Measure Name	Resp. Employee	KPI	ICMA	Add to My Measures	edit Measure Data
1694	2013	Annually	Activity	Percentage of hotel/motel occupancy tax delinquent accounts greater than \$1,000 referred to City Legal within 75 days of delinquency	Brumley, Lauren			<input type="checkbox"/>	<input checked="" type="checkbox"/>
1697	2013	Annually	Activity	Awarded Governmental Finance In's (GFOA) Award for Excellence	Brumley, Lauren	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>

Scroll Down to Bottom of Screen

Measure Search

Enter Search Criteria

FY: **2014** | Category: Select

Measure ID: | Measure Name: |

Department: Financial Services | Frequency: Select

Program: |

Activity: |

Level: Select | Measure Type: Select

Approval Status: Select | Measure Status: **Active**

Internal: Select |

ICMA Measure: | Key Performance:

Graphed Measure: | Supports Goal:

Program Page:

Reset **Search**

Click Select All to check boxes

select all

Add to My Measures **Edit Measure Data**

Then Edit Measure Data



eCOMBS Measure Module

How to bulk edit FY 2014 periodic data

9ADM	1811	Total number of...
9ADM	1812	Percent of in...
9ADM	1816	Customer Satisf...
9ADM	1818	Facility expend...
9ADM	7261	Budget Analysts...
9ADM	7403	Average Annual...
9ADM	7495	Annual Carbon...

Submit

Edit Periodic

Scroll Down to Bottom of Screen
Click Edit Periodic

9ADM	1818	Facility expense per square foot (excl...
9ADM	7261	Budget Analyst Turnover Rate
9ADM	7403	Average Annual Carbon Footprint
9ADM	7495	Annual Carbon Footprint

Submit

Edit Measure Data

Export to Excel

Activity Measure ID	Name	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Annual
24CC	1808	Average days between system close and availability of automated report	2	2	2	2	2	2	2	2	2	2	2	2
29AV	1725	Number of payrolls not met	0	0	0	0	0	0	0	0	0	0	0	0
80V9	1760	Personnel sick												
94DH	1808	Number of grievances and appeals per 100 employees												
94DH	1809	Sick leave hours used per 1,000 hours												
94DH	1825	Number of employee parties												
94DH	1826	LAB Time Study Rate for the Equivalent of 100 Employees												

Activity Measure ID	Name	Quarter 1	Quarter 2	Quarter 3	Quarter 4	Annual	
24CP	1721	Average number of calendar days for APF to review, approve and pay vouchers for departments	4.82	5.18	4.28	4.87	4.8
3CTS	1729	Items sold through auction					4273482
3PRC	1724	Dollar amount of purchases made that meet Sustainability guidelines					2764
4CEB	1781	Cost Management cost divided into cost subcontracting as a percentage					
4DEB	1783	Debt Outstanding (in millions)					
60V9	1760	Cash & investment cost divided into portfolio size as a percentage					
60V9	1768	Average Daily Bank Balance (Collected)					
60V9	1767	Investment Pool Income (in dollars)					
64DH	1807	Employee Turnover Rate					
		Number of emergency calls					
		Total square feet of facilities					4127
		Number of transactions					
		% of under \$5,000 competitive procurement awards to certified HBE vendors	0	0	0	0	0
		Total Dollar Purchases (under \$,000 Only)	4723	1123	196	4261	462
		% of under \$5,000 competitive procurement awards to certified HBE vendors	0	0	0	0	0

Fill in boxes

Sort order: Reporting Frequency, Activity ID, Measure ID



eCOMBS Measure Module

	Department Organization (Tree Page)
	Mission and Goals

eCOMBS - Reports

Where to print Mission and Goals and Program & Activity Organization Reports

CATEGORY NAME	DESCRIPTION
Budget Reports	Budget Preparation, Expense Refunds, Combined Summary, Line Item and Object Code Budget History Reports
Current Year Estimate Reports	Current CYE Reports
Financial Monitoring Reports	History, Monthly Actuals and Overtime Reports
Performance Measure Reports	Performance Measure Reports
Personnel Reports	Detail by Position, FTE and Misc. Reports
Revenue Reports	Revenue by Fund and Department

Where to print Business Planning activity pages



Questions / Comments

<http://budgetoffice.ci.austin.tx.us/index.cfm?sub=planning>

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