

Performance Excellence

Council

November 7, 2017

Agenda

- Why Performance Excellence? (Mayor's Office) – 5 minutes
- How do we achieve Performance Excellence (Steve King) – 10 minutes
- Implementing Performance Excellence – 20 minutes
 - *Comprehensive Plan / Imagine Madison* – Natalie Erdman
 - *Results Madison* – David Schmiedicke
- Discussion (Tom Mosgaller / Guy Van Rensselaer)

Why Performance Excellence?

What is Performance Excellence?

- It is a system for all the work we have done and will be doing in the future:
 - Leadership and Culture (Strategic Management Oversight Committee)
 - Strategic Management (Comp Plan / Results Madison / Line of Sight)
 - Customer-focused (Voice of Customer – internal and external)
 - Data driven – analysis, management (Data Management Team)
 - Employee Engagement (HR / Organization Development)
 - Equity work (RESJI)
 - Cross-functional teams (e.g., NRTs)
 - Project Management / Work planning / Continuous Improvement (Voice of the Process)

Performance Excellence System

Strategic Management Oversight Committee

Line of Sight Sub-Committee
Values / Mission / Goals

Voice of Process
Objective

- Process improvement tools
- Performance Meetings (Stat, Stocktake)

Voice of Customer
Objective

- Employee Engagement
- Resident Satisfaction

Data Management
Objective

- Open Data
- Policies & Procedures related to use of data as an asset

Comp Plan: Vision organized around 6 Citywide Goals/Themes

Results Madison: Vehicle to organize around Citywide Goals/Themes

Phase 1: Build the Baseline (2018)

1. Service Inventory
 - What do we do?
2. Service Performance Measures
 - How do we measure our success?
3. Data Collection Plans
 - What data is needed to monitor our performance measurers

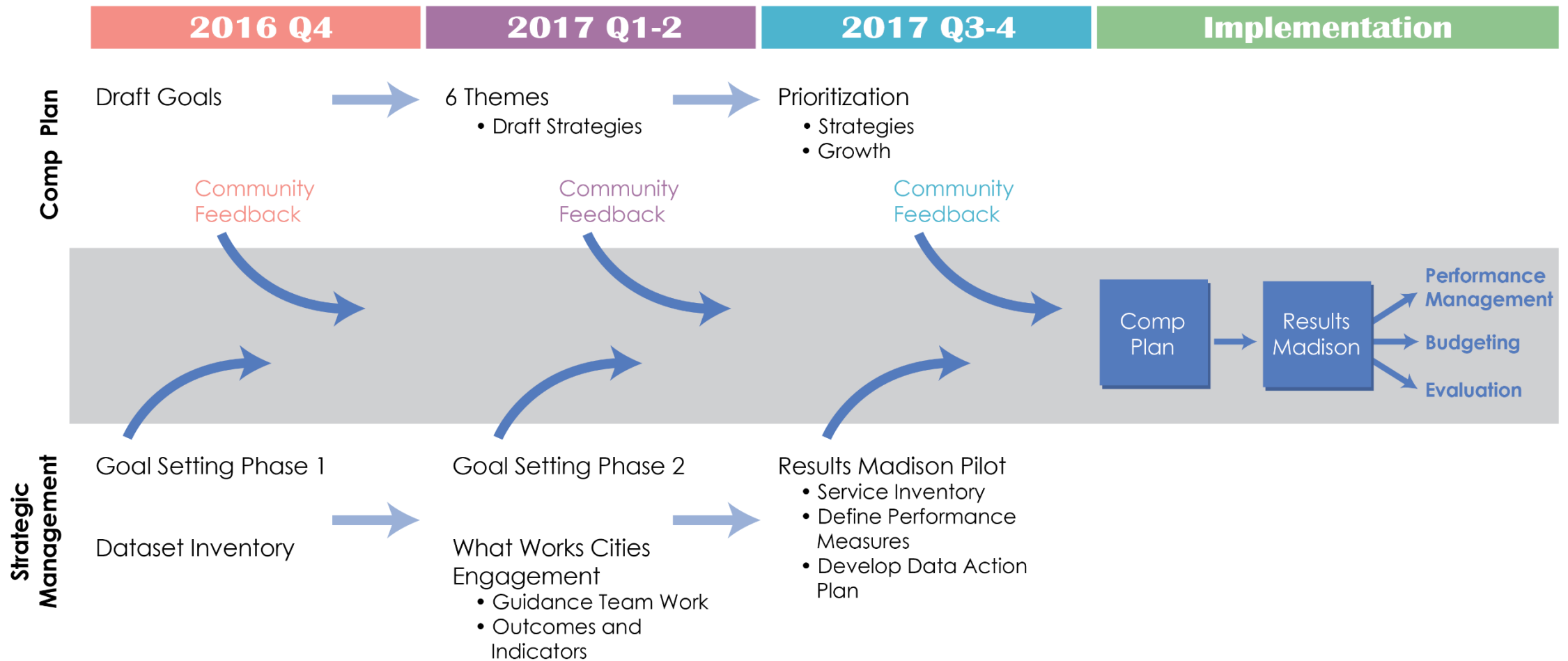
Phase 2: Monitoring Progress & Innovating where Necessary

