Training Objectives - Attendees will:

- have fun
- have an understanding of performance management / performancestat programs and the value they can provide
- have an understanding of the city’s overall approach to performance management
- be excited about using the tools and resources provided as part of our performance management program to improve their work
- Understand request for 2-year goals and performance measure in budget
- have an understanding how this fits in with TacomaData, Tacoma 2025, 2017-2018 Budget Process
What is performance management?

- Performance management includes activities which ensure that goals are consistently being met in an effective and efficient manner. Performance management can focus on the performance of an organization, a department, employee, or even the processes to build a product or service, as well as many other areas.
What is performance management?

Performance management is the **systematic process** by which an agency **involves its employees**, as individuals and members of a group, in **improving organizational effectiveness** in the accomplishment of agency mission and goals.
Performance Management System

1. Commit - Performance Standards
   • Identify relevant standards
   • Select indicators and benchmarks
   • Set goals and targets
   • Communicate expectations

2. Measure - Performance Measures
   • Define indicators and measures
   • Develop data systems
   • Collect data

3. Take Stock - Reporting and Assessing Progress
   • Analyze data
   • Feed data and analysis back to executives
   • Develop a regular reporting cycle

4. Act - Service and Program Improvements
   • Use data for decisions to improve policies, programs and outcomes
   • Create the learning organization
A key component is talking about performance without complicating it
## Breaking Down the Goal Statement

<table>
<thead>
<tr>
<th>Strategic Priority (e.g. High Performing Government, Safer Streets)</th>
</tr>
</thead>
<tbody>
<tr>
<td>What are you trying to achieve? (outcomes)</td>
</tr>
<tr>
<td>How do you know you’ve succeeded? (measures and targets)</td>
</tr>
<tr>
<td>What can you do to influence these outcomes? (programs and activities)</td>
</tr>
<tr>
<td>Who is ultimately responsible for the goal? (department)</td>
</tr>
</tbody>
</table>
Breaking Down the Goal Statement: Example

- In order to make our streets safer for all Tacomans, the Police Department
- will reduce violent crimes by 20%
What makes a performance measure “good?”

- Relevance
  - Purpose
  - Control/Influence
- Context
  - History
  - Targets
- Understandable
- Timely
- Reliability
### Where is the data? How hard is it to get?

<table>
<thead>
<tr>
<th>Internal Data</th>
<th>External Data</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Structured</strong></td>
<td><strong>Public</strong></td>
</tr>
<tr>
<td>Source Database</td>
<td>United States Census</td>
</tr>
<tr>
<td>Enterprise Data Warehouse</td>
<td>Facebook</td>
</tr>
<tr>
<td>Data Mart</td>
<td>LinkedIn</td>
</tr>
<tr>
<td>Data Store</td>
<td>Google</td>
</tr>
<tr>
<td><strong>Semi-Structured</strong></td>
<td><strong>Syndicated</strong></td>
</tr>
<tr>
<td>CSV</td>
<td>dun &amp; Bradstreet</td>
</tr>
<tr>
<td><strong>Unstructured</strong></td>
<td>Google Maps</td>
</tr>
<tr>
<td>XML</td>
<td>ICMA</td>
</tr>
</tbody>
</table>

**Source Database**

**Enterprise Data Warehouse**

**Data Mart**

**Data Store**

**Open Portal**

**PDF**

**EMAIL**

**CSV**

**XML**

**Easier**

**Harder**

**Easier**

**Harder**
Why set targets?

- Clarifies vision for all stakeholders
- Creates framework for tracking and comparison
- Inspires actors to continuous improvement
- Sets norms and expectations
But what if...

