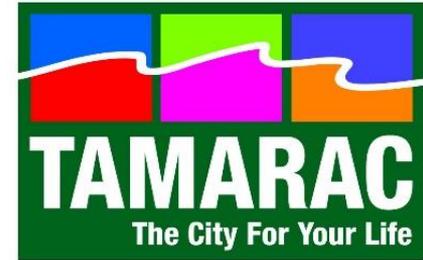


# ClearPoint Community South Florida Regional Meeting

# Agenda

- ▶ Introductions
- ▶ Participant Sharing, Discussion, and Questions
- ▶ Case Studies and Best Practices
- ▶ Lunch
- ▶ What's Coming Next in ClearPoint

# Who's here today?



MIAMI



# City of Fort Lauderdale

- Nine Departments and City Manager's Office with eight divisions
- Standardized scorecard with [Core Processes and Performance Metrics](#)
- Developed in collaboration with departments
- Managed and reported in Clearpoint by Clearpoint administrators (in this room today!) in each department



# City of Fort Lauderdale

- Used in:
  - Annual budget process, included in Departmental Business Plans, Adopted Budget and Citywide new Strategic Plan
  - Citywide Quality Management System and ISO Certification
- Reviewed quarterly with each department's management team
- Elevated to City Management review if trends indicate substantial change



# Community Builders (Employees) Perspective

Metrics are reported Citywide and per Department

- Turnover rate (quarterly)
- Vacancy rate (monthly)
- Number of new on the job injuries (Workers Comp claims) (quarterly)
- Trend of Community Builder caused crashes (quarterly)
- Percent of Community Builders in active employment status past one year (annually)
- Percent of Community Builders receiving discrimination and harassment training (compliance training) (quarterly)
- Percent of Community Builders at maximum salary (annually)
- Average number of training hours per Community Builder (quarterly)
- Performance evaluation rate (quarterly)



CITY OF FORT LAUDERDALE



WE BUILD COMMUNITY

# **Sarasota County Strategy and Performance Management**

Katie White, PDS Performance Management Analyst

Becca Truluck, ICMA Management Fellow

# Strategy & Performance Management



Oct.

- Leadership prework
- Leadership retreat

Nov.

- Consultant meetings with County Administration, Board of County Commissioners (BOCC) and Constitutional Officers

Dec.

- BOCC(2), Leadership and Constitutional Officer Retreats
- Plan writing

Jan.

- Plan finalization and adoption
- ClearPoint overhaul and implementation of new Strategic Plan

Feb.

- Finalize action list
- Plan rollout (road shows) and implementation

## Enterprise Rollout and Implementation

- Accountability mechanisms
  - Monthly Leadership meetings
  - BOCC memos
  - Department budget proposals
- ClearPoint update
  - Office of Strategy Management expertise
  - Budget chapter adaptation

## ClearPoint Enterprise Strategy Management

- Vision 2034
  - Defined Vision Guiding Principles
  - “What it is”
    - Ex.) Beautiful Community
- Mission 2034
  - Defined Mission Guiding Principles
  - “What we do”
    - Ex.) Collaboration with the Cities
- Strategic Plan Goals based on Vision and Mission



**Sarasota County  
ClearPoint Dashboard  
Demonstration**

## Reference Slides

## Performance Management – Monthly Leadership Reports

- Communications
- Emergency Services
- Human Resources
- Office of Financial Management (OFM)
- Planning and Development Services (PDS)
- External Sources (Bureau of Labor Statistics, Visit Sarasota County)

## Performance Management – Quarterly Trends Reports

- Employment
  - Governmental Relations
  - Bureau of Labor Statistics
- Tourism (Visit Sarasota County)
- Residential Permitting (PDS)
- Commercial Permitting (PDS)
- Land Development (PDS)
- Code Enforcement (PDS)
- Forecasted Revenues (OFM)
- Expenditures (OFM)
- Customer Contact (Communications)
- Customer Satisfaction
  - Libraries and Historical Resources
  - Parks, Recreation and Natural Resources
  - Emergency Services