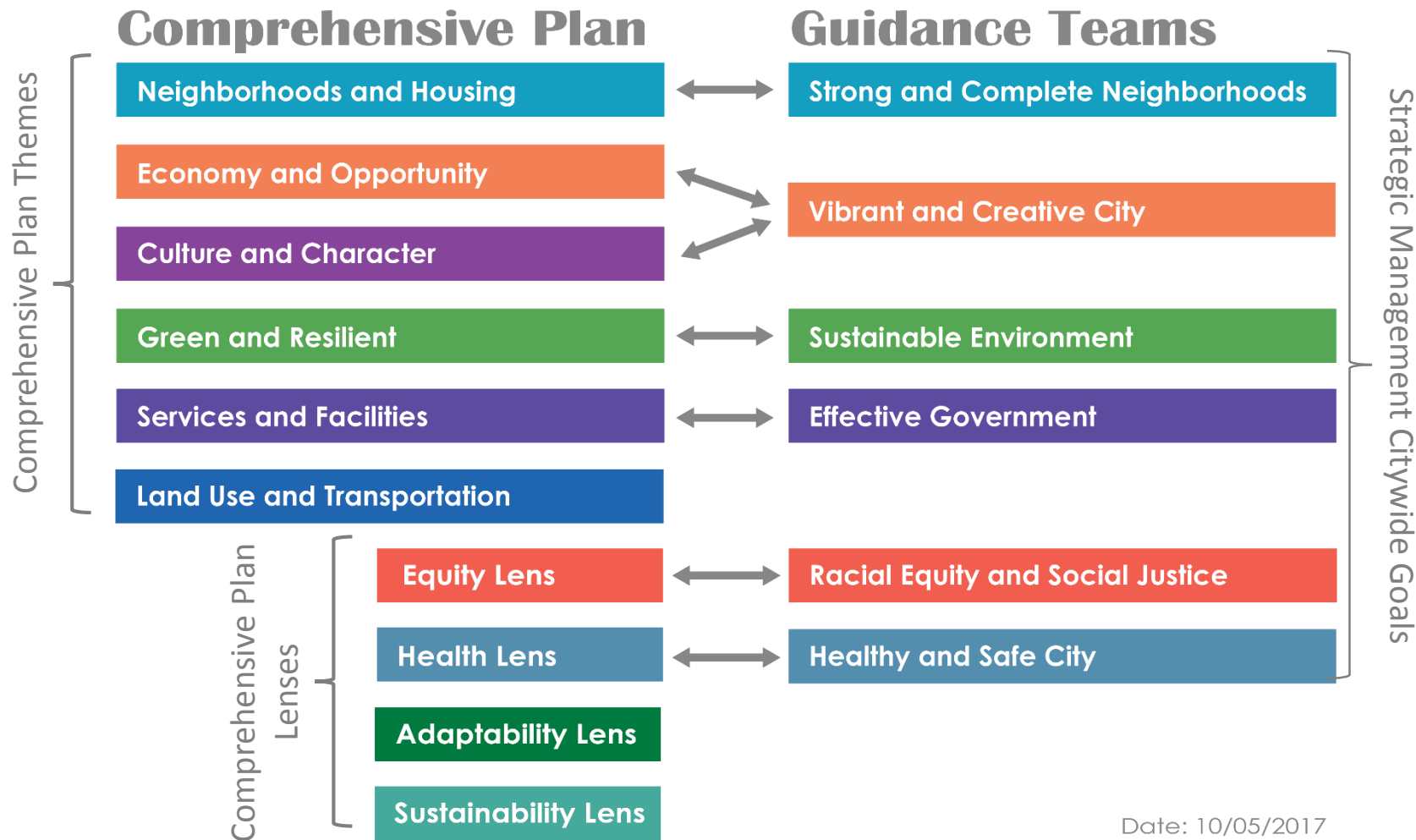
1. Develop service level workplans focused on strategies connected to outcomes laid out in Comp Plan
2. Build service level budgets around those workplans
3. Regular meetings organized around outcomes to report out on performance measures

