

Spilling the Beans

Everything You Want and Need to Know about Strategy and Performance Management

Quick Introductions

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Our Time Today



Spill the Beans

Pose questions...

...breakout sessions...

...report out...

...we'll share!



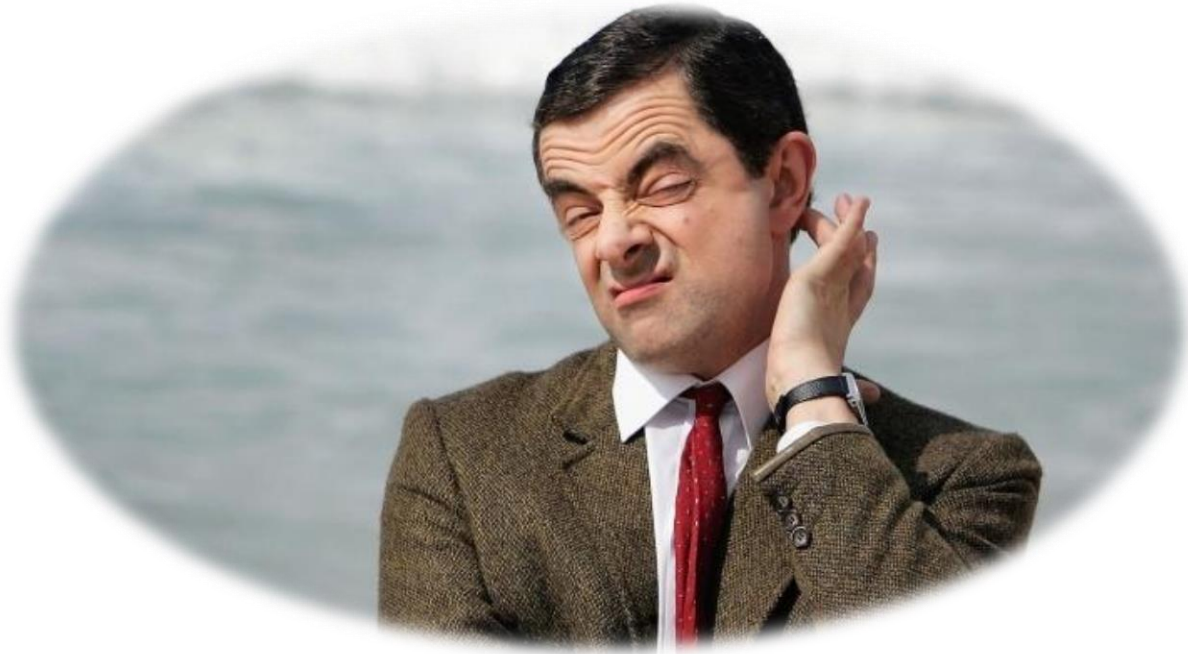
Make new friends, but keep the old!



Breakout Session 1: Where do things stand?

What are you doing with current strategy and performance management efforts and would like to do more of?

What's working well and what advice do you have for others?



Report Out



ClearPoint Pointers

- ▶ Identify your core competencies
 - What do you excel at as an organization?
 - What are your opportunities for improvement (OFIs)?
 - Conduct a SWOT Analysis
- ▶ Make sure your goals are actionable and measurable
- ▶ It's a “we thing” not an “office thing”
- ▶ Assign clear owners and clearly define responsibilities
- ▶ Determine a central place and format to track everything



Olathe Pointers

- ▶ **Business planning**
 - All housed in one place - ClearPoint
 - Refreshed every year
 - One click and update on [public web site](#)
 - Easy to utilize template
 - Metrics that align to organizational goals

Resource Management Department Business Plan 2018-2022



<p>Management & Budget Services</p> <ul style="list-style-type: none">• Budget• Performance Measurement• Process Improvement• Strategic Planning	<p>Human Resources & Risk Management Services</p> <ul style="list-style-type: none">• Recruitment & Retention• Comp & Benefits• Employee Safety & Wellbeing• Employee Relations• Compliance• Risk Management	<p>Finance Services</p> <ul style="list-style-type: none">• Financial Reporting• Accounts Payable• Payroll• Treasury & Cash Management• Procurement	<p>Administration & City Clerk</p> <ul style="list-style-type: none">• Department Administration• Economic Development Assistance• City Clerk's Office
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Collaborating with our customers to deliver the highest quality solutions that support innovative services to the community.