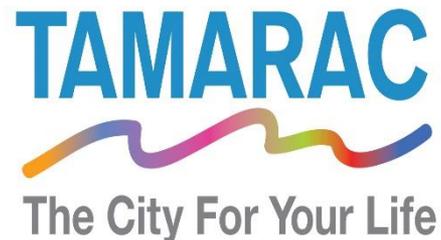
## Annual Budget Books

- Measures vary by department
- Some overlap with Leadership/Quarterly trends report measures

# Using Data to Achieve City Goals

March 2019

Laura Karpaviciute, Assistant to the City Manager



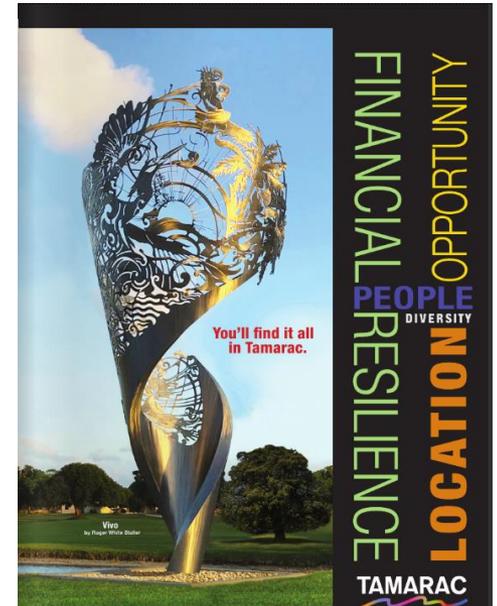
# City of Tamarac

- 56 years old
- 12 square miles
- 370 FTE's serving 65,000+ residents and 1,850+ businesses



# Performance measurement in Tamarac

- Helps us to achieve the City's goals:
  - Keep strategy on track
  - Improve operations
  - Determine resource allocation
- Integrated into the way City does business
  - It's everyone's job
  - Executive reviews
  - Tied with the budget
  - Adaptable
- Transparent





# Agenda

- Introduction
- A Little History
- Strategic Plan
- Challenges
- Conclusion / Discussion



# Introduction

Jennifer Hill

Director

Office of Management and Budget

St Lucie County

Matt Beard

Management Analyst

Office of Management and Budget

Innovation and Performance

Management Division



## Where We Were

- St Lucie County became a part of the Florida Benchmarking Consortium
- Process improvement teams were established to provide research and recommendations
- Lean Six Sigma training was provided



## Where We Are

- Developed a strategic planning model using a balanced scorecard approach
- Utilized ClearPoint Strategy as the software to track performance measures
  - Currently utilizing  $\frac{3}{4}$  of the County's departments
  - Departments are inputting data and reporting to Administration on a quarterly basis
  - Plan to be reporting countywide by the end of current fiscal year



St. Lucie County 2019 Strategy Map

*Our Core Values:* Integrity • Professionalism • Accountability • Excellence

# GUIDING PRINCIPLES & VALUES

*Our Mission*

To provide excellent customer service that advances a safe community, maintain a high quality of life and protects the natural resources.

<i>Governance</i>	<i>Perspective</i>	<i>Objectives</i>	<i>Initiatives</i>	<i>Performance Measures</i>
<b>Operational Areas</b> Infrastructure Public Safety Environment Community & Economic Development Culture & Recreation Management Services	SERVICE	<ul style="list-style-type: none"> <li>• Deliver excellent customer service</li> <li>• Innovations</li> </ul>	<ul style="list-style-type: none"> <li>• Public engagement</li> </ul>	<ul style="list-style-type: none"> <li>• Outcome measures</li> <li>• Output/workload measures</li> <li>• Customer service ratings on delivery of service</li> <li>• Customer engagement targets met</li> </ul>
	COMMUNITY	<ul style="list-style-type: none"> <li>• Provide for a safe community</li> <li>• Design, construct &amp; maintain infrastructure</li> <li>• Promote economic development</li> <li>• Protect natural resources</li> <li>• Maintain a high quality of life</li> </ul>	<ul style="list-style-type: none"> <li>• Deploy survey instruments to external and internal customers</li> </ul>	<ul style="list-style-type: none"> <li>• Effectiveness ratings</li> <li>• Efficiency ratings</li> </ul>
	PEOPLE	<ul style="list-style-type: none"> <li>• Develop and train workforce</li> </ul>	<ul style="list-style-type: none"> <li>• Employ engagement survey</li> <li>• Develop performance management process</li> <li>• Develop dashboards</li> <li>• Process improvements</li> <li>• Employee development</li> <li>• Develop standard operating procedures</li> </ul>	<ul style="list-style-type: none"> <li>• Employee engagement survey results</li> <li>• Development plans</li> <li>• Training hours</li> </ul>
	FINANCIAL MANAGEMENT	<ul style="list-style-type: none"> <li>• Provide transparent &amp; accountable financial management</li> </ul>	<ul style="list-style-type: none"> <li>• Communicate value of county service</li> </ul>	<ul style="list-style-type: none"> <li>• Capital improvement cost vs. plan</li> <li>• Percent of project complete vs. plan</li> </ul>