Comprehensive Plan & Strategic Management

Council Presentation

Alignment Process





Alignment

The Comp Plan themes & Strategic Management Citywide Goals have a great deal of overlap

The processes exist for different reasons; however, alignment between the processes will send a clear message to residents, decision makers, & staff about the outcomes the City is seeking to drive

This approach combines what we've learned from the community through the Comp Plan process with recommendations from Guidance Teams connecting data to gauging our success

Economy & Opportunity
Growing Economy,
Equitable Education and
Advancement

Neighborhoods & Housing
Complete Neighborhoods,
Housing Access

Land Use & Transportation
Compact Land Use,
Efficient Transportation

Culture & Character
Cultural Vibrancy & Unique
Character

Green & Resilient
Parks and Recreation,
Natural Resources

Healthy & Safe City
Healthy & Safe
Neighborhoods throughout
Madison

Effective Government
Efficient & Equitable
Government Operations

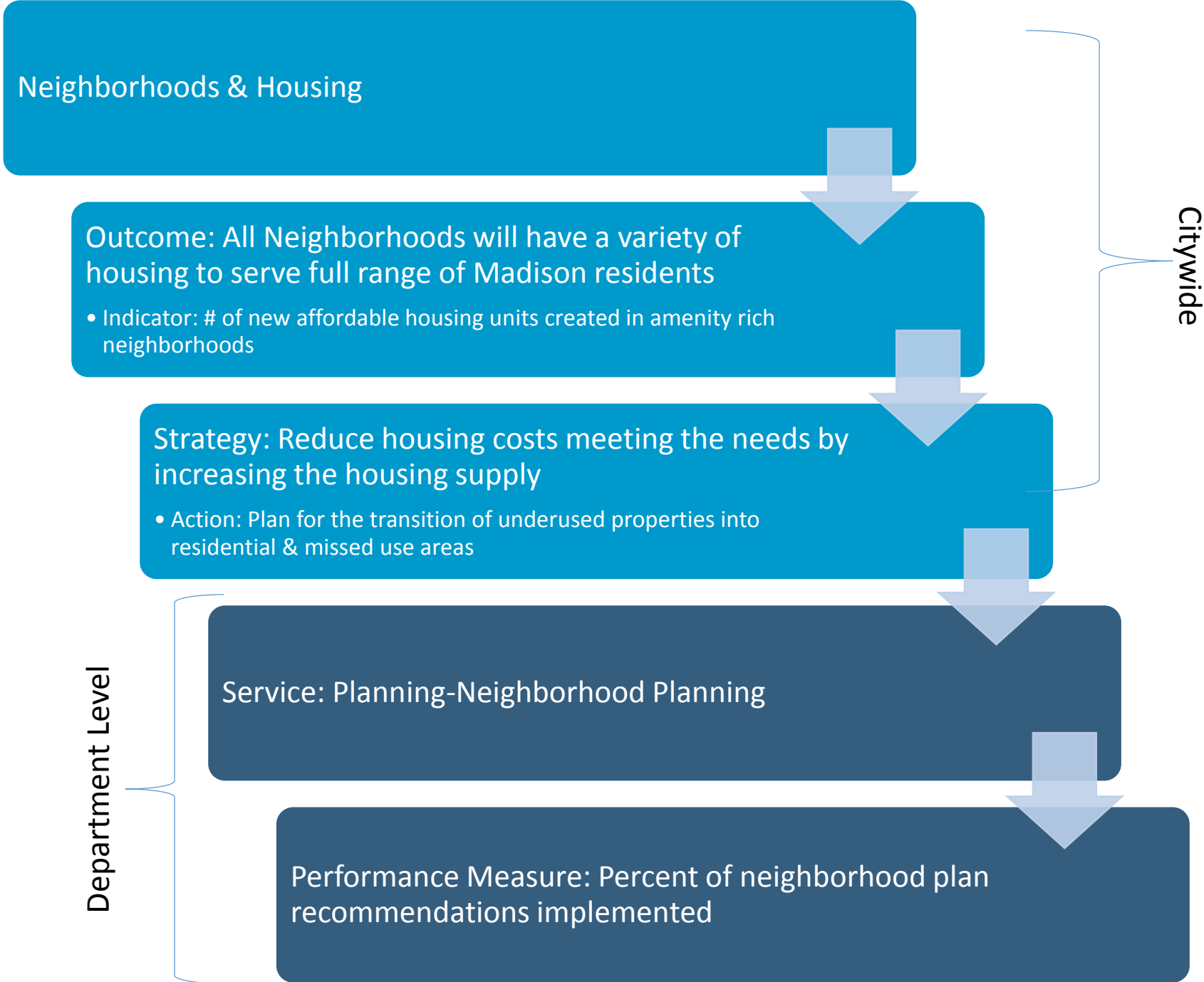
Aligning Efforts



Operationalizing the Framework:
An Example



Operationalizing the Framework:
An Example



Operationalizing the Framework:
An Example



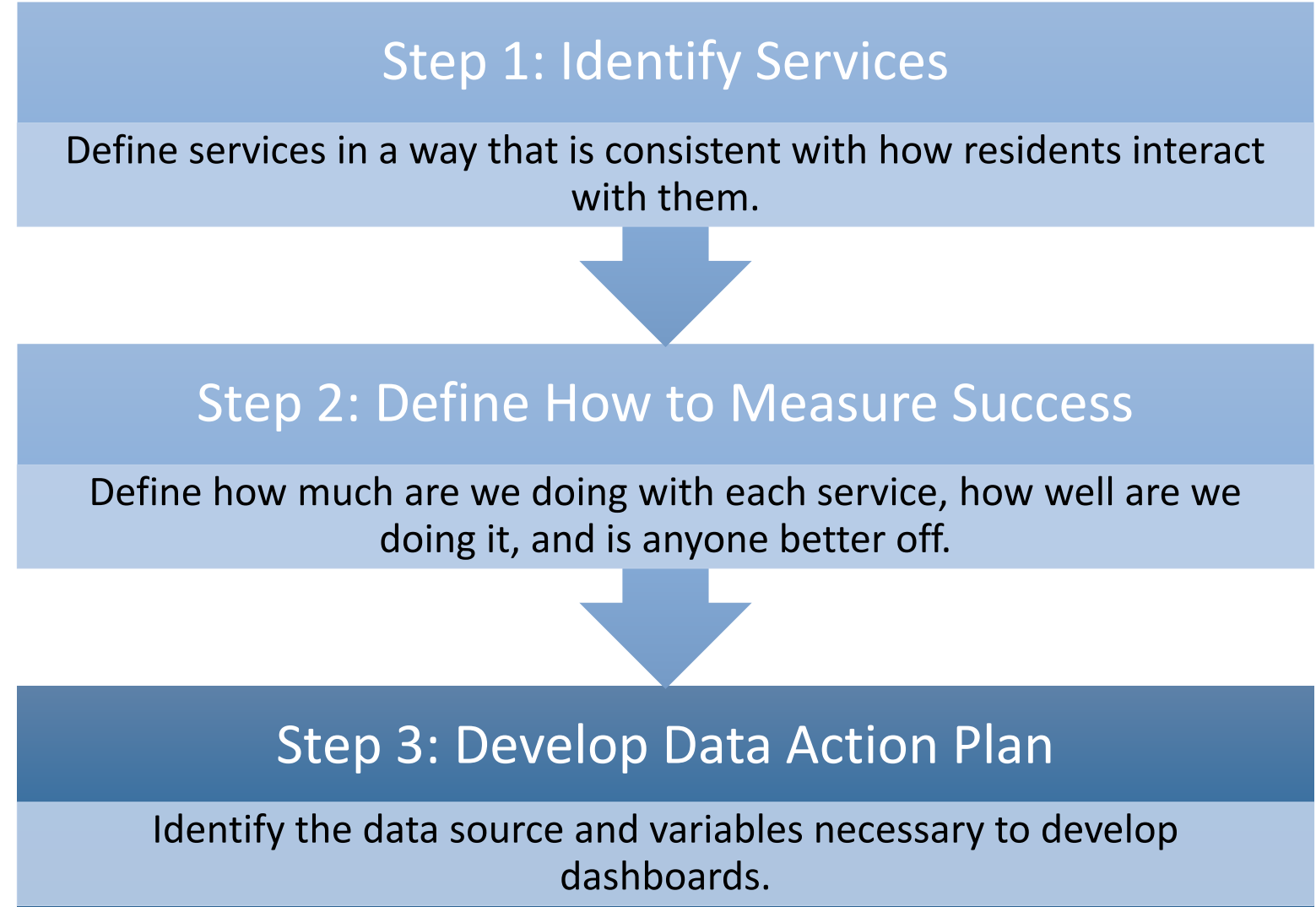
Results Madison Report Out

Streets and Library Pilot Engagements

Summer 2017

Results Madison Vision:

Connecting City Services
& Outcomes



Step 1: Identify Services

	Session 1	Session 2	Session 3
Meeting Objectives	<ul style="list-style-type: none">• Key terms• Strategic Management Framework• Deliverables• Orientation to the department	<ul style="list-style-type: none">• Brainstorm department services and define service components	<ul style="list-style-type: none">• Refine and finalize service inventory
Time	1 hour	2.5 hours	1 hour
Lessons Learned	<ul style="list-style-type: none">• Agencies need more time familiarizing themselves with terms	<ul style="list-style-type: none">• Offer agencies option of completing homework prior to the meeting• Important that Department head is in attendance unless agency is maintaining services✓ Library brainstormed 9 new services✓ Streets maintained their existing 6 services	<ul style="list-style-type: none">• Combine Session 2 and 3 if Department head is available or services are not changing.✓ Library consolidated their services from 9 to 7✓ Streets combined Sessions 2 and 3
Step 1 Direct Feedback	<ul style="list-style-type: none">• “Very well run”• “Effective way to collect and organize ideas from a large, diverse group”• “Participant driven”• “Very useful”• “Since the dashboard can also provide data assistance for internal functions, not just public-fronted functions, so I think that would need to be more clearly stated that this isn't just about what is done that the public sees or interacts with but also ways to improve internal processes - like managing seniority among employees.”		

