

[Transcript] Navigating the Shift: Performance Measurement in the DOGE Era - May 15, 2025

Liz Steward:

Good morning and good afternoon, everyone. We are just waiting for people to join the call. It is 11 o'clock here on the West Coast, 2:00 PM Eastern. Thank you so much for joining us.

For everyone just joining the call, if you can introduce yourself, tell us your name and where you're from in the chat box, which is in the top right-hand corner. A great way to start learning to use GoToWebinar if you haven't used it before, and just introduce yourself. That'd be wonderful.

Okay, a few more people joining. Just going to give this one more minute. Let everyone join the call.

All right. Well, let's get started. Thank you so much, everyone, for joining us today. My name is Liz Steward. I'm the Vice President of marketing and research at Envisio. I am thrilled to be hosting this webinar today. I have 12 years of experience working in performance management, working at BI and analytics companies at various places. About half my career has been spent working with public sector organizations, so very passionate about the work of the public sector, local government, higher education, school districts, as well as being a marketer. I also run our research programs here at Envisio and we'll touch a little bit on some of that research as we go through the presentation today, specifically around trust building in local government and the importance of data storytelling and performance measurement as a piece of trust building.

So we have a packed agenda. It doesn't look like it when you have just five bullet points on a slide. I'm just going to talk pretty briefly for five minutes, give our introductions, give a little bit of context for this webinar, why we are here, why we're hosting it here at Envisio, and then I'm going to hand over to three fantastic speakers. We're going to talk about performance management and performance measurement from different angles.

We will have a little bit of time for Q&A at the end. As I say, this is probably a new platform for a lot of people who go to webinars. So if you could please ask your questions in the Q&A box, which is in the top right-hand corner. If you put a question in the chat box, that's totally fine. We'll do our best to move it into Q&A, but if you want to guarantee your question gets seen, please use the Q&A box. We are recording the webinar today. We will be sending the webinar recording, the slides, the transcripts, the resources that we covered today in an email, which will be in your inbox either tomorrow or early next week. So no need to take copious notes or screenshot things.

A little bit of context as to why we are here today, why Envisio is hosting this webinar. It's probably fairly self-evident to everyone on this call that performance measurement and management has never been more critical than it is right now today. We are a government technology company. We don't engage in political discourse, but we also have to be realistic about what we are hearing from our public sector clients and the realities that they're facing today. So amidst this environment and calls for efficiency, many of our customers that we work with are facing funding cuts, a call to reduce spending. And so this webinar, our goal for this webinar is to really talk about how we do that effectively. So not just doing fewer things, but ensuring we're doing the right things, ensuring we understand the impact of the work, the impact of things that are being cut, and if we have to make cuts, how do we prioritize them?

The third piece to this as well is talking a little bit about trust and the importance of performance, measurement and management as we think about building trust with our communities. We live in such polarized times. I don't think there's any secret that trust is in decline across all levels of government. And what a lot of our research has been focused on at Envisio as a mission-driven company is how we improve and help our local government customers bolster that trust. And a clear thread in our research is the need to be telling stories about the work that we do, being transparent about the decisions that we make and about the impact of those decisions. So that data storytelling piece is absolutely critical and it has never been more critical than it is right now.

So this is obviously an area that is deeply important to us at Envisio. We are very passionate about this. I know we have many of our customers on this call, but our community of 200 plus public sector leaders, many of whom have very deep expertise in this area as well. Our goal together is to help everyone on this call walk away with some free resources, a plan of action to really start performance measurement program or improve it or get unstuck. And whether that is using the free resources and the templates and the insights from our speakers or spending some time with our consulting team, chatting to Meghan, one of our performance coaches who's on today, whatever that looks like for you, to really help advance this conversation and help you in your own communities start working on performance measurement and growing in that area.

I thought I'd just share this. This is hot off the press just two days ago. This is a press release actually from the Results for America. This is this reintroduction of a resolution to establish a commission of evidence-based policymaking. We are starting to see a real movement now towards more evidence-based governance. It's not new, but it is coming back to the fore. And so I thought I'd just share that to show that we are seeing a lot more of this and that is part of this conversation. It's about data-driven decision-making, is about informed decisions and not just about making across the board cuts.

Okay. Our first poll. We've told you a little bit about what we think the goals are for this webinar. I'd love to hear about what you would like to see from here, and this will just help us shape the conversation today. This is a multiple choice, I believe, poll. So you can answer all four of these or one or two of them. So we're looking at are you looking to learn the basics of performance measurement, get tips for building or improving your measures, finding out how others are using performance data or getting discovery tools and templates that you can use and take back to your communities today.

