

JUNE 5, 2019

CLEARPOINT SUMMIT – DURHAM, NC

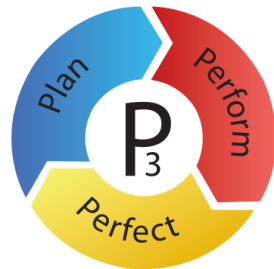
CITY OF CHARLOTTESVILLE, VA STRATEGIES TO RESOURCE AND SUPPORT YOUR CLEARPOINT VIPS

ABOUT US.....

Leslie Beauregard, Assistant City Manager since 2015

Director Budget and Performance Management 2003 – 2015

Developed P3 in 2008



ClearPoint since 2010



WAYS TO SUPPORT YOUR CLEARPOINT VIPS

- Basic and Advanced Training Guides and Workshops
- Open Labs
- Users News Updates/Email Distribution List
- Intranet Page/Strategic Plan & Management Reporting Guide
- NEW – Advisory Team

BASIC TRAINING

- Done a few times a year in house
- Going over the basics and the expectations
 - ✓ Department Scorecards
 - ✓ Strategic Plan Scorecard
- From how to find your scorecard, to updating objectives, measures, narrative, etc.

Clearpoint &
Strategic Plan
Management Guide

BASIC TRAINING

Department Scorecard Element Requirements 1

- These should reflect your Department Workplans and include:

- Purpose Statement
- Department/Division Summary
- Picture

Charlottesville Area Transit Overview
Charlottesville Area Transit

Purpose Statement

To provide safe, convenient, quality mobility options for the City of Charlottesville and the urban ring communities of Albemarle County.

Department Summary

Charlottesville Area Transit, CAT, provides public transportation services to the greater Charlottesville area. The City of Charlottesville works in partnership with Albemarle County and the University of Virginia to fund these services. Under a pre-paid arrangement with the University of Virginia, UVA IDs are accepted as fare on all buses. CAT also operates the FREE Trolley, connecting the University and Downtown, and staffs the Downtown Transit Station, offering information to area travelers, restrooms, and a comfortable place between bus trips. In addition to local funds and passenger fares, CAT operating expenses are covered by Federal and State grants.

- CAT Provides safe, efficient, on time, clean public transportation services to the City and the County's "Urban Ring" area.
- CAT's Maintenance Department provides expert fleet repair services and manages the installation and maintenance of all on-street passenger amenities.
- CAT's procurement and grants staff ensures that all state and federal codes guide major procurements for the department and ensures that CAT applies for and receives all grant funding it is eligible to receive. This ensures a strong stream of grant funding revenue to support system operations.
- Public transportation is inherently good for the environment. CAT facilities are all LEED Certified and CAT staff practices conservation and recycling in all aspects of the CAT operation.

Department Scorecard Element Requirements 2

- These should reflect your Department Workplans and include:

- Scorecard Overview
- Strategic Plan Alignment
- Web Resource

Scorecard Overview

Objective	Measures	Initiatives
Provide transit service matched to modern travel patterns	<ul style="list-style-type: none"> Ridership trends: Total CAT unlinked passenger trips Service Levels: Total Revenue Service Hours Service Levels: Total Revenue Service Miles 	<ul style="list-style-type: none"> Explore the possibility of a Regional Transit Authority Goal 3: A Beautiful and Sustainable Natural and Built Environment
Improve Network structure	<ul style="list-style-type: none"> Efficiency: Unlinked Passenger Trips per Revenue Service Hour Efficiency: Unlinked Passenger Trips per Revenue Service Mile 	
Provide simple responsive transit routes	<ul style="list-style-type: none"> CAT Driver Courtesy CAT Passenger Satisfaction 	
Foster a Transit First lifestyle		
Build Financial Stability		

