CAPACITY BUILDING IN PERFORMANCE MANAGEMENT: EXPERIENCES OF SMALL AND MID-SIZED CITIES
Introduction of Panelists

• Gerald Young, Senior Research Associate, ICMA
• Rebecca Jackson, Director of Strategic Performance Analytics, Fayetteville, NC
• Michael Walters Young, Budget & Strategic Innovation Manager, Franklin, TN
• Elizabeth Goltry Wadle, Budget Officer, Wichita, KS
• Alfred Ho, Professor, University of Kansas
The Fayetteville, NC Story
Rebecca Jackson
Director of Strategic Performance Analytics
Fayetteville, North Carolina
CITY SNAPSHOT

SERVE WITH RESPECT

24/7

City of Fayetteville, North Carolina

FY 2018

#ICMA2019

40,110
Parks & Recreation participants

City Employees 1,618

7 blighted structures demolished

115,857 feet of creeks and drainage ditches cleaned

7,367 tons of recycling collected

61,234 households for waste collection

896 tons of asphalt for potholes and street repairs

204,756 calls for service to 911

83 parks and recreation facilities

426,274 enplaned and deplaned passengers at the Fayetteville Regional Airport

1,394,298 FAST fixed route passengers

4 single family affordable home units constructed through ECD programs

741 miles of City streets maintained

269 construction plans reviewed

48,399 Priority I calls for service for Police

City Population 209,889

29,707 Fire Department calls for service
Office of Strategy & Performance

Aka the “SPA”: “Maximizing performance for a positive impact”

- Change agent to build a culture of High Performance
- Developing Strategic Plan
- Organizational performance management and reporting
- Sustaining implementation of strategic priority projects – Project Management support for CMO
- Continuous improvement projects, internal consulting, technical assistance and training
- Data Governance and open data
- Customer research – Surveys and citizen and employment engagement efforts.
Building Data Analytics Capacity

Developing Core Competencies through training & networking
• What’s DAT?
• Training in Six Sigma, project management and data analytics

Community collaborative projects and partnerships
• Civil Affairs Data Analytics Partnership
• Fayetteville State University GIS Summer Intern project
• Citizen engagement in open data program-- “Randy the Researcher”
• Greater Fayetteville United Social Capital Survey
• What Works Cities, Gov Ex, Sunlight & Results for America.
WHAT’S DAT?

Data Analytics Team

- Provide guidance & standards
- Data governance policy
- Open data
- Performance measure reviews
- Collaborative data analytics and process improvement projects.
Civil Affairs
Collaborative
N.I.C.E.Stat
Neighborhood Indicators and Community Evaluation

QuEST PROJECTS
Quality, Engagement, Sustainability and Training
Process Improvement and Evidence-Based Decision Making
Operational Dashboards

Aligning organizational strategy to employee performance

Code Enforcement

Total Violation Cases

15,456

365 Days
Transparent Reporting and Analytics for Citizens

https://tracstat.fayettevillenc.gov #ICMA2019
The Franklin, TN Story

Michael Walters Young
Budget & Strategic Innovation Manager
Franklin, Tennessee
About Franklin

- 748 Employees (FTE)
- Mayor-Aldermanic-City Administrator Form of Government
- Full-Service City

- Founded in 1799
- Rapid Population Growth:
  - 1970 Population: 9,497
  - 1990 Population: 20,098
  - 2020 Population (est): 80,000

- County Seat of Williamson County
- 7th Wealthiest County in America, 2016
- 6th Best Place to Live in America, 2019 (Money Magazine)
- Best Southern Town (Garden and Gun)
- Most Romantic Main Street (National Trust for Historic Preservation)
- #7 best place for STEM jobs in the U.S., 2018 (Livability.com)
- #1 in Nation for Image & Reputation (2019 National Citizens Survey)
Man we collect a lot...but...

- As City rapidly grew, different departments had different approaches to using data...or not all. Even today, the use of analytics ranges from being nearly non-existent in some departments to quite advanced in others.

- As of 2014, at least 12 different performance measurement initiatives were running in the City (ICMA, GFOA, TMBP, AWWA, APWA, TRPA, APA, CALEA, ISO, Sustainable Franklin, Departmental Workloads, etc...etc...etc...)

**Key**

Centralize, Normalize and Standardize information and performance measurement efforts in one place: *The Budget!* Budget analysts & department heads became intimately involved, and thus proficient, in performance measurement and in turn, changed the culture.
Moving the Needle

- Beginning in 2014, all departments were required to have performance measures within their respective budget documents. Standardized look and feel of all sections.

