Creating a Highly Effective Performance Planning, Budgeting and Management System

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Booth 1229

OCTOBER 22–25
ICMA 2017
SAN ANTONIO
103RD ANNUAL CONFERENCE • BEXAR COUNTY

Creating a Highly Effective Performance Planning, Budgeting and Management System

What this presentation will cover:

- What many local governments are doing today.
- The disadvantages of this approach.
- A more effective approach.
- Some challenges to implementing these improvements.
- How to address these challenges.
- What it can look like when done effectively.

What Many Local Governments Are Doing Today

- **Strategic Plans** with general (non-measurable) goals supported by identified projects.

- **Budgets** with lists of performance measures that are often a mix of activity/workload measures, outputs, and "outcomes."

Disadvantages of This Approach

Strategic Plan:
- not results-oriented
- not comprehensive
- not linked to the budget

Therefore, the Strategic Plan is not really a planning document to guide the organization toward better long-term performance/results.

Disadvantages of This Approach (cont’d)

Budget:

- Performance measures don’t actually tell how effective a program is.
- Difficult to see the relationship between spending levels and performance levels.
- Lack of any goal hierarchy means unclear linkages between program activities, outputs, and outcomes.
- Often, little ability to see performance data during the year for managing programs.

Better: A Real, Effective Performance Management System

- **Strategic Plan** – results-oriented goals for longer-term program outcomes, service levels, community conditions, etc.
- **Annual Performance Plan** – targets based on goals and structure of Strategic Plan, with measures that track effectiveness/efficiency.

Better: A Real, Effective Performance Management System (cont'd)

- **Performance Budget** – integrates the Annual Plan's performance measures around cost centers and in at least a 2-level hierarchy relating activities/outputs to outcomes, suggesting how spending levels impact results. Option to track efficiency of program activities (i.e., unit costs).

- **Performance Reporting** – performance data tracked throughout the year, with analytical tools provided, so that managers can manage their programs for better results.

Challenges to Doing This Well

- Inertia – don’t know how to get started.
- Don’t know what to measure, so are just using whatever performance measures are already available.
- Inability to associate dollars with performance measures (i.e, the cost centers aren’t suitable).
- Current budgeting/financial systems not capable of supporting real performance management, and no intention now to get a new ERP.

Good News: You don’t need a new ERP or financial system

Cascade™ – extends what you are already using, into a real Performance Management system:

- Develops a results-oriented Strategic Plan.
- Creates an Annual Performance Plan linking activities/outputs to outcomes, and to long-term results.
- When you are ready for Performance Budgeting, it links dollars to annual performance measures.
- Reports and analyzes program performance throughout the year.
- Can be used stand-alone, or integrated with your systems.

Key Elements of an Effective Performance Management System

Long-Term Strategic Plan:

1. Define your desired long-term outcomes – e.g., service levels and results.
2. Cascade departmental goals to program goals/measures.
3. Identify goal leadership responsibilities.
4. Describe the strategies for achieving the goals.

Key Elements of an Effective Performance Management System

Annual Performance/Operating Plan:

1. Develop goals for annual service levels and outcomes/results based on long-term goals.
2. Cascade departmental goals to program goals/measures.
3. Identify the goal leadership responsibilities.
4. Describe the strategies for achieving the goals.

Key Elements of an Effective Performance Management System

Annual Plan → Performance Budget:

1. Incorporate the Annual Performance Plan into a Performance Budgeting solution.
2. Identify total budget costs for each goal or group of goals/measures.
3. Link these Performance Budget costs to their Line Item amounts.

Key Elements of a Comprehensive Results Based Management System

Performance Reporting & Monitoring:

1. Set interim performance targets.
2. Report results periodically.
3. Track performance trends over time.
4. Flag performance problems.
5. Use performance data to manage day-to-day operations.

Long-Term Strategic Plan

1. Define your desired long-term outcomes – e.g., service levels and results.
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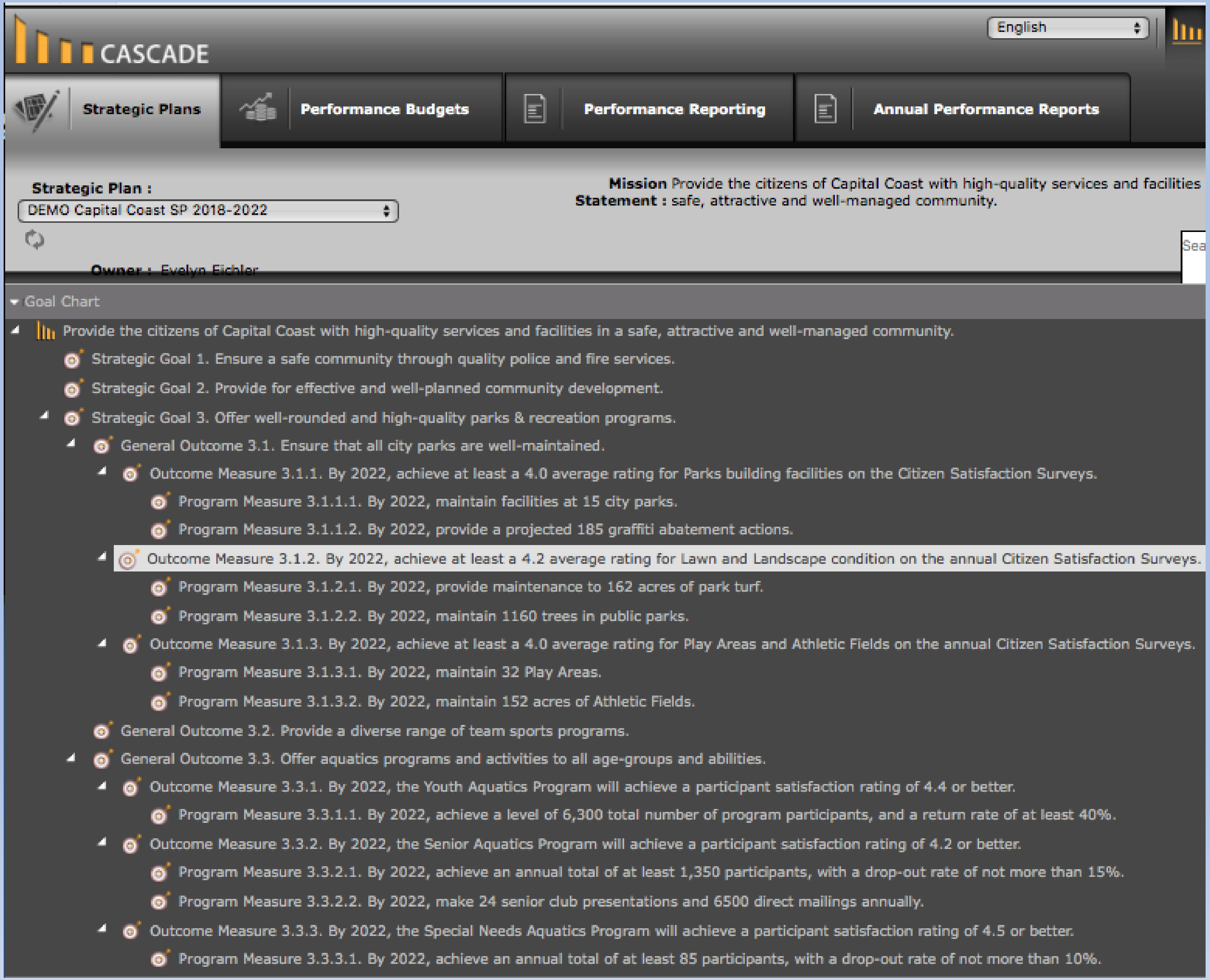


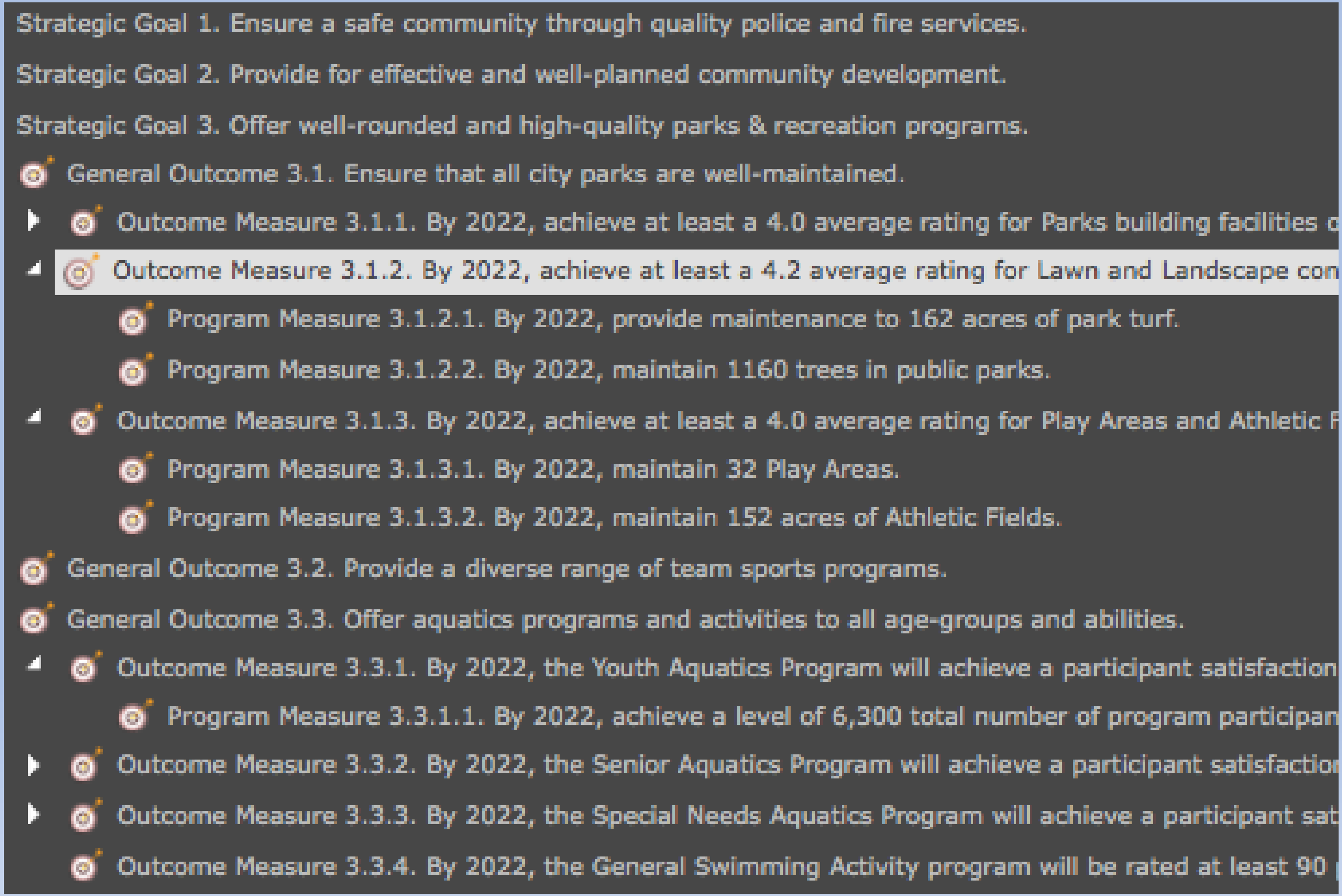
Strategic Plan : DEMO Capital Coast SP 2018-2022

Mission Statement : Provide the citizens of Capital Coast with high-quality services and facilities safe, attractive and well-managed community.

Owner : Evelyn Eichler

Goal Chart

- Provide the citizens of Capital Coast with high-quality services and facilities in a safe, attractive and well-managed community.
  - Strategic Goal 1. Ensure a safe community through quality police and fire services.
  - Strategic Goal 2. Provide for effective and well-planned community development.
  - Strategic Goal 3. Offer well-rounded and high-quality parks & recreation programs.
    - General Outcome 3.1. Ensure that all city parks are well-maintained.
      - Outcome Measure 3.1.1. By 2022, achieve at least a 4.0 average rating for Parks building facilities on the Citizen Satisfaction Surveys.
        - Program Measure 3.1.1.1. By 2022, maintain facilities at 15 city parks.
        - Program Measure 3.1.1.2. By 2022, provide a projected 185 graffiti abatement actions.
      - Outcome Measure 3.1.2. By 2022, achieve at least a 4.2 average rating for Lawn and Landscape condition on the annual Citizen Satisfaction Surveys.
        - Program Measure 3.1.2.1. By 2022, provide maintenance to 162 acres of park turf.
        - Program Measure 3.1.2.2. By 2022, maintain 1160 trees in public parks.
      - Outcome Measure 3.1.3. By 2022, achieve at least a 4.0 average rating for Play Areas and Athletic Fields on the annual Citizen Satisfaction Surveys.
        - Program Measure 3.1.3.1. By 2022, maintain 32 Play Areas.
        - Program Measure 3.1.3.2. By 2022, maintain 152 acres of Athletic Fields.
    - General Outcome 3.2. Provide a diverse range of team sports programs.
    - General Outcome 3.3. Offer aquatics programs and activities to all age-groups and abilities.
      - Outcome Measure 3.3.1. By 2022, the Youth Aquatics Program will achieve a participant satisfaction rating of 4.4 or better.
        - Program Measure 3.3.1.1. By 2022, achieve a level of 6,300 total number of program participants, and a return rate of at least 40%.
      - Outcome Measure 3.3.2. By 2022, the Senior Aquatics Program will achieve a participant satisfaction rating of 4.2 or better.
        - Program Measure 3.3.2.1. By 2022, achieve an annual total of at least 1,350 participants, with a drop-out rate of not more than 15%.
        - Program Measure 3.3.2.2. By 2022, make 24 senior club presentations and 6500 direct mailings annually.
      - Outcome Measure 3.3.3. By 2022, the Special Needs Aquatics Program will achieve a participant satisfaction rating of 4.5 or better.
        - Program Measure 3.3.3.1. By 2022, achieve an annual total of at least 85 participants, with a drop-out rate of not more than 10%.



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Strategic Goal 2. Provide for effective and well-planned community development.

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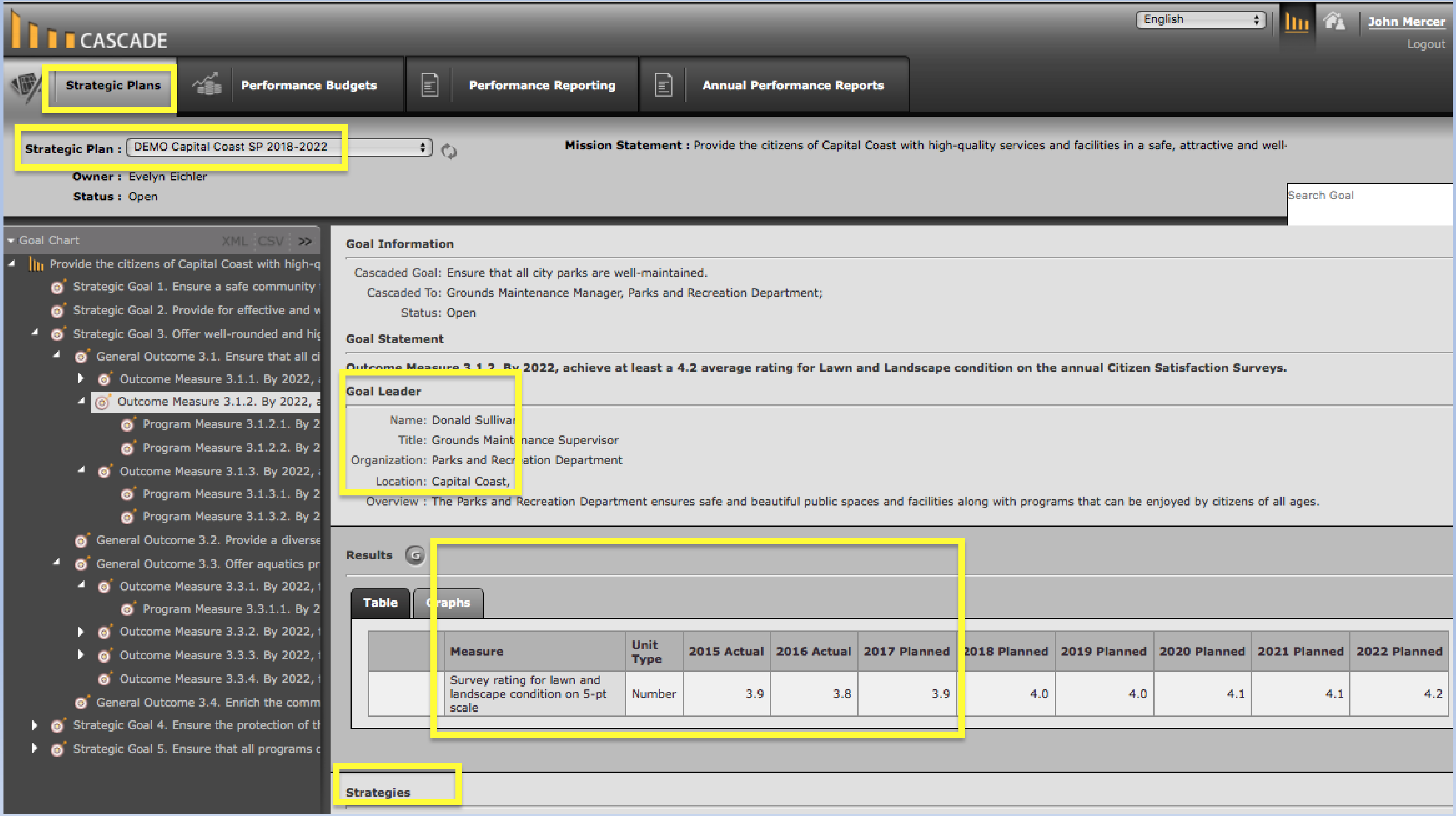
  - Outcome Measure 3.3.4. By 2022, the General Swimming Activity program will be rated at least 90



Strategic Plan : DEMO Capital Coast SP 2018-2022

Owner : Evelyn Eichler

Status : Open

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      - Outcome Measure 3.3.4. By 2022,
    - General Outcome 3.4. Enrich the comm
  - Strategic Goal 4. Ensure the protection of th
  - Strategic Goal 5. Ensure that all programs c

Goal Information

Cascaded Goal: Ensure that all city parks are well-maintained.
Cascaded To: Grounds Maintenance Manager, Parks and Recreation Department;
Status: Open

Goal Statement

Outcome Measure 3.1.2. By 2022, achieve at least a 4.2 average rating for Lawn and Landscape condition on the annual Citizen Satisfaction Surveys.

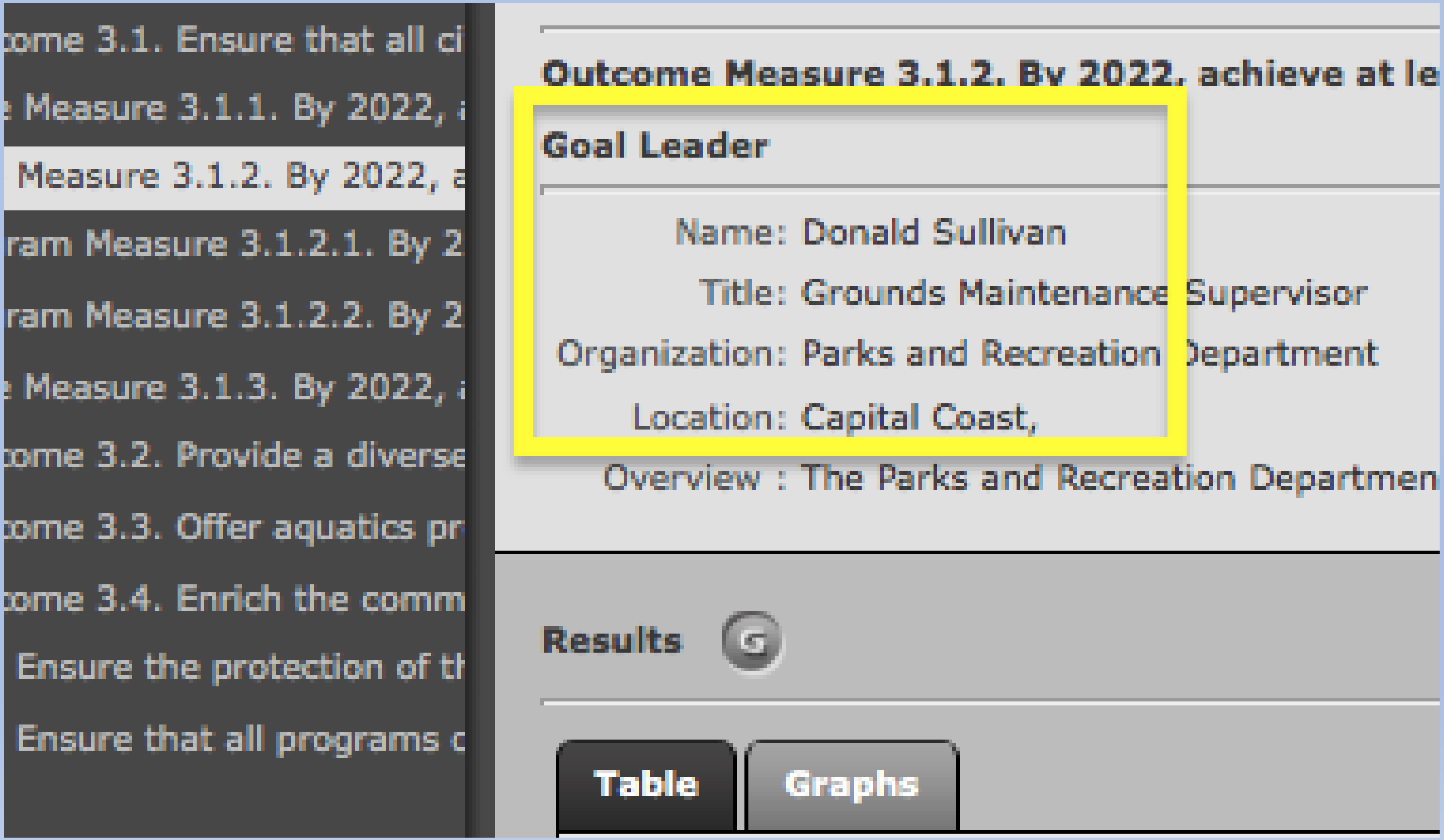
Goal Leader

Name: Donald Sullivan
Title: Grounds Maintenance Supervisor
Organization: Parks and Recreation Department
Location: Capital Coast,
Overview : The Parks and Recreation Department ensures safe and beautiful public spaces and facilities along with programs that can be enjoyed by citizens of all ages.