Let's just give that 30 more seconds. Okay, interesting. Yeah, if we can share those results with everyone. The majority are saying we're looking at how others are using performance data, which is great. We have a fantastic resource to help with this as well. And then a speaker from the City of Corona, California who's going to be talking us through their experience. And then, close second, get tips for building or improving your measures. Okay, fantastic. Thank you so much everyone filling that in.

The number one thing was looking at what other people are doing. I just wanted to highlight this first free resource. This is our Measure What Matters guide. This is a second edition of this guide. It is our most popular educational piece that we've written at Envisio. It is a step-by-step guide on how to create effective performance measures. We updated it just a few months ago and did a very deep dive analysis

of our Envisio database. We have 20,000 KPIs that are held in Envisio from our various customers in different sectors. And so this guide contains over 100 examples of what others are measuring. So a great place to start if you just want to get ideas or copy and refine what others are doing.

Really briefly, I know we have a lot of customers on call, so I'll be quick and hand over to our speakers. I mentioned that Envisio is a mission-driven company. Our mission is to build trusted public institutions. This sign is a real sign that we have in the office, which I'm sitting in right now. We do think of ourselves as public servants in the private sector. Many, many of our staff have come from some form of public service backgrounds, and we really look to partner with our public sector customers to help them along this journey of performance management.

And a quick snapshot of Envisio, we serve 26 million residents today. This is actually a key KPI for us. It's like how many residents are we actually touching with Envisio dashboards and reports. We have over 200 customers, which I mentioned already, and many of them are experts in this field. So we have seven What Works Cities certified cities. We have a Malcolm Baldrige Award winner in our customer base. And when the ICMA certificate in performance management was a thing, many of our customers got that as well.

That is enough from me. I'm going to introduce our wonderful panel of speakers today. First up, we're going to hear from David Swindell. David is the director of the Center for Urban Innovation, Arizona State University. David is a well of expertise in this area of performance measurement and a lot of experience in local government benchmarking as well. He and I have worked together for a number of years on a lot of the research programs that we run at Envisio, and David's going to give us a little bit of context, a little bit more about what we are facing today and why it's important to be thinking about performance measurement in this way.

David's going to head over to Meghan. Meghan is one of our planning and performance coaches. Meghan works with many of our customers to help them develop performance measures. She has stood before many city councils and helped our customers tell their story with data. And Meghan is going to walk us through how to develop effective performance measures and some of the methodologies that we use at Envisio. Regardless of what technology you use, these can be taken and applied to your own communities.

And then, last but not least, we're going to hear from Alex Mercado. He's from the City of Corona, California. Corona is an absolute superstar performance measurement, and Alex is going to talk to us a little bit about their journey to get there and give you some ideas of not just what the end result could look like, but some of the steps they took to get there, what it was like to get started, some of the things they learned along the way.

And so with that, I'm going to hand over to David. Welcome David.

David Swindell:

Thank you, Liz.

As Liz said, I'm Davis Swindell, director of Center for Urban Innovation at Arizona State University, and I've been working with communities for over 30 years on performance measurement issues in a host of different contexts. We also currently facilitate the Valley Benchmark Communities program here where we take the largest municipalities in the Phoenix metropolitan area and do a comparative benchmarking exercise on a set of consistent standardized performance indicators. We've been doing this for several years now, and I think we're the longest surviving one to be doing this at the metropolitan level. It's a very useful exercise that our communities really value.

What I want to do this morning or afternoon for some of you is to kind of contextualize what this is, who's doing this, who's engaged in performance management, and I'll start with just the question of your view of this as innovative, and there's a debate with regards to what is innovative. If a new practice is new to your organization but it's not new to the field, is that innovative? That's an open question. People debate this. Or does it have to be a brand new idea of the field? And quite frankly, performance measurement is a really old idea, several thousands of years old, and we have archaeological records as to just how old performance measurement actually is. But if we advance the clock a little bit, we've seen a lot of activity in this over the last 75 years, starting with Drucker's work with regards to management by objectives back in the 1950s, and the '70s with the rise of KPIs, '70s and '80s and the '90s in the aughts, the balanced scorecard approach. And of course, today, the flavor, if you will, is dashboards. How do we present this information to communities?

The important part about this, while these themes have changed and evolved over the decades, is that the underlying information that we're trying to seek for our improved managerial decision-making, that really hasn't changed. The rationale behind approaching performance measurement hasn't changed. What we've been trying to do is, over the years, over the decades, is to integrate this not just from the private sector side, but on the public sector side, into a methodology designed to help managers improve their decision-making.