Departmental Business Plans in ClearPoint

The screenshot displays the ClearPoint Strategy web application interface. At the top, there is a navigation bar with icons for Scorecards, Maps, Goals, Measures, Initiatives, and Action Items. On the right side of the navigation bar, there are icons for notifications, a lock, a help icon, and a user profile icon labeled 'CS'. Below the navigation bar, the main content area is titled 'Business Plan - Resource Management' with the subtitle 'RM_Resource Management'. The page content features a large blue header with the text 'Introduction' and a central graphic that reads 'Resource Management Department Business Plan 2018-2022'. Below the graphic is a photograph of a group of approximately 15 people, likely the department staff. On the left side of the interface, there is a dark sidebar menu with a list of departments, including Budget, Chamber of Commerce, Internal Direction Finance, OlatheConnect, Regional Benchmarking, CMO, City Auditor, Communications and Marketing, Fire, IT, Legal, Library, Municipal Court, Organizational Development, Parks & Recreation, Police, PW_Public Works, RM_Resource Management (which is highlighted), Reference Measures, BSAs, and LT PerforMax. At the bottom of the page, there is a breadcrumb trail: 'Administrator > RM_Resource Management > Scorecard > Business Plan - Resource Management'. A chat icon is visible in the bottom right corner.

Departmental Business Plans in ClearPoint

The screenshot displays the ClearPoint Strategy interface for the City of Olathe, KS. The top navigation bar includes a menu icon, a search bar, and several filter buttons: Scorecards, Maps, Goals, Measures, Initiatives, and Action Items. On the right side, there are notification, lock, help, and user profile icons.

The left sidebar shows a navigation tree with the following items: City of Olathe, KS; Dec-18; Budget; Chamber of Commer...; Internal DirectionFin...; Internal DirectionFin...; OlatheConnect; Regional Benchmarki...; CMO; City Auditor; Communications and...; Fire; IT; Legal; Library; Municipal Court; Organizational Devel...; Parks & Recreation; Police; PW_Public Works; RM_Resource Manag...; Reference Measures (...); BSAs; LT PerforMax; and History.

The main content area is titled "Challenges and Opportunities" and contains the following text:

The Resource Management Department operates in a broad, dynamic environment. The department collaborates with an extensive list of customers and stakeholders. Challenges and opportunities arise on a continuous basis and we must maintain an agile operational plan that provides information and values-based, data-driven guidance. The Department has identified these significant business challenges and opportunities that impact delivery of our core services to customers:

Increased Demand for Services
The organization's services will be enhanced and modified to meet the diverse and ever-changing needs of Olathe's citizens and employees.

Strategy:

- To meet the diverse needs of all departments and stakeholders, Resource Management will strategically research, plan and allocate human, financial and capital resources and enhance processes, while adhering to organizational values, policies, legal mandates and fiduciary responsibilities.

Legal Mandates
The Resource Management Department faces a dynamic, ever-changing legal and regulatory environment. This exerts compliance pressure on related activities within the department.

Strategies:

- Staff members attend pertinent seminars and conferences and are active in professional organizations, to stay up-to-date with current legal interpretations.
 - Staff members continuously review policies and procedures to ensure they are compliant with regulatory changes.
 - Communicate changes and continuously educate managers and supervisors regarding best practices.
- Kansas Open Record Act (KORA) challenges the record storage and retrieval capability of the City Clerk.
 - City Clerk staff serve as the freedom of information officer to address Kansas Open Records Act (KORA) requests received from the public. Staff is researching software programs that would streamline the current manual process and provide analytics for the requests that are received.
- Generally Accepted Accounting Principles (GAAP) & the Governmental Accounting Standards Board (GASB) requirements are always changing which requires vigilant monitoring to ensure compliance with accounting requirements. New standards for accounting, auditing, grant reporting and financial reporting add a layer of complexity and increase staff workloads.
 - Staff members keep up to date with pronouncements and implementation guides by attending pertinent seminars and conferences as well as being active in professional organizations.

