

# Getting Others to Understand Performance Management

By: Wydale Holmes – Tempe, AZ

Rafael Baptista – Raleigh, NC

6/20/2019

# Agenda

- Introduction to Performance Management Team
- Member Introduction
- Tempe, AZ Presentation – Wydale Holmes
- Raleigh, NC Presentation – Rafael Baptista
- Wrap up

# What we are all about

- Our goal is to bring together different cities and counties to share new concepts and ideas
  - Share information and lessons learned about performance management, strategic planning, process improvement, benchmarking, public engagement, etc.
- How we chose you
  - Researched cities and counties who have received the GFOA Budget Award, Special Recognition for Performance Management and ICMA Certificate in Performance Management – mostly in the southwest region
- Meeting Setup
  - 2-4 presenters from various members at each meeting
  - 1 hour and will occur quarterly or semi-annually

# Let's get to know you

Tell us about your organization? What is your role in performance management, strategic planning, or continuous improvement?

- Albuquerque, NM
- Arapahoe County, CO
- Arvada, CO
- El Paso, TX
- Fort Collins, CO
- Gilbert, AZ
- Gunnison County, CO
- Las Cruces, NM
- Oklahoma City, OK
- Olathe, KS
- Raleigh, NC
- Tempe, AZ



**Tempe**

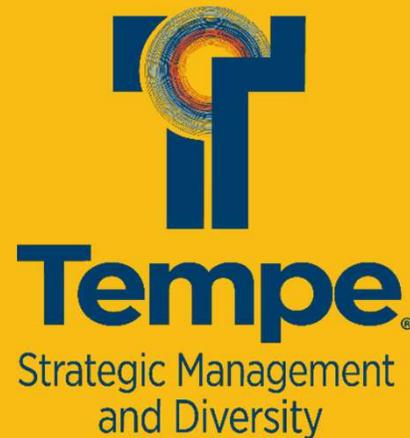
Making waves in the desert

# Performance Management:

*Getting Others to Understand*



June 20, 2019  
Wydale K. Holmes, MPA, CPM, SPHR







# 1 Facilitation

- Strategic Planning
  - Visioning
  - Purpose Statements
  - SWOT Analysis
  - Council Priorities
  - Strategy Sessions





## 2 Training

- Strategic Management 101
  - General
  - Customized
- New Employee Orientation
- Tempe Accelerates



# 3 Consulting + Coaching



- Senior Management
- Departments, Teams, “Owners”
  - Performance Measure R + D
  - Developing “worksheets”
  - Strategy Coaching
  - Pre-Accelerates Session Guidance



# 4 Performance-Led Budgeting



# 5 Applied Work



- Tempe Accelerates
- Council Presentations  
(Priority + Related Performance Measures)
- Request For Proposals
- Technology + Innovation Steering Committee
- Performance Portal





# Next destination



- Strategic Management 102
- Data Academy
- Employee Performance Management  
— Alignment with Performance Measures

# TEMPE'S STRATEGIC PLAN

## MEASURABLE, ACCOUNTABLE, TRANSPARENT

Search all open datasets



### BROWSE OUR STRATEGIC PRIORITIES



 Safe & Secure Communities



 Strong Community Connections



 Quality of Life



 Sustainable Growth & Development



 Financial Stability & Vitality

[performance.tempe.gov](https://performance.tempe.gov)

performance.tempe.gov

data.tempe.gov

Tempe Accelerates

Visit us:

[www.tempe.gov/government/strategic-management-and-diversity/strategic-management/](http://www.tempe.gov/government/strategic-management-and-diversity/strategic-management/)