So if we can go to the next slide. We don't have a post-COVID survey on who's doing this. The last survey that was done in 2018 I did in partnership with the International City County Management Association, where we surveyed a nationally representative sample of mayors and city managers, just over 600 responses in five thematic areas, one of which focused specifically on performance data analytics. And in that survey, we found some interesting findings. If we're going to go ahead and advance that. One was that only two out of five communities are actually doing performance data collection, which was a little disappointing to me because I think we've been banging this drum for many decades now, and to only see 41%, 42% that are actually engaged in this was a little disappointing. I'm hoping those numbers have gone up in recent years as the barriers to entry have gone down, but I want to draw your attention to who is actually doing this.

You can see population size in the city is a really key indicator in terms of who is more likely to be engaged in this level of performance data collection. There's a big difference between communities that are sized 50,000 and above versus those that are 50,000 and below. You can see that here in the numbers, a big break in the percentage of those who are doing it. And also, the geographic distinction. Southern cities and western cities in the US are more likely to be doing this. These are younger cities and

typically more professional cities in the sense of having the city manager form of government. So when you look at the nature of government, the form of government that these communities are that are participating in and collecting data on the next slide here, you'll see that city manager cities are more likely than strong mayor cities to actually be engaged in that kind of activity to help them improve their managerial decision-making. Also, communities that are in metropolitan areas, that also ties to the size of the cities as well. Those tend to be communities that are more likely to engage in data acquisition for performance.

In the next slide, I wanted to know as a researcher, I just want to know why are communities not doing this even though we've made, I think, a pretty strong case for decades as to why this is important, not just to collect data, but to use the data in a way that's going to help improve those decisions and hopefully improve the quality of life for our citizens. So the number one reason that we were told by those who are not collecting data is that they don't have the staff capacity to collect it. They're not surprising. You look at the size of the organizations, the size of the cities they're serving, these are smaller organizations that probably don't have a deep bench for collecting, or second reason, analyzing those data. We found several communities that are collecting the data, but they don't do anything with it, which raises the question, why would you collect it in the first place if you're not actually integrating it into some kind of managerial feedback? Governing body has not requested the data That raises the question, well, is that supposed to be a motivating factor? Is waiting for somebody else to ask for it before you actually do it because you, the manager or the mayor can utilize this to help you make those decisions.

Let's go to the next slide and talk about how people are utilizing it for purposes of management. The number one reason that communities do this is to justify and formulate budget requests. They identify where needs are through these performance analytics. Secondly, it's informing elected officials to help them know where we are as an organization, how are we doing? And third, providing better services more efficiently, which I actually think that would be my number one reason where I'm in a city position these days is to really help us make those managerial decisions to improve service delivery. The least common answer was monitoring performance of contractors, which I think is a real missed opportunity simply because we've privatized or contracted out so many of our local government public services, and if we're not paying attention to how they're performing, we're not going to be able to actually identify whether or not they're doing a really good job of that or not. And we're locked into that contract, but are they meeting the goals specified in the contract? You got to measure it if you're going to be able to answer that question.

I'm going to advance to the next one. How do you get into this? What's the starting point? Performance measurement is not just a standalone exercise, you come up with some measures, some KPIs, whatever you're looking at and go forth and do it. It's part of a process. It's part of the strategic planning process. So to commit to this, to integrate this and to manage your decision making means that you have to commit to a strategic planning process to guide what measures you're actually going to ultimately collect. That starts with an environmental scan. It moves on to the SWOT analysis to working with your staff, working with your committee, working with your counselors to identify an organization's vision,

mission, strategic goals. And from there, those goals that flow from the vision and the mission, objectives and tasks steps, action steps emerge from that in order to gauge progress on those action steps. That's when you need the metrics. That's when you need those performance indicators to actually gauge progress on the strategic plan.

Then, of course, it has to be iterated. You have to do this again and again every few years in order to make sure that you're progressing or if things have come off the rails, that you can actually adjust, pivot. There are always going to be changes. We're experiencing that right now in the United States. A lot of changes that are coming down, a lot more on the horizon with regards to implications for local government budgets that are going to require a great deal of pivoting by our local communities. And how the communities deal with that, well, they're going to need to take stock of where they are currently and the performance indicator information that they have will help them decide where they can and where they shouldn't actually be pivoting with regards to some of their services that they provide.