Financial

The bottom of the page shows a breadcrumb trail: Administrator » RM_Resource Management » Scorecard » Business Plan - Resource Management. A blue chat icon is visible in the bottom right corner.

Departmental Business Plans in ClearPoint

☰
🔍
📊 Scorecards ▾
🗺️ Maps ▾
🎯 Goals ▾
📈 Measures ▾
📌 Initiatives ▾
👉 Action Items ▾
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CS

ClearPoint Strategy City of Olathe, KS
 < Dec-18 >
 Budget
 Chamber of Commer...
 Internal DirectionFin...
 Internal DirectionFin...
 OlatheConnect
 > Regional Benchmarki...
 > CMO
 > City Auditor
 > Communications and...
 > Fire
 > IT
 > Legal
 > Library
 > Municipal Court
 Organizational Deliv...
 > Parks & Recreation
 > Police
 > PW_Public Works
 > RM_Resource Manag...
 Reference Measures (...
 > BSAs
 LT_PerforMax
 ↻ History

Be Responsible & Accountable Financial Stewards - Key Result Indicator Measures

Department Goals	Measure Name	Measure Series	Dec-16	Dec-17	Dec-18
Financially Strong - Goal #1: Develop, monitor, and uphold transparent, long-term financial plans and policies	Electronic Payments to Vendors (% of total payments made electronically) (RMD) <small>Accounting</small>	Actual % YTD	29.45%	33.71%	38.65%
		Target			37%
	Percentage of Savings Due to Competitive Bidding (RMD) (Annual) <small>RM_Procurement</small>	Actual Percentage of Savings	9.58%	7.48%	6.38%
		Target	9.58%	8.53%	7.81%
	Achieve Compliance with GFOA Distinguished Budget Presentation Award <small>RM_APR</small>	Actual	100%	100%	100%
		Target	Yes = 100	Yes = 100	Yes = 100
	% of Expenditures to General Fund Budget (Annual) <small>Budget</small>	Actual	-5.50%	-5.81%	-0.16%
		Target	<= 0 Percent	<= 0 Percent	<= 0 Percent
	% of Revenues to General Fund Budget (Annual) <small>Budget</small>	Actual	0.60%	-0.21%	3.11%
		Target	+/- 5 percent	+/- 5 percent	+/- 5 percent
	Receive GFOA CAFR Award <small>RM_APR</small>	Actual	100%	100%	100%
		Target	Yes = 100	Yes = 100	Yes = 100
	General Obligation Bond Rating Index (Council Key Result Indicator #4) (OPD) <small>RM_APR</small>	Actual	9	9	9
		Target	9	9	

Administrator RM_Resource Management » Scorecard » Business Plan - Resource Management



Breakout Session 2: Opportunities for Improvement

Where are some opportunities for improvement with your strategy and performance management approach?

What advice do you have for others?



Report Out



ClearPoint Pointers

- ▶ Organizational buy-in
 - Lunch and Learns
 - Strategy Roadshow
 - Recognize
- ▶ Network and lean on one another
- ▶ Create a process document
- ▶ Cascade your strategy
 - Department Workplans or Business Plans
- ▶ Link spending and strategic priorities
- ▶ Strategic plan refresh
- ▶ Have you captured the citizen's perspective?