**CORE VALUES**

- W**illingness
- O**pportunity
- R**eliability
- K**nowledge
- S**incerity

**OUR VISION**

**ST. LUCIE WORKS**

**OUR MISSION**

To provide excellent customer service that advances a safe community, maintain a high quality of life and protect the natural resources



**Service**

- Deliver excellent customer service
- Innovations



**People**

- Develop and train workforce



**Community**

- Provide for a safe community
- Design, construct and maintain infrastructure
- Promote economic development
- Protect natural resources
- Maintain a high quality of life



**Financial Management**

- Provide transparent and accountable financial management



# Strategic Plan

- Board acceptance to develop a 20 year strategic plan
- The plan will have short, medium and long term goals
- Citizen Survey
- Planned to have engagement meetings planned during the development



# Challenges

- Automation
- Buy in at the department level
- Flow of Administration review meetings
- Still learning from mistakes

# Utilizing ClearPoint

## Mission Statement

Foster sustainable, quality development that advances a safe and economically sound community, maintains a high quality of life, and protect the natural environment by providing professional and responsive review and guidance on the adopted policies and codes which guide future growth and community development, including State Statutes and Rules, to ensure the health, safety and welfare of the citizens of St. Lucie County.

## Function

### Planning Division

- Provide customer service by guiding and assisting applicants looking to invest in the community and expediting the review of applications from the Targeted Industry List
- Prepare and implement the goals, objectives and policies of the adopted Comprehensive Plan (Plan); including the periodic evaluation and appraisal of the Plan to determine if updates are needed
- Prepare and implement the Land Development Code to implement the goals of the adopted Comprehensive Plan
- Process and review all development proposals (zoning compliance, site plans, conditional uses, variances, adjustment to site plans, etc.) for consistency with the Comprehensive Plan and Land Development Code
- Process and review text amendments and map amendments for consistency with the Comprehensive Plan, Land Development Code and State Statute
- Perform land use studies and conduct a wide variety of land use analyses to ensure the compatibility land uses reflecting the needs and desires of the citizens and how they want their community to develop and grow
- Develop, maintain, and disseminate geographic data and GIS resources to enhance county functions and provide resources making geographic data available to the public and preparing maps depicting various data

### Building and Code Division

- Handle all applications for commercial and residential building permits as well as performs code enforcement and contractors licensing duties. The division ensures that all construction in the County is performed to meet the requirements of the Florida Building Code and that contractors who perform the work are properly licensed. The Code Enforcement staff ensures that properties in the County are maintained in a manner consistent with the St. Lucie Land Development Code and the Compiled Laws of St. Lucie County

## Accomplishments

### Planning Division

- *Promote Economic Development & Deliver Excellent Customer Service:* With approval of Maverick Boat Group Major Site Plan, the department facilitated the completion of the construction of Maverick Boat Group's 106,000 square foot manufacturing facility and start of production.
- *Deliver Excellent Customer Service & Develop and Train Workforce:* Reorganization of the division to improve efficiency, promote cross training, align with staff strengths and provide improved services. Completed process mapping of 50 Planning Department procedures to prepare for the Land Management Systems to provide for online permitting, planning and code enforcement application processing and records management.
- *Maintain A High Quality of Life:* Drafted, processed and transmitted amendments to the Comprehensive Plan to address the community vision for growth, explore emerging issues, foster economic development and the provision of infrastructure, and ensure orderly and balanced future economic, social, physical, environmental, and fiscal development of the county.

