Micro to Macro and Back Again

Performance Management and Measurement in Support of Strategic Goals
Session Objectives

1. Understand the relationship between performance measurement and management and audacious strategic goals
2. Identify some macro and micro level tools to help make the connection between performance data and strategic success
3. Learn about some real life examples of how to do it.
Standard justifications for performance measurement

1. It helps us save money.
2. It helps us be more efficient.
3. It helps us identify our core [services, processes, projects, roles, ...].
4. It keeps the tax rate down.
5. It helps us be more effective.
Standard objections to performance measurement

1. Government is too complex for simplistic data.
2. Everything we do is unique, there is no way to create comparisons [year / year, with other agencies, ....].
3. Council makes political decisions and they don’t care about data.
4. Its just about cost cutting.
And so here we are ....

Unless implementation is given equal weight, new policy and whiz-bang ideas will never fully prosper. Public servants below the fault line [strategy / policy level] are struggling to cope with bolts of lightning from politicians and senior bureaucrats above the fault line, as well as from a growing number of oversight bodies and the media, all the while trying to make performance accountability work in world where it simply has no footing. At the same time, they are aware that society no longer values their work or their performance as it once did.

In *What is Government Good At?*, Savoie, Donald, McGill-Queen’s, 2015 at page 280.
Budgeting in Government

“In government, the budget steals the stage. It decides who wins and who loses, and it lays down government priorities in the most concrete of terms. Two students of public administration have observed that “budgeting is the most important annual ritual of governing – the World Series of Government, or perhaps the Grey Cup of Government, within the Canadian context”.

The private sector does not operate anything like government. Budgeting in government and in the private sector is different in virtually all respects. The budget in government is akin to market forces, market share, and the bottom line all rolled into one, but without the market forces, market share, and a bottom line.”

Savoie, at page 65.
And if all of the above are true?

Public executives who seek to improve performance are certainly in the complexity business. Indeed, it is the complex environment in which public managers must work that imposes limits. Yet, I suspect, appreciating, predicting, and understanding complexity is much more of a challenge in public management than it is in computer design. After all the vagaries of silicon and software languages are much more limited and comprehensible than are the vagaries of the humans—employees, citizens, legislators, journalists—with whom public managers who seek to improve delivery must deal daily, and whose behavior affects the results.

*Behn, ibid, note 5 on page 107*
Reasons that performance measurement goes wrong

1. Short time horizons – public sector change often takes generations or at least years, not months, or election cycles.

2. Over-simplification and ‘siloification’ – decisions about roads affect poverty, decisions about climate change affect bus maintenance.

3. Over-complication – ‘the perfect is the enemy of the good’.

4. Measuring people and departments instead of services.
I don’t want it good, I want it Tuesday
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Michael Quinn Patton
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When the moon is in the 7th house ...

“But just because a management team employed the combination of Z, Y, and Q in situation S, and result R occurred, does not mean that, for S, Z+Y+Q caused R. The Z+Y+Q might have, indeed, been the cause. Or it might have been Z+Q. Then, again, it could have been only Y. Or maybe Jupiter was aligned with Mars.”

“How Scientific is the ‘science of delivery’” Robert D. Behn in Canadian Public Administration volume 60, No. 1 pp. 89-110 at page 96
Real Life - Sudbury
Continuous Management Cycle

- Set Strategic Direction and desired service levels
- Develop strategies to achieve goals & objectives
- Discuss risk analysis and management
- Capacity considerations

Strategic Planning

- Set specific objectives for the planning period
- Plan strategies
- Identify inputs, activities and outputs
- Set Performance Targets for service levels
- Allocate resources

Annual Planning

- Measure and monitor results and assess progress towards planned service levels
- Compare actual results to planned results
- Explain variances between planned and actual results

Program / Service Delivery

- Report results against planned service levels
- State why information is credible and balanced
- Demonstrate use of and learning from results

Learning & Adjusting

Performance Reporting

- Measure and monitor results and assess progress towards planned service levels
- Compare actual results to planned results
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Continuous Management Cycle

- Strategic Plan
- Learning & Adjusting
- Annual Report
- National Benchmarks
- Scorecards/Dashboards
- Strategic Planning
- Annual Planning
- Performance Reporting
- Measuring, Monitoring & Assessing Results
- Program / Service Delivery
- Budget
- PP&D
- Variance Reports
- Strat Plan Status
- Project Updates
Back to Theory
Aligning Services to Strategic Goals