Olathe Pointers

▶ PerformMax

- Mile wide – inch deep vs inch wide – mile deep
- Subject matter expert led
- Discussion question format
- Elevated collaboration (ex. Feeling of safety in Parks, non-injury accident rates)

▶ Citizen Satisfaction Reporting

- Index summary page
- Measure level detail page



Citizen Satisfaction Reporting: DirectionFinder

City of Olathe, KS

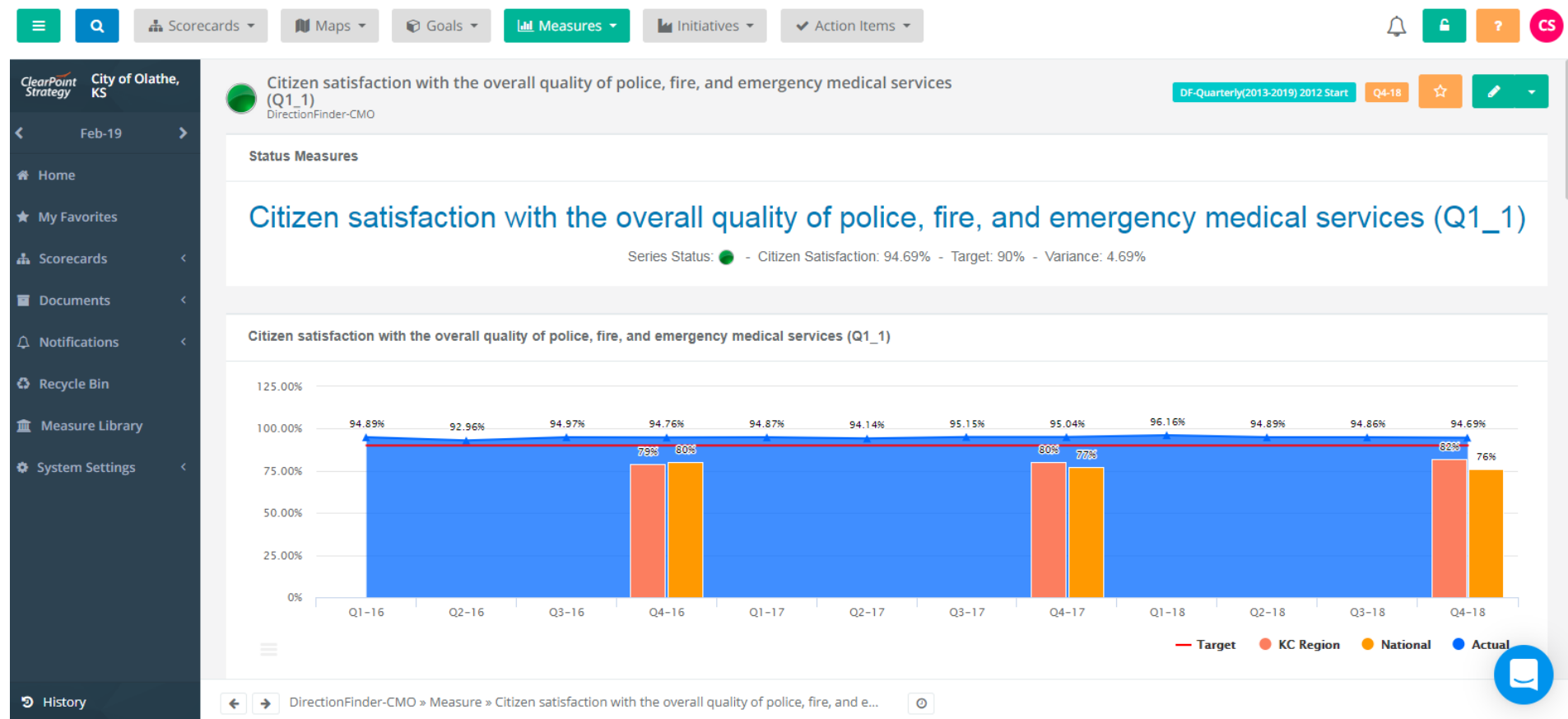
DirectionFINDER
"Helping communities use citizen input to set a course for tomorrow"

DF Overall Index

- DF Quality of Life Index
- DF City Leadership Index
- DF Customer Service Index Report
- DF Diversity Index
- DF Communication Index
- DF Codes and Ordinances Index
- DF City Library Index
- DF Active Lifestyle Index
- DF Public Safety Index
- DF Utility Services Index
- DF Wastewater Index
- DF Yard Waste Index
- DF Recycling Index
- DF Water Index
- DF Transportation Index
- DF Trash Index
- DF City Maintenance Index
- DF Street Maintenance Index
- DF Stormwater Index