Find in Scorecard Overview - SP Alignment... Default Sort Order Display All Rows

Strategic Plan Alignment

3. A Beautiful and Sustainable Natural and Built Environment

Web Resource

Charlottesville Area Transit website

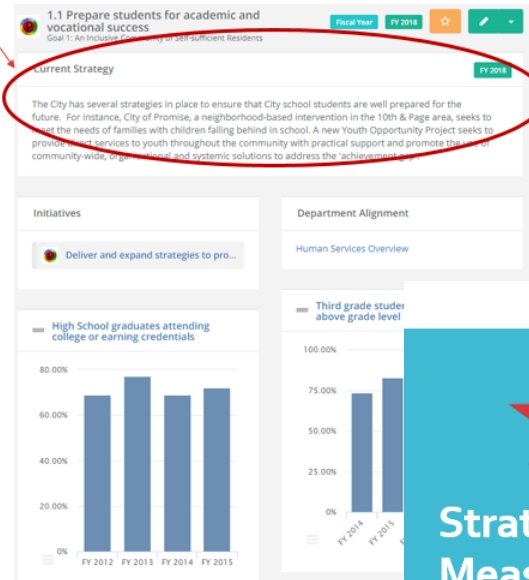
BASIC TRAINING



Strategic Plan Objective
Minimum Requirements

- Current Strategy updated for FY 2018 (June 2018)
- Link to all Initiatives
- Link to Department Scorecards
- Link to all Measures
- Review ALL relevant Objective information

Confirm if this is still relevant!



1.1 Prepare students for academic and vocational success
Goal 1: An Inclusive Community of Self-Sufficient Residents

Current Strategy FY 2018

The City has several strategies in place to ensure that City school students are well prepared for the future. For instance, City of Promise, a neighborhood-based intervention in the 10th & Page area, seeks to meet the needs of families with children falling behind in school. A new Youth Opportunity Project seeks to provide support services to youth throughout the community with practical support and promote the use of community-wide, organizational and systemic solutions to address the achievement gap.

Initiatives
Deliver and expand strategies to pro...

Department Alignment
Human Services Overview

High School graduates attending college or earning credentials

Fiscal Year	Percentage
FY 2012	~68%
FY 2013	~75%
FY 2014	~68%
FY 2015	~70%

Third grade students above grade level

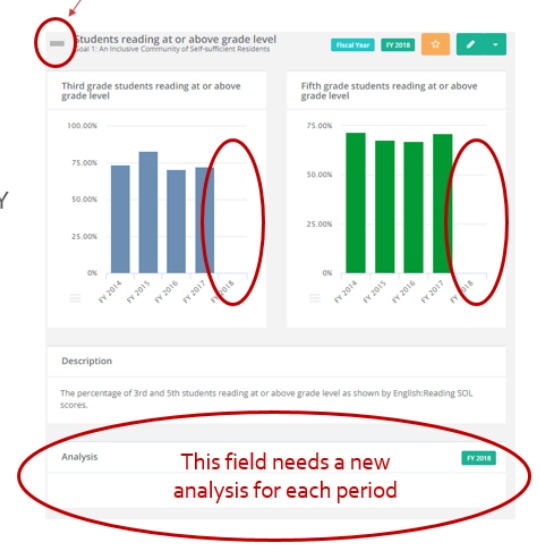
Fiscal Year	Percentage
FY 2014	~75%
FY 2015	~80%



Strategic Plan Measure
Minimum Requirements

- Status Symbol (e.g., upward green arrow)
- Graph updated for FY 2018 (June 2018)
- Description
- Analysis
 - If current data is unavailable, state when the data will become available.

Update Status Symbol here



Students reading at or above grade level
Goal 1: An Inclusive Community of Self-Sufficient Residents

Third grade students reading at or above grade level

Fiscal Year	Percentage
FY 2014	~75%
FY 2015	~85%
FY 2016	~70%
FY 2017	~75%
FY 2018	~75%

Fifth grade students reading at or above grade level

Fiscal Year	Percentage
FY 2014	~70%
FY 2015	~65%
FY 2016	~65%
FY 2017	~65%
FY 2018	~65%

Description
The percentage of 3rd and 5th students reading at or above grade level as shown by English-Reading SOL scores.

Analysis
This field needs a new analysis for each period

ADVANCED TRAINING

- Picked a few “super users” who already know well the basics
- Done at least once a year with a ClearPoint Strategy trainer/staffer
- Good “deep dive” into CP
- Big picture!
- Small groups for engagement at higher level

Super User Session (9AM – 12PM)

- **Brief Account Overview**
- **Charting**
 - Front-end customization options
 - Saving chart types
 - Basic JSON exercises
- **Strategy Maps**
 - Creating a strategy map
- **Summary Reports**
 - Types of reports in ClearPoint
 - Column display options
 - Filtering reports
- **Other Visual Options**
 - Detail page pod options
 - Basic HTML table styling

- **Exporting Reports**

- Briefing book customization options
- HTML Export options
- Emailing pages

- **Notifications and Reminders**

- **What’s Next in ClearPoint**

- **Questions**

- Any additional time will be used to answer questions related to super users’ ClearPoint scorecards, reports, and processes.