Results

	Measure	Unit Type	2015 Actual	2016 Actual	2017 Planned	2018 Planned	2019 Planned	2020 Planned	2021 Planned	2022 Planned
	Survey rating for lawn and landscape condition on 5-pt scale	Number	3.9	3.8	3.9	4.0	4.0	4.1	4.1	4.2

Strategies



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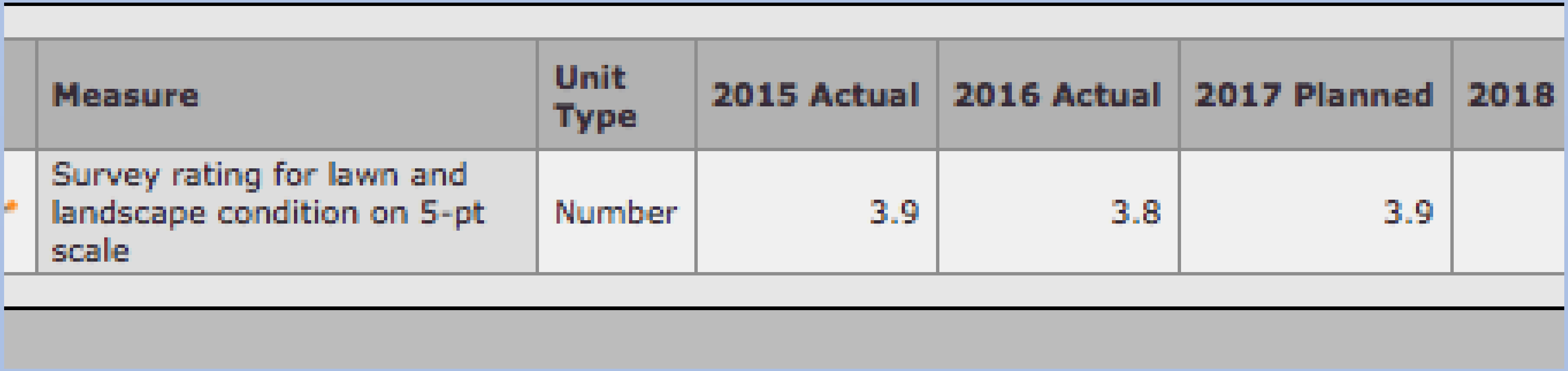

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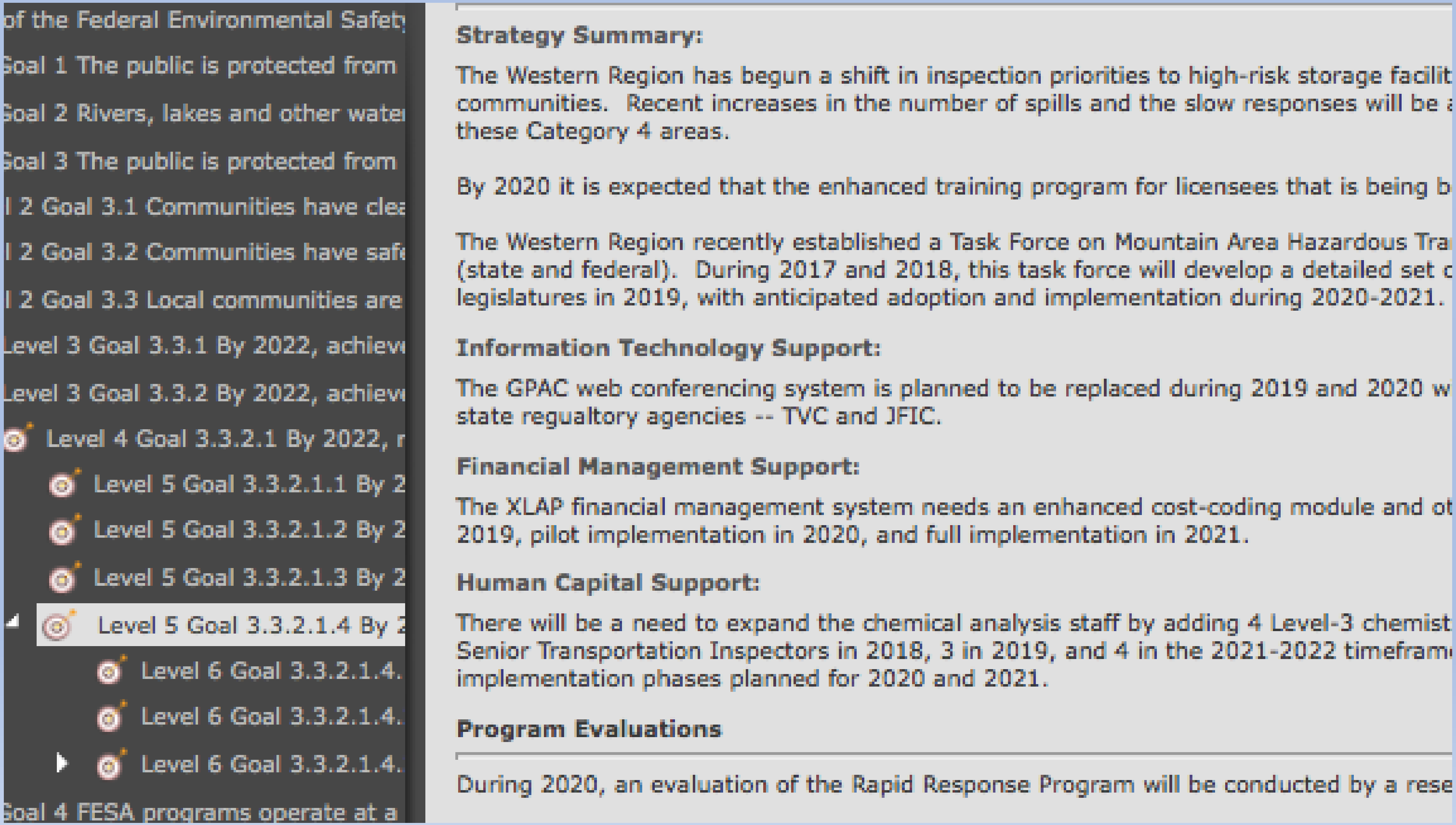
*	Survey rating for lawn and landscape condition on 5-pt scale	Number	3.9	3.8	3.9	


of the Federal Environmental Safety
Goal 1 The public is protected from
Goal 2 Rivers, lakes and other water
Goal 3 The public is protected from
l 2 Goal 3.1 Communities have clea
l 2 Goal 3.2 Communities have safe
l 2 Goal 3.3 Local communities are
Level 3 Goal 3.3.1 By 2022, achieve
Level 3 Goal 3.3.2 By 2022, achieve
Level 4 Goal 3.3.2.1 By 2022, r
Level 5 Goal 3.3.2.1.1 By 2
Level 5 Goal 3.3.2.1.2 By 2
Level 5 Goal 3.3.2.1.3 By 2
Level 5 Goal 3.3.2.1.4 By 2
Level 6 Goal 3.3.2.1.4.
Level 6 Goal 3.3.2.1.4.
Level 6 Goal 3.3.2.1.4.
Goal 4 FESA programs operate at a

Strategy Summary:

The Western Region has begun a shift in inspection priorities to high-risk storage facilit communities. Recent increases in the number of spills and the slow responses will be a these Category 4 areas.

By 2020 it is expected that the enhanced training program for licensees that is being b

The Western Region recently established a Task Force on Mountain Area Hazardous Tra (state and federal). During 2017 and 2018, this task force will develop a detailed set o legislatures in 2019, with anticipated adoption and implementation during 2020-2021.

Information Technology Support:

The GPAC web conferencing system is planned to be replaced during 2019 and 2020 w state regualtory agencies -- TVC and JFIC.

Financial Management Support:

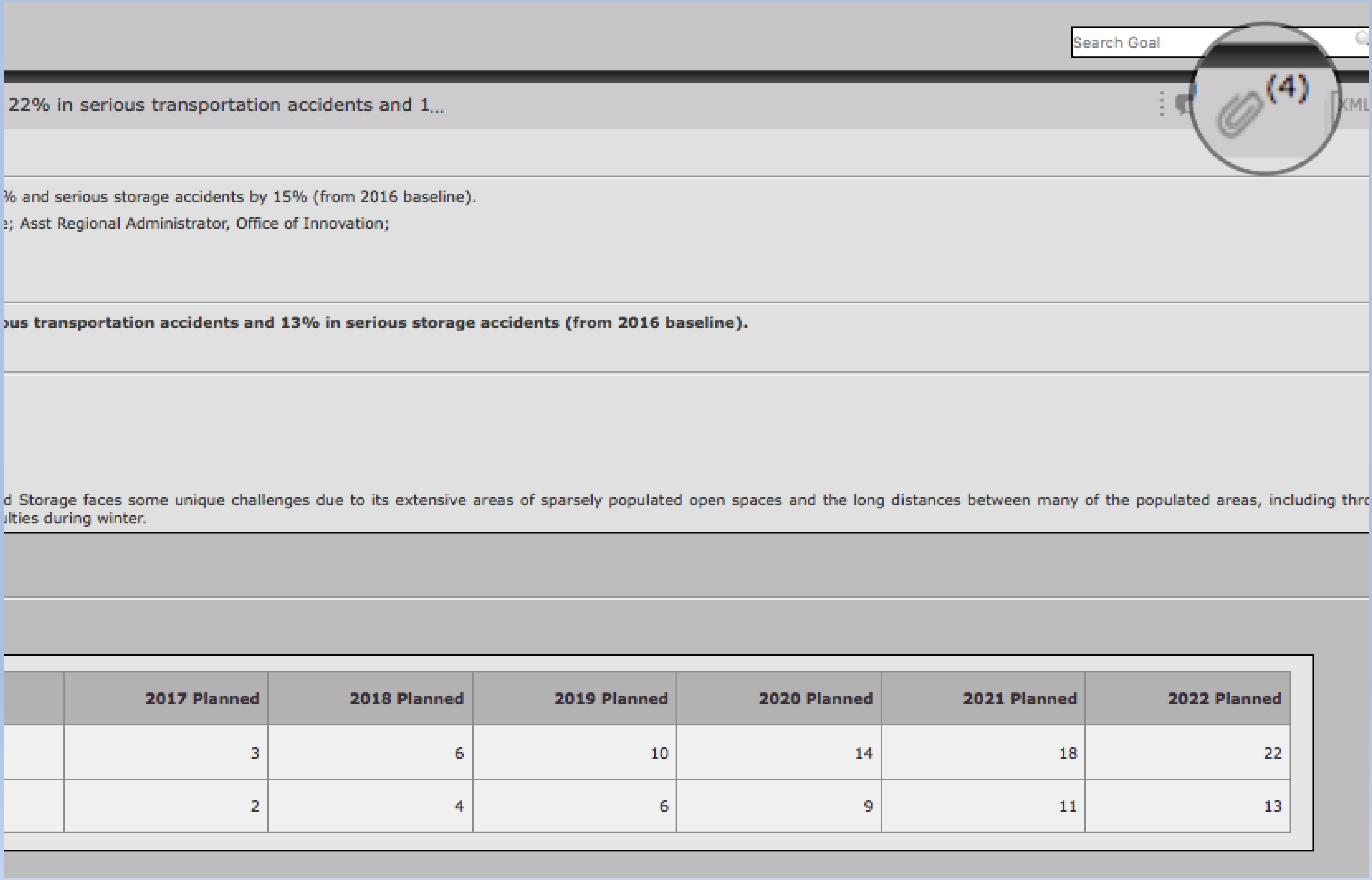
The XLAP financial management system needs an enhanced cost-coding module and ot 2019, pilot implementation in 2020, and full implementation in 2021.

Human Capital Support:

There will be a need to expand the chemical analysis staff by adding 4 Level-3 chemist Senior Transportation Inspectors in 2018, 3 in 2019, and 4 in the 2021-2022 timefram implementation phases planned for 2020 and 2021.

Program Evaluations

During 2020, an evaluation of the Rapid Response Program will be conducted by a rese



22% in serious transportation accidents and 1...

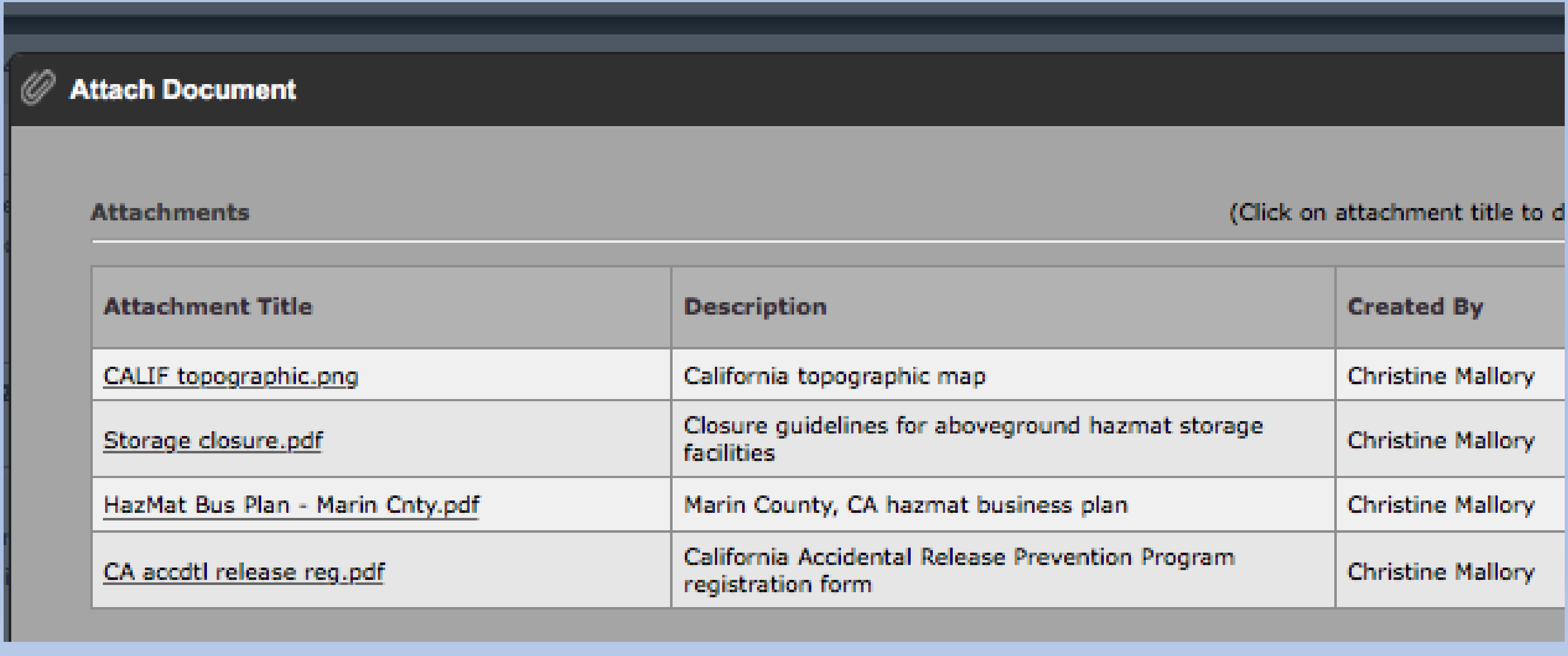
% and serious storage accidents by 15% (from 2016 baseline).

; Asst Regional Administrator, Office of Innovation;

ous transportation accidents and 13% in serious storage accidents (from 2016 baseline).

d Storage faces some unique challenges due to its extensive areas of sparsely populated open spaces and the long distances between many of the populated areas, including thr
ulties during winter.

	2017 Planned	2018 Planned	2019 Planned	2020 Planned	2021 Planned	2022 Planned
	3	6	10	14	18	22
	2	4	6	9	11	13



Attachments

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Attachment Title	Description	Created By
CALIF topographic.png	California topographic map	Christine Mallory
Storage closure.pdf	Closure guidelines for aboveground hazmat storage facilities	Christine Mallory
HazMat Bus Plan - Marin Cnty.pdf	Marin County, CA hazmat business plan	Christine Mallory
CA accdtl release reg.pdf	California Accidental Release Prevention Program registration form	Christine Mallory

Use your existing Strategic Plan

- As the basis for developing a long-term plan that is truly *results-oriented.*
- To serve as the "*plan of plans*" – incorporating or linking to project plans and other detailed planning documents.
- To provide the structure for creating the Annual Performance Plans that *ensure implementation.*

Annual Performance/Operating Plan

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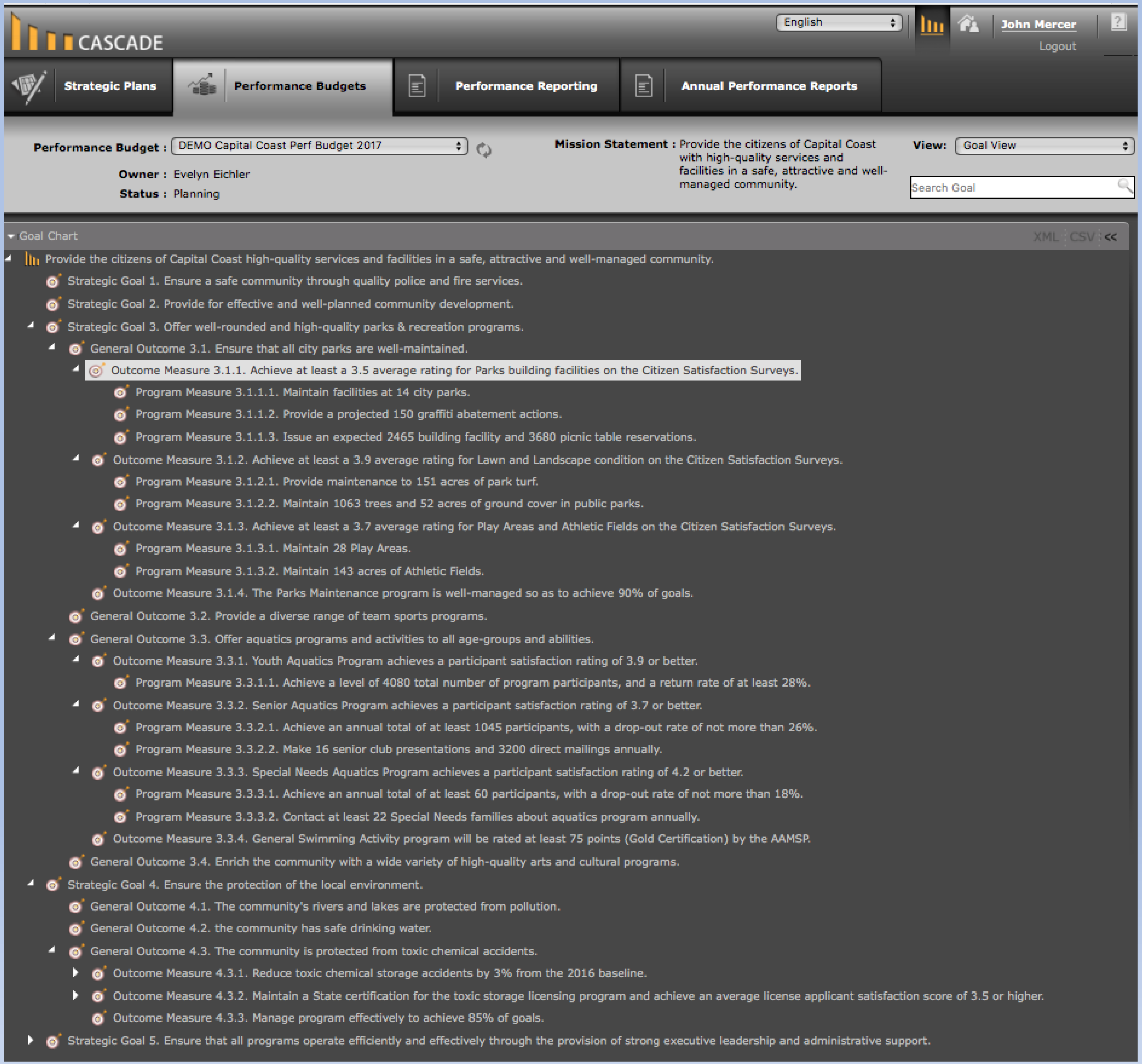

Performance Budget : DEMO Capital Coast Perf Budget 2017

Owner : Evelyn Eichler

Status : Planning

Mission Statement : Provide the citizens of Capital Coast with high-quality services and facilities in a safe, attractive and well-managed community.

View: Goal View

Search Goal

Goal Chart

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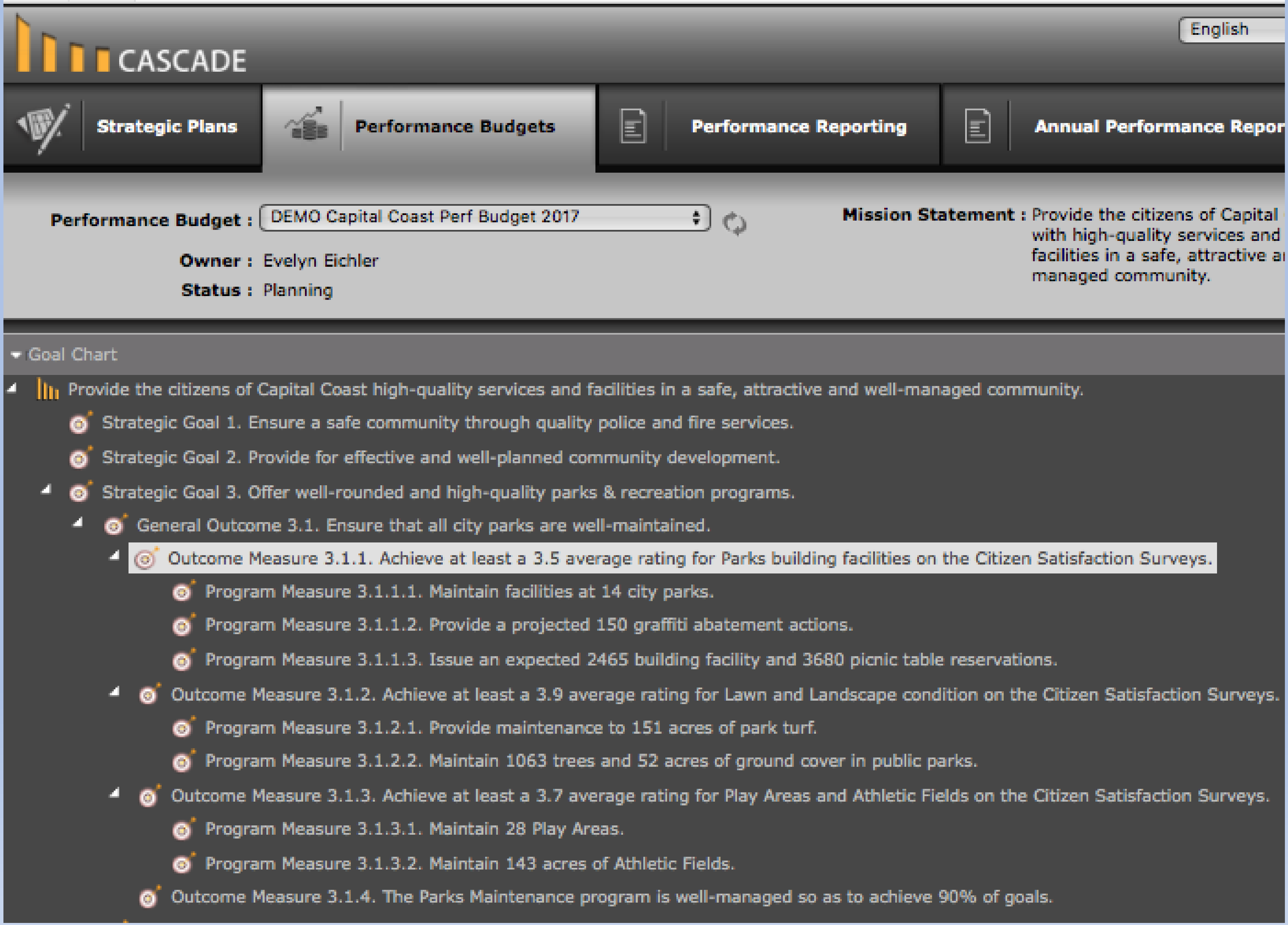
      - Outcome Measure 3.1.1. Achieve at least a 3.5 average rating for Parks building facilities on the Citizen Satisfaction Surveys.
        - Program Measure 3.1.1.1. Maintain facilities at 14 city parks.
        - Program Measure 3.1.1.2. Provide a projected 150 graffiti abatement actions.
        - Program Measure 3.1.1.3. Issue an expected 2465 building facility and 3680 picnic table reservations.
      - Outcome Measure 3.1.2. Achieve at least a 3.9 average rating for Lawn and Landscape condition on the Citizen Satisfaction Surveys.
        - Program Measure 3.1.2.1. Provide maintenance to 151 acres of park turf.
        - Program Measure 3.1.2.2. Maintain 1063 trees and 52 acres of ground cover in public parks.
      - Outcome Measure 3.1.3. Achieve at least a 3.7 average rating for Play Areas and Athletic Fields on the Citizen Satisfaction Surveys.
        - Program Measure 3.1.3.1. Maintain 28 Play Areas.
        - Program Measure 3.1.3.2. Maintain 143 acres of Athletic Fields.
      - Outcome Measure 3.1.4. The Parks Maintenance program is well-managed so as to achieve 90% of goals.
    - General Outcome 3.2. Provide a diverse range of team sports programs.
    - General Outcome 3.3. Offer aquatics programs and activities to all age-groups and abilities.
      - Outcome Measure 3.3.1. Youth Aquatics Program achieves a participant satisfaction rating of 3.9 or better.
        - Program Measure 3.3.1.1. Achieve a level of 4080 total number of program participants, and a return rate of at least 28%.
      - Outcome Measure 3.3.2. Senior Aquatics Program achieves a participant satisfaction rating of 3.7 or better.
        - Program Measure 3.3.2.1. Achieve an annual total of at least 1045 participants, with a drop-out rate of not more than 26%.
        - Program Measure 3.3.2.2. Make 16 senior club presentations and 3200 direct mailings annually.
      - Outcome Measure 3.3.3. Special Needs Aquatics Program achieves a participant satisfaction rating of 4.2 or better.
        - Program Measure 3.3.3.1. Achieve an annual total of at least 60 participants, with a drop-out rate of not more than 18%.
        - Program Measure 3.3.3.2. Contact at least 22 Special Needs families about aquatics program annually.
      - Outcome Measure 3.3.4. General Swimming Activity program will be rated at least 75 points (Gold Certification) by the AAMSP.
    - General Outcome 3.4. Enrich the community with a wide variety of high-quality arts and cultural programs.
  - Strategic Goal 4. Ensure the protection of the local environment.
    - General Outcome 4.1. The community's rivers and lakes are protected from pollution.
    - General Outcome 4.2. the community has safe drinking water.
    - General Outcome 4.3. The community is protected from toxic chemical accidents.
      - Outcome Measure 4.3.1. Reduce toxic chemical storage accidents by 3% from the 2016 baseline.
      - Outcome Measure 4.3.2. Maintain a State certification for the toxic storage licensing program and achieve an average license applicant satisfaction score of 3.5 or higher.
      - Outcome Measure 4.3.3. Manage program effectively to achieve 85% of goals.
  - Strategic Goal 5. Ensure that all programs operate efficiently and effectively through the provision of strong executive leadership and administrative support.