Next slide. Why do this? Why measure for performance? Obviously, it aligns the activities with the strategic plan that I was just explaining, tracks progress. That's just useful for accountability, and accountability is important if... You want. It's a prerequisite for building trust in your community. You must have some form of accountability and feedback for the community to actually have trust in your organization. It informs a better decision-making, encourages continuous product improvement for your product line, your services that you're providing to the citizens. And also, as long as you're sharing your information with the communities, then it can enhance communication and transparency. It helps citizens understand what it is that you're doing in your organization, how you're progressing, not just in terms of accountability, but also just in terms of letting them know that you're doing the doing that needs done in order to serve the community of which they are a part. So the transparency, again, contributes to that ability to build trust.

Motivates teams and individuals. If they're part of that strategic planning process, if they're part of the process to develop the measures by which their unit within the organization will be measured, they're going to have a greater sense of ownership over the plan and over the measures themselves, which is important as opposed to those line workers being maybe resistant to those particular measures and feeling that they're being judged in a negative sense as opposed to an aspirational sense. Also, this performance measurement approach reduces risk. You actually have information about the environment within which you're operating. You're better able to pivot when necessary, therefore, you're able to make better decisions and avoid making decisions that come at a higher cost.

Now, the last point I'll raise also is with regards to the next slide, there are some other reasons given the day that we're living in right now with regards to why measuring is important. It enhances the accountability. I mentioned that. Provides pathways to transparency, to build trust between residents and government, which is, again, a critical issue that Liz mentioned in her opening, that is we've seen erosion even at the local government level in the last several years, particularly after COVID.

So building that kind of trust helps build political capital, helps to build defenders amongst the citizenry of our local governments so that when states are employing DOGE-like organizations to make cuts for

supposed improvements in efficiency at the state level, those are going to have implications for local governments and being able to articulate what it is that you're doing and how well you're performing is going to go a long way to responding to those potential threats to local organizations caused by decisions made at the state level. The key to all this is sharing the information. And if you're going to build trust, if you're going to build that political capital, you've got to actually let people know what you're doing. If you're improving your performance but you don't tell anybody, then you're not going to be building trust, accountability. You're not going to be building any kind of political capital amongst your would-be defenders.

So if you want to innovate in your organization, do this kind of work, there's no silver bullet solution. You got to measure. You got to measure the stuff, which means you need to commit to a strategic planning process that builds in connected performance indicators, connected to that vision, connected to the mission of the organization, and don't be afraid of bad news because bad news is useful for us to actually be able to improve, innovate, and move forward in our service to our communities. I'm going to stop there and hand it over to Meghan. So that's the 10,000-foot view. She's going to bring you into some more of the details.

Meghan Brodmann-Bishop:

Wonderful. Thanks so much, David.

Hello, everyone. Good morning, good afternoon. Thank you so much for joining us today. We're going to pop another quick poll up on the screen here right now. So if you don't mind taking a moment just to let us know how would you rate your organization's current use of performance measures? You don't use them at all, you're just starting out, you have some measures, but maybe they aren't used consistently, or you have a strong consistent measurement program, or maybe you're just not quite sure what state your organization is in. So we'll just give a couple more seconds here for folks to respond and then we can just take a quick look at the results before we move on. We'll give 10 more seconds. So if you haven't put in your vote yet, make sure to do so.

Wonderful. Okay, if we want to close that down and look at the results quickly. 60% of folks said they have some measures but they aren't used consistently. So that's the majority of folks here today. And then some of you are just starting out, so we'll give you some tips today. Some of you don't use them at all. Maybe you're not sure where to get started. 10% have a strong consistent measurement program. So hopefully today will just be a refresher. And then 2% are not sure. Thanks so much folks for contributing to that.

Now that David has set the context for us, let's actually dig a little bit deeper in how we can define performance measures, not just to track data, but to make stronger decisions, defend funding, and clearly demonstrate the impact that you're having.

Moving on, we just saw an overview of that strategic plan development process. We are now going to focus in on the measure development portion of that process and how that aligns to strategic planning. We're going to go through each of these in some degree of detail, but at a high level here, the key steps are to review your strategic plan, build a strategic family of measures using existing data where possible,

focus on what matters most and eliminate the noise and visualize your progress to tell a compelling story. Ultimately, our goal here is to put this into action and make better decisions using this data, something that Alex is going to expand on just a little bit later.

Moving on to the next slide. Let's just take a quick moment to review a typical cascading strategic plan format. The top two levels are your strategic levels. They define the long-term vision and the impact your organization is striving to make. Those broad, big picture goals you'll work toward over many years. At the bottom is the operational level, often referred to as actions or initiatives. This is where you define and track the day-to-day efforts that help drive that impact forward. We can link performance measures to both strategic and operational levels. At the strategic level we're focused on outcomes and efficiencies, so the real-world change or the value that you're achieving. And at that operational level, we measure the inputs and outputs to ensure we're delivering in a sustainable and consistent way.