- This is a new measure for my dept
- I don’t have historical data
- My background is not in statistics
- I’m new to this work
- The data exists, but it is not high quality
There’s another way… Proxy Measures

• Indirect measure of the desired outcome which is strongly correlated to that outcome
• Commonly used when direct measures of the outcome are unobservable and/or unavailable
• Use a proxy measure when there is little or no data available about the program being implemented, but the outcome the program is designed to influence has an existing and commonly accepted proxy
<table>
<thead>
<tr>
<th>This Measure</th>
<th>Is a Proxy For</th>
<th>And can be found here</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gross Domestic Product (GDP)</td>
<td>Quality of Life, Standard of Living</td>
<td>Department of Commerce: Bureau of Economic Analysis has <a href="#">GDP by state &amp; metropolitan statistical area</a></td>
</tr>
<tr>
<td>Unemployment Rate</td>
<td>Economy, Labor Market</td>
<td>Department of Labor’s Bureau of Labor Statistics publishes regular updates to employment, unemployment and wage data.</td>
</tr>
<tr>
<td>Air Quality Index (AQI)</td>
<td>Environmental Quality</td>
<td>The Environmental Protection Agency (EPA) publishes <a href="#">Air Quality data</a> by city and county.</td>
</tr>
<tr>
<td>Infant Deaths (Mortality)</td>
<td>Maternal, Infant &amp; Child Health</td>
<td>The CDC publishes <a href="#">Linked Birth and Infant Death Data</a> with links to local public health agencies.</td>
</tr>
<tr>
<td>Obesity Rates</td>
<td>Health &amp; Well-being of a community</td>
<td>CDC publishes <a href="#">Nutrition, Physical Activity and Obesity: Data, Trends and Maps</a> which can be viewed at the state and city level for many cities</td>
</tr>
<tr>
<td>Homicide Rates</td>
<td>Public Safety</td>
<td>Local jurisdictions are the best source for the most current crime data, but the <a href="#">FBI</a> publishes annual reports.</td>
</tr>
<tr>
<td>Reading &amp; Math Proficiency Levels</td>
<td>Education Quality</td>
<td>The National Center for Education Statistics publishes <a href="#">proficiency scores</a> on standardized tests for many participating jurisdictions.</td>
</tr>
<tr>
<td>General Fund Personnel and Operating Expenses per Capita, FTEs per 1,000 population</td>
<td>Government Operations &amp; Management</td>
<td>Personnel Costs, Operating Costs, and FTE counts are usually available in government budget documents, and population is available through the <a href="#">US Census Bureau</a></td>
</tr>
</tbody>
</table>
Target Setting Categories

Uncertainty
- no baseline data exists to set appropriate targets without guessing