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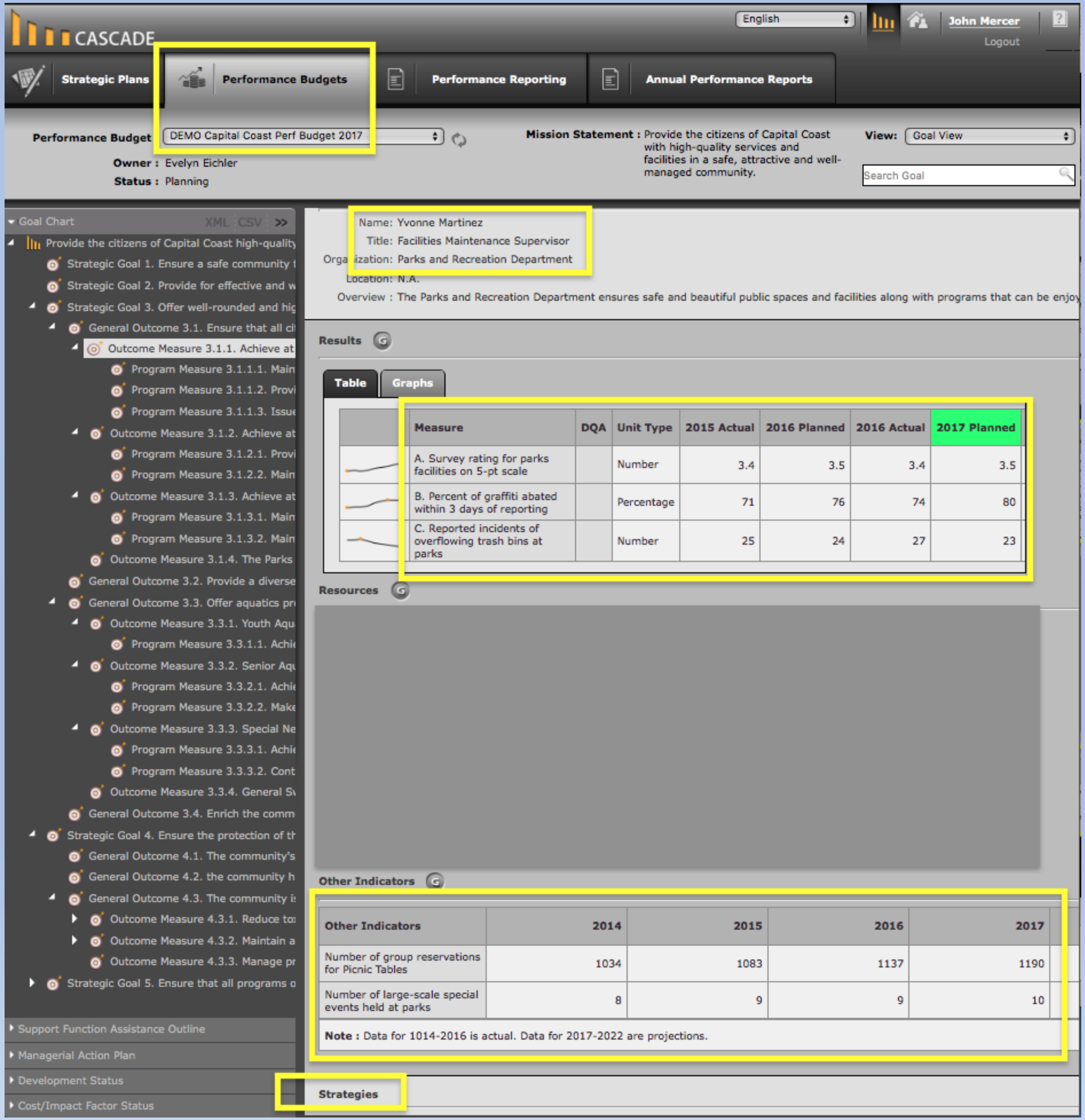

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- Support Function Assistance Outline
- Managerial Action Plan
- Development Status
- Cost/Impact Factor Status

Name: Yvonne Martinez
Title: Facilities Maintenance Supervisor
Orga ization: Parks and Recreation Department
Location: N.A.
Overview : The Parks and Recreation Department ensures safe and beautiful public spaces and facilities along with programs that can be enjoy

Results

Measure	DQA	Unit Type	2015 Actual	2016 Planned	2016 Actual	2017 Planned
A. Survey rating for parks facilities on 5-pt scale		Number	3.4	3.5	3.4	3.5
B. Percent of graffiti abated within 3 days of reporting		Percentage	71	76	74	80
C. Reported incidents of overflowing trash bins at parks		Number	25	24	27	23

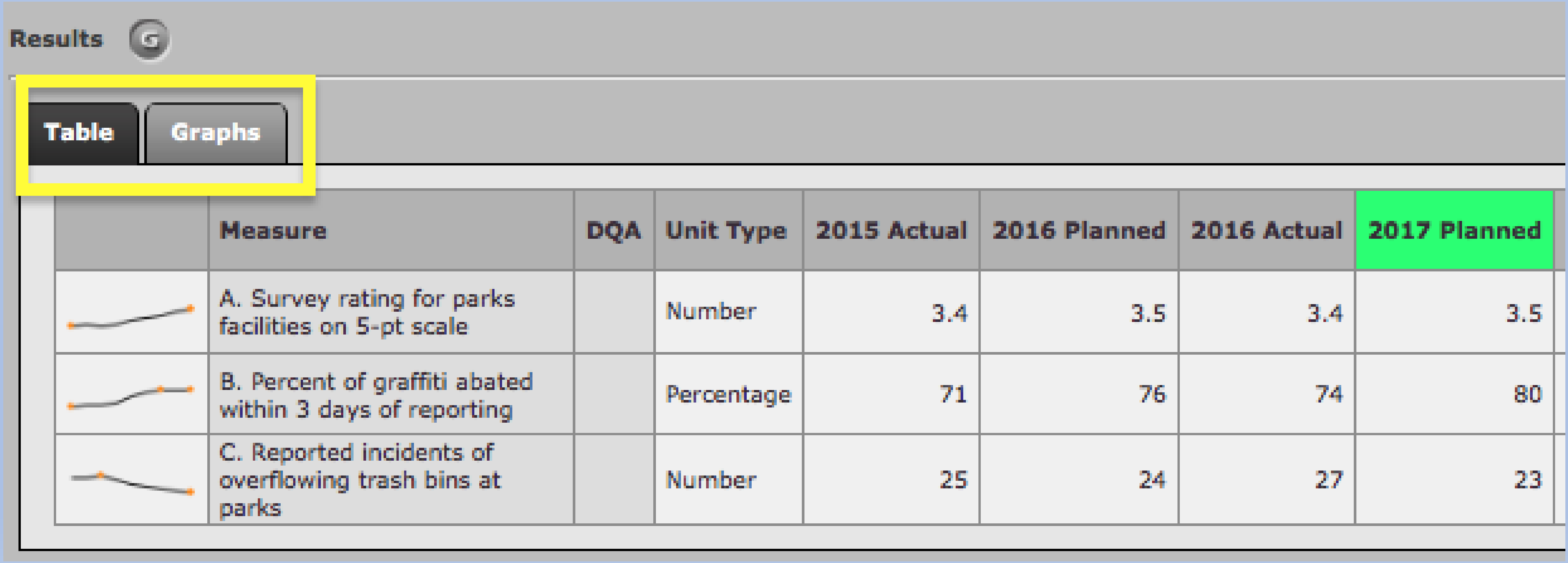
Resources

Other Indicators

Other Indicators	2014	2015	2016	2017
Number of group reservations for Picnic Tables	1034	1083	1137	1190
Number of large-scale special events held at parks	8	9	9	10

Note : Data for 1014-2016 is actual. Data for 2017-2022 are projections.

Strategies



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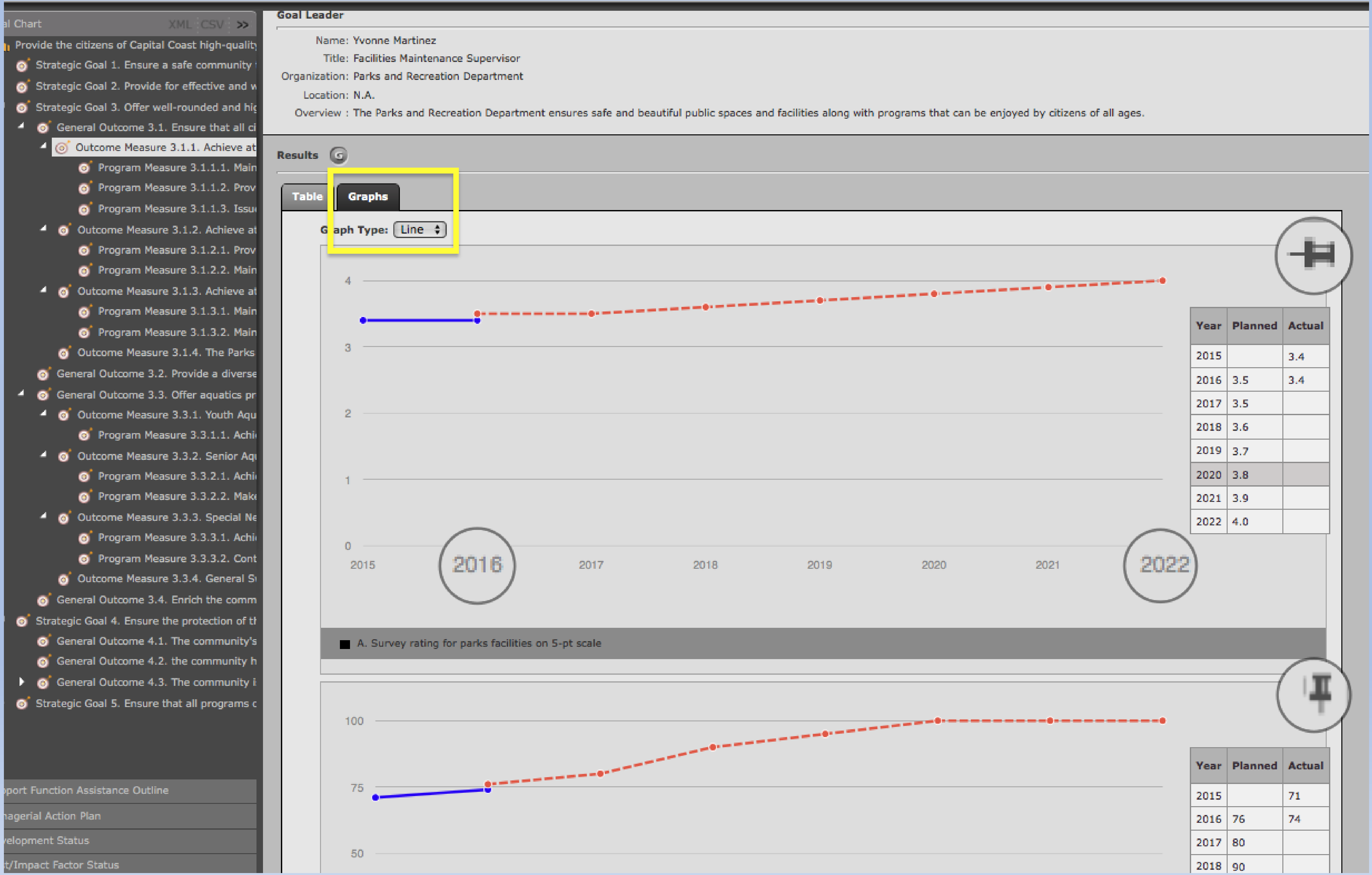
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Program Measure 3.1.3.2. Main
Outcome Measure 3.1.4. The Parks
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Results
Table
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2016
2017
2018
2019
2020
2021
2022
100
75
50

Goal Leader

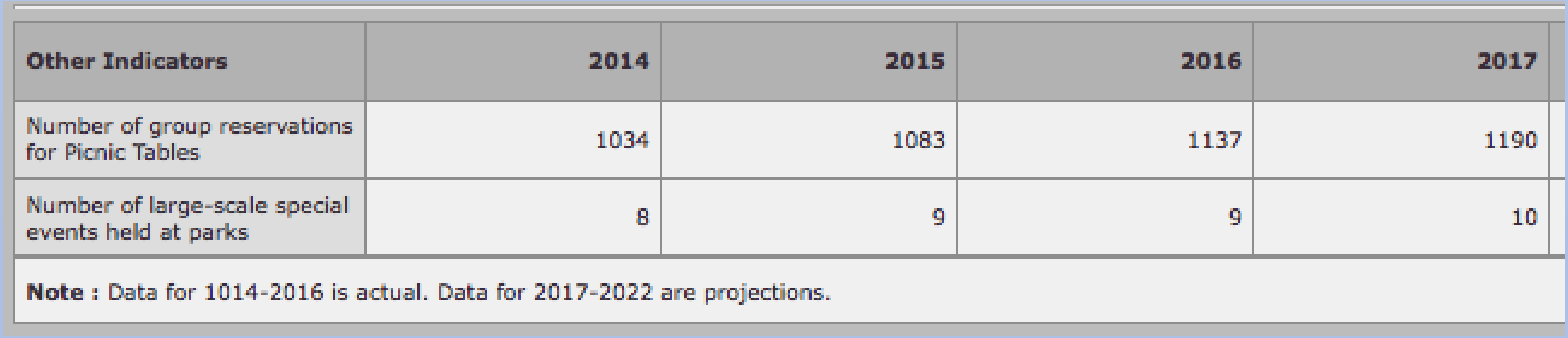
Name: Yvonne Martinez
Title: Facilities Maintenance Supervisor
Organization: Parks and Recreation Department
Location: N.A.
Overview : The Parks and Recreation Department ensures safe and beautiful public spaces and facilities along with programs that can be enjoyed by citizens of all ages.

Graph Type: Line

Year	Planned	Actual
2015		3.4
2016	3.5	3.4
2017	3.5	
2018	3.6	
2019	3.7	
2020	3.8	
2021	3.9	
2022	4.0	

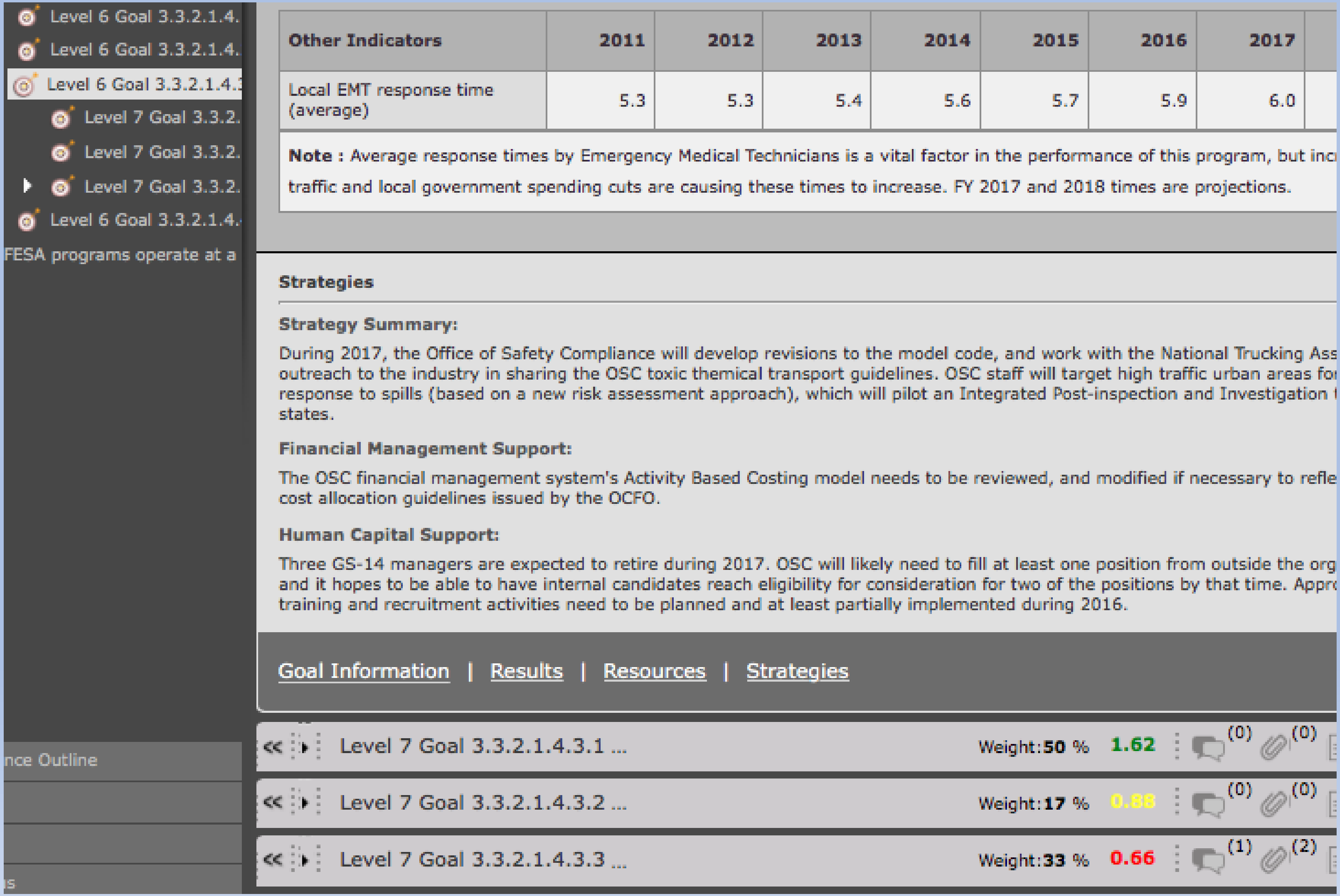
■ A. Survey rating for parks facilities on 5-pt scale

Year	Planned	Actual
2015		71
2016	76	74
2017	80	
2018	90	



Other Indicators	2014	2015	2016	2017
Number of group reservations for Picnic Tables	1034	1083	1137	1190
Number of large-scale special events held at parks	8	9	9	10

Note : Data for 1014-2016 is actual. Data for 2017-2022 are projections.


Level 6 Goal 3.3.2.1.4.
Level 6 Goal 3.3.2.1.4.
Level 6 Goal 3.3.2.1.4.
Level 7 Goal 3.3.2.
Level 7 Goal 3.3.2.
Level 7 Goal 3.3.2.
Level 6 Goal 3.3.2.1.4.
FESA programs operate at a
nce Outline
Goal Information | Results | Resources | Strategies

Other Indicators	2011	2012	2013	2014	2015	2016	2017
Local EMT response time (average)	5.3	5.3	5.4	5.6	5.7	5.9	6.0

Note : Average response times by Emergency Medical Technicians is a vital factor in the performance of this program, but inc traffic and local government spending cuts are causing these times to increase. FY 2017 and 2018 times are projections.

Strategies

Strategy Summary:

During 2017, the Office of Safety Compliance will develop revisions to the model code, and work with the National Trucking Ass outreach to the industry in sharing the OSC toxic themical transport guidelines. OSC staff will target high traffic urban areas fo response to spills (based on a new risk assessment approach), which will pilot an Integrated Post-inspection and Investigation states.

Financial Management Support:

The OSC financial management system's Activity Based Costing model needs to be reviewed, and modified if necessary to refle cost allocation guidelines issued by the OCFO.

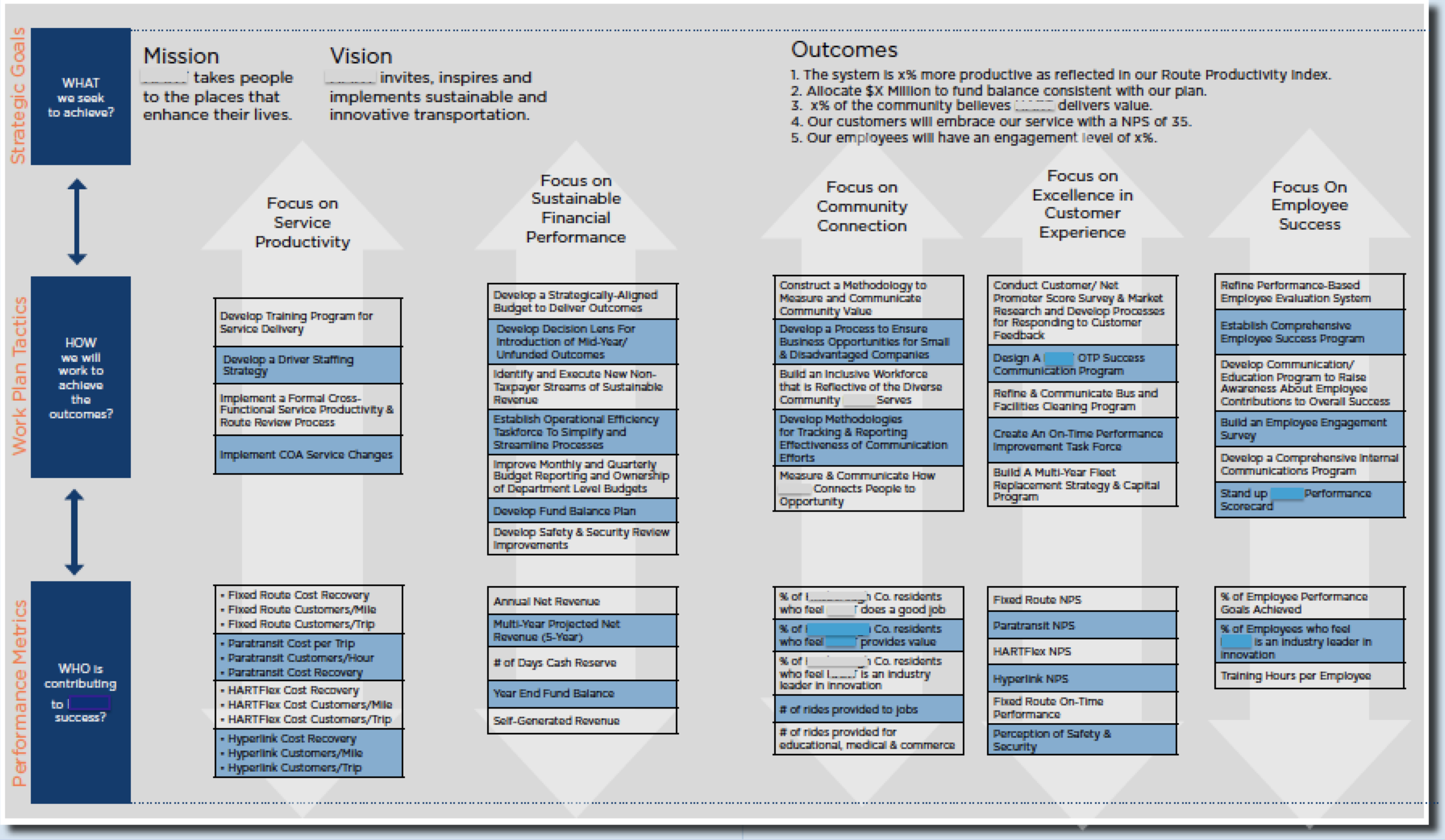
Human Capital Support:

Three GS-14 managers are expected to retire during 2017. OSC will likely need to fill at least one position from outside the org and it hopes to be able to have internal candidates reach eligibility for consideration for two of the positions by that time. Appr training and recruitment activities need to be planned and at least partially implemented during 2016.

Level 7 Goal 3.3.2.1.4.3.1 ... Weight:**50** % 1.62 (0) (0)

Level 7 Goal 3.3.2.1.4.3.2 ... Weight:**17** % 0.88 (0) (0)

Level 7 Goal 3.3.2.1.4.3.3 ... Weight:**33** % 0.66 (1) (2)



Strategic Goals

WHAT we seek to achieve?

Mission

[redacted] takes people to the places that enhance their lives.

Vision

[redacted] invites, inspires and implements sustainable and innovative transportation.

Outcomes

1. The system is x% more productive as reflected in our Route Productivity Index.
2. Allocate $X Million to fund balance consistent with our plan.
3. x% of the community believes [redacted] delivers value.
4. Our customers will embrace our service with a NPS of 35.
5. Our employees will have an engagement level of x%.

Work Plan Tactics

HOW we will work to achieve the outcomes?

Performance Metrics

WHO is contributing to [redacted] success?