Administrator | Department Common Measures-CMO » Scorecard » Index Score Landing Page

Citizen Satisfaction Reporting: DirectionFinder

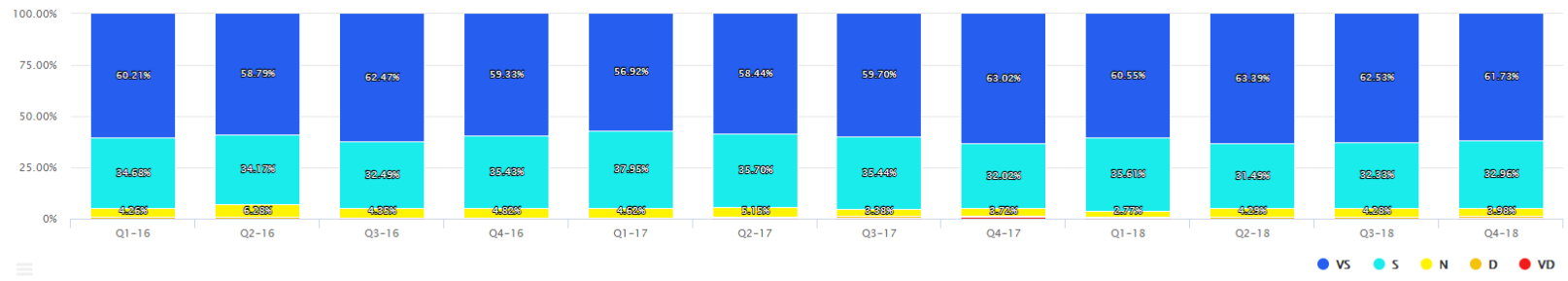


Citizen Satisfaction Reporting: DirectionFinder

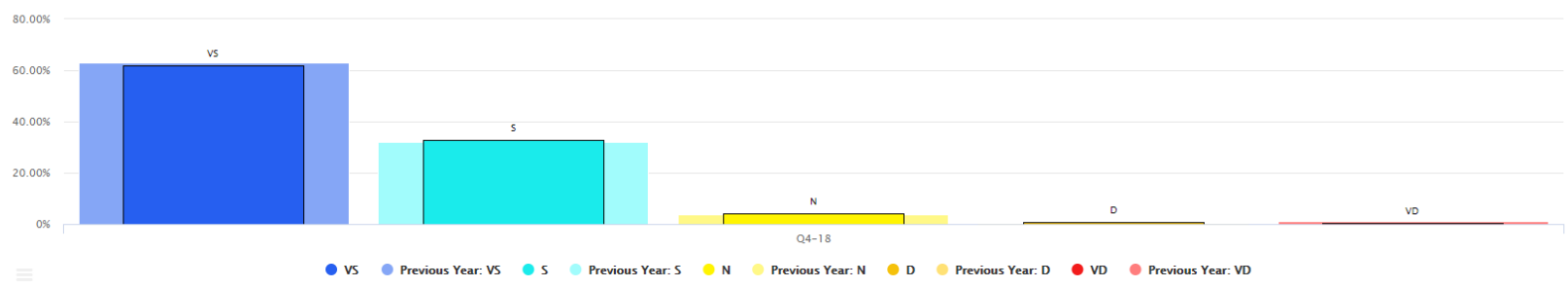
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Scorecards ▾
Maps ▾
Goals ▾
Measures ▾
Initiatives ▾
Action Items ▾
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ClearPoint Strategy City of Olathe, KS
 Feb-19
 Home
 My Favorites
 Scorecards
 Documents
 Notifications
 Recycle Bin
 Measure Library
 System Settings
 History

Satisfaction Breakout Trend



Satisfaction Breakout Prior vs. Current Year Quarter



Internal Analysis

← →
 DirectionFinder-CMO » Measure » Citizen satisfaction with the overall quality of police, fire, and emergency medical services (...)
🔍



Breakout Session 3: Communication

How are you, or do you intend, to communicate your strategic plan and performance to staff, leadership, and the community?