Overconfidence
- targets are unrealistic and unattainable based on baseline data

Mediocrity
- targets are far below proven capacity

Accuracy
- targets are carefully calculated to drive precise achievement

Stability
- performance has reached an acceptable level, time to maintain and shift focus
<table>
<thead>
<tr>
<th>Uncertainty</th>
<th>Overconfidence</th>
<th>Mediocrity</th>
<th>Accuracy</th>
<th>Stability</th>
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</thead>
<tbody>
<tr>
<td>Do’s</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>❑ Consider a proxy measure.</td>
<td>❑ Understand why it is happening</td>
<td>❑ Understand its relationship to fear, distrust, and complacency</td>
<td>❑ Leverage multiple datasets and variables</td>
<td>❑ Celebrate it</td>
</tr>
<tr>
<td>❑ Take advantage of benchmarking</td>
<td>❑ Correct it by taking an informed approach</td>
<td>❑ Correct it by taking an informed approach</td>
<td>❑ Use proven data science practices</td>
<td>❑ Learn from it</td>
</tr>
<tr>
<td>❑ Make an informed guess.</td>
<td>❑ Identify the actual past performance history</td>
<td>❑ Identify the actual past performance history</td>
<td>❑ Run multiple what-if scenarios and sensitivity analysis</td>
<td>❑ Identify a permanent champion</td>
</tr>
<tr>
<td>❑ Remember, targets can be revised.</td>
<td>❑ Confirm all trends and anomalies</td>
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<td>❑ Pick an acceptable error range</td>
<td>❑ Continue monitoring (behind the scenes)</td>
</tr>
<tr>
<td>❑ Ask an outside expert.</td>
<td>❑ Show (do not just tell) why a more aggressive target is reasonable and achievable</td>
<td>❑ Find a middle ground</td>
<td>❑ Prevent it from recurring</td>
<td>❑ Move on</td>
</tr>
<tr>
<td>❑ Consider not setting a target.</td>
<td>❑ Find a middle ground</td>
<td>❑ Plan for future success by providing more resources to inform the next round</td>
<td>❑ Do not get intimidated</td>
<td></td>
</tr>
<tr>
<td>❑ Create a data collection schedule and stick to it.</td>
<td>❑ Adjust the timelines</td>
<td>❑ Do not refine targets too frequently</td>
<td>❑ Do not take it for granted</td>
<td></td>
</tr>
<tr>
<td>❑ Decide analytical methods in advance</td>
<td>❑ Let it go</td>
<td>❑ Prevent it from recurring</td>
<td>❑ Do not jeopardize it</td>
<td></td>
</tr>
<tr>
<td>❑ Engage Stakeholders</td>
<td>❑ Do not tolerate it</td>
<td>❑ Do not get intimidated</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Don’t’s</th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>❑ Do not give up. The absence of baseline data does not justify inaction.</td>
<td>❑ Do not be defensive</td>
<td>❑ Do not tolerate it</td>
<td>❑ Do not get intimidated</td>
<td>❑ Do not take it for granted</td>
</tr>
<tr>
<td>❑ Do not confuse reluctance with incapacity.</td>
<td>❑ Do not assume they know better</td>
<td>❑ Do not exacerbate it by shaming people with talk of &quot;accountability&quot;</td>
<td>❑ Do not bend your target toward the actuals</td>
<td>❑ Do not jeopardize it</td>
</tr>
<tr>
<td>❑ Do not be surprised when a target reveals a bad measure.</td>
<td>❑ Do not over-correct</td>
<td>❑ Do not refine targets too frequently</td>
<td>❑ Do not get intimidated</td>
<td></td>
</tr>
<tr>
<td>❑ Do not advertise targets that negatively impact your stakeholders.</td>
<td>❑ Do not get intimidated</td>
<td>❑ Do not bend your target toward the actuals</td>
<td>❑ Do not refine targets too frequently</td>
<td></td>
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Visualizations

• Selecting the right type of visualization is key, but there’s help out there
  • Google it
  • Map it
  • Chart it
  • Picture it

• Dashboard Examples
  • Los Angeles
  • Louisville
  • New Orleans
Be Brief

- Don’t try to tell the whole story
- Trust your skills and visualizations
- Let people ask questions
Goal Taxonomy in Tacoma

Priority Areas defined by committee

10 Year and 2 Year Goals
Set by departments - relate to 2025 priorities

Performacne Measures
How we know we are getting to the 2 year goals
How we know we are getting to the 2 year goals
How we know we are getting to the 2 year goals

Department Activities
What we do that affects PMs
What we do that affects PMs
What we do that affects PMs
What we do that affects PMs
What we do that affects PMs
How does it operate in the real world?

Ideal - performance measures are well developed and remain fairly consistent year to year.
Reality - performance measures are not well developed and change from year to year.

Ideal - performance is tracked from performance measures developed for either the business process or Budget/Tacoma24/7 dashboard each quarter.
Reality - tracking is sporadic and done only when required.

Ideal - progress towards performance targets is continually monitored and all anomalies are analyzed in detail with data.
Reality - progress is measured monthly and only a few anomalies are analyzed in detail.

Ideal - Stuff gets fixed, everyone sees how the processed worked, citizens rejoice and fist bumps all around.
Reality - Little clarity on when fixes occur and how departments are improving their service delivery.
Where are we going…

• https://performance.chattanooga.gov/
• https://www.portlandoregon.gov/dashboard/
Template Review and Next Steps

• What goal are you working on?
• What will reporting look like?
• How do I get help? Required to schedule Office Hours time
• Due Date – September 2