Focus on Service Productivity

Work Plan Tactics:
- Develop Training Program for Service Delivery
- Develop a Driver Staffing Strategy
- Implement a Formal Cross-Functional Service Productivity & Route Review Process
- Implement COA Service Changes

Performance Metrics:
- Fixed Route Cost Recovery
- Fixed Route Customers/Mile
- Fixed Route Customers/Trip
- Paratransit Cost per Trip
- Paratransit Customers/Hour
- Paratransit Cost Recovery
- HARTFlex Cost Recovery
- HARTFlex Cost Customers/Mile
- HARTFlex Cost Customers/Trip
- Hyperlink Cost Recovery
- Hyperlink Customers/Mile
- Hyperlink Customers/Trip

Focus on Sustainable Financial Performance

Work Plan Tactics:
- Develop a Strategically-Aligned Budget to Deliver Outcomes
- Develop Decision Lens For Introduction of Mid-Year/ Unfunded Outcomes
- Identify and Execute New Non-Taxpayer Streams of Sustainable Revenue
- Establish Operational Efficiency Taskforce To Simplify and Streamline Processes
- Improve Monthly and Quarterly Budget Reporting and Ownership of Department Level Budgets
- Develop Fund Balance Plan
- Develop Safety & Security Review Improvements

Performance Metrics:
- Annual Net Revenue
- Multi-Year Projected Net Revenue (5-Year)
- # of Days Cash Reserve
- Year End Fund Balance
- Self-Generated Revenue

Focus on Community Connection

Work Plan Tactics:
- Construct a Methodology to Measure and Communicate Community Value
- Develop a Process to Ensure Business Opportunities for Small & Disadvantaged Companies
- Build an Inclusive Workforce that is Reflective of the Diverse Community [redacted] Serves
- Develop Methodologies for Tracking & Reporting Effectiveness of Communication Efforts
- Measure & Communicate How [redacted] Connects People to Opportunity

Performance Metrics:
- % of [redacted] Co. residents who feel [redacted] does a good job
- % of [redacted] Co. residents who feel [redacted] provides value
- % of [redacted] Co. residents who feel [redacted] is an industry leader in innovation
- # of rides provided to jobs
- # of rides provided for educational, medical & commerce

Focus on Excellence in Customer Experience

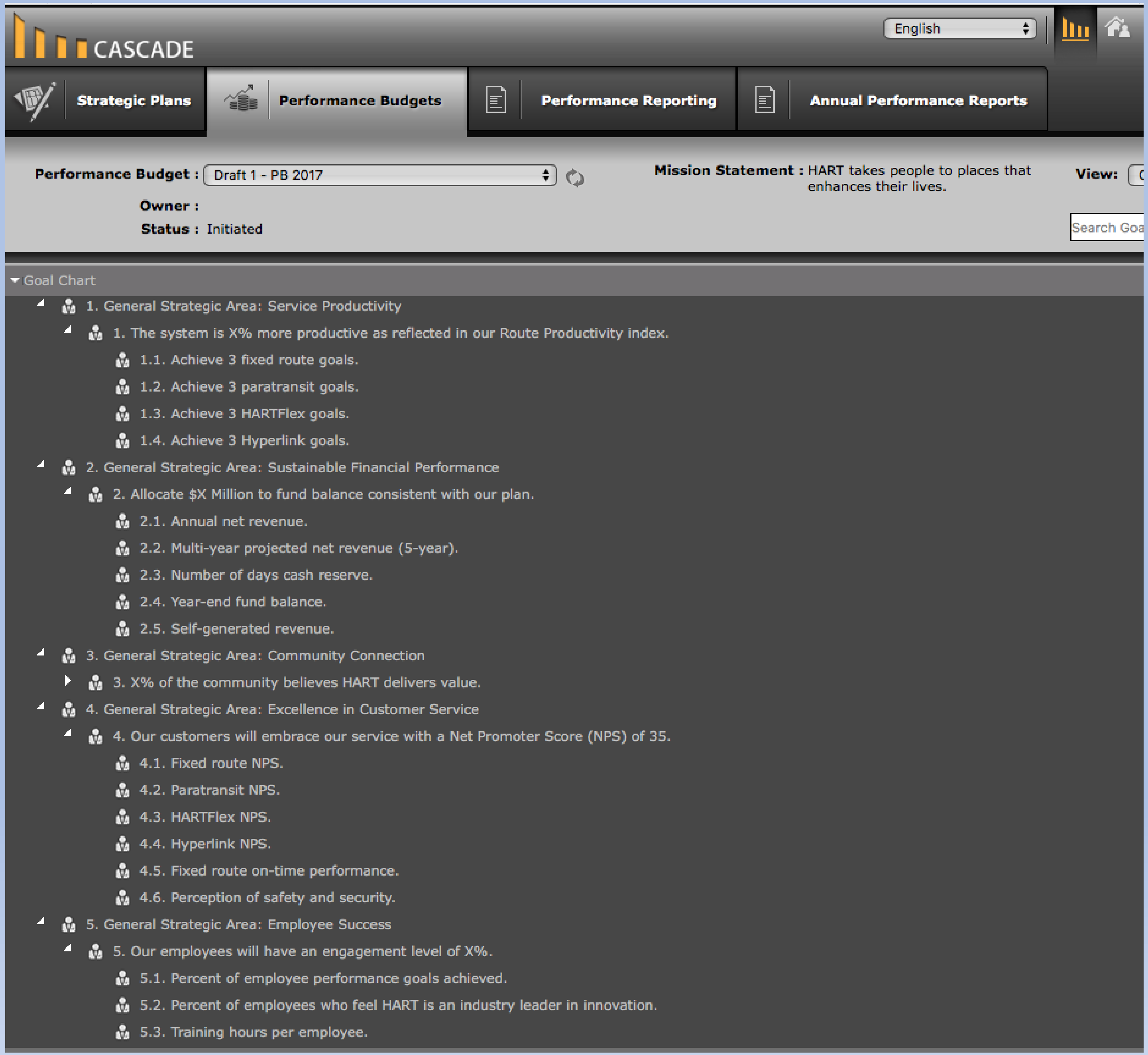
Work Plan Tactics:
- Conduct Customer/ Net Promoter Score Survey & Market Research and Develop Processes for Responding to Customer Feedback
- Design A [redacted] OTP Success Communication Program
- Refine & Communicate Bus and Facilities Cleaning Program
- Create An On-Time Performance Improvement Task Force
- Build A Multi-Year Fleet Replacement Strategy & Capital Program

Performance Metrics:
- Fixed Route NPS
- Paratransit NPS
- HARTFlex NPS
- Hyperlink NPS
- Fixed Route On-Time Performance
- Perception of Safety & Security

Focus On Employee Success

Work Plan Tactics:
- Refine Performance-Based Employee Evaluation System
- Establish Comprehensive Employee Success Program
- Develop Communication/ Education Program to Raise Awareness About Employee Contributions to Overall Success
- Build an Employee Engagement Survey
- Develop a Comprehensive Internal Communications Program
- Stand up [redacted] Performance Scorecard

Performance Metrics:
- % of Employee Performance Goals Achieved
- % of Employees who feel [redacted] is an industry leader in innovation
- Training Hours per Employee



Performance Budget : Draft 1 - PB 2017

Owner :

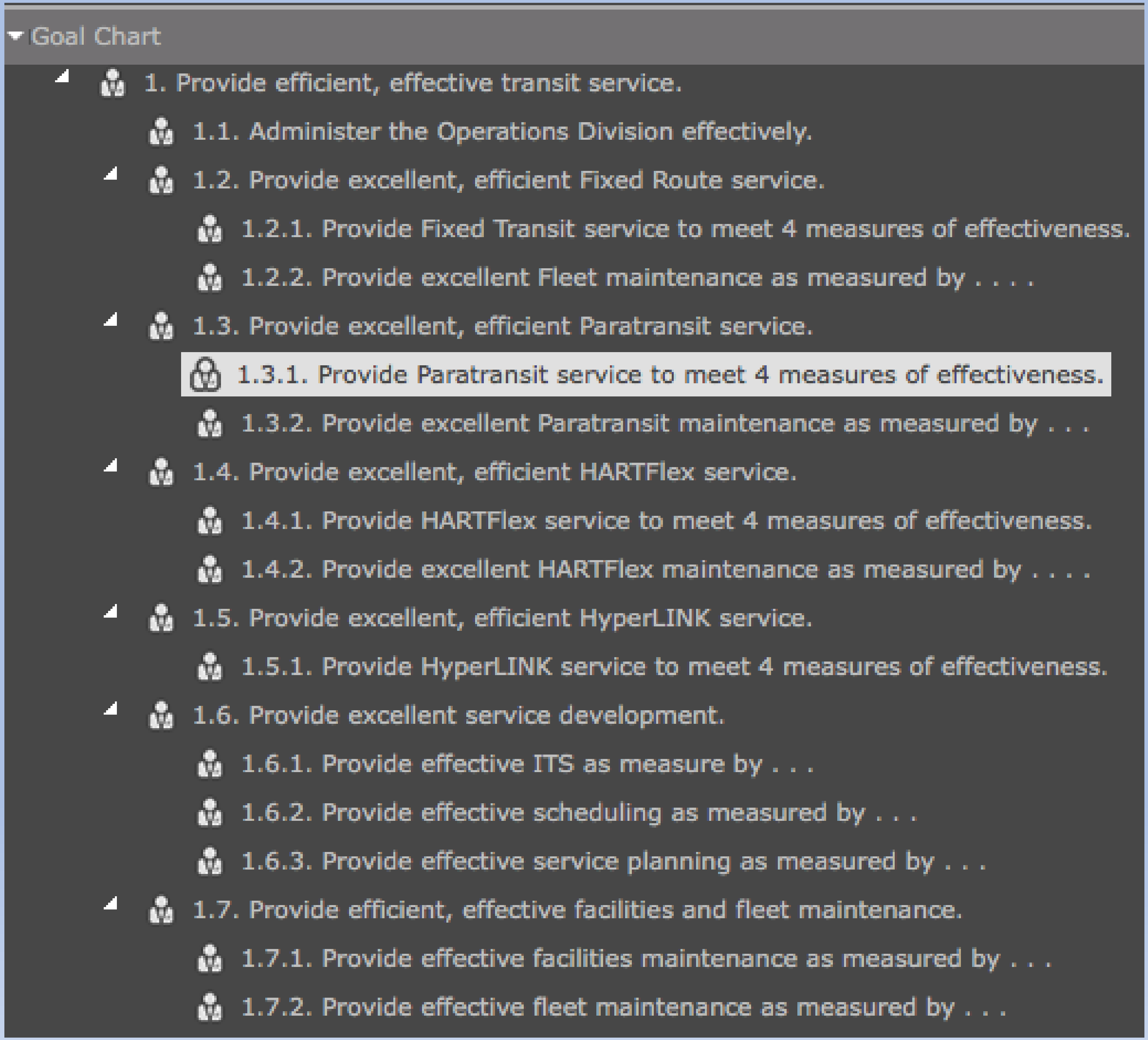
Status : Initiated

Mission Statement : HART takes people to places that enhances their lives.

View:

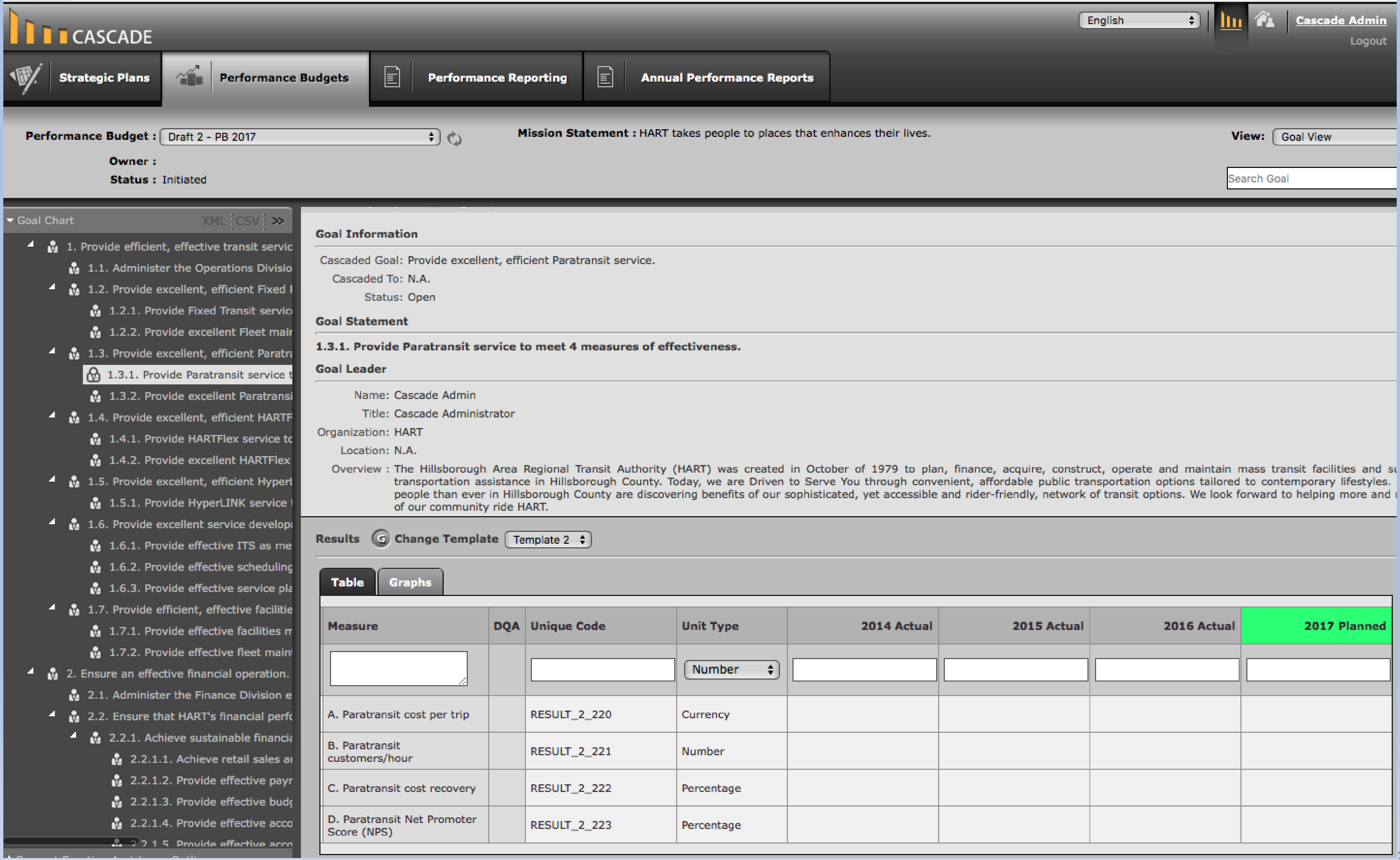
Goal Chart

- 1. General Strategic Area: Service Productivity
  - 1. The system is X% more productive as reflected in our Route Productivity index.
    - 1.1. Achieve 3 fixed route goals.
    - 1.2. Achieve 3 paratransit goals.
    - 1.3. Achieve 3 HARTFlex goals.
    - 1.4. Achieve 3 Hyperlink goals.
- 2. General Strategic Area: Sustainable Financial Performance
  - 2. Allocate $X Million to fund balance consistent with our plan.
    - 2.1. Annual net revenue.
    - 2.2. Multi-year projected net revenue (5-year).
    - 2.3. Number of days cash reserve.
    - 2.4. Year-end fund balance.
    - 2.5. Self-generated revenue.
- 3. General Strategic Area: Community Connection
  - 3. X% of the community believes HART delivers value.
- 4. General Strategic Area: Excellence in Customer Service
  - 4. Our customers will embrace our service with a Net Promoter Score (NPS) of 35.
    - 4.1. Fixed route NPS.
    - 4.2. Paratransit NPS.
    - 4.3. HARTFlex NPS.
    - 4.4. Hyperlink NPS.
    - 4.5. Fixed route on-time performance.
    - 4.6. Perception of safety and security.
- 5. General Strategic Area: Employee Success
  - 5. Our employees will have an engagement level of X%.
    - 5.1. Percent of employee performance goals achieved.
    - 5.2. Percent of employees who feel HART is an industry leader in innovation.
    - 5.3. Training hours per employee.



Goal Chart

- 1. Provide efficient, effective transit service.
  - 1.1. Administer the Operations Division effectively.
  - 1.2. Provide excellent, efficient Fixed Route service.
    - 1.2.1. Provide Fixed Transit service to meet 4 measures of effectiveness.
    - 1.2.2. Provide excellent Fleet maintenance as measured by . . . .
  - 1.3. Provide excellent, efficient Paratransit service.
    - 1.3.1. Provide Paratransit service to meet 4 measures of effectiveness.
    - 1.3.2. Provide excellent Paratransit maintenance as measured by . . .
  - 1.4. Provide excellent, efficient HARTFlex service.
    - 1.4.1. Provide HARTFlex service to meet 4 measures of effectiveness.
    - 1.4.2. Provide excellent HARTFlex maintenance as measured by . . . .
  - 1.5. Provide excellent, efficient HyperLINK service.
    - 1.5.1. Provide HyperLINK service to meet 4 measures of effectiveness.
  - 1.6. Provide excellent service development.
    - 1.6.1. Provide effective ITS as measure by . . .
    - 1.6.2. Provide effective scheduling as measured by . . .
    - 1.6.3. Provide effective service planning as measured by . . .
  - 1.7. Provide efficient, effective facilities and fleet maintenance.
    - 1.7.1. Provide effective facilities maintenance as measured by . . .
    - 1.7.2. Provide effective fleet maintenance as measured by . . .



Performance Budget : Draft 2 - PB 2017

Owner :

Status : Initiated

Mission Statement : HART takes people to places that enhances their lives.

View: Goal View

- 1. Provide efficient, effective transit servic
  - 1.1. Administer the Operations Divisio
  - 1.2. Provide excellent, efficient Fixed I
    - 1.2.1. Provide Fixed Transit servic
    - 1.2.2. Provide excellent Fleet mair
  - 1.3. Provide excellent, efficient Paratra
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    - 1.3.2. Provide excellent Paratransi
  - 1.4. Provide excellent, efficient HARTF
    - 1.4.1. Provide HARTFlex service tc
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  - 1.5. Provide excellent, efficient Hyperl
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  - 1.6. Provide excellent service developi
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    - 1.6.2. Provide effective scheduling
    - 1.6.3. Provide effective service pla
  - 1.7. Provide efficient, effective facilitie
    - 1.7.1. Provide effective facilities m
    - 1.7.2. Provide effective fleet maint
- 2. Ensure an effective financial operation.
  - 2.1. Administer the Finance Division e
  - 2.2. Ensure that HART's financial perfo
    - 2.2.1. Achieve sustainable financia
      - 2.2.1.1. Achieve retail sales ar
      - 2.2.1.2. Provide effective payr
      - 2.2.1.3. Provide effective budg
      - 2.2.1.4. Provide effective acco
      - 2.2.1.5. Provide effective acco

Goal Information

Cascaded Goal: Provide excellent, efficient Paratransit service.
Cascaded To: N.A.
Status: Open

Goal Statement

1.3.1. Provide Paratransit service to meet 4 measures of effectiveness.

Goal Leader

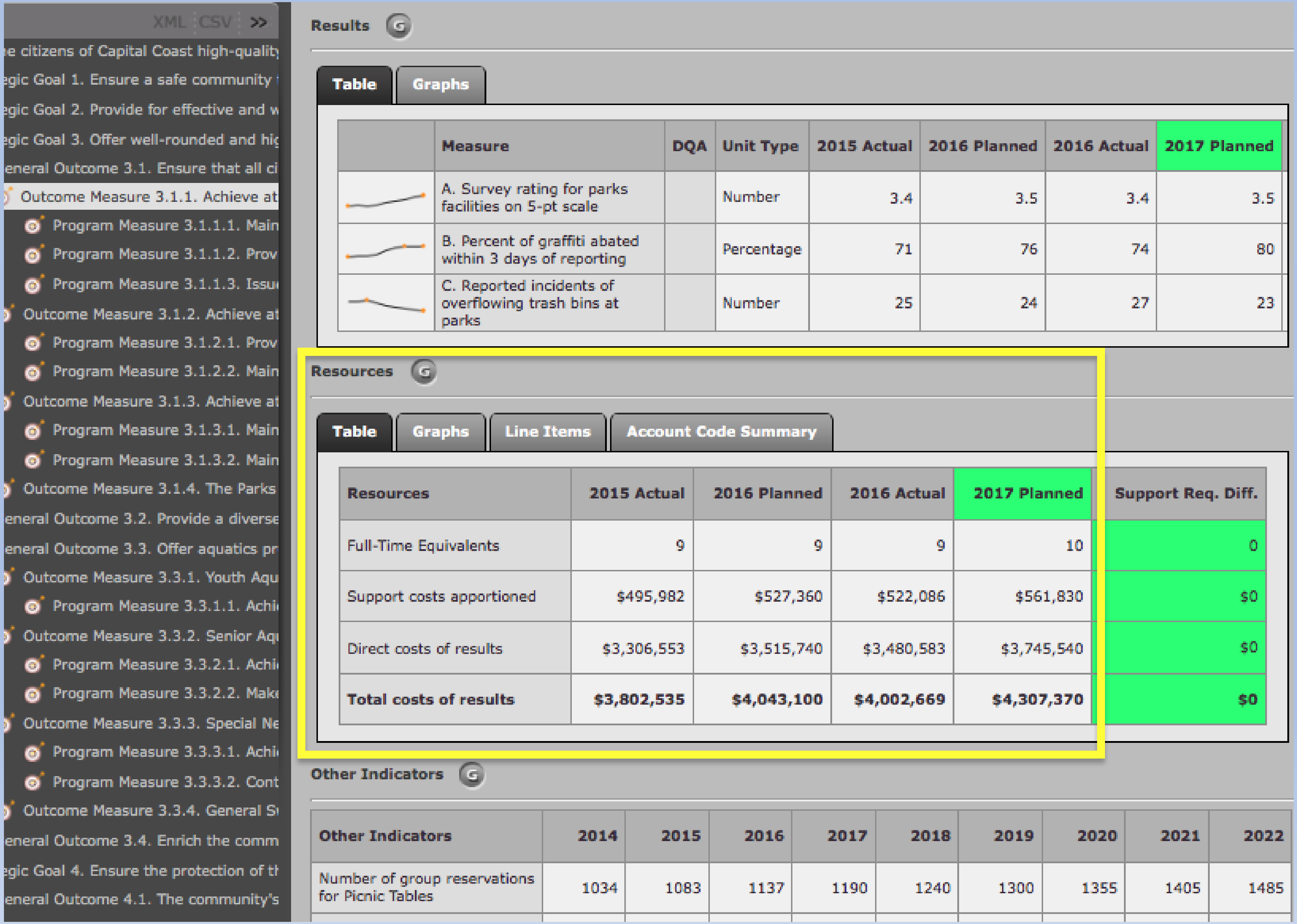
Name: Cascade Admin
Title: Cascade Administrator
Organization: HART
Location: N.A.
Overview : The Hillsborough Area Regional Transit Authority (HART) was created in October of 1979 to plan, finance, acquire, construct, operate and maintain mass transit facilities and s transportation assistance in Hillsborough County. Today, we are Driven to Serve You through convenient, affordable public transportation options tailored to contemporary lifestyles. people than ever in Hillsborough County are discovering benefits of our sophisticated, yet accessible and rider-friendly, network of transit options. We look forward to helping more and of our community ride HART.