For this part of the workshop we will use two common strategic goals as examples:

1. Decrease single vehicle, single occupant mode share. [Mode Share]

2. Reduce the number of people living below the LICO cutoff. [Poverty]
Starting In the Middle

Describing What Government Does with a Service Inventory
Service Inventory Schematic

- Vision
- Program
- External Service
- Internal Service
- Process Activity
- Resource
- Staff
- City Council
- City Manager
- Dept.
- Branch
- Staff

- Governance
- Accountability
- Responsibility
- Authority

Services

Not Services
## Services and Strategy – More Specifically

<table>
<thead>
<tr>
<th>Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stormwater Collection and Control</td>
</tr>
<tr>
<td>Waste Collection</td>
</tr>
<tr>
<td>Waste Diversion</td>
</tr>
<tr>
<td>Recreation and Culture: Cultural Interpretation</td>
</tr>
<tr>
<td>Community Standards Bylaw Enforcement</td>
</tr>
</tbody>
</table>
Ask what conditions you are trying to create with your strategy.
The Seven Population Accountability Questions

1. What are the quality of life conditions that we want for the children, families and adults in our community?
2. What would these conditions look like if we could see them?
3. How can we measure these conditions?
4. How are we doing on the most important of these measures?
5. Who are the partners that have a role to play in doing better?
6. What works to do better, including no-cost and low-cost ideas?
7. What do we propose to do?

Results Based Accountability as developed by Mark Friedman in his book *Trying Hard is Not Good Enough*
Identify the services that will have to be involved in tackling your strategy.
## Services related to Mode Share

<table>
<thead>
<tr>
<th>Service</th>
<th>Client</th>
<th>Output</th>
<th>Output Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scheduled Transit</td>
<td>Transit Rider</td>
<td>Ride</td>
<td>Movement</td>
</tr>
<tr>
<td>On-Demand Transit</td>
<td>Transit Rider</td>
<td>Ride</td>
<td>Movement</td>
</tr>
<tr>
<td>Roads</td>
<td>Roadway User (not just cars)</td>
<td>Lane-km of Road</td>
<td>Resource</td>
</tr>
<tr>
<td>Sidewalks</td>
<td>Sidewalk User</td>
<td>Km of Sidewalk</td>
<td>Resource</td>
</tr>
<tr>
<td>Off Road Paths</td>
<td>Off Road Path User</td>
<td>Km of Off Road Path</td>
<td>Resource</td>
</tr>
<tr>
<td>Parks and Natural Areas</td>
<td>Parks and Natural Area User</td>
<td>Hectare of Park or Natural Area</td>
<td>Resource</td>
</tr>
<tr>
<td>Police (Incident Intervention)</td>
<td>Traffic Law Violator</td>
<td>Ticket</td>
<td>Period of Sanction</td>
</tr>
<tr>
<td>Parking</td>
<td>Parker</td>
<td>Parking Space</td>
<td>Resource</td>
</tr>
<tr>
<td>Business Licensing</td>
<td>Business Owner (eg: taxi company)</td>
<td>License</td>
<td>Period of Permission</td>
</tr>
</tbody>
</table>
## Hint: Services related to Poverty Reduction

<table>
<thead>
<tr>
<th>Service</th>
<th>Client</th>
<th>Output</th>
<th>Output Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Assistance</td>
<td>Eligible Recipient</td>
<td>Money</td>
<td>Funds</td>
</tr>
<tr>
<td>Job Training</td>
<td>Eligible Student</td>
<td>Class</td>
<td>Educational Encounter</td>
</tr>
<tr>
<td>Homeless Shelter</td>
<td>Homeless Person</td>
<td>Bed</td>
<td>Resource</td>
</tr>
<tr>
<td>Social Housing</td>
<td>Eligible Tenant</td>
<td>Unit of Housing</td>
<td>Resource</td>
</tr>
<tr>
<td>Sidewalks</td>
<td>Sidewalk User</td>
<td>Km of Sidewalk</td>
<td>Resource</td>
</tr>
<tr>
<td>Parks and Natural Areas</td>
<td>Parks and Natural Area User</td>
<td>Hectare of Park or Natural Area</td>
<td>Resource</td>
</tr>
<tr>
<td>Police (Incident Intervention)</td>
<td>Panhandling Bylaw Violator</td>
<td>Ticket or Summons</td>
<td>Period of Sanction</td>
</tr>
<tr>
<td>Transit</td>
<td>Rider</td>
<td>Ride</td>
<td>Movement</td>
</tr>
</tbody>
</table>
Then ask key questions about how the services support the strategy
The Seven Performance Accountability Questions

1. Who are our clients (consider primary and secondary customers)?
2. How can we measure if our clients are better off?
3. How can we measure if we are delivering services well?
4. How are we doing on the most important of these measures?
5. Who are the partners that have a role to play in doing better?
6. What works to do better, including no-cost and low-cost ideas?
7. What do we propose to do?