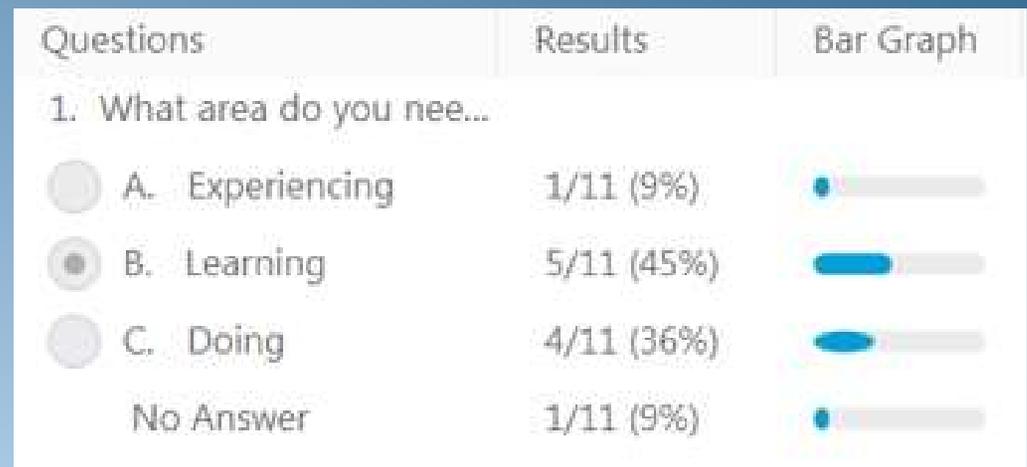
**Wydale K. Holmes**

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# Poll Question – Tempe, AZ

- What area do you need to develop more in your performance management program?
  - A. Experiencing
  - B. Learning
  - C. Doing



# Poll Question – Raleigh, NC

- How confident are you that your workforce has the skills and empowerment to successfully support your strategic plan?
  - A. Great deal of confidence
  - B. Quite a lot of confidence
  - C. Very little confidence
  - D. No confidence

Questions	Results	Bar Graph
1. How confident are you...		
<input type="radio"/> A. Great deal of con...	3/11 (27%)	
<input type="radio"/> B. Quite a lot of co...	4/11 (36%)	
<input checked="" type="radio"/> C. Very little confid...	3/11 (27%)	
<input type="radio"/> D. No confidence	0/11 (0%)	
No Answer	1/11 (9%)	