Results Change Template: Template 2

Measure	DQA	Unique Code	Unit Type	2014 Actual	2015 Actual	2016 Actual	2017 Planned
			Number				
A. Paratransit cost per trip		RESULT_2_220	Currency				
B. Paratransit customers/hour		RESULT_2_221	Number				
C. Paratransit cost recovery		RESULT_2_222	Percentage				
D. Paratransit Net Promoter Score (NPS)		RESULT_2_223	Percentage				

Annual Performance/Operating Plan –> Performance Budget

1. Incorporate the Annual Performance Plan into a Performance Budgeting solution
2. Identify total budget costs for each goal or group of goals/measures – easiest start is if each is built around an existing Cost Center
3. Link these Performance Budget costs to their Line Item amounts



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gic Goal 2. Provide for effective and w
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eneral Outcome 4.1. The community's

Results

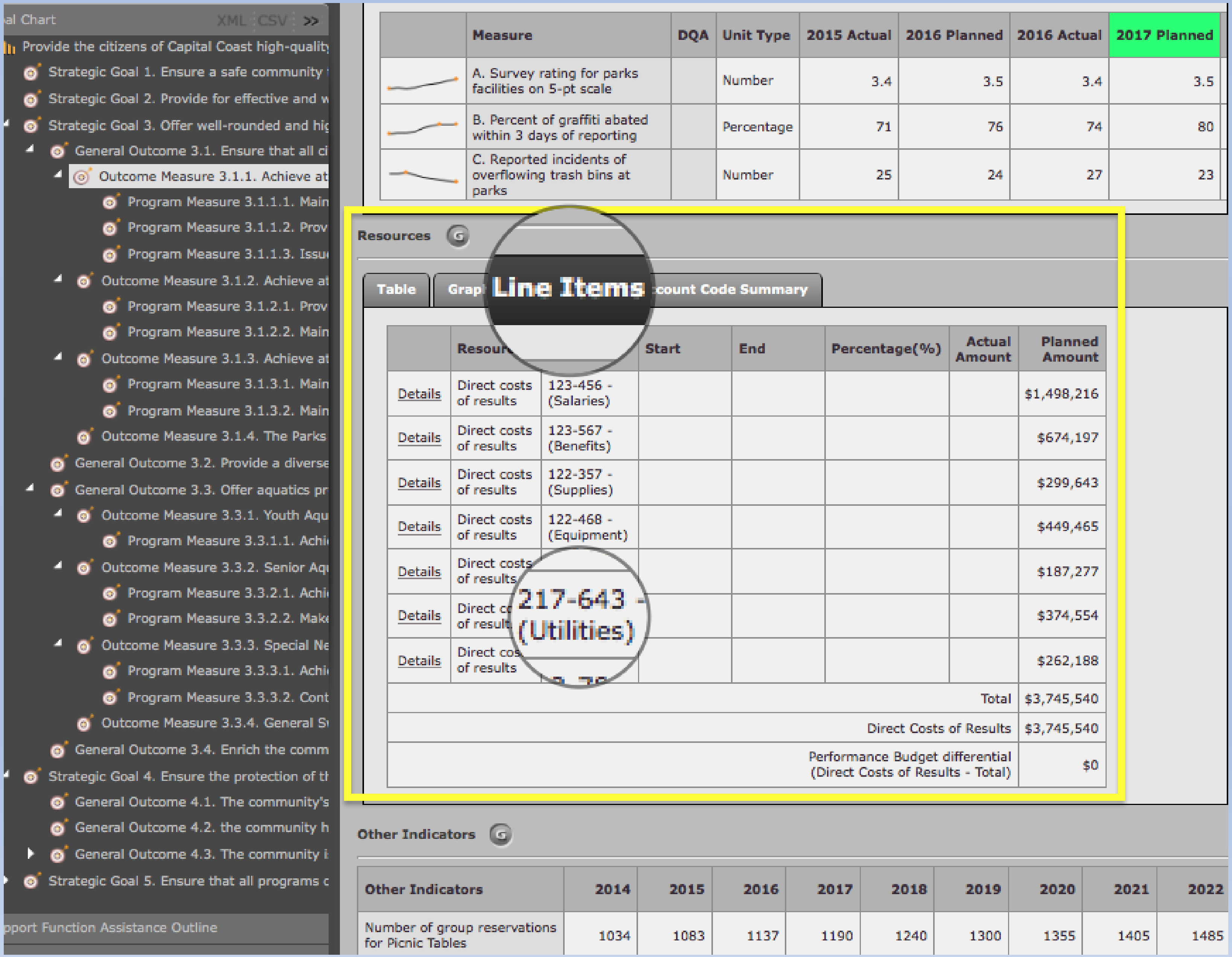
	Measure	DQA	Unit Type	2015 Actual	2016 Planned	2016 Actual	2017 Planned
	A. Survey rating for parks facilities on 5-pt scale		Number	3.4	3.5	3.4	3.5
	B. Percent of graffiti abated within 3 days of reporting		Percentage	71	76	74	80
	C. Reported incidents of overflowing trash bins at parks		Number	25	24	27	23

Resources

Resources	2015 Actual	2016 Planned	2016 Actual	2017 Planned	Support Req. Diff.
Full-Time Equivalents	9	9	9	10	0
Support costs apportioned	$495,982	$527,360	$522,086	$561,830	$0
Direct costs of results	$3,306,553	$3,515,740	$3,480,583	$3,745,540	$0
Total costs of results	**$3,802,535**	**$4,043,100**	**$4,002,669**	**$4,307,370**	**$0**

Other Indicators

Other Indicators	2014	2015	2016	2017	2018	2019	2020	2021	2022
Number of group reservations for Picnic Tables	1034	1083	1137	1190	1240	1300	1355	1405	1485



- Provide the citizens of Capital Coast high-quality
  - Strategic Goal 1. Ensure a safe community
  - Strategic Goal 2. Provide for effective and w
  - Strategic Goal 3. Offer well-rounded and hig
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        - Program Measure 3.3.1.1. Achi
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  - Strategic Goal 5. Ensure that all programs c

pport Function Assistance Outline

	Measure	DQA	Unit Type	2015 Actual	2016 Planned	2016 Actual	2017 Planned
	A. Survey rating for parks facilities on 5-pt scale		Number	3.4	3.5	3.4	3.5
	B. Percent of graffiti abated within 3 days of reporting		Percentage	71	76	74	80
	C. Reported incidents of overflowing trash bins at parks		Number	25	24	27	23

Resources

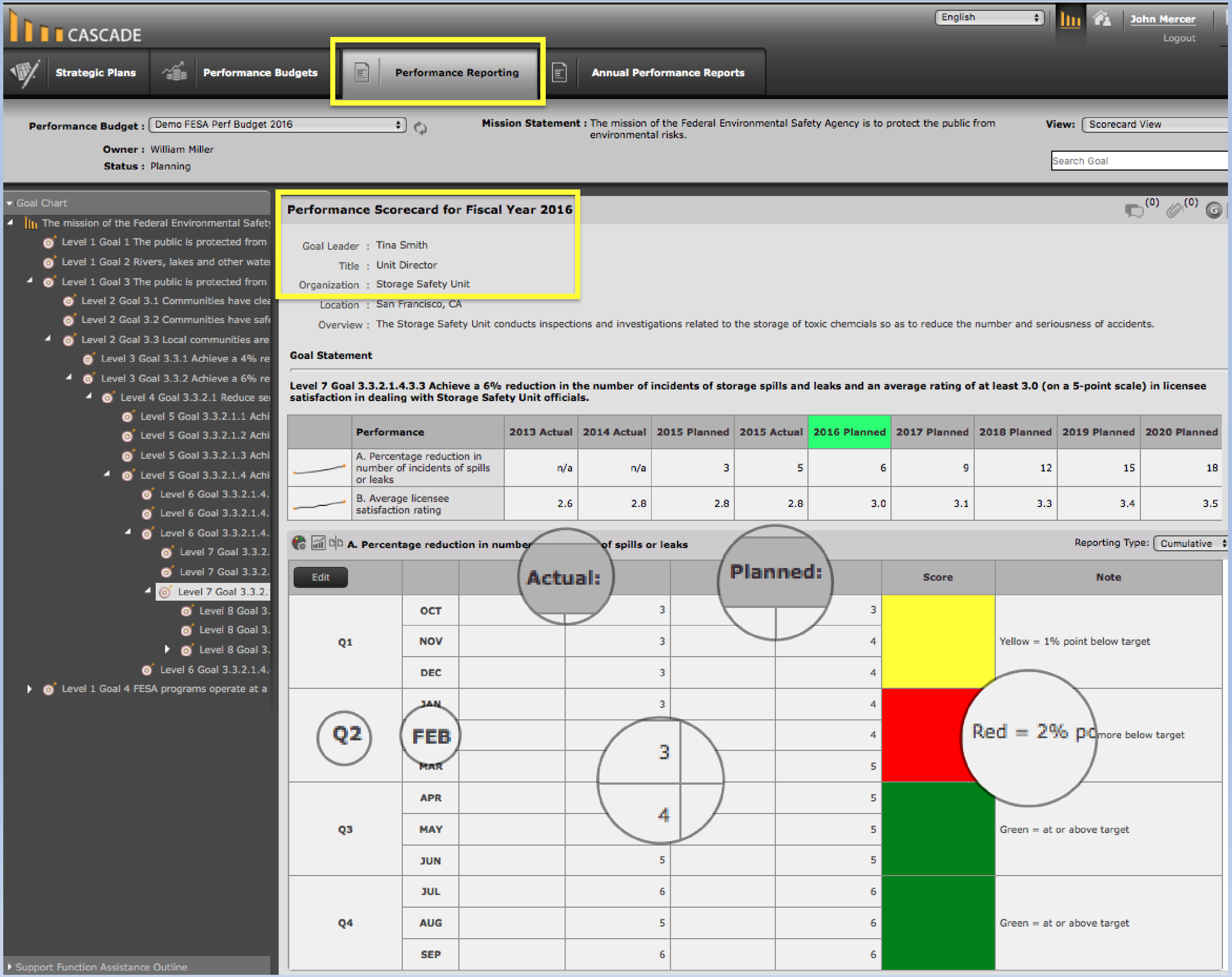
	Resou		Start	End	Percentage(%)	Actual Amount	Planned Amount
Details	Direct costs of results	123-456 - (Salaries)					$1,498,216
Details	Direct costs of results	123-567 - (Benefits)					$674,197
Details	Direct costs of results	122-357 - (Supplies)					$299,643
Details	Direct costs of results	122-468 - (Equipment)					$449,465
Details	Direct costs of results						$187,277
Details	Direct c of result	217-643 - (Utilities)					$374,554
Details	Direct cos of results						$262,188
						Total	$3,745,540
						Direct Costs of Results	$3,745,540
						Performance Budget differential (Direct Costs of Results - Total)	$0

Other Indicators

Other Indicators	2014	2015	2016	2017	2018	2019	2020	2021	2022
Number of group reservations for Picnic Tables	1034	1083	1137	1190	1240	1300	1355	1405	1485

Performance Reporting & Monitoring

1. Set interim performance targets
    - Identify goal leadership responsibilities
2. Report results periodically
    - Include explanations
    - Dashboards are very useful for monitoring



Performance Budget : Demo FESA Perf Budget 2016

Owner : William Miller

Status : Planning

Mission Statement : The mission of the Federal Environmental Safety Agency is to protect the public from environmental risks.

View: Scorecard View

- The mission of the Federal Environmental Safety
  - Level 1 Goal 1 The public is protected from
  - Level 1 Goal 2 Rivers, lakes and other wate
  - Level 1 Goal 3 The public is protected from
    - Level 2 Goal 3.1 Communities have clea
    - Level 2 Goal 3.2 Communities have safe
    - Level 2 Goal 3.3 Local communities are
      - Level 3 Goal 3.3.1 Achieve a 4% re
      - Level 3 Goal 3.3.2 Achieve a 6% re
        - Level 4 Goal 3.3.2.1 Reduce se
          - Level 5 Goal 3.3.2.1.1 Achi
          - Level 5 Goal 3.3.2.1.2 Achi
          - Level 5 Goal 3.3.2.1.3 Achi
          - Level 5 Goal 3.3.2.1.4 Achi
            - Level 6 Goal 3.3.2.1.4.
            - Level 6 Goal 3.3.2.1.4.
            - Level 6 Goal 3.3.2.1.4.
              - Level 7 Goal 3.3.2.
              - Level 7 Goal 3.3.2.
              - Level 7 Goal 3.3.2.
                - Level 8 Goal 3.
                - Level 8 Goal 3.
                - Level 8 Goal 3.
            - Level 6 Goal 3.3.2.1.4.
  - Level 1 Goal 4 FESA programs operate at a

Performance Scorecard for Fiscal Year 2016

Goal Leader : Tina Smith
Title : Unit Director
Organization : Storage Safety Unit
Location : San Francisco, CA
Overview : The Storage Safety Unit conducts inspections and investigations related to the storage of toxic chemcials so as to reduce the number and seriousness of accidents.

Goal Statement

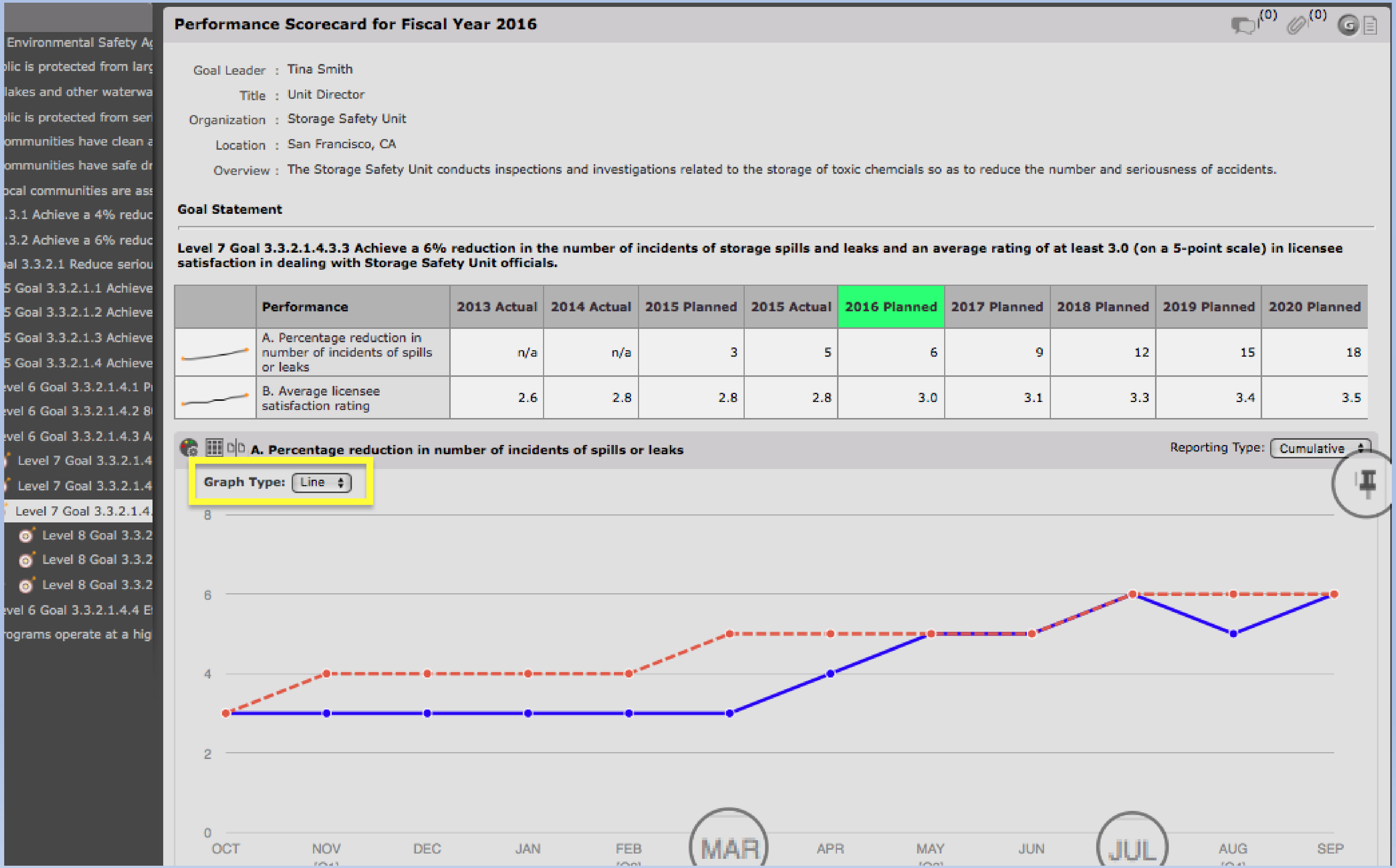
Level 7 Goal 3.3.2.1.4.3.3 Achieve a 6% reduction in the number of incidents of storage spills and leaks and an average rating of at least 3.0 (on a 5-point scale) in licensee satisfaction in dealing with Storage Safety Unit officials.

Performance	2013 Actual	2014 Actual	2015 Planned	2015 Actual	2016 Planned	2017 Planned	2018 Planned	2019 Planned	2020 Planned
A. Percentage reduction in number of incidents of spills or leaks	n/a	n/a	3	5	6	9	12	15	18
B. Average licensee satisfaction rating	2.6	2.8	2.8	2.8	3.0	3.1	3.3	3.4	3.5

A. Percentage reduction in number of spills or leaks

Reporting Type: Cumulative

Edit		Actual:	Planned:	Score	Note
Q1	OCT	3	3	🟨	Yellow = 1% point below target
	NOV	3	4		
	DEC	3	4		
Q2	JAN	3	4	🟥	Red = 2% po more below target
	FEB		4		
	MAR	3	5		
Q3	APR	4	5	🟩	Green = at or above target
	MAY		5		
	JUN	5	5		
Q4	JUL	6	6	🟩	Green = at or above target
	AUG	5	6		
	SEP	6	6		


Environmental Safety Ag
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lakes and other waterwa
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Level 7 Goal 3.3.2.1.4
Level 7 Goal 3.3.2.1.4.
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ograms operate at a hig
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Performance Scorecard for Fiscal Year 2016

Goal Leader : Tina Smith
Title : Unit Director
Organization : Storage Safety Unit
Location : San Francisco, CA
Overview : The Storage Safety Unit conducts inspections and investigations related to the storage of toxic chemcials so as to reduce the number and seriousness of accidents.

Goal Statement

Level 7 Goal 3.3.2.1.4.3.3 Achieve a 6% reduction in the number of incidents of storage spills and leaks and an average rating of at least 3.0 (on a 5-point scale) in licensee satisfaction in dealing with Storage Safety Unit officials.

	Performance	2013 Actual	2014 Actual	2015 Planned	2015 Actual	2016 Planned	2017 Planned	2018 Planned	2019 Planned	2020 Planned
	A. Percentage reduction in number of incidents of spills or leaks	n/a	n/a	3	5	6	9	12	15	18
	B. Average licensee satisfaction rating	2.6	2.8	2.8	2.8	3.0	3.1	3.3	3.4	3.5

A. Percentage reduction in number of incidents of spills or leaks

Reporting Type: Cumulative

Graph Type: Line

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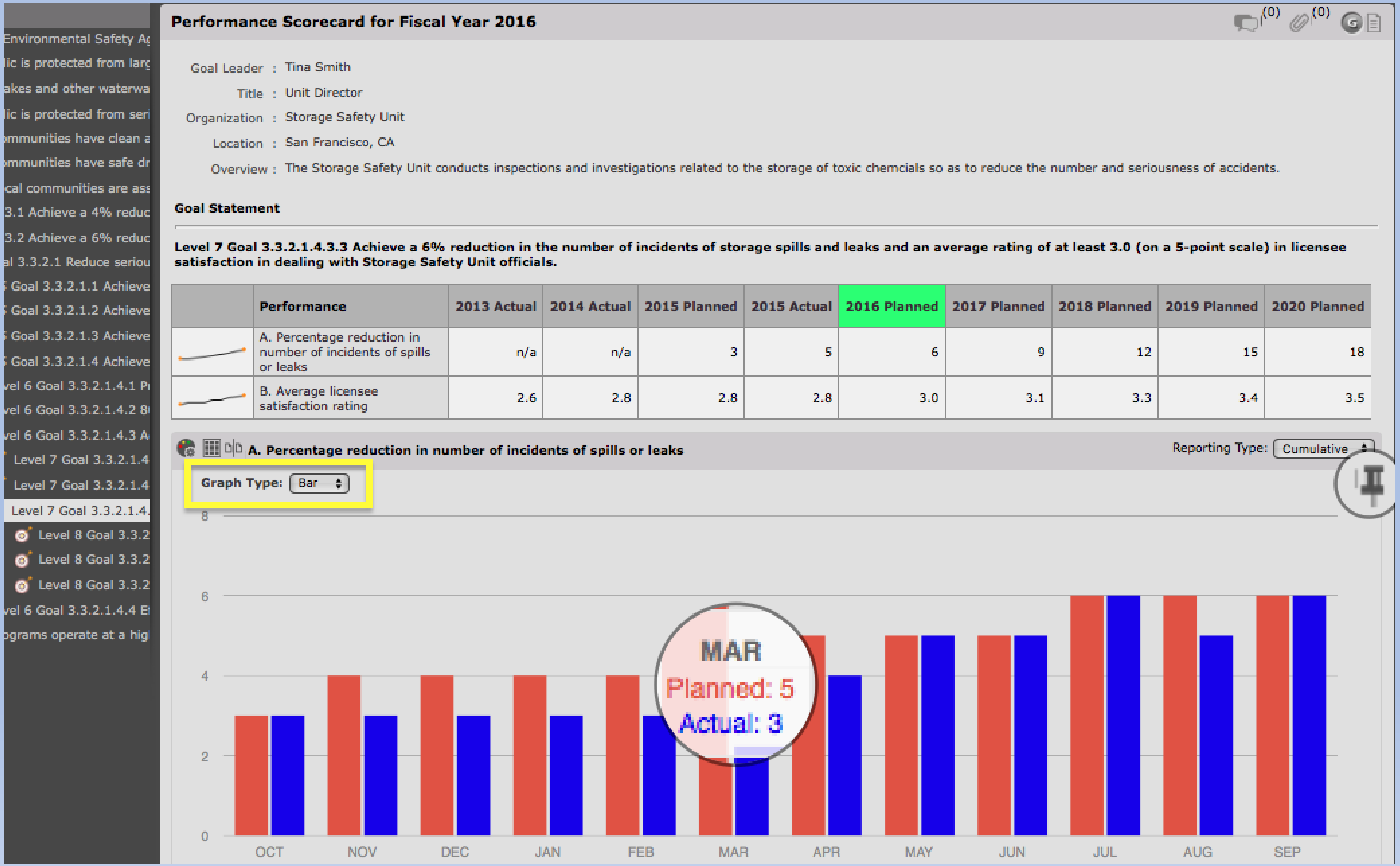

Environmental Safety Ag
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vel 6 Goal 3.3.2.1.4.4 E
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Performance Scorecard for Fiscal Year 2016

Goal Leader : Tina Smith
Title : Unit Director
Organization : Storage Safety Unit
Location : San Francisco, CA
Overview : The Storage Safety Unit conducts inspections and investigations related to the storage of toxic chemcials so as to reduce the number and seriousness of accidents.

Goal Statement

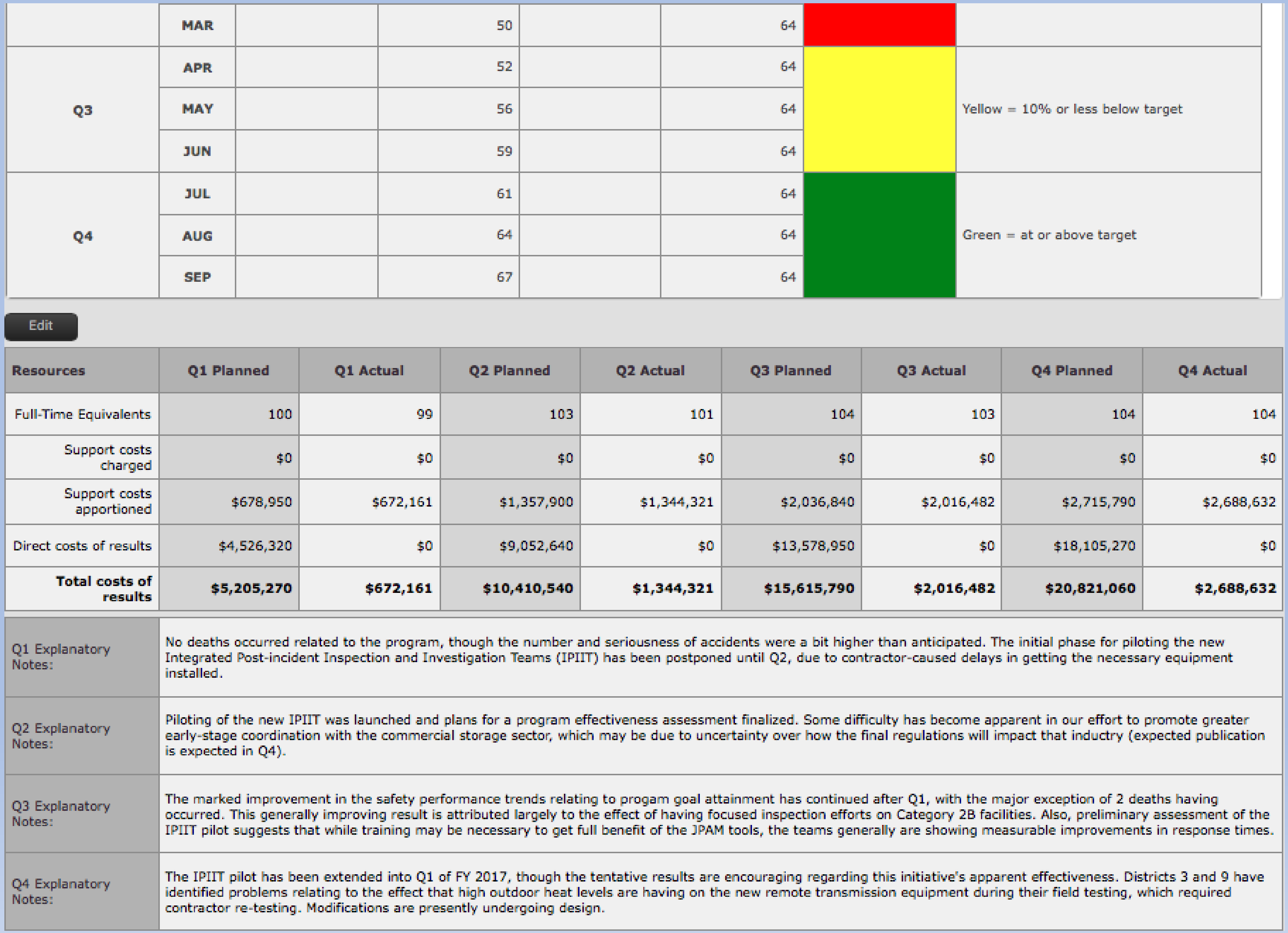
Level 7 Goal 3.3.2.1.4.3.3 Achieve a 6% reduction in the number of incidents of storage spills and leaks and an average rating of at least 3.0 (on a 5-point scale) in licensee satisfaction in dealing with Storage Safety Unit officials.