Super User Q&A (12PM – 1PM)

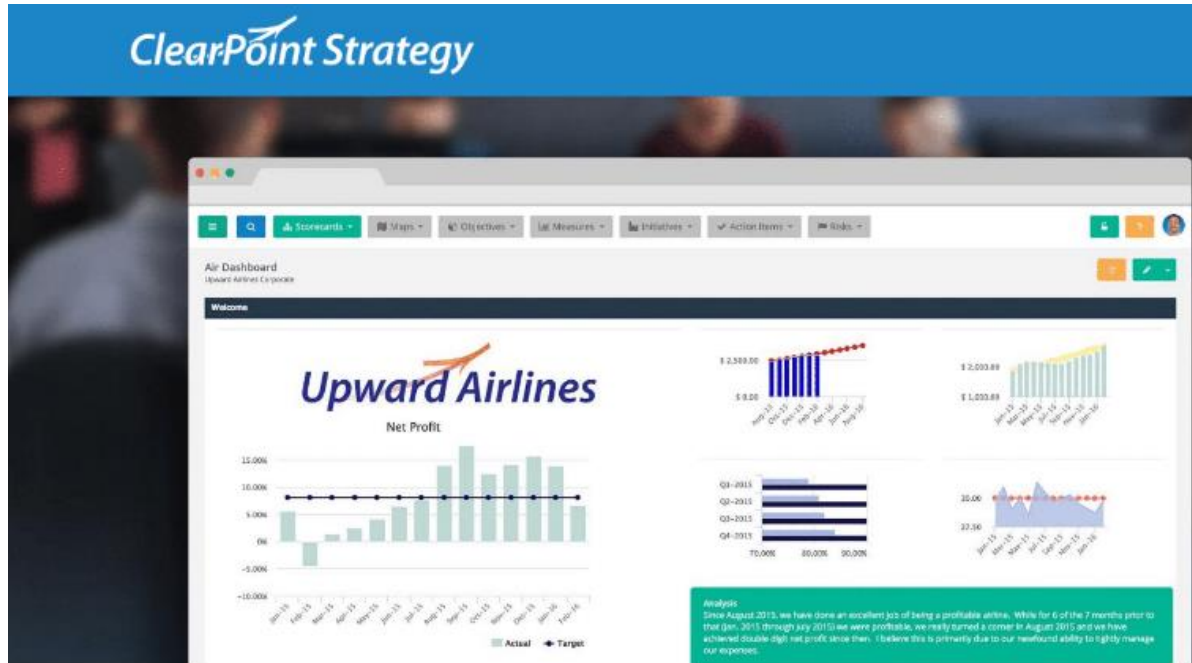
This will be a chance for super users to dive into any additional questions related to their use of ClearPoint. Users can also bring anything they need to set up in ClearPoint, and we will be available to assist.

Administration Session (1PM – 2PM)

This session will be a chance for Leslie and ClearPoint to go over the ClearPoint Cleaning Guide and questions regarding account organization and administrator capabilities.

ADVANCED TRAINING

ClearPoint helps municipalities improve performance



Three panels illustrate ClearPoint's capabilities for municipalities:

- Manage your municipal strategic plan:** A red panel showing a dashboard for 'Metropolis' with various metrics and charts.
- Create community dashboards for your citizens:** A green panel showing a dashboard for 'Metropolis' with sections for 'Operations & Technology' (15%), 'Community Support' (150), 'Safety & Preparedness' (15), and 'Transportation Stability' (4.5%).
- Network with others to share best practices:** A purple panel showing a bar chart comparing 'Total new traffic congestion or transportation as a % of GDP' across different regions.

A large double-headed arrow is positioned below the three panels, indicating a bidirectional flow of information and best practices.

ClearPoint Client Case Studies

Examples from around the World

OPEN LABS

- A time for users to work on their scorecard updates and learn from others in a setting without distractions
- Convey the big issues regarding performance management citywide
- Starts as instructional and then there is open time
- Go off site of City Hall offices
- Have used forum to get input from users:
 - What do you wish ClearPoint would do?
 - What do you spend much of you time on in ClearPoint?
 - What things would you like to be different?