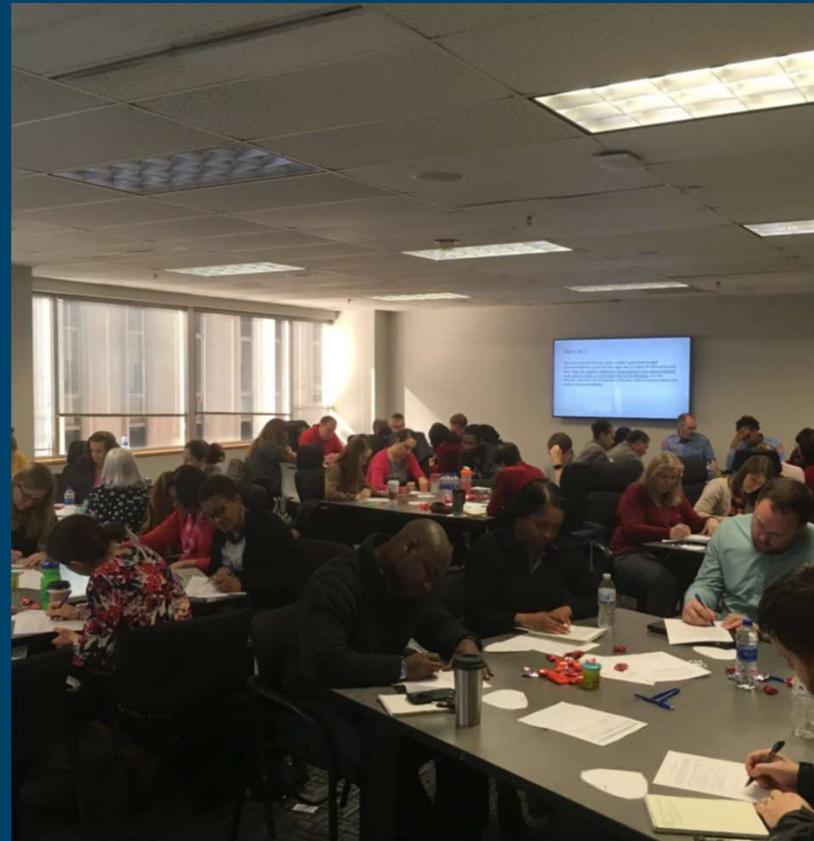
# Raleigh, NC

Rafael Baptista



Raleigh

Analytics Academy:  
How Raleigh  
empowers  
employees to make  
data-driven  
decisions





## Raleigh What We do

- Run Raleigh's Strategic Planning and Performance Analytics Academy
- We provide high quality training on topics of Strategic Planning, Performance Analytics, Continuous Improvement and Budgeting to City Employees





# Selected List of Topics

- *Principles of Departmental Business Planning*
- *Data Integrity*
- *Budget Boot Camp*
- *How to Analyze and Use Data in Decision Making*
- *Behavioral Economics*
- *Principles of Continuous Improvement*
- *Logic Modeling*
- *Data-Driven Decision Making*



## FY19 Strategic Planning & Performance Analytics Academy

### TOPICS BY LEARNING PATH

#### PERFORMANCE ANALYTICS

*Principles of Performance Measures and Financial Data - (January 10th 1-4pm SWS)*

*Data-Driven Decision Making - (February 13th 1-4pm OEP 809, February 20th 9am-12p, SWS)*

*Is Your Measure Reliable? Data Integrity - (March 6th 1-3pm OEP 809, March 14th 9-11 SWS)*

*Data Visualization - (April 4th 1-5pm SWS, April 17th 9-11am OEP 809)*

*Survey Design and Analysis - (June 12th 9-11am SWS, June 14th 1-5pm OEP 809)*

#### BUDGETING

*Budget Boot Camp - (October 31st 9-11am OEP 809)*

*Advanced Budget Boot Camp (January 23rd 2-4pm OEP 809)*

*Business Case Development - (November 14th 9-11am SWS, November 16th 1-5pm OEP 809, January 11th 1-5pm OEP 809)*

#### CONTINUOUS IMPROVEMENT

*Principles of Continuous Improvement - (December 5th 1-3pm OEP 809)*

*Principles of Design Thinking - (March 29th 9-11am SWS)*

#### STRATEGIC AND BUSINESS PLANNING

*Principles of Departmental Business Planning - (January 9th 9-11am SWS, January 15th 1-5pm OEP)*

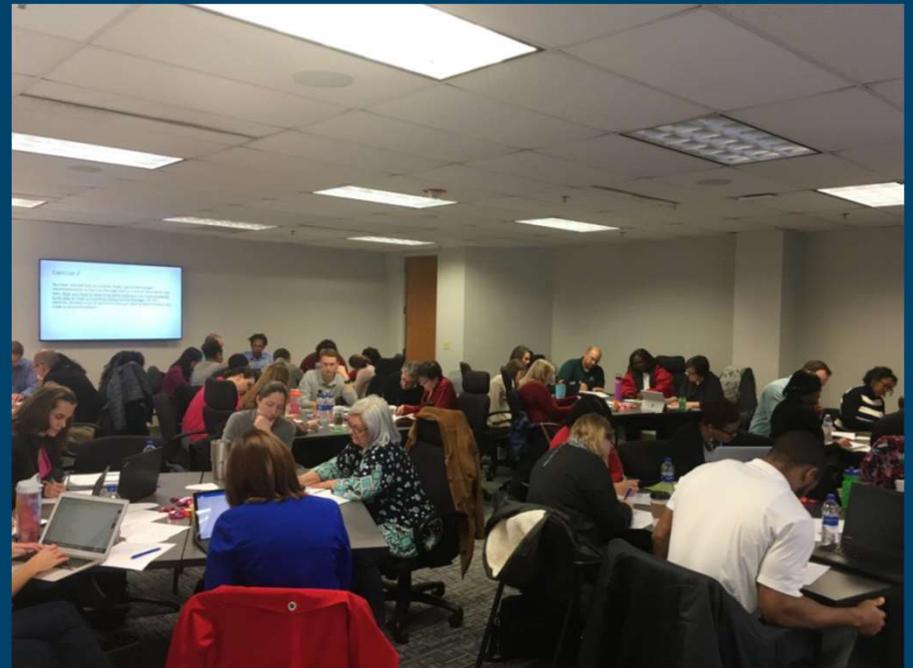
*Principles of Strategic Planning - (May 2nd 1-3pm SWS)*