	Performance	2013 Actual	2014 Actual	2015 Planned	2015 Actual	2016 Planned	2017 Planned	2018 Planned	2019 Planned	2020 Planned
	A. Percentage reduction in number of incidents of spills or leaks	n/a	n/a	3	5	6	9	12	15	18
	B. Average licensee satisfaction rating	2.6	2.8	2.8	2.8	3.0	3.1	3.3	3.4	3.5

A. Percentage reduction in number of incidents of spills or leaks

Reporting Type: Cumulative

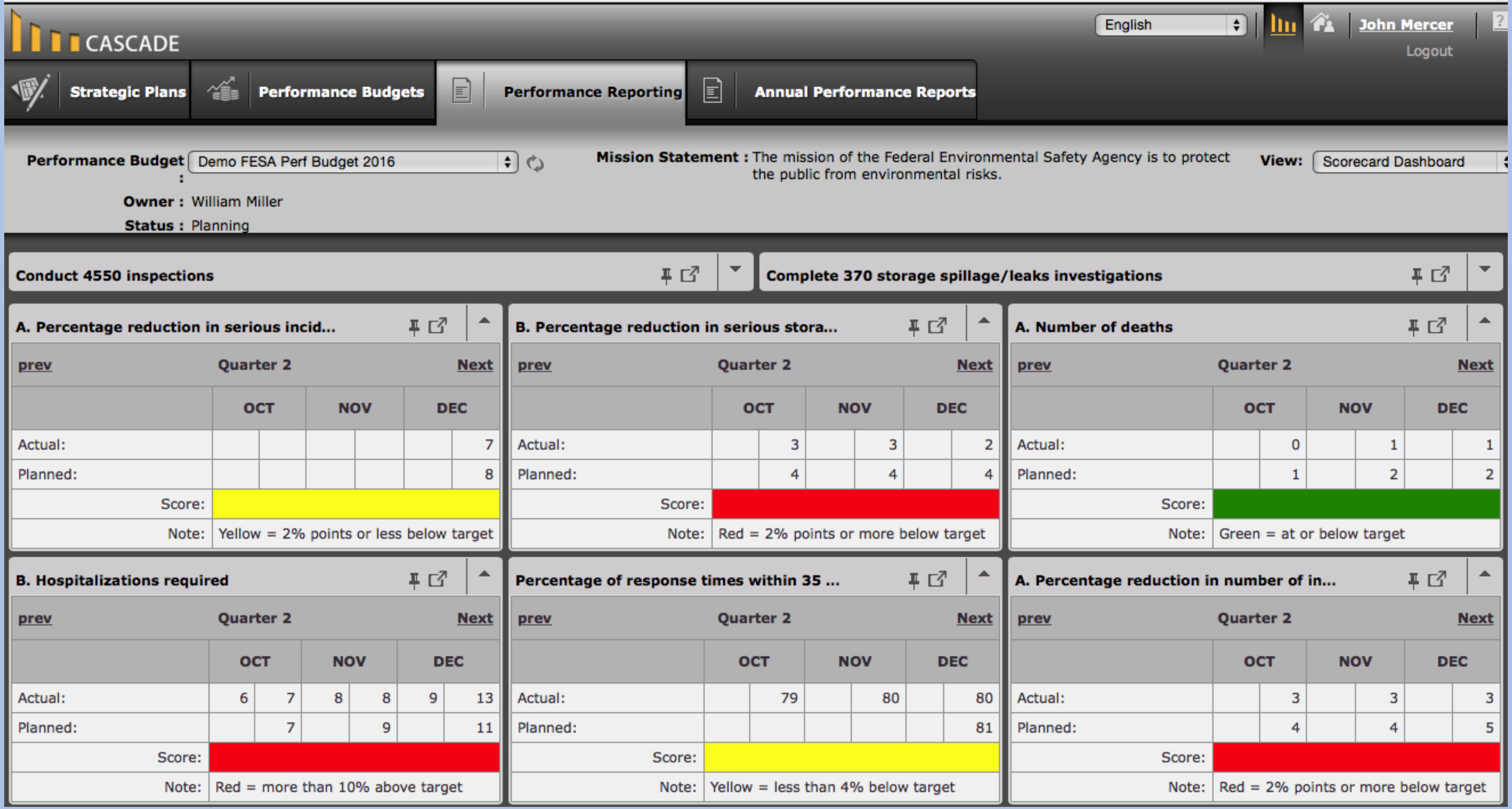
Graph Type: Bar



	MAR		50		64	🟥	
Q3	**APR**		52		64	🟨	Yellow = 10% or less below target
	MAY		56		64		
	JUN		59		64		
Q4	**JUL**		61		64	🟩	Green = at or above target
	AUG		64		64		
	SEP		67		64		

Resources	**Q1 Planned**	**Q1 Actual**	**Q2 Planned**	**Q2 Actual**	**Q3 Planned**	**Q3 Actual**	**Q4 Planned**	**Q4 Actual**
Full-Time Equivalents	100	99	103	101	104	103	104	104
Support costs charged	$0	$0	$0	$0	$0	$0	$0	$0
Support costs apportioned	$678,950	$672,161	$1,357,900	$1,344,321	$2,036,840	$2,016,482	$2,715,790	$2,688,632
Direct costs of results	$4,526,320	$0	$9,052,640	$0	$13,578,950	$0	$18,105,270	$0
Total costs of results	**$5,205,270**	**$672,161**	**$10,410,540**	**$1,344,321**	**$15,615,790**	**$2,016,482**	**$20,821,060**	**$2,688,632**

Q1 Explanatory Notes:	No deaths occurred related to the program, though the number and seriousness of accidents were a bit higher than anticipated. The initial phase for piloting the new Integrated Post-incident Inspection and Investigation Teams (IPIIT) has been postponed until Q2, due to contractor-caused delays in getting the necessary equipment installed.
Q2 Explanatory Notes:	Piloting of the new IPIIT was launched and plans for a program effectiveness assessment finalized. Some difficulty has become apparent in our effort to promote greater early-stage coordination with the commercial storage sector, which may be due to uncertainty over how the final regulations will impact that inductry (expected publication is expected in Q4).
Q3 Explanatory Notes:	The marked improvement in the safety performance trends relating to progam goal attainment has continued after Q1, with the major exception of 2 deaths having occurred. This generally improving result is attributed largely to the effect of having focused inspection efforts on Category 2B facilities. Also, preliminary assessment of the IPIIT pilot suggests that while training may be necessary to get full benefit of the JPAM tools, the teams generally are showing measurable improvements in response times.
Q4 Explanatory Notes:	The IPIIT pilot has been extended into Q1 of FY 2017, though the tentative results are encouraging regarding this initiative's apparent effectiveness. Districts 3 and 9 have identified problems relating to the effect that high outdoor heat levels are having on the new remote transmission equipment during their field testing, which required contractor re-testing. Modifications are presently undergoing design.


CASCADE
English
John Mercer
Logout
Strategic Plans
Performance Budgets
Performance Reporting
Annual Performance Reports

Performance Budget : Demo FESA Perf Budget 2016

Owner : William Miller

Status : Planning

Mission Statement : The mission of the Federal Environmental Safety Agency is to protect the public from environmental risks.

View: Scorecard Dashboard

Conduct 4550 inspections

Complete 370 storage spillage/leaks investigations

A. Percentage reduction in serious incid...

prev	Quarter 2					Next
	OCT		NOV		DEC	
Actual:						7
Planned:						8
Score:	🟨					
Note:	Yellow = 2% points or less below target					

B. Percentage reduction in serious stora...

prev	Quarter 2					Next
	OCT		NOV		DEC	
Actual:		3		3		2
Planned:		4		4		4
Score:	🟥					
Note:	Red = 2% points or more below target					

A. Number of deaths

prev	Quarter 2					Next
	OCT		NOV		DEC	
Actual:		0		1		1
Planned:		1		2		2
Score:	🟩					
Note:	Green = at or below target					

B. Hospitalizations required

prev	Quarter 2					Next
	OCT		NOV		DEC	
Actual:	6	7	8	8	9	13
Planned:		7		9		11
Score:	🟥					
Note:	Red = more than 10% above target					

Percentage of response times within 35 ...

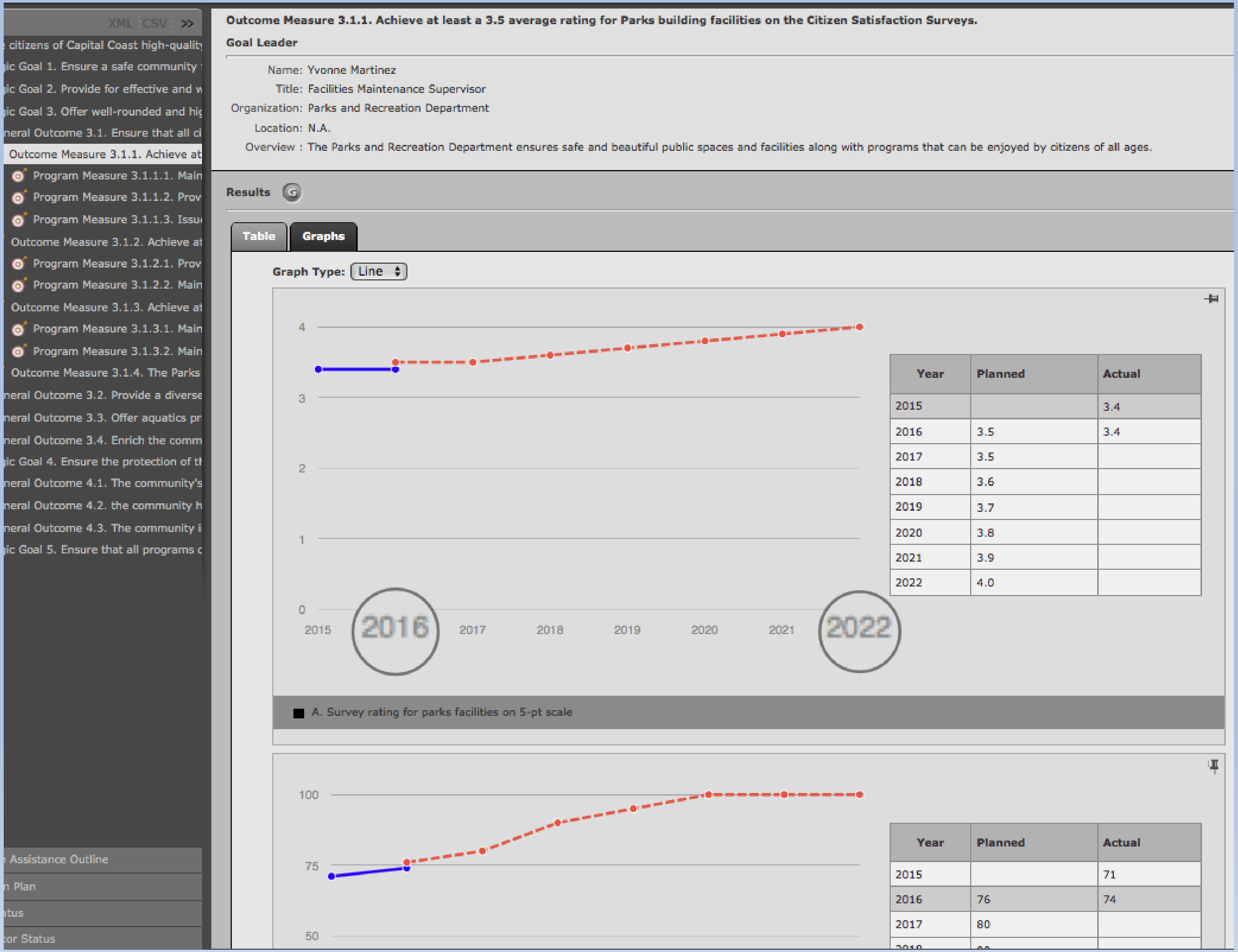
prev	Quarter 2					Next
	OCT		NOV		DEC	
Actual:		79		80		80
Planned:						81
Score:	🟨					
Note:	Yellow = less than 4% below target					

A. Percentage reduction in number of in...

prev	Quarter 2					Next
	OCT		NOV		DEC	
Actual:		3		3		3
Planned:		4		4		5
Score:	🟥					
Note:	Red = 2% points or more below target					

Performance Reporting & Monitoring

3. Track performance trends over time
    - Year-to-year results
    - Monthly, quarterly, etc. (Planned vs. Actual)
    - Compare performance trends by program, by location, etc.
    - Look for interrelationships in performance (e.g., when one goes up, another goes down)



citizens of Capital Coast high-quality
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ic Goal 4. Ensure the protection of th
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neral Outcome 4.2. the community h
neral Outcome 4.3. The community i
ic Goal 5. Ensure that all programs c

Outcome Measure 3.1.1. Achieve at least a 3.5 average rating for Parks building facilities on the Citizen Satisfaction Surveys.

Goal Leader

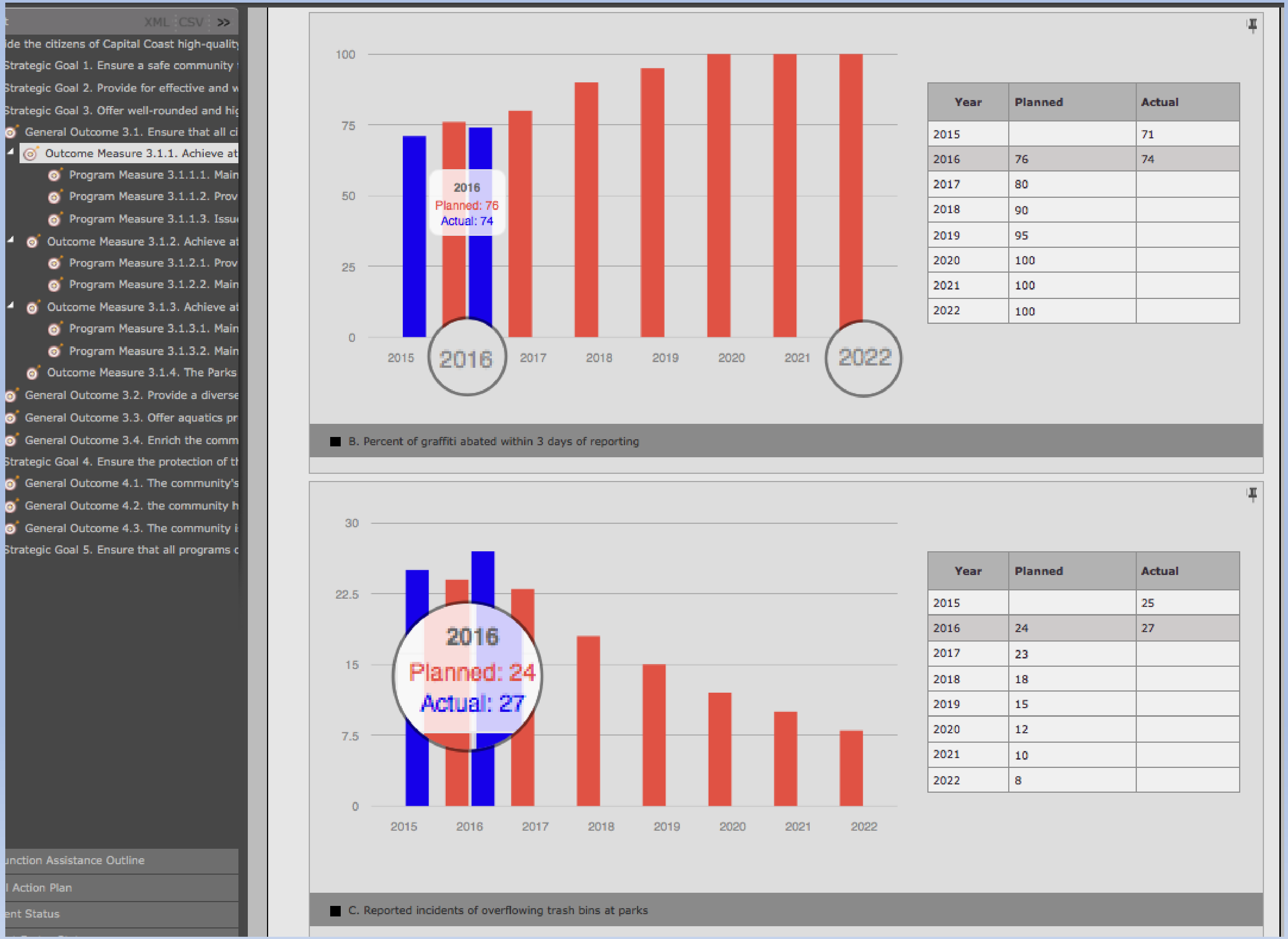
Name: Yvonne Martinez
Title: Facilities Maintenance Supervisor
Organization: Parks and Recreation Department
Location: N.A.
Overview : The Parks and Recreation Department ensures safe and beautiful public spaces and facilities along with programs that can be enjoyed by citizens of all ages.

Graph Type: Line

Year	Planned	Actual
2015		3.4
2016	3.5	3.4
2017	3.5	
2018	3.6	
2019	3.7	
2020	3.8	
2021	3.9	
2022	4.0	

■ A. Survey rating for parks facilities on 5-pt scale

Year	Planned	Actual
2015		71
2016	76	74
2017	80	



ide the citizens of Capital Coast high-quality
Strategic Goal 1. Ensure a safe community
Strategic Goal 2. Provide for effective and w
Strategic Goal 3. Offer well-rounded and hig
- General Outcome 3.1. Ensure that all ci
  - Outcome Measure 3.1.1. Achieve at
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  - Outcome Measure 3.1.2. Achieve at
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    - Program Measure 3.1.3.1. Main
    - Program Measure 3.1.3.2. Main
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Strategic Goal 4. Ensure the protection of th
- General Outcome 4.1. The community's
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Strategic Goal 5. Ensure that all programs c

unction Assistance Outline
l Action Plan
ent Status

100
75
50
25
0
2015
2016
2017
2018
2019
2020
2021
2022
2016
Planned: 76
Actual: 74

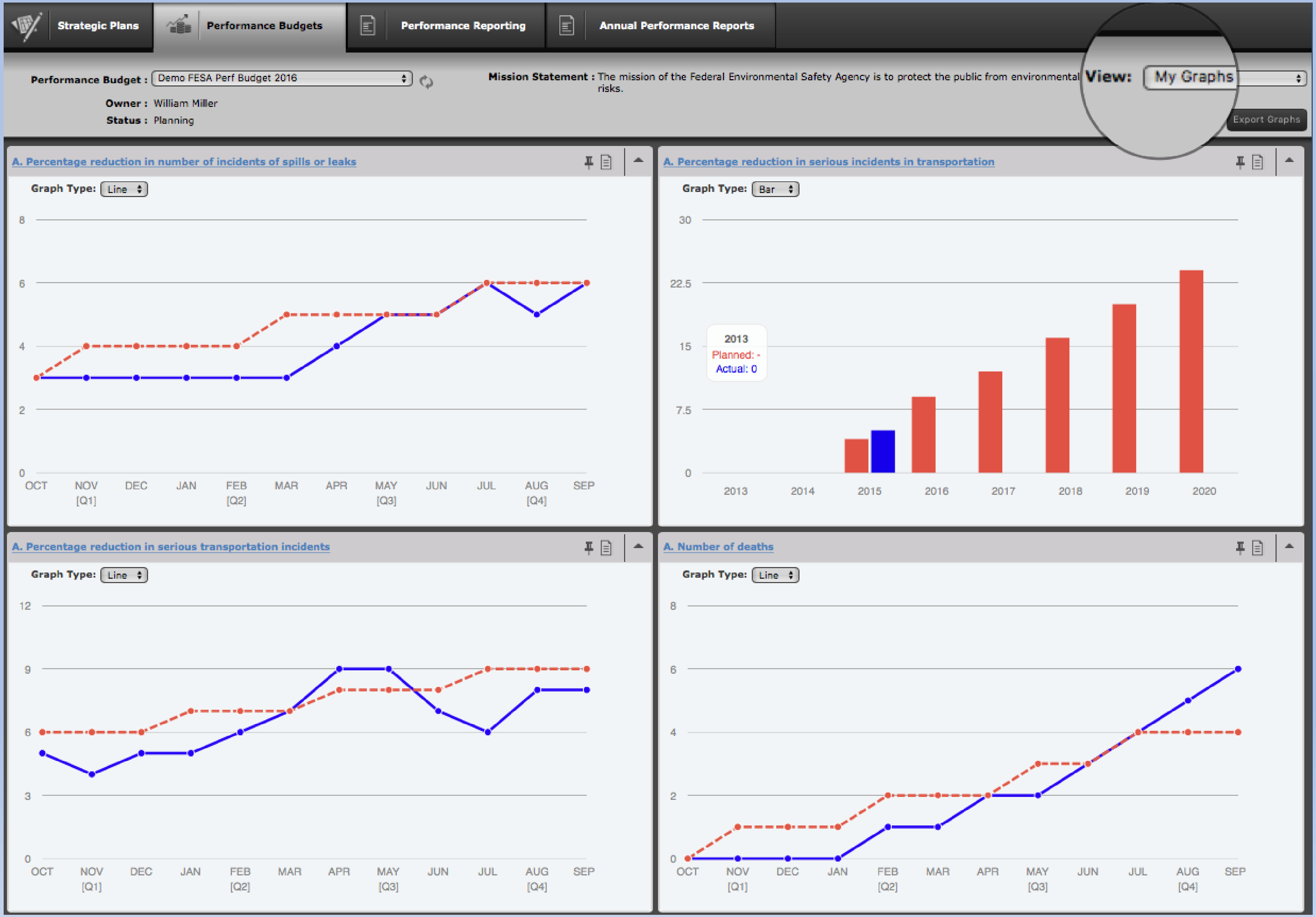
Year	Planned	Actual
2015		71
2016	76	74
2017	80	
2018	90	
2019	95	
2020	100	
2021	100	
2022	100	

■ B. Percent of graffiti abated within 3 days of reporting

30
22.5
15
7.5
0
2015
2016
2017
2018
2019
2020
2021
2022
2016
Planned: 24
Actual: 27

Year	Planned	Actual
2015		25
2016	24	27
2017	23	
2018	18	
2019	15	
2020	12	
2021	10	
2022	8	

■ C. Reported incidents of overflowing trash bins at parks



Performance Budget : Demo FESA Perf Budget 2016

Owner : William Miller

Status : Planning

Mission Statement : The mission of the Federal Environmental Safety Agency is to protect the public from environmental risks.

View: My Graphs

A. Percentage reduction in number of incidents of spills or leaks

Graph Type: Line

A. Percentage reduction in serious incidents in transportation

Graph Type: Bar

2013
Planned: -
Actual: 0

A. Percentage reduction in serious transportation incidents

Graph Type: Line

A. Number of deaths

Graph Type: Line

Strategic Plans
Performance Budgets
Performance Reporting
Annual Performance Reports
Export Graphs
0
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OCT
NOV [Q1]
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AUG [Q4]
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7.5
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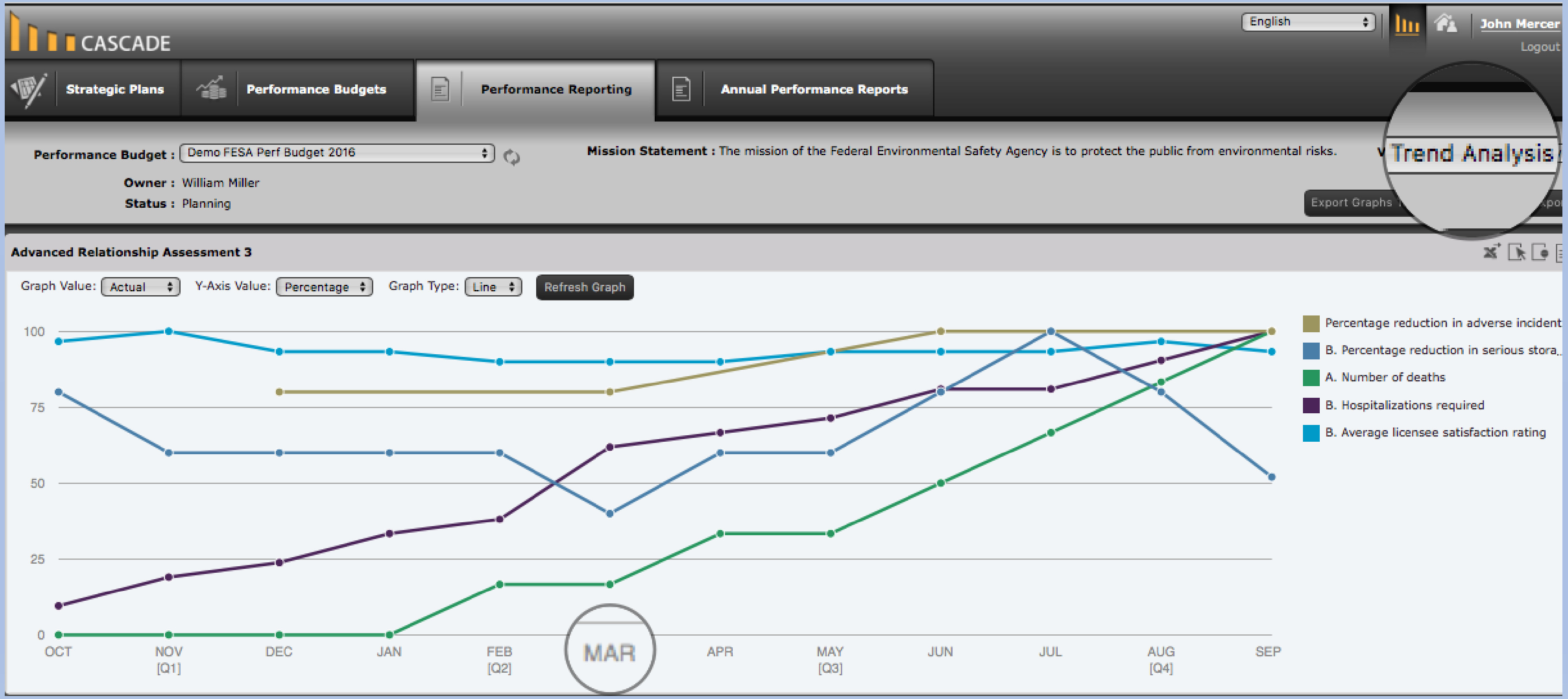
12


CASCADE
English
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Logout
Strategic Plans
Performance Budgets
Performance Reporting
Annual Performance Reports
Trend Analysis
Export Graphs
Refresh Graph
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OCT
NOV
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DEC
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FEB
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MAY
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JUN
JUL
AUG
[Q4]
SEP

Performance Budget : Demo FESA Perf Budget 2016

Owner : William Miller

Status : Planning

Mission Statement : The mission of the Federal Environmental Safety Agency is to protect the public from environmental risks.

