Business Planning 2016 Overview

Shannon Szymczak, Corporate Budget Manager

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?
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

Managing for Results

ACT
Performance Based Decision-Making
- Performance Data
- Citizen Expectations
- Council Direction
- Management Decisions

PLAN
Business Planning
- Goals
- Program Objectives
- Activity Objectives
- Services
- Performance/Operations Measures

CHECK
Performance Reporting
- Performance/Operations Performance Results
- Program and Management Audits
- Individual SSPR Evaluations

DO
Performance Budgeting
- Program Funding
- Activity Funding
- Supplies/Materials/Equipment/Facilities
- Staffing
- Aligned Financial System
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

Goal - 1
Goal - 2
Goal - 3

Program

Activity
Service
Service
Service
SSPR

Program

Activity
Service
Service
Service
SSPR

Activity
Service
Service
Service
SSPR

Service
SSPR

SSPR = Employee Evaluation
**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)

**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)

## 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 *measureable* 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
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 \textit{without} qualifiers (i.e. “excellent”)
  - Should \textit{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)

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 \underline{activity/program} is to provide \underline{services} to \underline{customers} so that \underline{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)
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)

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.
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

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

Make sure that all measures have meaningful definitions in eCOMBS

Business Planning Intranet Site

Direct link to Intranet: [http://budgetoffice.ci.austin.tx.us/index.cfm?sub=planning](http://budgetoffice.ci.austin.tx.us/index.cfm?sub=planning)

Or access through cityspace
Business Planning Intranet Site

Direct link to Intranet: http://budgetoffice.ci.austin.tx.us/index.cfm?sub=planning

Click on Business Planning link on the left-hand menu

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

- Annual Budget - The 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 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, health, 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.

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 SharePoint Site


Click on New to make entries (must have been granted permissions to do this)
**eCOMBS Measure Module**

**eCOMBS Access:** [https://ecombs.ci.austin.tx.us/login](https://ecombs.ci.austin.tx.us/login)

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.

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**eCOMBS Measure Module**

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

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**Important Features of the Left-hand Measures Menu**

- Modify Mission & Goals here
- Add New Measures and Descriptions here
- Add/Modify Programs, Activities, Objectives, History & Services here
- Print Change Matrix here
Modifying Mission and Goals:

1. Click on Department on left-hand menu
2. Click on Department Description tab
3. Click Edit Department Description button
4. Make changes, CLICK Update Button

Don't forget to click after making changes

Click on “E” to edit existing goals

Number how you want to display
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.
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.
Make sure that all sections are filled out completely. Especially Activity Contact, which is published in the budget document.

Programming Quirk: Years are Reversed for Measure Name Changes
eCOMBS Measure Module

How to find department key indicators

Measure Search

Enter Search Criteria

- FY: 2016
- Category: Select
- Measure Id: 
- Measure Name: 
- Department: Parks and Recreation
- Frequency: Select
- Program: 
- Activity: 
- Level: Select
- Approval Status: Select
- Internal: Select
- ICMA Measure: Key Performance:
- Graphed Measure: Supports Goal:
- Program Page: 

Search

How to bulk edit FY 2014 periodic data

Scroll Down to Bottom of Screen

Click Select All to check boxes

Select all

Add to My Measures

Edit Measure Data

Then Edit Measure Data

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eCOMBS Measure Module

How to bulk edit FY 2014 periodic data

Sort order: Reporting Frequency, Activity ID, Measure ID

Where to print Business Planning activity pages
Questions / Comments

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

Shannon.Szymczak@austintexas.gov
512-974-2575