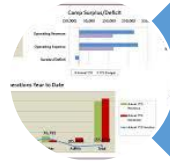
Step 2: Define How to Measure Success

	Session 4	Session 5
Meeting Objectives	<ul style="list-style-type: none"> Brainstorm family of measures <ul style="list-style-type: none"> How much did we do? How well did we do it? Is anyone better off? 	<ul style="list-style-type: none"> Refine which measures were inputs, outputs, outcomes, efficiency, versus service quality. Remove overlapping measures
Time	2-3 hours	1 hour
Lessons Learned	<ul style="list-style-type: none"> Send a preparation email prior to this session about the family of measures. Need to address outcome statements during future iterations of this Step. ✓ Library: 6-16 measures in each of their 7 services. ✓ Streets: 3-8 measures in each of their 6 services. 	<ul style="list-style-type: none"> Measures are clearly defined within each service and no redundant measures. Each service has attainable measures that are currently tracked and actionable.
Step 2: Direct Feedback	<ul style="list-style-type: none"> "I think the question of "is anyone better off" is so difficult to answer -- more resources on how to get to real impact would be helpful (if they exist!)" "I would have liked to see a better representation of libraries that are known for data usage in their budgeting and decision-making." "I probably should have been more thorough in checking them [the measures], so they may have been more useful if I had engaged with them more." "Challenge the department members to be more forward thinking and innovative regarding their present data collection and its relevancy" 	

Step 3: Develop Data Action Plan

	Session 6	Session 7
Meeting Objectives	<ul style="list-style-type: none"> Discuss where relevant data is stored regarding each measure including dataset source and variables to facilitate dashboard creation 	<ul style="list-style-type: none"> Conclude identifying the dataset sources and variables for each brainstormed measure Assess level of prioritization based on how easily the data could be connected to visualization software
Time	1 hour	1 hour
Lessons Learned	<ul style="list-style-type: none"> Add in another week or allot more time to complete Assign homework to identify the measures as headline or secondary More time needed to work through current gaps in data collection 	<ul style="list-style-type: none"> Ensure we have intentional discussion on data management, including managing gaps in data and best practices moving forward Library Data Action Plan Streets Data Action Plan
Step 3: Direct Feedback	<ul style="list-style-type: none"> "Need to develop additional data collection methods to capture customer satisfaction info" "I think it brought to light areas we could be measuring/improving that we aren't currently." "Created the idea of being more intentional in collecting data that will provide a better measure for outcome achievement." "It's good when others are asking questions and it triggers your mind and/or challenges what you are doing. Is this best for the agency?" "The need for a community engagement plan to centralize all the library's efforts in this area." "There are many items we would like to capture that would be very useful in our day-to-day decision-making that we need to add into our workflow (for example, customer surveys and staff surveys)." 	

