PERFORMANCE MANAGEMENT WORK SESSION

July 17, 2017
Noon
City Council Chambers
313 Court Street, The Dalles, Oregon

AGENDA

1. CALL TO ORDER

2. PERFORMANCE MANAGEMENT DISCUSSION

3. ADJOURN

Prepared by/
Izetta Grossman
City Clerk

MEMORANDUM

TO: Honorable Mayor, Members of Council, City Manager, and
            Department Heads

FROM: Matthew Klebes, Assistant to the City Manager

DATE: July 10, 2017

ISSUE: Performance Management Discussion Outline

The Dalles City Council Work plan for FY 17/18 set the development of Performance Management Benchmarks as a goal of Transparent Efficient Government (Goal F3). For this initiative, performance management is a process that provides feedback, accountability, and documentation for performance outcomes focused at the overall department level and NOT on individuals.

The objective of the upcoming work session is to review and reach an agreed upon definition of terminology, a restructuring of our values, goals, and projects based on said definitions, and provide input on the proposed performance benchmarking process. This information and input is needed to effectively identify performance management data points.

The following pages are documents we will use during the upcoming Performance Management session:

- Implementation
- Terminology
- Structure of current vision, mission, and goals
- Structure of potential vision, mission, values, and goals
- Structure and examples of potential department objectives, strategies, and performance benchmarks
- Examples of values and value statements
- Examples of potential performance benchmarks

PERFORMANCE MANAGEMENT IMPLEMENTATION

I. Leadership Team Meeting
   a. City Manager brings up topic as a goal and reasons why we are doing it
   b. Assistant to City Manager (ACM) introduces concept of performance management and approach
II. Leadership team and City Council works to identify overall City goals based on City Mission and Values
III. ACM individually meets with Department heads and staff about identified goals that potentially apply to them
   a. What do they do in relation to the goal
      i. Look at summary of what they do and select actions that are measurable and we want to track
         1. Work with staff and department head to define as an performance benchmark
IV. Collect data for 1 year on internal benchmarks
V. Review results and develop strategies for improvement
VI. Present to public as internally selected performance management (Maybe a Town Hall)
   a. Ask which metrics are the most important/useful
   b. Which metrics surprised them the most
   c. Which metrics may be missing
VII. Revise process and additional benchmarks from community
VIII. Repeat

TERMINOLOGY

It is important to have consensus regarding terminology. How do you define goal, objective, mission, value, strategy, etc.? Below is a sample hierarchy:

- **Vision**: What the community wants the community to become
  - **Mission**: What is the City's direct role in achieving that vision
    - **Values**: Our framework that shapes our approach
      - **Goals**: How will the City achieve the mission
        - **Objectives**: How will departments achieve the goals
          - **Strategies**: What is the plan for achieving the department objectives
            - **Performance Benchmark**: What will we measure to determine if we are achieving the objective and goal

Example
- **Vision**: "Improving economic vitality, governance, infrastructure, fostering cultural enrichment, providing recreation and open space, enhancing education, strengthening and sustaining community life" (Vision Action Plan)
  - **Mission**: "By working together, we will provide services that enhance the vitality of The Dalles."
    - **Values**: "Provide transparent and efficient administration of City government"
      - **City Goal**: Provide easy, concise, and timely City services
        - **Finance Department Objective**: Improved ability for citizens to pay City bills
          - **Department Strategy**: Reduce the cost of online bill pay by eliminating service charges for citizens that sign up for auto-pay
            - **Performance Benchmark**: Percentage of citizens signed up for auto pay; reduction in delinquent accounts
        - **Planning Department Objective**: Timely response to citizen concerns and feedback.
          - **Department Strategy**: Respond to citizens' complaints within 48 hours
            - **Performance Benchmark**: Percentage of complaints responded to within 48 hours.

Litmus Test for performance benchmarks: "Does this provide data that will measure change on an ongoing basis?"

- **Vision:** "Improving economic vitality, governance, infrastructure, fostering cultural enrichment, providing recreation and open space, enhancing education, strengthening and sustaining community life" (Vision Action Plan)

  o **Mission:** "By working together, we will provide services that enhance the vitality of The Dalles."

    ▪ **Values:**
      "Work and partner with governmental agencies and non-profits to improve coordination of services and open communication "
      "Promote economic development opportunities which will provide jobs and enhance community livability"
      "Maintain a sustainable budget that will support City operations and capital improvements, while assuring an adequate contingency fund"
      "Encourage civic responsibility and promote health and public safety through programs, partnerships, plans, and policies"
      "Provide transparent and efficient administration of City government"

      - **City Goals:**
      Various; Dog River Pipeline, Lone Pine Well, implement codification program, Performance benchmarking, etc.
        o **Department Objective:**

          ▪ **Department Strategy:**

            - **Performance Benchmark:**

EXAMPLE OF A POTENTIAL OUTCOME OF UPCOMING MEETING

VISION, MISSION, VALUES, AND CITY GOALS ONLY

- **Vision:** "Improving economic vitality, governance, infrastructure, fostering cultural enrichment, providing recreation and open space, enhancing education, strengthening and sustaining community life" (Vision Action Plan)

  - **Mission:** "By working together, we will provide services that enhance the vitality of The Dalles."