### Building and Code Division

- *Innovations & Deliver Excellent Customer Service & Develop:* Approval of a contract with Tyler Technologies, Inc. for the EnerGov Land Management System Software to provide for online permitting, planning, contractor licensing and code enforcement application processing and records management.
- *Deliver Excellent Customer Service & Develop and Train Workforce:* Completed process mapping of Building Department procedures to prepare for the Land Management Systems to provide for online permitting, planning and code enforcement application processing and records management
- *Maintain A High Quality of Life: Insurance Services* Organization (ISO) Score - St. Lucie ISO score improved from the last survey done in 2013. The ISO collects information on a community's building-code adoption and enforcement services, analyzes the data, and then assigns a Building Code Effectiveness Classification from 1 to 10. Class 1 represents exemplary commitment to building-code enforcement. The information is available to insurance companies who use the ISO insurance rating program to provide credits to individual property insurance policies in recognition of a community's efforts to mitigate property damage due to natural disasters. The Building Department rating improved on commercial and industrial properties from a class 3 to a class 2. Residential remained at a class 3. St. Lucie County improved its rating due to increasing the number of building inspectors and plans examiners, improved collection of documents related to flood information, and more staff training.
- *Deliver Excellent Customer Service & Maintain A High Quality of Life:* Code Compliance processed 3,467 cases in 2018, 1,784 cases abated without action by the Code Enforcement Board, a 70% improvement over 2017; and, 180 cases were referred to the Board which is 64% less than 2017. All improvements due to greater outreach of staff working with citizens to resolve the issues.

## Initiatives

### Planning Division

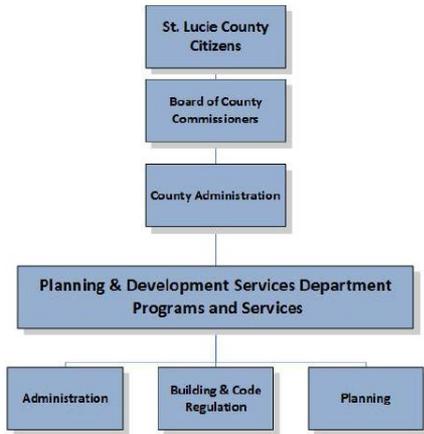
- *Maintain A High Quality of Life:* Adopt the updated the Comprehensive Plan to address the community vision for growth, explore emerging issues, foster economic development and the provision of infrastructure, and ensure orderly and balanced future economic, social, physical, environmental, and fiscal development of the county
- *Promote Economic Development & Provide for a Safe Community & Maintain A High Quality of Life:* Continued coordination and development of an Airport Connector with FDOT to link the highway network to the Treasure Coast International Airport and the Port of Fort Pierce, and lead to the development of a Freight Logistics Zone (FLZ) to advance the long-term economic development of the area. The Airport Connector can direct land uses of industrial, commercial, mixed use, office, and public facilities to a transportation corridor to integrate land/sea/air distribution opportunities.
- *Innovations & Deliver Excellent Customer Service & Develop and Train Workforce:* Continue to improve the efficiency of the Pre-Application and Zoning Compliance processes, and update applications for ease of use and consistency. Create guides to assist applicants with code requirements. Develop workflows to implement the Land Management Software to provide online permitting/reviews and improve turnaround times.

### Building and Code Division

- *Deliver Excellent Customer Service:* Continue to improve efficiency in the permit submittal process to improve overall service. Continue to improve efficiency of performance metrics for the permitting process and the division's service.
- *Innovations & Deliver Excellent Customer Service:* Create a public portal with flood data information on website with a link to FEMA for our citizen's use and education.
- *Innovations & Deliver Excellent Customer Service:* Configuration and implementation of the EnerGov Land Management System Software to provide for online permitting, planning, contractor licensing and code enforcement application processing and records management.