Engagement Deliverables



Dashboard Development



Explore Automating Paper Based Processes and Data Cleaning



Begin Replicable Data Collection Process

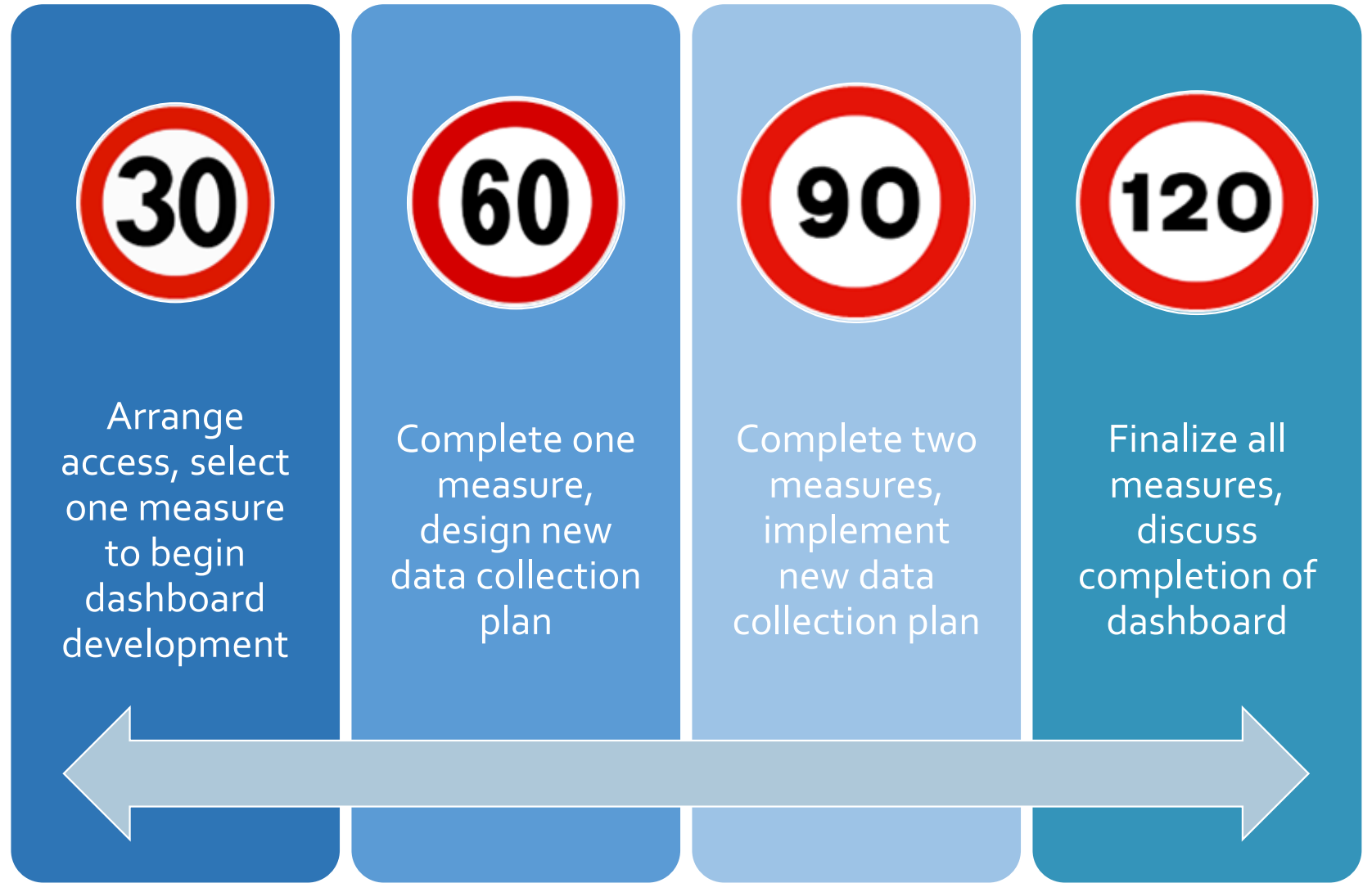


Define Outcome Statements to link to Strategic Framework



Design Pre-Engagement Survey for Results Madison Rollout

Next Steps



Results Madison Toolkit

3 Step Engagement

- 1. Define services
- 2. Define how to measure success
- 3. Create data action plan

Building Work Plans

- Agencies build work plans to support the direction they want to shift their performance.

Budgeting Around Work Plans

- Funding in the budget reflects the priorities set forth in work plans.

Transparency and Open Data

- The City of Madison holds data in the public trust and will work to proactively share information related to Result Madison.

Scaling the Work

Agency Surveys

- Provide agencies with the opportunity to assess what they would like to get out of the process
- Use these assessments to build an engagement model that aligns with agency goals & capacity levels

Cohort Model

- Utilize cohorts to connect staff from across the organization involved in the work
 - Objective: Emphasize the learning culture of this work ensuring agencies are learning from one another

Management Retreat

- Present the process to Managers allowing them to ask questions regarding the process & bigger picture
- Preview the process allowing for feedback and improvements to process

Department Division Heads

- Ensure that all Managers see where their services fit into the proposed framework
- Preview the tools and processes that will be utilized during service inventory

Guidance Teams

- Meet with Guidance Teams to finalize recommended outcomes & indicators under proposed themes

Common Council Update

- Provide update briefing for Council members regarding alignment efforts
- Provide update about how this work will be operationalized through Results Madison program

Agency Engagements

- Service Inventory Workshops
- Conduct 3-step engagement with Departments building upon service inventory to:
 1. Define Family of Measures for each service
 2. Develop Data Action plan for measures
 3. Work through 1 process improvement with focus on improving data collection

Next Steps

Next steps are focused on updating Managers & Alders regarding vision of initiative soliciting feedback about how it will be operationalized

Agency engagement process has been modified based on lessons learn from Streets & Library

- Hold Workshops to finalize services; spend bulk of engagement focused on measure development & data action plans

Discussion

- What questions do you have about Performance Excellence?
- How do you want to receive updates?

THANK YOU!