What's Working?

Leading Performance Management Practices in Agencies

- Underlying theories and policy direction about performance management are critical but it’s the real-world stories that communicate their value.
- Panelists will share their experiences and lessons learned by implementing performance management practices to achieve mission success.
- Examples will focus on leveraging new technologies and improving the use of data and evidence.
What’s Working Panelists

- **Lenora Stiles**, Director, Office of Strategic Planning and Performance Improvement, US Department of the Treasury
- **Aaron Ray**, Deputy Director for Policy, Colorado Governor’s Office of State Planning and Budgeting
- **Beth Murdock**, Senior Performance Analyst, City of Alexandria, Virginia
- Moderator: Karin O’Leary, IBM Services

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What’s Working?
Treasury Levers for Driving Enterprise Initiatives

- **Strategic Planning**: Long-term priority setting
- **Budget Formulation**: Near-term planning and resource alignment
- **Strategic Management**: Progress/risk monitoring and course correction

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What’s Working?
How Treasury Monitors Progress and Adjusts Course

<table>
<thead>
<tr>
<th>SESSIONS</th>
<th>FALL (September–November)</th>
<th>WINTER (January–March)</th>
<th>SPRING (April–May)</th>
<th>SUMMER (June–July)</th>
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<tbody>
<tr>
<td>FOCUS</td>
<td>Organizational Performance and Program Management</td>
<td>Strategic Objective Annual Review (SOAR)</td>
<td>Organizational Performance and Program Management</td>
<td>Budget and Program Management</td>
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<td>CHAIR</td>
<td>Dep Sec-COO/ASM-PIO</td>
<td>ASM – PIO/Deputy PIO</td>
<td>Dep Sec-COO/ASM-PIO</td>
<td>ASM – POC</td>
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<td>GOALS / OUTCOMES</td>
<td>Review progress on priorities from the previous year</td>
<td>Evaluate progress toward priorities in the strategic plan</td>
<td>Issue-based sessions: Dive deep on cross-cutting issues</td>
<td>Near-term priority execution through budget formulation</td>
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<td>Set priorities for the upcoming year</td>
<td>Identify and shift, as necessary, strategic Treasury priorities</td>
<td>Program-based sessions: check in on critical programs/projects</td>
<td>Update list of critical programs/projects based on budget requests</td>
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<td>Recognize successes; identify shortfalls/risks; assess organizational health</td>
<td>Outline potential topics for annual review with OMB</td>
<td>Confirm list and check status of critical programs/projects</td>
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<td>Deep dives on select critical programs/projects</td>
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What’s Working?
Treasury’s Key Elements of Data-driven Reviews

- Data must be useful
  - Staff must have capacity to analyze and communicate data
- Key players must be at the table
  - Attendees must prepare rigorously for the sessions

- Leadership must play a visible role in accountability
  - Follow-up items identified at meetings should be recorded and communicated
- Measures should align to organizational goals
  - Sessions should be held regularly and reliably
What’s Working?
Treasury’s Decision Calculus

- Move Beyond Compliance
- Maximize Value, Minimize Burden
- Strengthen Partnerships
- Leverage Existing Processes

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What’s Working?
Colorado: Aligning Budget and Performance Management

- In past, performance management and budget were not aligned.
- Agencies set performance management goals for the upcoming FY (e.g., FY 2021-22) and requested budget resources for the subsequent FY (e.g., FY 2022-23).
- As such, agencies could only identify goals that could be accomplished within existing resources...
- ... and, performance management goals were not available to inform budget formulation.
Colorado: Aligning Budget and Performance Management

- This year, agencies are setting performance management goals over a two year cycle.
- So FY 2022-23 budget formulation can be informed by FY 2022-23 performance management goals.
Alexandria, Virginia

Population \(\approx 160,000\)
Size \(\approx 15.5\) square miles
Bordered by Arlington County, Fairfax County, Prince George’s County, MD (over the Wilson Bridge), and DC (river)

Office of Performance Analytics (OPA)

- Internal consultants to departments and offices
- Highly focused on specific research questions and topics
- Work informs the budget process outside of budget development
Resident Survey

- Scientific, random sample survey
- Used to identify areas of challenge and success in the City
- Results analyzed by key demographic groups

Taxi Regulation

- Report highlights proposed changes to Taxi industry to compete with ride share programs
- Changes to City code in the process of being implemented
- Lower regulation burden on City and Taxis
Overtime Dashboard

- Dashboard updates monthly with automatic notifications to staff
- Easy to drill down into details
- Compare time periods, departments, funds, hours, etc.

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Parking Enforcement

- Addition of more parking enforcement officers
- Increase in salary to be more regional competitive
- Decrease in non-enforcement job duties

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Fire Station Analysis

99.3% of incidents within 4 min. travel time from stations; 77.4% are within 2 mins., and there is an average travel time of 1.47 min.*

$54.9m in estimated additional costs over 20 years**

Alex 311 Customer Service System

- City’s most utilized dashboard
- Track customer service tickets and response
- Visibility into the system
- Data pulled hourly from Salesforce
- Can bring you directly to overdue tickets