OPEN LABS

Open Lab Agenda

1. Update on P3 Citizen Workgroup
2. Changes to the “look” of ClearPoint and your department scorecards
 - Discussion and feedback
3. Overview of ClearPoint “basics”
4. ClearPoint SharePoint site review
 - Discussion and feedback
5. Time to work in your scorecards – questions and assistance

1. P3 Citizen Workgroup

- Met in August to get oriented to P3
- Have been receiving regular updates on our progress with scorecards
- Start rollout to workgroup – October!!

- *This team will review the scorecards submitted by departments*
- *What do you like and dislike?*
- *Are departments showing relevant information?*
- *Are the targets meaningful?*
- *What would you change?*

USERS NEWS UPDATES/EMAIL DISTRIBUTION LIST

Used to only send emails as reminders for users to do their updates in scorecards

And now.....

- Created clearpoint@charlottesville.org email distribution list
- Distributed not only to users but to all stakeholders – even those who are consumers and viewers
- Use of ClearPoint visual in the email
- Content includes information on ClearPoint webinars, training opportunities, news about open labs, resources, etc.
- Goal to send monthly

USERS NEWS UPDATES/EMAIL DISTRIBUTION LIST



Good Afternoon! It's been a while so wanted to reach out about a few things!

1. **ClearPoint Summit in Durham, NC** – several of us are attending the summit in Durham the first week of June! We will bring back some great ideas and strategies that we can share with everyone.
2. [New P3 Intranet Site](#) – Have you seen the new P3 Intranet site?? It's got some great stuff, and I will be adding a page for ClearPoint, but check out the *Strategic Plan Management and Reporting Guide*! This will feature prominently in all future training especially the **P3: Perfect** section and the evaluation and revisions timelines chapter.
3. **ClearPoint Training** – will be putting together some training this summer to get everyone up to speed (new users) and those who know the system more practice and we can also share our ideas from the summit. Those will be scheduled June/July timeframe.
4. [ClearPoint Resources](#) – just a reminder that ClearPoint Strategies has amazing resources on their website! Check it out!

INTRANET PAGE/STRATEGIC PLAN & MANAGEMENT REPORTING GUIDE

City Strategic Plan: P3

Strategic Plan & Management Reporting Guide

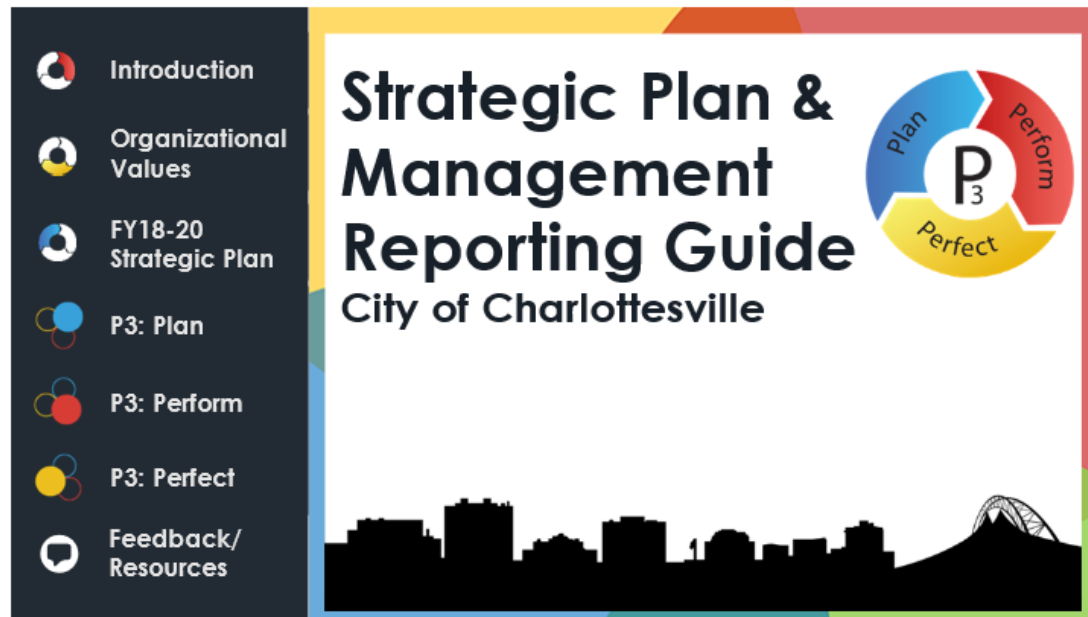
[City Strategic Plan: P3](#) 