# Utilizing ClearPoint



Objective	Measure	Charts
↑ Deliver Excellent Customer Service Permits	↑ Permits: Plan Review Time Permits	
	↑ Inspections: 24 Hour Completion Permits	



# Thank You

**Questions?**

# Case Studies and Best Practices



**Johnson County, KS**  
Automatic Evaluations



**Austin Resource Recovery**  
Gauge Dashboard



**City of Charlottesville, VA**  
User Buy-In



**City of Vaughan, ON**  
Business Plans



**City of Durham, NC**  
Leadership Engagement



**ClearPoint Strategy**  
Automation

# Automatic Project Evaluations

- ▶ Milestone percent complete determines initiative status, and quantitative data can be charted.

**Project 1) Redesign Employee Satisfaction Survey**  
Project Evaluations

FY 2018 Dec-17

**Owner:** Phillis Vance

**End Date:** 6/30/18

**Start Date:** 11/22/16

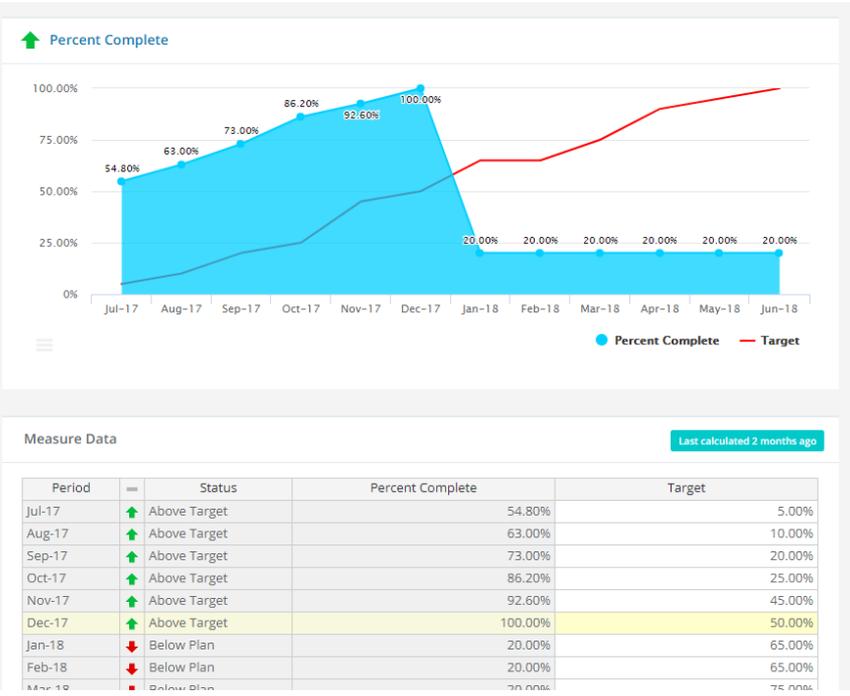
**Proposed Budget:** \$55,000

**Analysis:** Dec-17  
We are halfway through this initiative. We have made great progress on this and are on pace to get this rolled out by the end of our Fiscal Year. Great work team!

**Recommendations:** Dec-17  
Keep up the great work. The first few stages were toughest, and now we need to sit down and review where we are so we have solid steps moving forward to get this survey implemented.

**Milestones:**

- Hire-survey-consultants
- Build new survey questions
- Test new survey questions
- Review results and make improvements
- Rollout new survey



# Gauge Dashboard

- ▶ Departments are summarized in gauge charts, showing average percent of target



# Department Business Plans

## ▶ Sections are color coded to display different types of information

2018 Business Plan  
Department Business Plan
Dec-17 ☆ ✎

**What does our department do?**

The Building Standards Department ensures the safe and lawful use of lands and buildings through administration and enforcement of the Metropolis Building Code