Results Based Accountability as developed by Mark Friedman in his book *Trying Hard is Not Good Enough*
More Real Life
What’s A “Service Level”?  

A Service Level is:

A direction or requirement for a particular service area against which performance may be measured.
Why Define Service Levels?

Understand Expectations
- Clarify whether “the way things have always been done” is acceptable, or just habit

Identify Priorities
- Whether service is acceptable or change is needed, clarify where resources/effort should be directed

Manage Resources
- Shift discussions away from spending levels and toward service efforts
## Metrics - Mode Share

<table>
<thead>
<tr>
<th>Service</th>
<th>Metric</th>
<th>Metric Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scheduled Transit</td>
<td>Riders</td>
<td>How much did we do?</td>
</tr>
<tr>
<td>Scheduled Transit</td>
<td>Riders per Hour</td>
<td>How well did we do it?</td>
</tr>
<tr>
<td>Scheduled Transit</td>
<td>Cost per Rider</td>
<td>Cost</td>
</tr>
<tr>
<td>Scheduled Transit</td>
<td>y/y change in # of Riders</td>
<td>Is anyone better off?</td>
</tr>
<tr>
<td>Scheduled Transit</td>
<td>y/y change in % of Riders</td>
<td>Is anyone better off?</td>
</tr>
<tr>
<td>Scheduled Transit</td>
<td>y/y change in Transit Mode Share</td>
<td>Is anyone better off?</td>
</tr>
<tr>
<td>Roads</td>
<td>#lane-km rated good to very good quality</td>
<td>How well did we do it?</td>
</tr>
<tr>
<td>Sidewalks</td>
<td>y/y change in number of slip and fall notices</td>
<td>How well did we do it?</td>
</tr>
<tr>
<td>Roads</td>
<td>Cyclists per lane-km</td>
<td>How much did we do?</td>
</tr>
</tbody>
</table>
## Metrics - Poverty Reduction

<table>
<thead>
<tr>
<th>Service</th>
<th>Metric</th>
<th>Metric Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Assistance</td>
<td># people on assistance</td>
<td>How much did we do?</td>
</tr>
<tr>
<td>Financial Assistance</td>
<td># of people who exited assistance to employment in the last year</td>
<td>Is anyone better off?</td>
</tr>
<tr>
<td>Financial Assistance</td>
<td>Time from first contact until eligibility decision</td>
<td>How well did we do it?</td>
</tr>
<tr>
<td>Financial Assistance</td>
<td>Cost of delivery per dollar of assistance provided</td>
<td>Cost</td>
</tr>
<tr>
<td>Social Housing</td>
<td>Number of people housed in the last year</td>
<td>How much did we do?</td>
</tr>
<tr>
<td>Social Housing</td>
<td>NOI (net operating investment) per unit of social housing</td>
<td>Cost How well did we do it?</td>
</tr>
<tr>
<td>Social Housing</td>
<td>Number of people remaining in stable housing for more than 1 year</td>
<td>Is anyone better off?</td>
</tr>
</tbody>
</table>
Service Levels are All Very Well – but...

- But why if the end of my service, hits the process on your face?
- Or rather, what if in the ‘budgeting world series’, sewers always win over arts and culture?
Managing Complexity in Sudbury
Annual Business Planning

- Annual Planning
  - Department Performance Plan
    - Services
    - Special Projects
    - Service Levels
    - Resources
    - Performance Metrics
  - Annual Workplan
    - Processes
    - Projects
    - Allocation of Resources
  - Workload Requirements
    - Provide Services - Processes
  - Strategic Plan Deliverables
    - Advance and/or Improve Service - Projects
    - Change Agenda - Projects

Communication Tool

Management Tool

Annual Budget Book

Annual Planning

Department Performance Plan

Annual Workplan

Workload Requirements

Strategic Plan Deliverables

Provide Services - Processes

Advance and/or Improve Service - Projects

Change Agenda - Projects

Sudbury

www.greatersudbury.ca
Welcome to Work Plan Application
What would you like to do?