[ClearPoint Support](#)

[Important Documents](#)

[P3 Core Team](#)

[Strategic Plan & Management Reporting Guide](#)



Introduction

Organizational Values

FY18-20 Strategic Plan

P3: Plan



P3: Perform

P3: Perfect

Feedback/ Resources

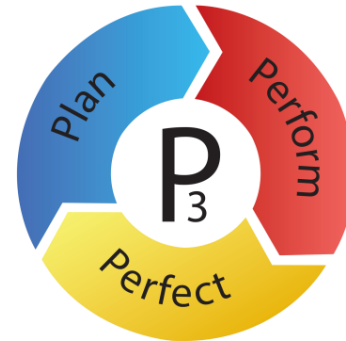
Strategic Plan & Management Reporting Guide

City of Charlottesville



NEW – ADVISORY TEAM

- Will help develop and execute ideas around all things ClearPoint
 - Trainings
 - User engagement
 - Communications
 - Needed resources
 - Whatever else!!!!



- Not only for users – for anyone who's interested in advancing ClearPoint and performance management in the City!

WHAT DOES THAT LOOK LIKE TO THE PUBLIC?

Charlottesville Open Data Home



Choose any of the City's strategic initiatives below for more information, status updates, and progress.

STRATEGIC PLAN

DEPARTMENT PERFORMANCE

EFFICIENCY STUDY

BUDGET AND STRATEGIC PLAN PROGRESS REPORT

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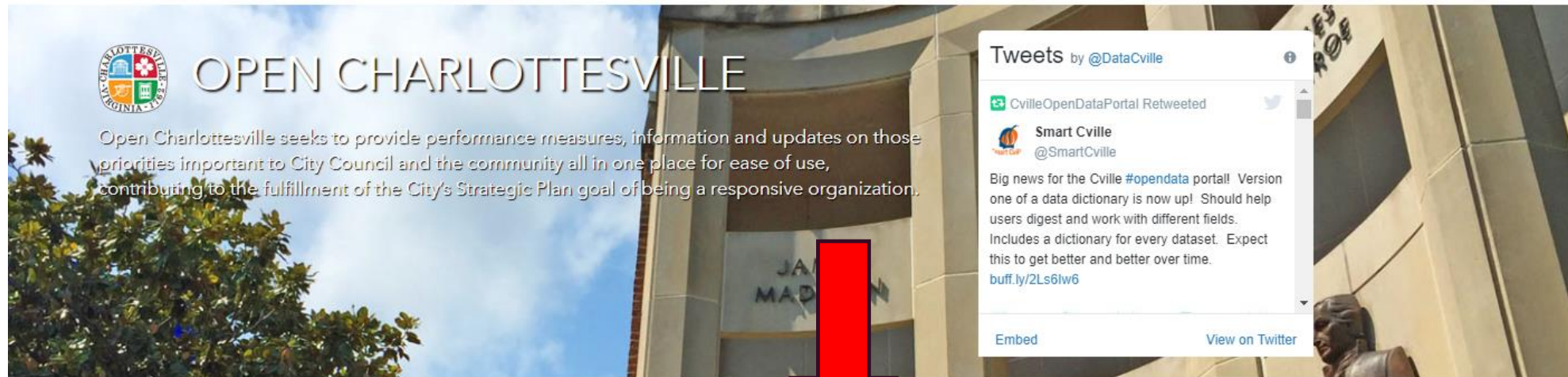
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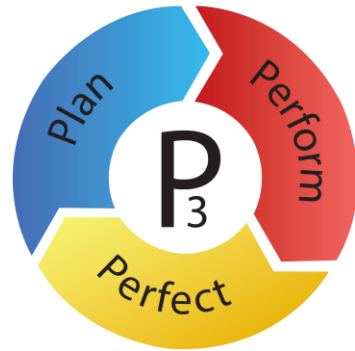
STRATEGIC PLAN

DEPARTMENT
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