Advanced Relationship Assessment 3

Graph Value: Actual

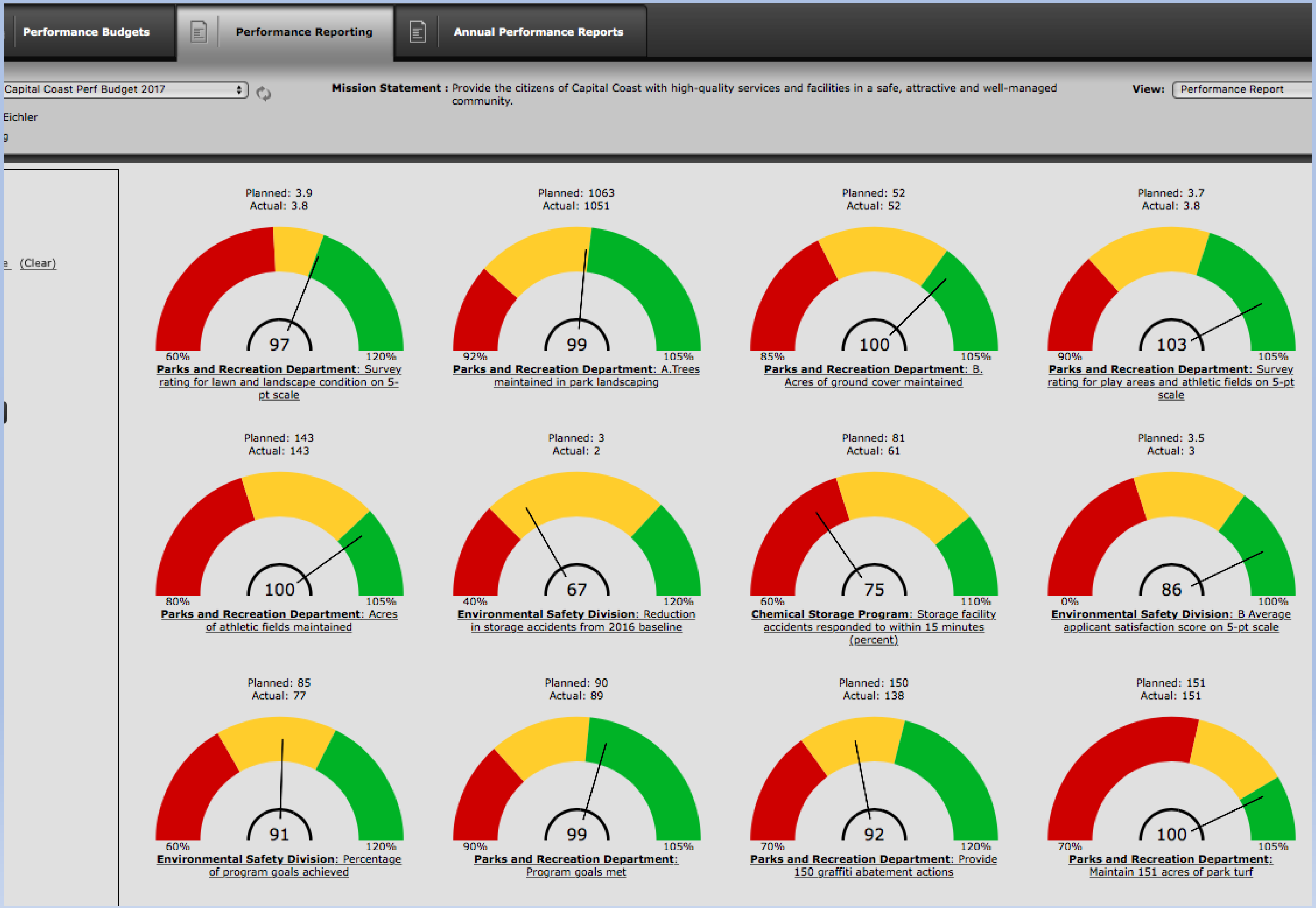
Y-Axis Value: Percentage

Graph Type: Line

- Percentage reduction in adverse incident
- B. Percentage reduction in serious stora...
- A. Number of deaths
- B. Hospitalizations required
- B. Average licensee satisfaction rating

Performance Reporting & Monitoring

4. Flag performance problems
    - Drill-down capability is essential to finding the source of the problem


Performance Budgets
Performance Reporting
Annual Performance Reports
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86
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91
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99
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105%
92
70%
120%
100
70%
105%

Capital Coast Perf Budget 2017

Eichler

Mission Statement : Provide the citizens of Capital Coast with high-quality services and facilities in a safe, attractive and well-managed community.

View: Performance Report

Planned: 3.9
Actual: 3.8
Parks and Recreation Department: Survey rating for lawn and landscape condition on 5-pt scale

Planned: 1063
Actual: 1051
Parks and Recreation Department: A.Trees maintained in park landscaping

Planned: 52
Actual: 52
Parks and Recreation Department: B. Acres of ground cover maintained

Planned: 3.7
Actual: 3.8
Parks and Recreation Department: Survey rating for play areas and athletic fields on 5-pt scale

Planned: 143
Actual: 143
Parks and Recreation Department: Acres of athletic fields maintained

Planned: 3
Actual: 2
Environmental Safety Division: Reduction in storage accidents from 2016 baseline

Planned: 81
Actual: 61
Chemical Storage Program: Storage facility accidents responded to within 15 minutes (percent)

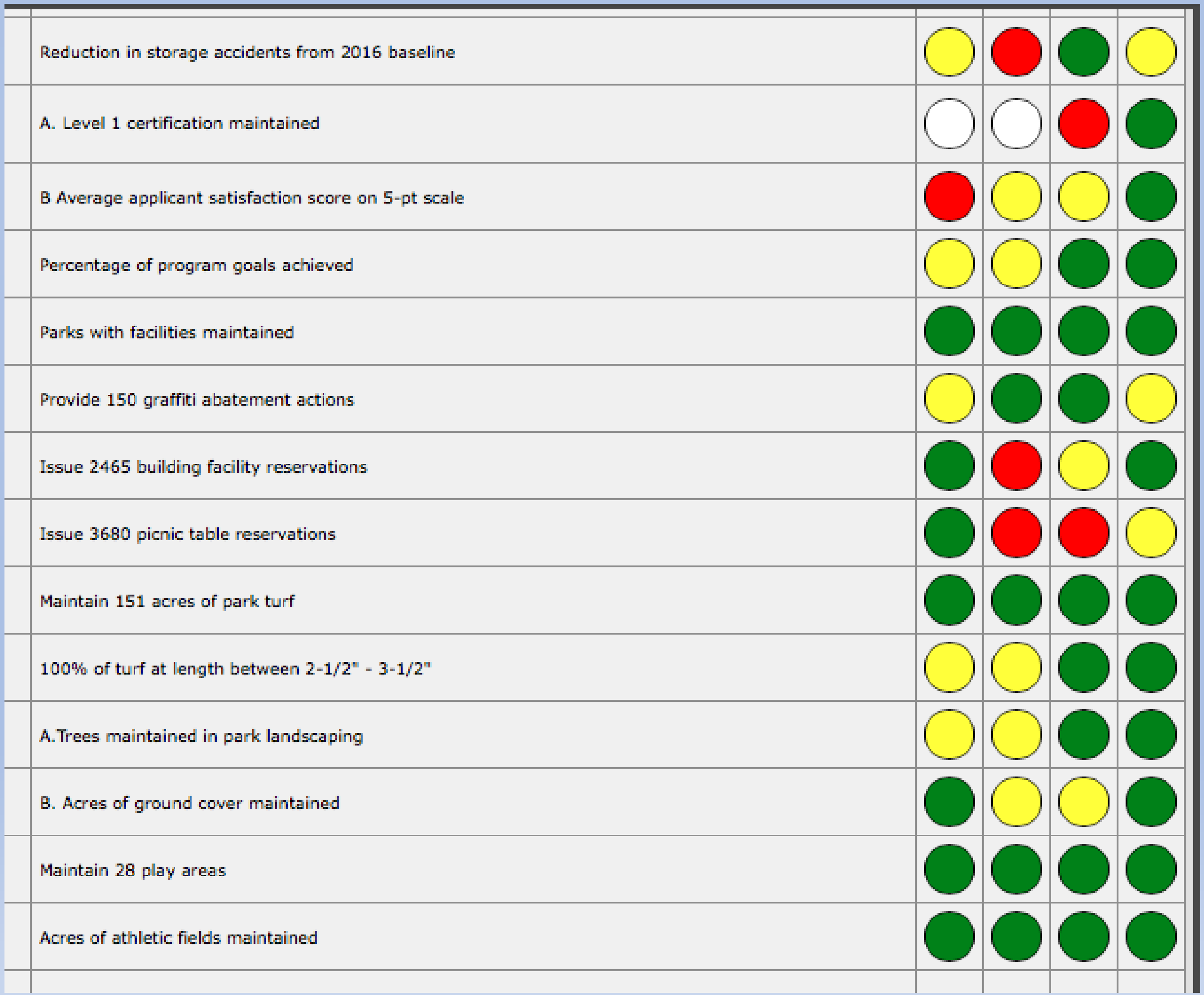
Planned: 3.5
Actual: 3
Environmental Safety Division: B Average applicant satisfaction score on 5-pt scale

Planned: 85
Actual: 77
Environmental Safety Division: Percentage of program goals achieved

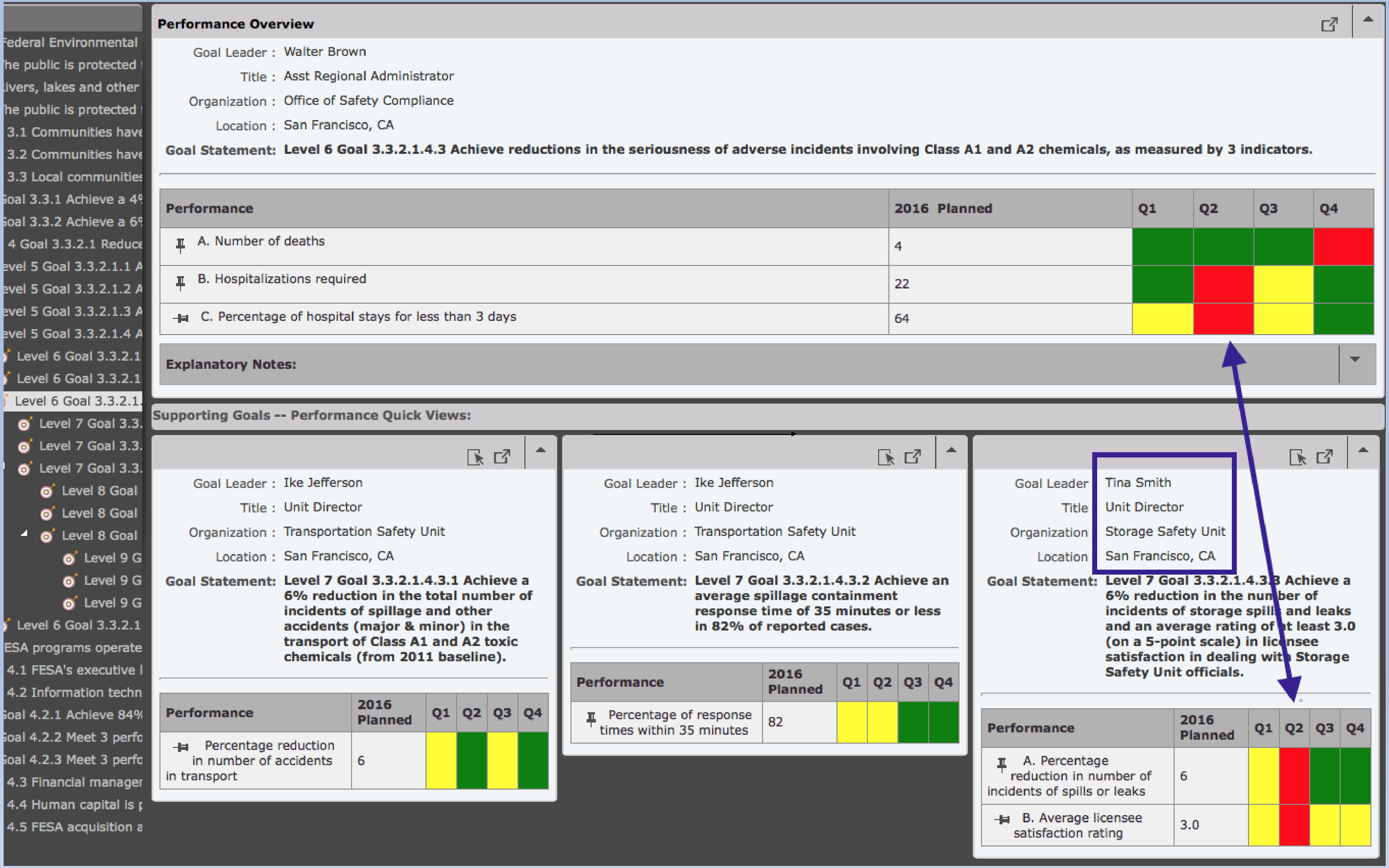
Planned: 90
Actual: 89
Parks and Recreation Department: Program goals met

Planned: 150
Actual: 138
Parks and Recreation Department: Provide 150 graffiti abatement actions

Planned: 151
Actual: 151
Parks and Recreation Department: Maintain 151 acres of park turf



	Reduction in storage accidents from 2016 baseline	🟡	🔴	🟢	🟡
	A. Level 1 certification maintained	⚪	⚪	🔴	🟢
	B Average applicant satisfaction score on 5-pt scale	🔴	🟡	🟡	🟢
	Percentage of program goals achieved	🟡	🟡	🟢	🟢
	Parks with facilities maintained	🟢	🟢	🟢	🟢
	Provide 150 graffiti abatement actions	🟡	🟢	🟢	🟡
	Issue 2465 building facility reservations	🟢	🔴	🟡	🟢
	Issue 3680 picnic table reservations	🟢	🔴	🔴	🟡
	Maintain 151 acres of park turf	🟢	🟢	🟢	🟢
	100% of turf at length between 2-1/2" - 3-1/2"	🟡	🟡	🟢	🟢
	A.Trees maintained in park landscaping	🟡	🟡	🟢	🟢
	B. Acres of ground cover maintained	🟢	🟡	🟡	🟢
	Maintain 28 play areas	🟢	🟢	🟢	🟢
	Acres of athletic fields maintained	🟢	🟢	🟢	🟢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3.2 Communities have
3.3 Local communities
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Level 6 Goal 3.3.2.1
ESA programs operate
4.1 FESA's executive l
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oal 4.2.2 Meet 3 perfo
oal 4.2.3 Meet 3 perfo
4.3 Financial manager
4.4 Human capital is p
4.5 FESA acquisition a

Performance Overview

Goal Leader : Walter Brown
Title : Asst Regional Administrator
Organization : Office of Safety Compliance
Location : San Francisco, CA

Goal Statement: Level 6 Goal 3.3.2.1.4.3 Achieve reductions in the seriousness of adverse incidents involving Class A1 and A2 chemicals, as measured by 3 indicators.

Performance	2016 Planned	Q1	Q2	Q3	Q4
A. Number of deaths	4	🟩	🟩	🟩	🟥
B. Hospitalizations required	22	🟩	🟥	🟨	🟩
C. Percentage of hospital stays for less than 3 days	64	🟨	🟥	🟨	🟩

Explanatory Notes:

Supporting Goals -- Performance Quick Views:

Goal Leader : Ike Jefferson
Title : Unit Director
Organization : Transportation Safety Unit
Location : San Francisco, CA

Goal Statement: Level 7 Goal 3.3.2.1.4.3.1 Achieve a 6% reduction in the total number of incidents of spillage and other accidents (major & minor) in the transport of Class A1 and A2 toxic chemicals (from 2011 baseline).

Performance	2016 Planned	Q1	Q2	Q3	Q4
Percentage reduction in number of accidents in transport	6	🟨	🟩	🟨	🟩

Goal Leader : Ike Jefferson
Title : Unit Director
Organization : Transportation Safety Unit
Location : San Francisco, CA

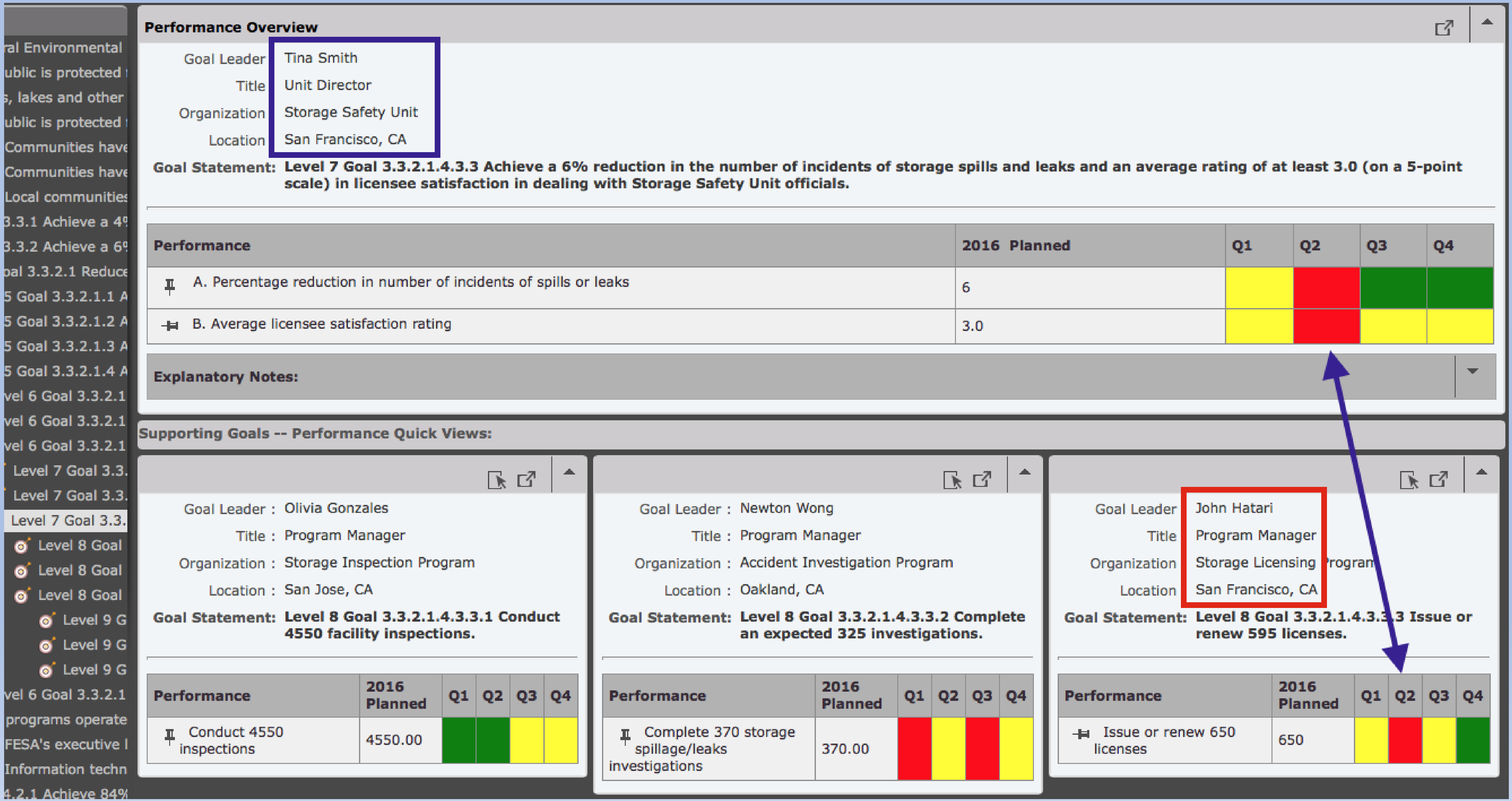
Goal Statement: Level 7 Goal 3.3.2.1.4.3.2 Achieve an average spillage containment response time of 35 minutes or less in 82% of reported cases.

Performance	2016 Planned	Q1	Q2	Q3	Q4
Percentage of response times within 35 minutes	82	🟨	🟨	🟩	🟩

Goal Leader Tina Smith
Title Unit Director
Organization Storage Safety Unit
Location San Francisco, CA

Goal Statement: Level 7 Goal 3.3.2.1.4.3.3 Achieve a 6% reduction in the number of incidents of storage spills and leaks and an average rating of at least 3.0 (on a 5-point scale) in licensee satisfaction in dealing with Storage Safety Unit officials.