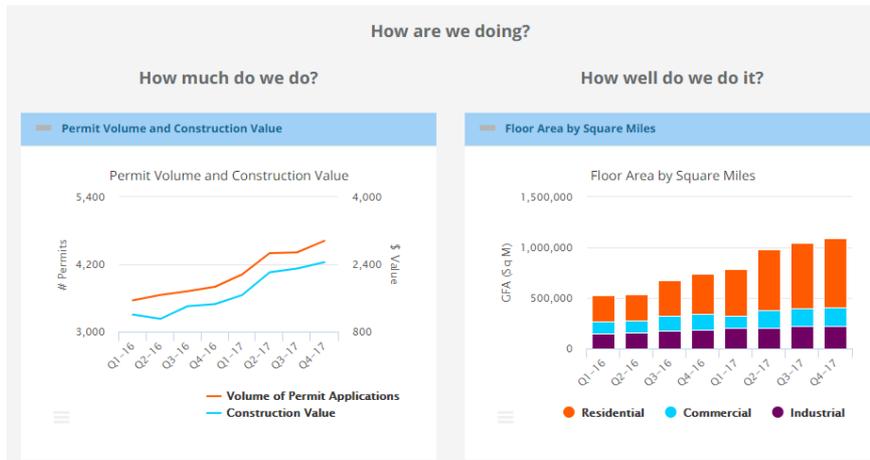
The MBC regulations including health and life safety standards, building permit by-law requirements, and zoning regulations. The Chief Building Official (CBO) represents the City at the Building Code Commission.

**What services does our department provide to residents and businesses?**

- Building Permits and Inspection Services - ensuring construction activity is in compliance with requirements and associated standards
- Zoning By-law Services - review of applications throughout the Development Application Approval Processes
- General Administration - including monetary requirements, public inquiries and sign permits
- Facilitating pre-permit consultations and inter-departmental coordination for complex - high profile and corporate projects through permits

**What are we proposing to do in 2018 to improve progress?**

Initiative	Legislated?	New Funding Request?	Partners	Proposed Budget	End Date
<input type="checkbox"/> Hospital - Facilitate Zoning and Building Permits Approval	Yes	Yes	Development Engineering, Development Planning, Office of the CHRO, Office of the City Solicitor	\$12,000	1/25/18
<input type="checkbox"/> Comprehensive Zoning By-law Review	Yes	Yes	Development Planning, Policy Planning and Environmental Sustainability, By-law Compliance, Licensing and Permit Services	\$20,000	6/30/18
<input type="checkbox"/> Establish and Implement Regulatory Protocol and Education Program	Yes	Yes	Fire and Rescue Service, By-law, Licensing and Permit Services, Policy Planning and Environmental Sustainability	\$25,450	12/1/18



# Leadership Engagement

- ▶ Custom landing pages can help manage portfolios, set meeting agendas, and more.

Manager Home Page  
Manager Profile

**Description**

This is the manager's landing page for all their departmental strategic plans, including a dashboard view of key performance measures. The manager can access all of the information they need regarding the divisions they are in charge of from a single page in ClearPoint.

**Notes**

Reports from August are now available - please review before quarterly meeting this month.

**Portfolio**

 <b>Shannon Huntington, Finance Division</b> Measure Dashboard Shannon's Work Plan Goals Chart	 <b>Jim Huang, Customer Relations Division</b> Measure Dashboard Jim's Work Plan Goals Chart	 <b>Carter Frank, Internal Process Division</b> Measure Dashboard Carter's Work Plan Goals Chart
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**News**

**UPDATES**

- Upward Airlines hired two new people in the Strategy Department - welcome Stan Johnson (sjohnson@upair.com) and Linda Petworth (lpetworth@upair.com)! They will be assisting with clean data entry and strategy refresh sessions. Please reach out to them with any appropriate onboarding materials and set up any necessary training sessions within the next 3 months.
- Upward Airlines was named the Top Strategic National Airline for 2018! Way to go team!

**REMINDERS**

- Per our Risk Assessment discussion last week, remember to reset passwords every other month.

**Important Dates**

**Monday, October 8** - Data updates for September are due. ClearPoint will be locked until our monthly meeting for review.

**Wednesday, October 10** - Monthly recap meeting. Please review the Matrix Report in advance.

**Tuesday, October 16** - Individual strategic goal templates filled out and submitted by 12pm ET; please collaborate with your broader team on this project.

**Thursday, October 18** - Company-wide strategy session; time and location TBD

**Monday, November 5 - Thursday, November 9** - ClearPoint Strategy's regional client meetup is taking place at our office this week. Please come prepared with questions!