**Want to learn more?**  
Email Rafael Baptista <[rafael.baptista@raleighnc.gov](mailto:rafael.baptista@raleighnc.gov)>



# Our Results

- 329 employees attended
- 835 total attendance
- 20 topics over three years
- Number of negative evaluations in FY19: 0
- % of Departments reached: 100%
- Return Rate: 52%





# How we manage the Academy and select topics

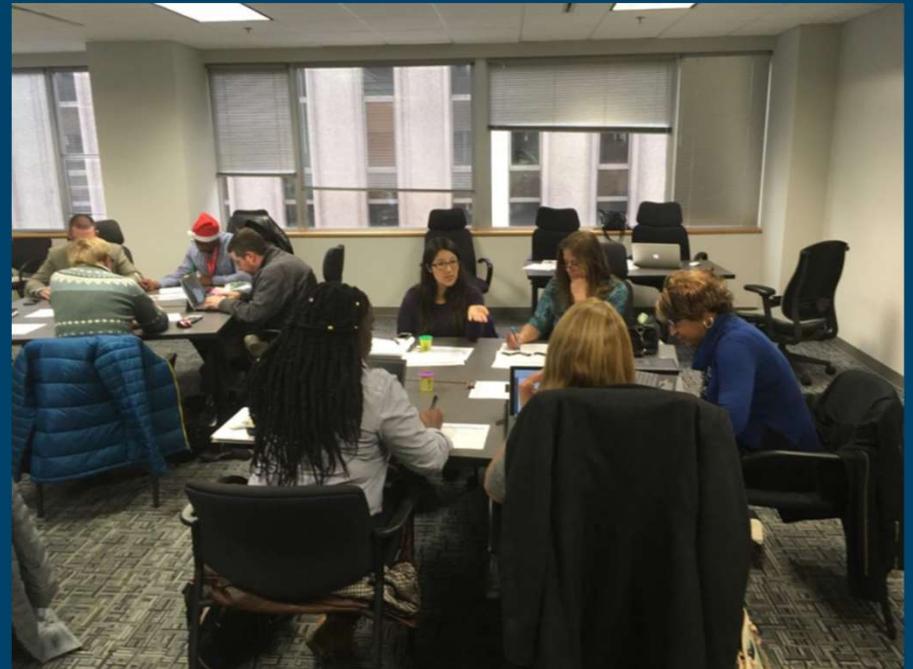
- Managed by the Budget and Management Services Department
- Advised by Academy Steering Committee
- Assess progress of strategic plan
- Look at departmental business plans
- Academy schedule approved by City Manager's Office
- Leverage existing resources to reduce costs





## How we run our sessions

- Highly interactive
- Candy and Play-Doh
- Attendees get all session materials after the session
- Pull examples from within the organization whenever possible





## Some activities from our sessions

- Developed performance measures for a bakery
- Balanced City budget with budget simulation tool
- Developed a business case for their program
- Identified ways to improve Fire turnout times
- Identified process improvement opportunities in their program