Performance	2016 Planned	Q1	Q2	Q3	Q4
A. Percentage reduction in number of incidents of spills or leaks	6	🟨	🟥	🟩	🟩
B. Average licensee satisfaction rating	3.0	🟨	🟥	🟨	🟨



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5 Goal 3.3.2.1.2 A
5 Goal 3.3.2.1.3 A
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vel 6 Goal 3.3.2.1
programs operate
FESA's executive l
Information techn
4.2.1 Achieve 84%

Performance Overview

Goal Leader Tina Smith
Title Unit Director
Organization Storage Safety Unit
Location San Francisco, CA

Goal Statement: **Level 7 Goal 3.3.2.1.4.3.3 Achieve a 6% reduction in the number of incidents of storage spills and leaks and an average rating of at least 3.0 (on a 5-point scale) in licensee satisfaction in dealing with Storage Safety Unit officials.**

Performance	2016 Planned	Q1	Q2	Q3	Q4
A. Percentage reduction in number of incidents of spills or leaks	6	🟨	🟥	🟩	🟩
B. Average licensee satisfaction rating	3.0	🟨	🟥	🟨	🟨

Explanatory Notes:

Supporting Goals -- Performance Quick Views:

Goal Leader : Olivia Gonzales
Title : Program Manager
Organization : Storage Inspection Program
Location : San Jose, CA

Goal Statement: **Level 8 Goal 3.3.2.1.4.3.3.1 Conduct 4550 facility inspections.**

Performance	2016 Planned	Q1	Q2	Q3	Q4
Conduct 4550 inspections	4550.00	🟩	🟩	🟨	🟨

Goal Leader : Newton Wong
Title : Program Manager
Organization : Accident Investigation Program
Location : Oakland, CA

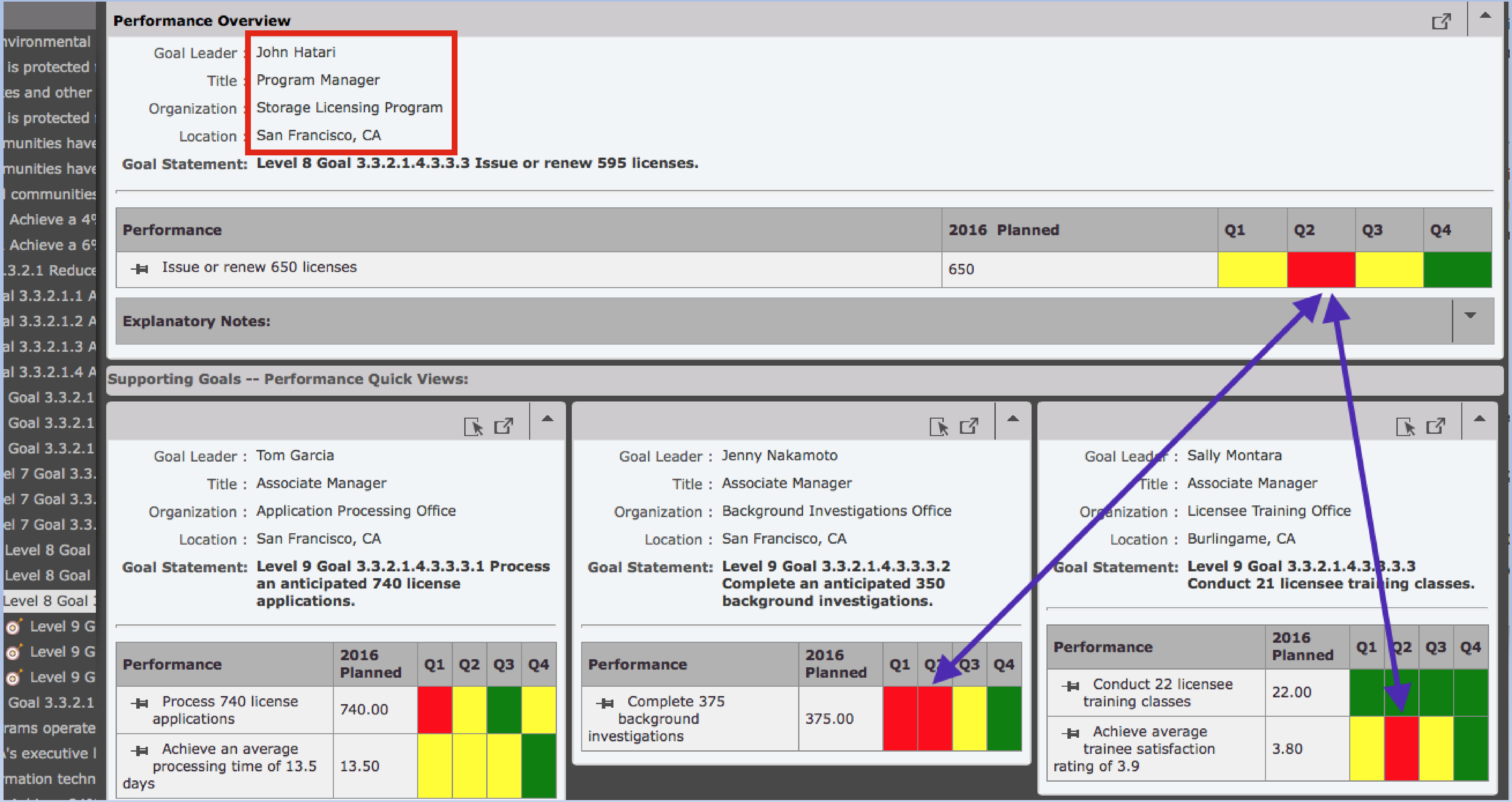
Goal Statement: **Level 8 Goal 3.3.2.1.4.3.3.2 Complete an expected 325 investigations.**

Performance	2016 Planned	Q1	Q2	Q3	Q4
Complete 370 storage spillage/leaks investigations	370.00	🟥	🟨	🟥	🟨

Goal Leader John Hatari
Title Program Manager
Organization Storage Licensing Program
Location San Francisco, CA

Goal Statement: **Level 8 Goal 3.3.2.1.4.3.3.3 Issue or renew 595 licenses.**

Performance	2016 Planned	Q1	Q2	Q3	Q4
Issue or renew 650 licenses	650	🟨	🟥	🟨	🟩



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Achieve a 6
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al 3.3.2.1.2 A
al 3.3.2.1.3 A
al 3.3.2.1.4 A
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Performance Overview

Goal Leader : John Hatari
Title : Program Manager
Organization : Storage Licensing Program
Location : San Francisco, CA

Goal Statement: **Level 8 Goal 3.3.2.1.4.3.3.3 Issue or renew 595 licenses.**

Performance	2016 Planned	Q1	Q2	Q3	Q4
Issue or renew 650 licenses	650	🟨	🟥	🟨	🟩

Explanatory Notes:

Supporting Goals -- Performance Quick Views:

Goal Leader : Tom Garcia
Title : Associate Manager
Organization : Application Processing Office
Location : San Francisco, CA

Goal Statement: **Level 9 Goal 3.3.2.1.4.3.3.3.1 Process an anticipated 740 license applications.**

Performance	2016 Planned	Q1	Q2	Q3	Q4
Process 740 license applications	740.00	🟥	🟨	🟩	🟨
Achieve an average processing time of 13.5 days	13.50	🟨	🟨	🟨	🟩

Goal Leader : Jenny Nakamoto
Title : Associate Manager
Organization : Background Investigations Office
Location : San Francisco, CA

Goal Statement: **Level 9 Goal 3.3.2.1.4.3.3.3.2 Complete an anticipated 350 background investigations.**

Performance	2016 Planned	Q1	Q2	Q3	Q4
Complete 375 background investigations	375.00	🟥	🟥	🟨	🟩

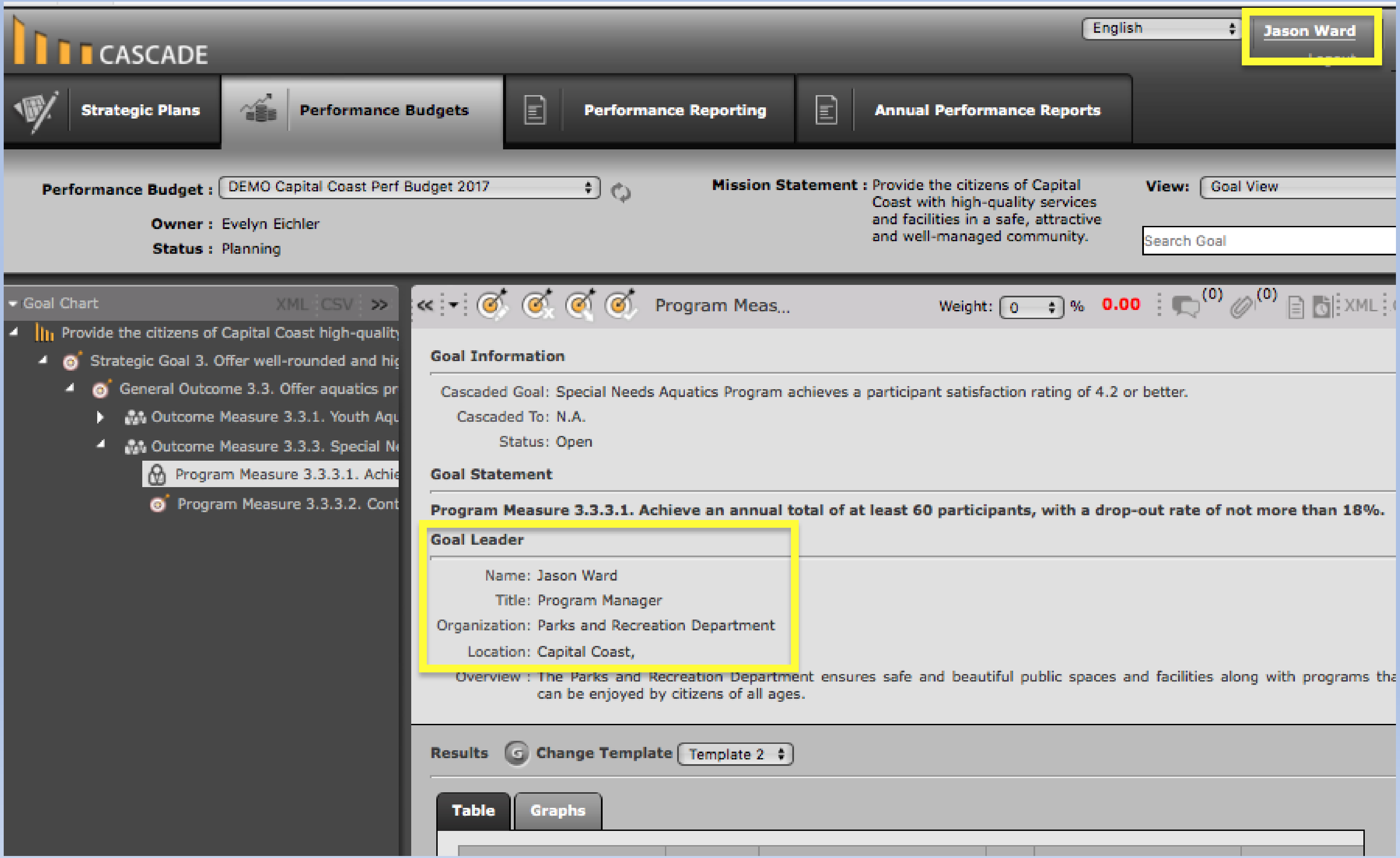
Goal Leader : Sally Montara
Title : Associate Manager
Organization : Licensee Training Office
Location : Burlingame, CA

Goal Statement: **Level 9 Goal 3.3.2.1.4.3.3.3.3 Conduct 21 licensee training classes.**

Performance	2016 Planned	Q1	Q2	Q3	Q4
Conduct 22 licensee training classes	22.00	🟩	🟩	🟩	🟩
Achieve average trainee satisfaction rating of 3.9	3.80	🟨	🟥	🟨	🟩

Performance Reporting & Monitoring

5. Use performance data to manage day-to-day operations
    - Provide every manager
        - “Clear line-of-sight” above
        - Access to timely performance data below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Performance Budget : DEMO Capital Coast Perf Budget 2017

Owner : Evelyn Eichler

Status : Planning

Mission Statement : Provide the citizens of Capital Coast with high-quality services and facilities in a safe, attractive and well-managed community.

View: Goal View

Search Goal

- Provide the citizens of Capital Coast high-quality
  - Strategic Goal 3. Offer well-rounded and hig
    - General Outcome 3.3. Offer aquatics pr
      - Outcome Measure 3.3.1. Youth Aqu
      - Outcome Measure 3.3.3. Special Ne
        - Program Measure 3.3.3.1. Achie
        - Program Measure 3.3.3.2. Cont

Goal Information

Cascaded Goal: Special Needs Aquatics Program achieves a participant satisfaction rating of 4.2 or better.

Cascaded To: N.A.

Status: Open

Goal Statement

Program Measure 3.3.3.1. Achieve an annual total of at least 60 participants, with a drop-out rate of not more than 18%.

Goal Leader

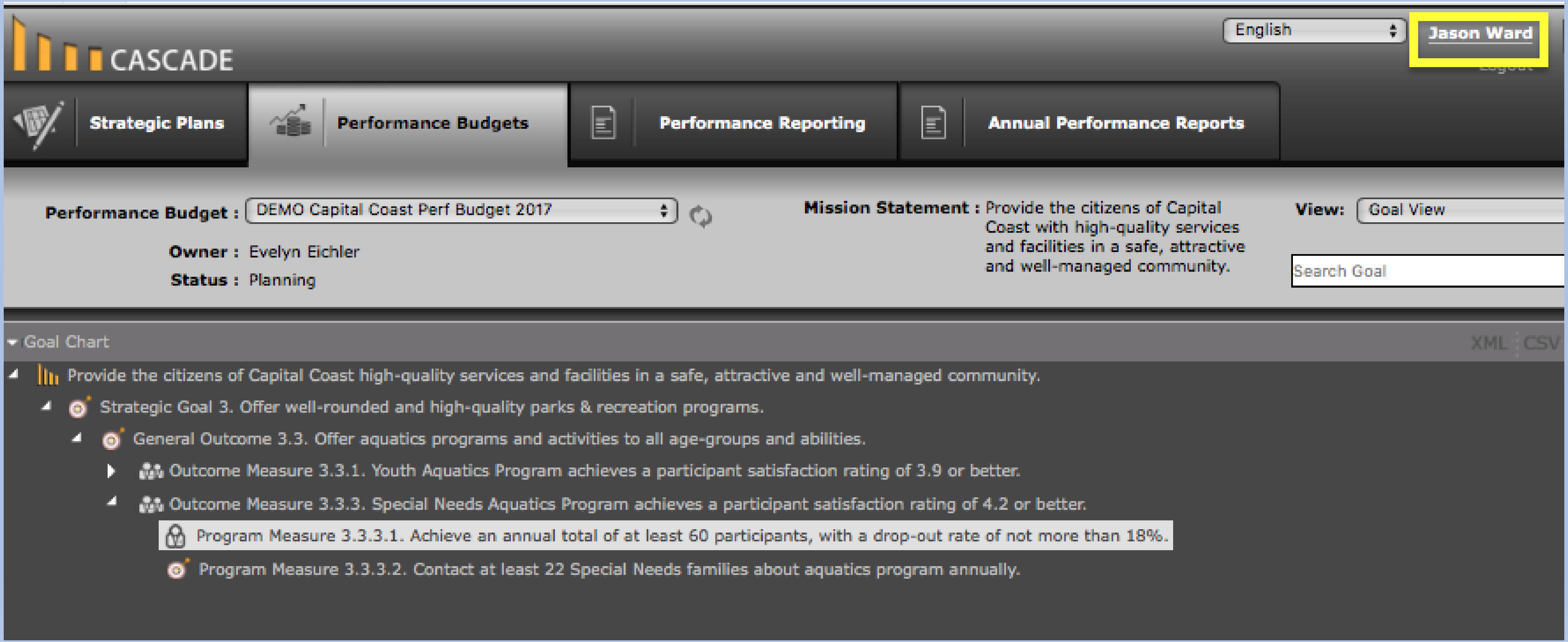
Name: Jason Ward

Title: Program Manager

Organization: Parks and Recreation Department

Location: Capital Coast,

Overview : The Parks and Recreation Department ensures safe and beautiful public spaces and facilities along with programs tha can be enjoyed by citizens of all ages.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Performance Budget : DEMO Capital Coast Perf Budget 2017

Owner : Evelyn Eichler

Status : Planning

Mission Statement : Provide the citizens of Capital Coast with high-quality services and facilities in a safe, attractive and well-managed community.

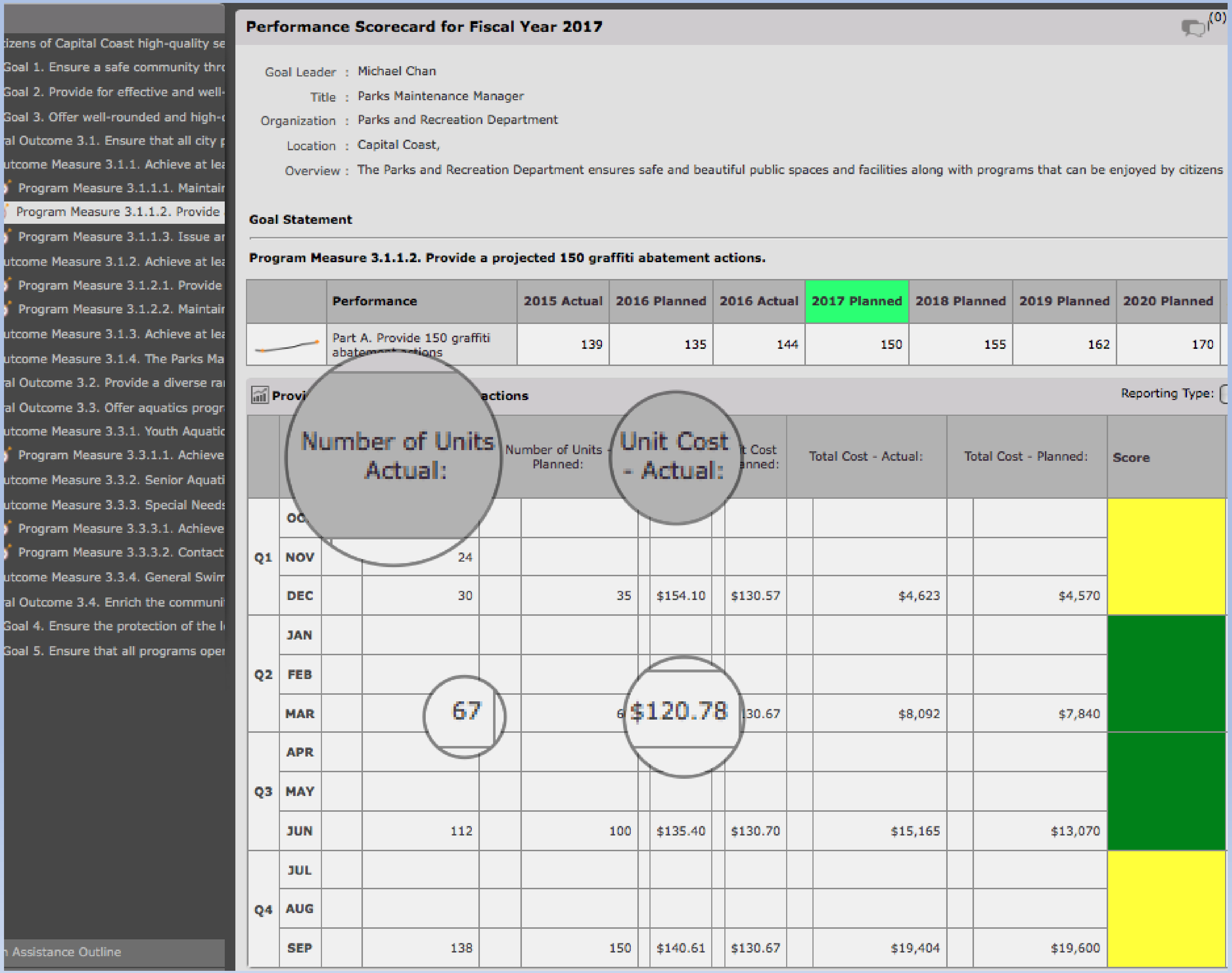
View: Goal View

- Provide the citizens of Capital Coast high-quality services and facilities in a safe, attractive and well-managed community.
  - Strategic Goal 3. Offer well-rounded and high-quality parks & recreation programs.
    - General Outcome 3.3. Offer aquatics programs and activities to all age-groups and abilities.
      - Outcome Measure 3.3.1. Youth Aquatics Program achieves a participant satisfaction rating of 3.9 or better.
      - Outcome Measure 3.3.3. Special Needs Aquatics Program achieves a participant satisfaction rating of 4.2 or better.
        - Program Measure 3.3.3.1. Achieve an annual total of at least 60 participants, with a drop-out rate of not more than 18%.
        - Program Measure 3.3.3.2. Contact at least 22 Special Needs families about aquatics program annually.

Integrating Performance with your Financial System

Facilitates measuring program efficiency – even on a selective basis for certain tasks :

- Automatically calculate unit costs of certain activities and outputs
- Track trends in program efficiency over time



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Goal 4. Ensure the protection of the l
Goal 5. Ensure that all programs oper
Assistance Outline

Performance Scorecard for Fiscal Year 2017

Goal Leader : Michael Chan
Title : Parks Maintenance Manager
Organization : Parks and Recreation Department
Location : Capital Coast,
Overview : The Parks and Recreation Department ensures safe and beautiful public spaces and facilities along with programs that can be enjoyed by citizens

Goal Statement

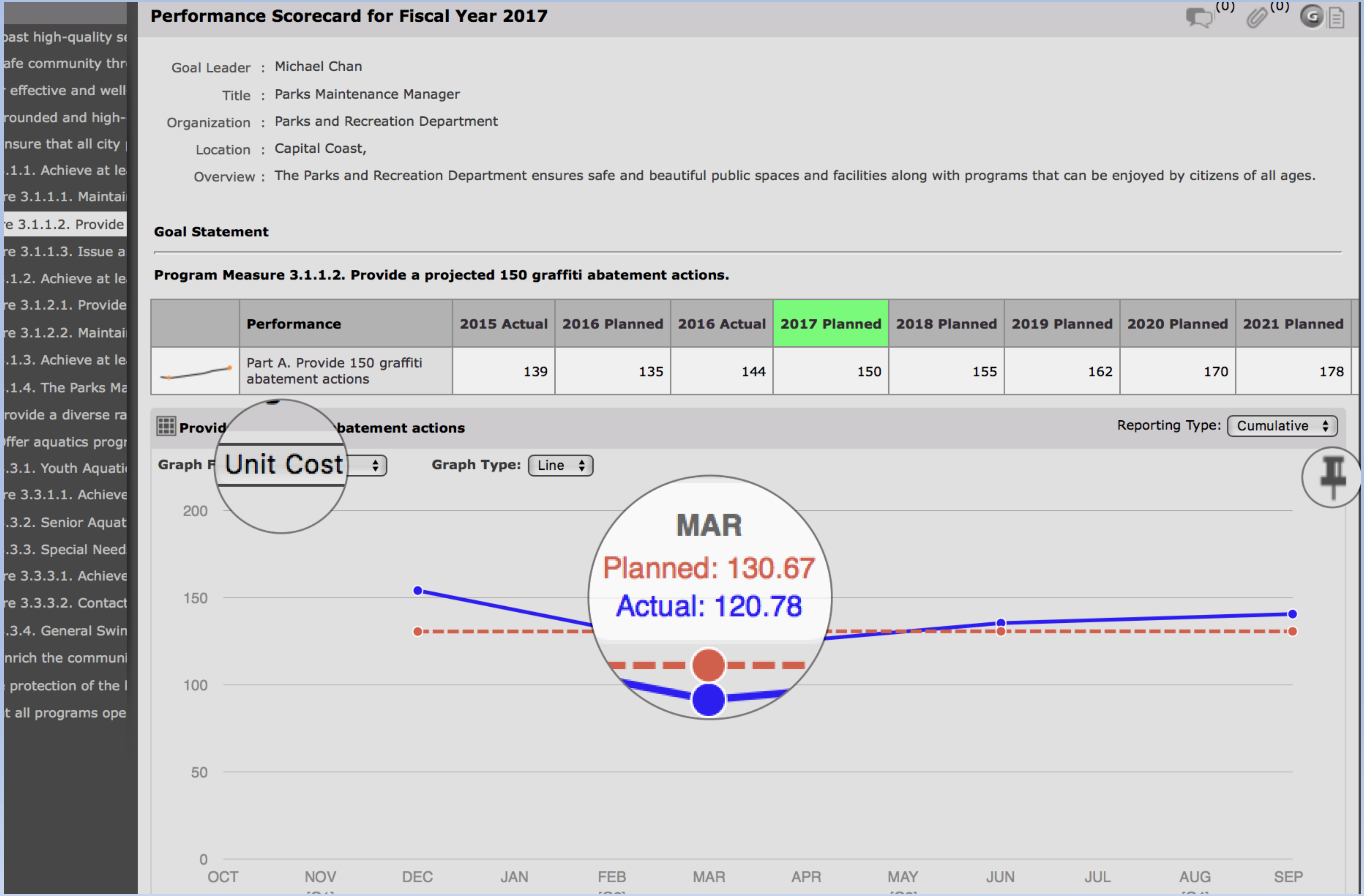
Program Measure 3.1.1.2. Provide a projected 150 graffiti abatement actions.

	Performance	2015 Actual	2016 Planned	2016 Actual	2017 Planned	2018 Planned	2019 Planned	2020 Planned
	Part A. Provide 150 graffiti abatement actions	139	135	144	150	155	162	170

Provi actions

Reporting Type:

		Number of Units Actual:	Number of Units Planned:	Unit Cost - Actual:	t Cost anned:	Total Cost - Actual:	Total Cost - Planned:	Score
Q1	OC							🟨
	NOV	24						
	DEC	30	35	$154.10	$130.57	$4,623	$4,570	
Q2	JAN							🟩
	FEB							
	MAR	67	6	$120.78	30.67	$8,092	$7,840	
Q3	APR							🟩
	MAY							
	JUN	112	100	$135.40	$130.70	$15,165	$13,070	
Q4	JUL							🟨
	AUG							
	SEP	138	150	$140.61	$130.67	$19,404	$19,600	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Performance Scorecard for Fiscal Year 2017

Goal Leader : Michael Chan
Title : Parks Maintenance Manager
Organization : Parks and Recreation Department
Location : Capital Coast,
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	Performance	2015 Actual	2016 Planned	2016 Actual	2017 Planned	2018 Planned	2019 Planned	2020 Planned	2021 Planned
	Part A. Provide 150 graffiti abatement actions	139	135	144	150	155	162	170	178

Provid **batement actions**

Reporting Type: Cumulative

Graph F Unit Cost

Graph Type: Line

200
150
100
50
0
OCT
NOV
DEC
JAN
FEB
MAR
APR
MAY
JUN
JUL
AUG
SEP
MAR
Planned: 130.67
Actual: 120.78

Getting Started with What You Already Have

- If no strategic plan or ability to link to the budget, then begin by developing just an Annual Plan with goals and measures
- Sort your existing measures into a a hierarchy of results supported by activities (i.e., workload measures) – even just 2 levels of measures can work well
- Organize small groupings of measures around your existing cost centers

For more information about Performance Planning/Budgeting

-

Stop by Booth 1229

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Cascade software:

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Director for Government Performance
Capital Novus

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