Create
- A Project
- A Process

Review
- My Projects
- All Projects
- My Processes

Projects requiring Resources

<table>
<thead>
<tr>
<th>Name</th>
<th>Division</th>
<th>StartDate</th>
<th>EndDate</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

There are no items to display

© 2017 - Work Planning Application
Objectives of Greater Sudbury’s Business Planning & Budgeting Process

- Establish a shared understanding of priorities, expected levels of service and planned results
  - Performance Plans
  - Department workplans
Objectives of Greater Sudbury’s Business Planning & Budgeting Process

- Obtain resources to complete the plan
  - Base Budgets
  - Business Cases for Service Level Change
- Build trust and confidence by demonstrating accountability
  - Strategic Plan Status Reports
  - Variance Reports
  - Performance indicators
  - Individual performance appraisals
Accountability Defined:

Accountability is a concept that calls for one to answer to others to justify the provision of resources, explain how resources were used and provide information to assess performance.
Describe the rationale for the Base Budget
Figuring out what works
Intelligent Guesses

For public managers, learning from data about results is rarely easy (Behn 2014: chapter 9). The manager is not running a controlled experiment, carefully changing nothing in half of the jurisdiction while making only one change in the other half (and denying those running the control-group half any knowledge about the treatment). Typically, the manager is making a number of changes, which means that there exist a number of possible causal explanations for any improvement in results. Thus, the manager’s ability to assign causal credit is difficult. And if the management team is just starting out—if this is the team’s first effort to improve performance—which of the team’s multiple actions deserves how much of the credit? The answer to this question cannot be called “science.” It could, however, be an intelligent guess.

How Scientific is the “science of delivery”? Robert D. Behn in Canadian Public Administration volume 60, No. 1 pp. 89-110 at page 96
Using Logic Models and Leading, Lagging and Proxy Indicators

**Leading**
- Data on scale of homelessness due to unstable housing
- Identify barriers to finding housing
- Identify barriers to staying in housing
- Identify supports required to remain in housing

**Examples**
- Relieve Barriers to finding housing
- Relieve barriers to staying in housing
- Provide supports to remain in housing

**Lagging**
- Reduce time on the waiting list
- Increase # of people in stable housing

**Proxy**
- Provide job training programs for people in social housing
- Provide addiction services and social work support
- Data on number of people in stable housing for more than 1 year
Workplan Objectives

- Serve as the driver for the annual budget process by matching base budget resources with planned outputs
- Provide a structure for work planning and proactively identify service needs and priorities
- Connect resources with anticipated service demands
- Make departmental performance visible, clarify accountability relationships and service expectations
Work Plan Process Overview

- Segment workplan into “ongoing processes” and “projects”
- Assign 100% of available resources in the workplan
- Identify process metrics
- Experiment and learn - focus is on better resource management, not meeting quotas
- Monitoring, follow up and reporting
- Assign lead responsibility for each process, project
1. Identify Work Processes

- Define processes that reflect tangible outputs and would resonate with staff, users.
- Group individual activities into departmental work processes, according to Directors’ perceptions of the appropriate level of detail.
- The nature of several work processes is such that they rely on inputs from other parts of the organization to be able to produce outputs either for other departments/divisions, or for the corporation as a whole.
- Processes are described in each Department’s workplan.
CAO’s Office Processes

<table>
<thead>
<tr>
<th>Year</th>
<th>Name</th>
<th>Description</th>
<th>Total Hrs</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>Collaboration</td>
<td>Attend and advise Council or its standing committees on strategic and policy matters</td>
<td>100</td>
</tr>
<tr>
<td>2018</td>
<td>Communication</td>
<td></td>
<td>250</td>
</tr>
<tr>
<td>2018</td>
<td>Divisional Operational Business Processes</td>
<td>General administration processes</td>
<td>250</td>
</tr>
<tr>
<td>2018</td>
<td>Executive Support</td>
<td>Office management, administrative tasks and issues follow-up/management</td>
<td>850</td>
</tr>
<tr>
<td>2018</td>
<td>Professional Development &amp; Training</td>
<td>Personal development/training and related travel time.</td>
<td>70</td>
</tr>
<tr>
<td>2018</td>
<td>Staff Report Review</td>
<td>Review and finalize staff reports</td>
<td>192.5</td>
</tr>
<tr>
<td>2018</td>
<td>Team Leadership</td>
<td>Attend ELT meetings, conduct one:one staff meetings and respond to ad hoc inquiries/support requests</td>
<td>240</td>
</tr>
</tbody>
</table>
Connecting Process to Strategy and then Improving It
## Connection to Process Level - Poverty