**Monday, December 3** - Make sure to put the year-end meeting on your calendar; invites just went out last week.

Board Meeting  
Board Meeting

**Meeting Agenda**

**Board Meeting  
Agenda  
December 10th, 2017**

Strategic Overview	BSC View
KPI Dashboard	KPI Dashboard
Project Management	Project Evaluation Overview
Red Report	Red Alert - All Red Measures
Other documents	

Agenda	
9:00 - 11:00	Introduction and Strategic Overview
11:00 - 12:30	KPI Dashboard
12:30 - 1:30	Lunch
1:30-2:30	Project Management
3:30-5:30	Areas that need help
5:30-6:30	Questions and other Discussion

**Strategic Plan**

Vision

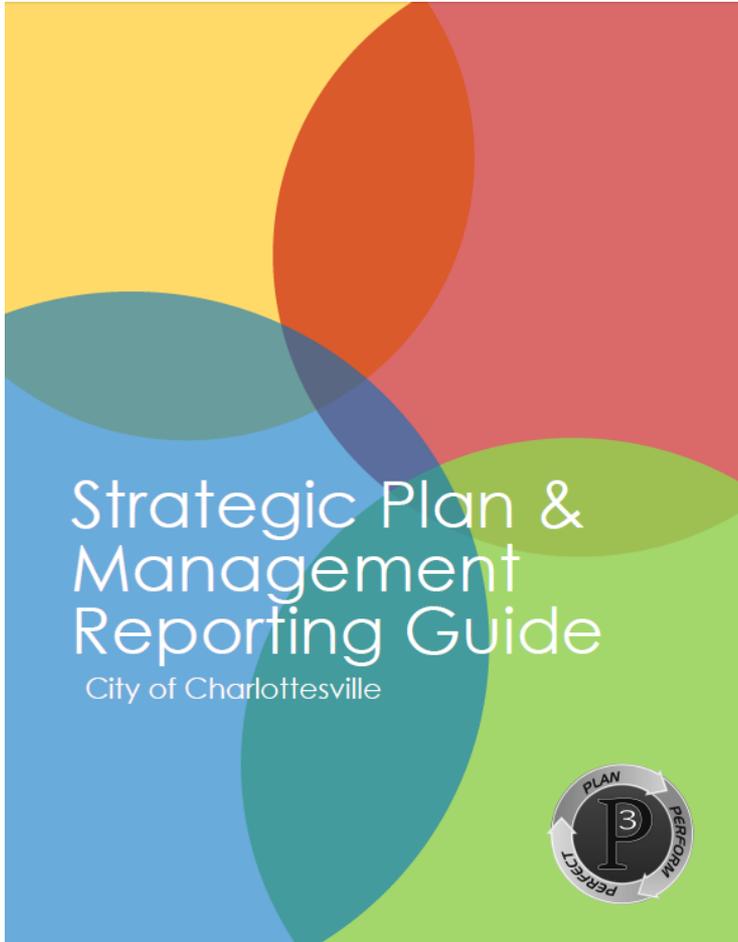
At Upward Airlines, our vision is to create a community that will transform the aviation space. We will provide our customers empathetic and friendly customer service for less. We will welcome our employees into an environment of innovation and learning. We will improve sustainability in our world through efficient manufacturing processes and recycling initiatives.

**Mission**

The mission of Upward Airlines is to deliver the best in-flight experience, through our top notch customer service, efficient processes, and competitive pricing.

Key Goals	
↑ Frequent Reliable Departures	■ No Elites
↑ Increase Shareholder Value	● No Frills
↑ Comparable To Other Travel	↑ Standard Fleet
■ Very Low Ticket Prices	■ High Utilization
■ Fast Ground Turnaround	↑ High Compensation
● Good Locations	■ Flexible Union Contracts
↓ Direct Routes	↓ High Employee Ownership
↑ Fun Experience	