What advice do you have for others?



Report Out



ClearPoint Pointers

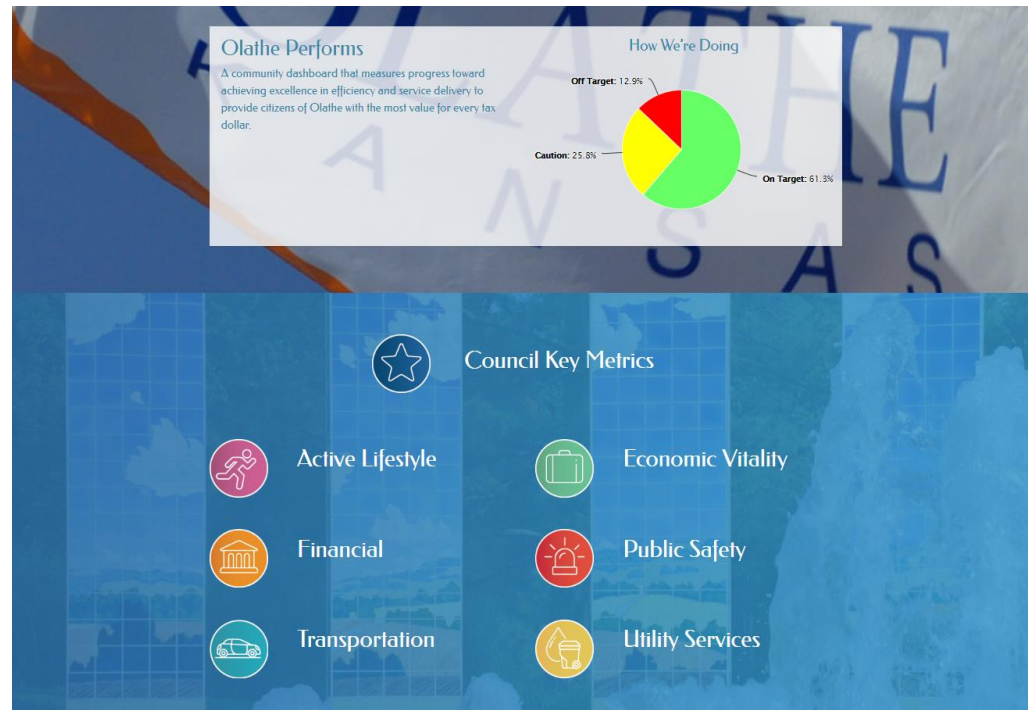
- ▶ Keep your audience in mind
- ▶ Focus groups to find out what is relevant
- ▶ Start simple with sharing and expand
 - Internally
 - Post reports
- ▶ Be sure it's easy for anyone to understand
- ▶ Don't just "data dump"
- ▶ Rule of Three



Olathe Pointers

▶ Evolving Olathe Performs

- Align with row level data and open data portal
- Align with 2040 strategic plan
- Future info graphic direction



The beans have been spilled...



Helpful Resources



8 Things Missing From Your City's Strategic Plan



Local Government KPI Library



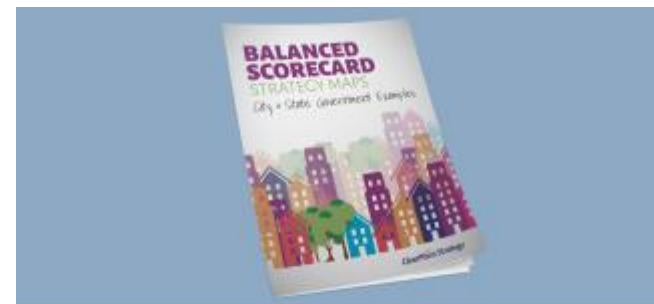
How To Lead Effective Strategy Review Meetings



Community Dashboard Design Template



Strategic Plan Review



City & State Government Strategy Maps

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