<table>
<thead>
<tr>
<th>Service</th>
<th>Metric</th>
<th>Metric Type</th>
<th>How could Lean Help?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Assistance</td>
<td># people on assistance</td>
<td>How much did we do?</td>
<td>Case loads per case worker, days to open file, minutes of contact between case worker and client?</td>
</tr>
<tr>
<td></td>
<td># of people who exited assistance to employment in the last year</td>
<td>Is anyone better off?</td>
<td># of job opportunities available, # of employer partners, cost of job grant per job?</td>
</tr>
<tr>
<td></td>
<td>Time from first contact until eligibility decision</td>
<td>How well did we do it?</td>
<td>Cycle time from first contact to case worker assignment, cycle time from case worker assignment to decision?</td>
</tr>
<tr>
<td>Social Housing</td>
<td>Number of people housed in the last year</td>
<td>How much did we do?</td>
<td>Number of units available, unit turnover rate, unit turnover cost, cycle time from waiting list placement to offer?</td>
</tr>
</tbody>
</table>
## Connection to Process—Mode Share

<table>
<thead>
<tr>
<th>Service</th>
<th>Metric</th>
<th>Metric Type</th>
<th>How could Lean help?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scheduled Transit</td>
<td>Riders per Hour</td>
<td>How well did we do it?</td>
<td>Busiest routes, Rider wait times, Bus utilization rates, Bus downtime rates, ??</td>
</tr>
<tr>
<td>Scheduled Transit</td>
<td>Cost per Rider</td>
<td>Cost</td>
<td>Cost / time to issue passes, cost / time to collect fares, bus utilization rates?</td>
</tr>
<tr>
<td>Scheduled Transit</td>
<td>y/y change in % of Riders</td>
<td>Is anyone better off?</td>
<td>Busiest routes, Rider wait times, route locations?</td>
</tr>
<tr>
<td>Scheduled Transit</td>
<td>y/y change in Transit Mode Share</td>
<td>Is anyone better off?</td>
<td>Travel time per mode type, rider cost per mode type, rider retention factors?</td>
</tr>
<tr>
<td>Roads</td>
<td>#lane-km rated good to very good quality</td>
<td>How well did we do it?</td>
<td>Cost per lane-km of winter control, equipment downtime, cost per asphalt type?</td>
</tr>
</tbody>
</table>
Improving Processes and Services

- Organizations / Units
  - Accountable
  - Transition and Improve
  - Projects

- Program
  - Administers
  - External Service
    - Implemented by
      - Process
        - Consumes
          - Resource

- Community
  - Experiences Outcomes
  - Client Receives Output
  - - Assess and Improve
    - Performance Data
2. Identify Projects

- Projects are time-bound, non-recurring work that have clear start and end dates.
- Reflect contributions to Council’s Strategic Priorities or other departments’ projects that require analytical support from Corporate Services.
- Projects are published separately from processes in the workplan.
Project Setup Creates Link to Goals & Services
Project Setup Creates Link to Goals & Services

Create

Name *
Business Unit: Office of the C.A.O.
Importance: Slightly Important
Urgency: Slightly Urgent
Services: ---Select---
Strategic Goal: N/A
Capital Budget: Provides leadership and strategic direction to departments to assist in achieving project or program objectives.
Contributors: Leads the development of business plans across dozens of service areas within the organization. Engages with key stakeholders to advance Council and City priorities.
Description: Leads a workforce of approximately 2,500 employees in the delivery of excellent public services.

Start Date: 2017-Aug-30
End Date: 2017-Nov-30
Rank: 21
Status: Pending

Include all Contributors?
Project Setup Creates Link to Goals & Services
### Projects