# User Buy-In



# Automation

Our Automated Reporting Calendar						
S	M	T	W	T	F	S
27	28	29	30	31	1	2
					1 <sup>st</sup> reminder: updates for monthly Customer Success meeting	
3	4	5	6	7	8	9
	Reminder: weekly sales pipeline updates Weekly Meeting: Full Team	Reminder: updates for monthly Sales and Marketing meeting	2 <sup>nd</sup> reminder: updates for monthly Customer Success meeting	Report: Sales and Marketing monthly pre-read	Monthly Meeting: Customer Success Monthly Meeting: Sales and Marketing	
10	11	12	13	14	15	16
	Reminder: weekly client project updates Weekly Meeting: Full Team	Reminder: updates for monthly Local Government meeting		Report: Local Government monthly pre-read	Monthly Meeting: Local Government Monthly Meeting: Product Development	
17	18	19	20	21	22	23
	Reminder: weekly sales pipeline updates Weekly Meeting: Full Team		Report: Leader Alignment monthly pre-read		Monthly Meeting: Leader Alignment	
24	25	26	27	28	29	30
	Reminder: weekly client project updates Weekly Meeting: Full Team				1 <sup>st</sup> reminder: updates for next month's Customer Success meeting	

Customer Success  
  Sales and Marketing  
  Local Government  
  Product Development  
  Leader Alignment  
  Full Team

Meeting  
 Automatically scheduled reminder email  
 Automatically scheduled briefing book

# 2019 Strategy and Performance Management Summit

## Join us in Durham on June 4<sup>th</sup> – 6<sup>th</sup>!

### June 4<sup>th</sup>: ClearPoint Training

#### ▶ Creating Your Report Cadence

- Data Loader basics
- Leveraging Scheduling, Reminders, and Notifications
- Exporting Briefing Books

#### ▶ Branding ClearPoint

- Customized Charts
- Custom Pod and Table Styles
- Organizationally branded reports

#### ▶ Leveraging Data

- Advanced use of the Data Loader
- Complex calculations within Measures and Projects
- ClearPoint's dynamic evaluations for Objectives, Measures, and Projects



# 2019 Strategy and Performance Management Summit

## Join us in Durham on June 4<sup>th</sup> – 6<sup>th</sup>!

### June 5th: ClearPoint Summit

The summit day will include presentations from strategy experts at high-performing organizations on topics like Measure Management, Departmental Buy in and Workplan Management, Project Management, and more!

#### SPEAKERS



# 2019 Strategy and Performance Management Summit

## Join us in Durham on June 4<sup>th</sup> – 6<sup>th</sup>!

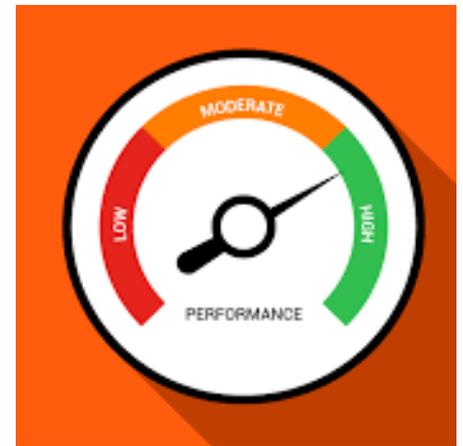
### June 6th: Performance Driven Government Day

#### How Benchmarking is Driving Performance

- ▶ City of Raleigh & North Carolina Benchmarking Project
- ▶ Johnson County & Kansas City Regional Benchmarking Initiative

#### From Well-Managed to High Performing and the National Networks Supporting the Journey

- ▶ City of Fort Collins, Malcolm Baldrige Quality Award
- ▶ City of Durham, Bloomberg I-Team
- ▶ Duke University's Center for Advanced Hindsight
- ▶ What Works Cities



#### Lunch Keynote: What Works Cities: The Benefits of Certification

# ClearPoint 12.5



Coming in Summer 2019

# The Future of ClearPoint

## ClearPoint 12.5

- Peer-to-Peer Sharing
- Accessible Measure Library data
- More access for more users to the ML
- Bulk Scorecard editing and updating

## ClearPoint 14

- Additional element hierarchy options
- More advanced summary report options
- Embed codes for simpler exporting of charts to a website

## ClearPoint 14.5

- “The Administrator Release”
- More Administrator controls around home pages and permissions
- Improved user administration
- New charting options



Roadmap Timeline

# Questions?





# Contact Information

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