- Beginning in 2015, all departments also were required to tie their department operations to the City's adopted Strategic Plan – Franklin Forward

**Workload (Output) Measures**

<table>
<thead>
<tr>
<th>Measures/Goal</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
<th>2019*</th>
<th>2020*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maintain utility billing error rate at or below 0.5% error per 10,000 billed items</td>
<td>5.0%</td>
<td>5.1%</td>
<td>5.8%</td>
<td>4.9%</td>
<td>4.8%</td>
</tr>
<tr>
<td>Errors 10,000 Bills</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Increase Electronic vs. Manual Payments by 1% by Fiscal Year Ending</td>
<td>72.6%</td>
<td>75.7%</td>
<td>76.9%</td>
<td>79.9%</td>
<td>81.0%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Workload (Output) Measures</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
<th>2019*</th>
<th>2020*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of property tax bills issued</td>
<td>30,366</td>
<td>31,287</td>
<td>31,930</td>
<td>33,000</td>
<td>37,500</td>
</tr>
<tr>
<td>Number of water &amp; sewer bills issued</td>
<td>327,318</td>
<td>339,302</td>
<td>347,972</td>
<td>369,150</td>
<td>376,533</td>
</tr>
<tr>
<td>New requests for service (Total)</td>
<td>2,857</td>
<td>2,492</td>
<td>2,500</td>
<td>2,500</td>
<td>2,550</td>
</tr>
<tr>
<td>Water (Monthly Average)</td>
<td>$45.07</td>
<td>$47.60</td>
<td>$48.18</td>
<td>$50.75</td>
<td>$51.77</td>
</tr>
</tbody>
</table>

**Forward**

- A Safe, Clean, and Livable City
- Quality Life Experiences
- Effective and Fiscally Sound City Government Providing High-quality Services
- Sustainable Growth and Economic Prosperity

#ICMA2019
From Thought to Finish...


• Also launched a Data Analytics Team with IT & Finance spearheading to create MetaData collections and begin the processing of getting our various data sets to talk to one another so analytics can actually occur.

• Beginning in 2017, all Departments had to tie all new requests for funding to a theme within the Strategic Plan. No theme? No money!
Act Locally...Think Regionally

Old  Tennessee Municipal Benchmarking Project
- Led by MTAS (UT-Knoxville) for nearly 20 years
  - Dozens of municipalities participated
  - $4,000 annual subscription service
  - 1206 different measures collected
  - Suddenly dropped in May 2019

New  Benchmarking Alliance of Tennessee
- Led by City of Franklin
  - 60 data points
  - 50 measures
  - Free to participate
  - Data will be open to all who wish to see throughout the state
Today and Beyond...

• Departments are increasing using analytics in their daily decision making.

• The use of dashboards, especially those using GIS have continuously grown throughout the City.

• Budgets are consistently turned in with updated performance measures, elected officials and citizens alike utilize the Strategic Plan website to see “how we are doing” and departments by in large only ask for new people, programs and equipment if they have the statistical data justifying the expense.
The Wichita, KS Story
Elizabeth Goltry Wadle
Budget Officer
Wichita, Kansas
About Wichita

- 3,200 Employees
- 390,000 Population
- Council-Manager Form
- Budget Office located in Finance Department
- No full-time employees dedicated to performance measurement
- GFOA Special Recognition for Performance Measures for seven of past nine years
- ICMA Certificate Program for nine years
City of Wichita Program

• Current program since 2009
  ➢ First Steps:
    • Rejoined ICMA-CPM
    • Built Performance Measure Inventory
    • Developed Annual Report

• Heavy focus on benchmarking

• Data used for initial research and analysis

• Collecting and reporting data is the start of the budget development process
City of Wichita Progress

Effort has been institutionalized
- Organizational leadership
- Departments have built capacity
- Using data to tell stories has become part of the organizational culture
- Operating departments are transitioning to using data analysis for ongoing decision making

Low-cost and no-cost tools have been used
- Still using Microsoft Excel and Publisher
- File Sharing
- Ongoing data inventory
Tips for Expanding Your Program

1. Consistency
Organizational leadership is key to a program that becomes institutionalized

2. Leverage
Inventory existing data collection and reporting efforts

3. Collaboration
Identify a staff coordinator who is collaborative and analytical
Tips for Expanding Your Program

4. Thoroughness
   Apply the program throughout the organization

5. Longevity
   Develop datasets and processes that will outlast particular people or challenges

6. Celebrate
   Share success and constantly improve
Lessons Learned: Key Questions for the Panelists

- How do you pursue performance management (PM) with limited resources?
- Who is responsible for PM? How do you coordinate different departments to do the work?
- How do you analyze performance data from different departments? Who is responsible for the work?
- What types of data do you use? How do you build data analytics capacity over time?
- What are the roles of technologies?
- What kinds of partnership do you have that can be very helpful?
- What are the key lessons learned?
Questions?