<table>
<thead>
<tr>
<th>Name</th>
<th>Business unit</th>
<th>Services</th>
<th>Status</th>
<th>Rank</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019 Budget Book</td>
<td>Communications and Community Engagement Division</td>
<td>N/A</td>
<td>Pending</td>
<td>1</td>
<td>2018-Jul-02</td>
<td>2018-Nov-30</td>
</tr>
<tr>
<td>ACR/CRM replacement</td>
<td>Communications and Community Engagement Division</td>
<td>N/A</td>
<td>Pending</td>
<td>1</td>
<td>2017-Jun-14</td>
<td>2019-Apr-30</td>
</tr>
<tr>
<td>Arena Development</td>
<td>Office of the C.A.O.</td>
<td>Engages with key stakeholders ...</td>
<td>Pending</td>
<td>1</td>
<td>2017-Apr-03</td>
<td>2018-Apr-03</td>
</tr>
<tr>
<td>Council Orientation</td>
<td>Corporate Services Department</td>
<td>N/A</td>
<td>Pending</td>
<td>1</td>
<td>2018-Mar-01</td>
<td>2018-Dec-21</td>
</tr>
<tr>
<td>Customer service strategy</td>
<td>Communications and Community Engagement Division</td>
<td>N/A</td>
<td>Pending</td>
<td>1</td>
<td>2017-Jul-17</td>
<td>2018-Dec-31</td>
</tr>
<tr>
<td>Employee Expenses quarterly reporting</td>
<td>Accounting Section</td>
<td>Coordinates internal and other aspects</td>
<td>Pending</td>
<td>4</td>
<td>2018-Jan-01</td>
<td>2018-Dec-31</td>
</tr>
<tr>
<td>Implement new Performance Planning and Development for Non-Union Staff</td>
<td>Organizational Development, Safety and Wellness Section</td>
<td>Enhances organizational effectiveness and engagement</td>
<td>Pending</td>
<td>3</td>
<td>2017-Jan-02</td>
<td>2018-Jun-30</td>
</tr>
<tr>
<td>Talent Benchmarking Forum</td>
<td>Organizational Development, Safety and Wellness Section</td>
<td>Enhances organizational effectiveness and engagement</td>
<td>Pending</td>
<td>4</td>
<td>2017-Aug-28</td>
<td>2018-Apr-30</td>
</tr>
<tr>
<td>Workplace Inspection Software Program</td>
<td>Organizational Development, Safety and Wellness Section</td>
<td>Provides leadership and organizational support</td>
<td>Pending</td>
<td>3</td>
<td>2017-Aug-06</td>
<td>2017-Nov-06</td>
</tr>
</tbody>
</table>
3. Seek Input

- Directors contact their peers to learn about specific service needs/collaboration opportunities.
- Input received from each department would be included in the workplan - either as a distinct project or by assigning a portion of available capacity to accommodate the departments’ requests.
- Where requests exceed the resources available, Directors will be asked to assist in prioritizing to ensure the most important needs are addressed.
4. Match Resources with Service Requests

- Directors and Managers estimate process volumes, time requirements for projects
- Identify process capacities and the time available for providing project support
- Result = staff hours/days of effort required for each process, project
- Can identify performance indicators for each process/project
  - Link to MBNCanada data, Departmental Performance Plan
Use Reports to Check Capacity

![Image of Sudbury Work Planning interface with assigned hours for Ed Archer and Lisa McAuley, showing their assigned and available hours, and the difference in hours as a percentage]

© 2017 - Work Planning Application
Monitoring and Reporting

- Workplan is available for reference so that:
  - Everyone knows what we are doing for them
  - Everyone knows what we are doing for others
  - Everyone knows the impact of unplanned, emergency requests
- Regular updates on plan progress, results to GMs, ELT
- More frequent monitoring/reporting will occur on specific projects/processes within a department or project team
Work Plan Risks

- Projects are Dynamic – scope changes occur which impacts resources
- In-year projects may bump existing projects
- Shared commitment required – workplan highlights how results are delivered by collaboration, not individual departments
What’s In It For You?

- Improved dialogue with Council
- More and better stakeholder engagement
- Opportunity to focus attention on key performance drivers like proper, and properly funded, asset management activities
- Improved information for management to ensure that process improvement opportunities are capitalized on
What’s In It For You?

- More reliable long range plans and reduced risk of unmet expectations
- Improved opportunities to address increasing service demands of the public
- Increased public trust and confidence
Key Takeaways

- Taking deliberate steps to understand the connections between strategy and operating results makes service delivery easier and builds trust.
- This doesn’t happen by accident – but simple tools and regular reporting will make an enormous difference to your success.
- Focusing everyone's attention on services and service levels, not just cost, helps manage risk and increases the likelihood that you'll get the results you want. It takes the whole team.
- This isn’t just pie in the sky – real municipalities like Sudbury are doing it. Reach out to your colleagues for help and sharing.
“Just right enough.”

“We don’t get paid to do it right. Right is infinite money, time, processes. We get paid for the art of doing it just right enough...”

Adam Steltzner, Mars Rover Engineer