    - **Values:**

-Excellence	-Honesty	-Diverse
-Teamwork	-Accountability	-Creative
-Transparent Government	-Inclusive	-Efficient

      City Goals:
      "Work and partner with governmental agencies and non-profits to improve coordination of services and open communication "
      "Promote economic development opportunities which will provide jobs and enhance community livability"
      "Maintain a sustainable budget that will support City operations and capital improvements, while assuring an adequate contingency fund"
      "Encourage civic responsibility and promote health and public safety through programs, partnerships, plans, and policies"
      "Provide transparent and efficient administration of City government"

      - **Department Objective:**
        - **Department Strategy:**
          - **Performance Benchmark:**

EXAMPLE OF DEPARTMENT OBJECTIVES, STRATEGIES, AND BENCHMARKS TO FULLFILL GOAL

- **Vision:**
  - **Mission:**
    - **Values:**

      City Goals:
      A. "Work and partner with governmental agencies and non-profits to improve coordination of services and open communication "
      B. "Promote economic development opportunities which will provide jobs and enhance community livability"
      C. "Maintain a sustainable budget that will support City operations and capital improvements, while assuring an adequate contingency fund"
      D. "Encourage civic responsibility and promote health and public safety through programs, partnerships, plans, and policies"
      E. "Provide transparent and efficient administration of City government"

      - **Department Objective:**

        Goal E: The Finance department will provide transparent and efficient administration of City government by making bill payment more efficient and reduce the number of delinquent accounts

        - **Department Strategy:** The Finance Department will reduce the cost of online bill pay by eliminating service charges citizens that sign up for autopay

          - **Performance Benchmark:** Percentage of customers that sign up for auto-pay each year; ratio of customers signed up for auto pay; reduction in delinquent billing accounts

VALUES AND VALUE STATEMENT EXAMPLES

-Excellence	-Honesty	-Diverse
-Teamwork	-Accountability	-Creative
-Transparent Government	-Inclusive	-Efficient
-Ethical	-Dynamic	-Innovative

"Transparent, open, and honest government. This value reflects our first and most important responsibility. Our competence is measured and, in fact, reinforced through active engagement of those we serve. We maintain an organizational reputation for openness, honesty, and integrity."

"Equity. Fair and just opportunities and outcomes for all people"

"Professionalism. As stewards of public funds and information we understand the importance of our jobs in the public sector and we respect ourselves and the organizations that we serve"

"Leadership. We set an example of professionalism for our staff and for the community and possess the motivation to achieve our goals and fulfill our mission"

"Fiscal Responsibility. Proper use of public resources is a trust which we continually guard. In our management of this trust, we must avoid even the appearance of impropriety. In our management of public funds, we constantly strive for the greatest possible efficiency and effectiveness to sustain affordable services."

"Valuing Employees. Employees are supported and take pride in public service"

"Growth. While preserving the city's character, more people and businesses lead to a growing and thriving economy."

The following is an example spreadsheet of performance metrics by department

City Council

PM #	Performance Measure	Target	FY15/16	FY16/17	FY17/18	Type of Indicator	Purpose of Indicator
001	Percent of citizens surveyed who feel very or somewhat satisfied with City services	75%	60%	66%		Effectiveness	Measures perception of City services
002	Number of unique volunteers serving on City related committees	100	45	55		Effectiveness	Measures the active participation of community citizens in government
003	Percent of Council work and regular sessions that began at the appointed time	95%	100%	100%		Efficiency	Demonstrates good management

Administrative

PM #	Performance Measure	Target	FY15/16	FY16/17	FY17/18	Type of Indicator	Purpose of Indicator
100	Percent of employees receiving professional development in the current year	100%	100%	100%			Demonstrates good management
101	Number of articles for the City newsletter highlighting citizen boards and commissions	12	10	11		Effectiveness	Measures success of the City's outreach strategy
102	Number of city-wide employee meetings including a training component	4	4	4		Work place culture	Measures support and positive work place culture
103	Percent of participation in City-wide employee activities	75%	45	55		Work place culture	Measures support and positive work place culture

Public Works

PM #	Performance Measure	Target	FY15/16	FY16/17	FY17/18	Type of Indicator	Purpose of Indicator
200	Percent of employees receiving professional development in the current year	100%	75%	50%			Demonstrates good management
201	Millions of gallons of water supplied	119.93	120	119		Workload	Determines current and future needs
202	Percent of pot holes filled within 5 days of complaint receipt	100%	90%	100%		Efficiency	Measures efficiency of street operation
203	Miles of streets striped	10 miles	20 miles	10 miles		Workload	Determines current and future needs
204	Percent of wastewater discharge standards met	100%				Effectiveness	Measures responsibility of maintaining safe wastewater systems

Finance

PM #	Performance Measure	Target	FY15/16	FY16/17	FY17/18	Type of Indicator	Purpose of Indicator
300	Percent of employees receiving professional development in the current year	100%	100%	55%		Work place culture	Demonstrates good management
301	Percent in City business conducted online	25%	>1%	10%		Efficiency	Demonstrates good management
302	Debt service to revenues	5%	10%	7%		Effectiveness	Demonstrates good management
303	Cash liquidity	5	1	2		Effectiveness	Demonstrates good management

Planning

PM #	Performance Measure	Target	FY15/16	FY16/17	FY17/18	Type of Indicator	Purpose of Indicator
400	Percent of land use applicants rating planning and zoning services process as good or excellent	60%	76%	88%		Effectiveness	Measures the ongoing perception of City services
401	Number of applications received and responded to	N/A	1,000	1,200		Workload	Measures the workload of Department

Police

PM #	Performance Measure	Target	FY15/16	FY16/17	FY17/18	Type of Indicator	Purpose of Indicator
500	Average response time when office is on-duty	3 minutes	1 minute	1 minute		Effectiveness	Measures effectiveness of police response
501	Average response time when office is off-duty	20 minutes	25 minutes	22 minutes		Effectiveness	Measures effectiveness of police response
502	# of officers surveyed that rate the support of the community as high or very high	80%	80%	90%		Work place culture	Measures the perception of officer's support from the community