# Keys to Our Success

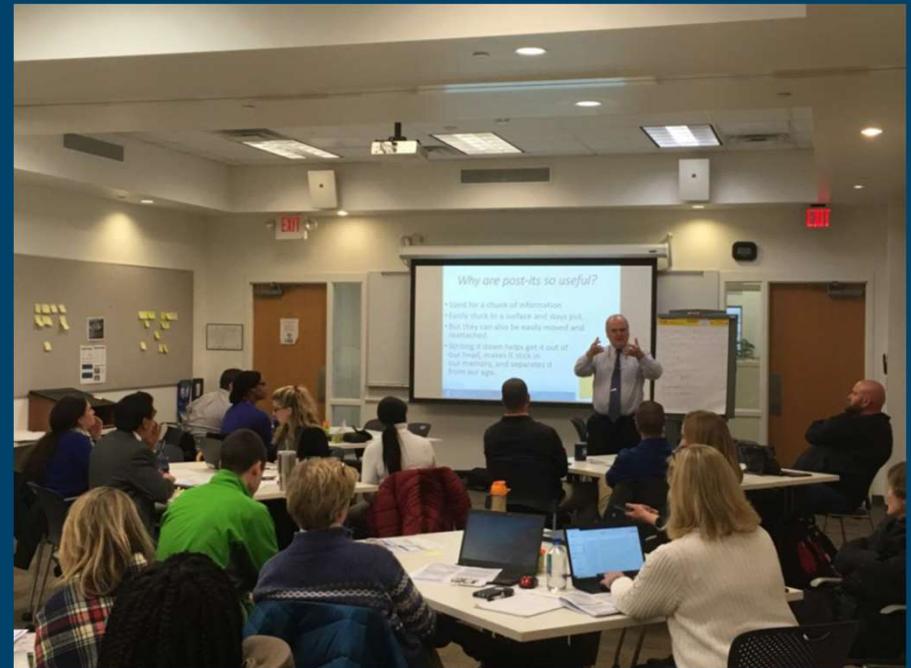


- The importance of executive buy-in
- The importance of piloting things
- Training topics align to Corporate Business needs
- We put a lot of thought and effort into each presentation
- We put the right people teaching the right classes



# Lessons Learned

- If teaching a complex subject, have multiple instructors present
- Be willing to adapt and change
- Need for resource bank





# Lessons Learned



# Member Questions

- Oklahoma City
  - Developing an RFP for a new system, what systems are you using to track performance data?
  - <https://www.surveymonkey.com/r/PerformanceManagementOKC>
- Bernalillo County
  - Do you know any free tools to share documents with the group or discuss topics and ask questions to the group?
    - Email Veronica Schornack [vschornack@bernco.gov](mailto:vschornack@bernco.gov)
  - What should we call this “Performance Management Team”?
    - Looking for catchy, creative name that will not get lost in our inboxes
    - Email submissions to Veronica Schornack [vschornack@bernco.gov](mailto:vschornack@bernco.gov), I’ll create a survey so everyone can vote on the names

# Next Performance Team Meeting

- When
  - Mid September (Quarterly)
- Topic
  - Continuous Improvement and How To Do It: Methodology and Project
    - What is your continuous/process improvement methodology? Baldrige, Lean, Six Sigma, etc.
    - How did you adapt the process to fit the needs of your organization?
    - What are the current project you are working on?
    - How do you track successful projects?
    - Do you offer training on continuous improvement methodologies for your organization?
- Presenters
  - Barb Morger-Arvada
  - Roman Sanchez & Julie Baldwin-Munoz- El Paso

# Contact Us

- Bernalillo County – Operations Excellence Office
  - Veronica Schornack, Operations Excellence Analyst, [vschornack@bernco.gov](mailto:vschornack@bernco.gov)
  - Angela Montano, Operations Excellence Specialist, [amontano@bernco.gov](mailto:amontano@bernco.gov)
  - Maria Zuniga, Operations Excellence Manager, [mzuniga@bernco.gov](mailto:mzuniga@bernco.gov)



# Questions