Looking a little bit deeper into this, we can move on to the next side. Bringing our inputs, outputs, efficiencies and outcomes together is known as creating a family of measures. As many organizations shift toward priority-based budgeting where resources are aligned to strategic goals, it's essential to tie every dollar spent to the outcome it's helping achieve. Creating a strategic plan isn't just about envisioning the future, it's about executing that vision effectively. A family of measures helps you connect your day-to-day work to those long-term goals. It helps you identify whether challenges are due to lack of resources, poor execution or other factors, and make adjustments based on what that data is telling you.

Let's briefly define the four types of measures here just to make sure that we're all on the same page. Inputs look at what resources are being used. For example, if we're looking at affordable housing, your resource might be the budget you have allocated for affordable housing programming. Outputs look at what are you delivering with that input or those resources being used. So for example, the number of housing units built. Efficiencies look at are you using those resources well. For example, what is the average cost per housing unit built? And then our outcome looks to understand what is that real world change. For example, the percent of residents with stable housing. While many factors influence outcomes, these are the best indicators to understand whether your efforts and investment are making a difference.

Next slide, please. Is the first step to this to just track everything? Not quite. That usually leads to noise, not insight. You want to prioritize measures that reflect progress on your most important goals, not just what's easiest to collect. We often see two extremes, organizations that track almost nothing, and more frequently, those drowning in data that they don't use. You can track all the metrics in the world, but if they're not driving decisions and you don't actually understand them, then the effort to collect and manage them isn't justified.

Moving on. That's why prioritizing your measures is critical to focus on those that track real community outcomes and build trust with the public. When we work with our customers to work through this process, we encourage folks to collaborate with departments across your organization to review and prioritize performance measures. So you would begin by simply compiling a list of what's already being tracked. This doesn't need to be perfect. It's really just a realistic snapshot of current data collection.

Some departments may not be actively measuring performance or they might be unsure about what data is relevant. In those cases, we recommend starting off with a simple brainstorming exercise to identify any data currently being collected and explore additional measures the department could realistically begin tracking.

Regardless of if you're starting from scratch or refining existing measures, you then want to assess each measure across five key dimensions. Do you have access to the data and how much effort is required to track the performance measure? Consider if the measure reflects something you can actually improve. You want to spend your time tracking measures that you can influence. Is this a performance measure that residents, elected officials or funders will be interested in? Is it a measure that can be easily understood and communicated to a wide audience? Finally, and most importantly, is this measure related to your strategic plan and the long-term goals you are working towards?

Working through each measure, you rank them on a simple one to five scale where one is the lowest and five is the highest. You can see an example up on screen here where we evaluated a series of housing-focused metrics across the five dimensions and we then ended up with a total score for each. What do we now do with these scores?

Moving on to the next slide. Once scored, we can group your measures into three categories. The first one here is high performers, generally those with a score above 20. These are strong candidates for external communication. These are high-scoring outcome and efficiency-focused measures that are your most powerful tools to demonstrate impact both to the public and to funders. Those with scores in the middle, so between 11 and 20 are operationally important but not necessarily ideal for external audiences. These are often input and output measures used to manage resources internally. Low performers with a score of 10 and below should be considered for retirement. These measures may be outdated, unused, or no longer aligned with your strategy.

It's important to note here that this matrix is a tool and not a rule. We use it to guide conversations but not to lock in rigid decisions. Some low-scoring measures may still be worth keeping based on context, so it's ultimately up to you to make the final decision.

Let's take a quick look at our priority matrix again on the next slide. We've identified the two highest impact measures for external communication to highlight progress and overall impact to elected officials, residents and funders. Two others are valuable internally for tracking efficiency and operational health. And one measure is ready for retirement as it isn't being used to inform decisions, nor is it really related to your strategy. Working through this process with your departments can help you create a focused transparent measurement strategy.

If we move on to the next slide, after reviewing your initial measures, it's time to identify gaps. Take a look back at your plan. Are there goals or priorities in your plan without any corresponding measures? If so, discuss that goal with your team with those who are working on it and ask, what does your success look like in numbers? What progress can you measure? What are you trying to influence, and what data tells your story best? Think of this as your elevator pitch. If you had five minutes with an elected official to tell them about this goal, what number would you want them to remember?

If you are looking for some inspiration, we have linked to a variety of free resources and examples from our customer base and you will be able to access these after the call. Keep in mind here that less is more. We don't want to aim for a data dump. Instead, create a dashboard of success with five to 10 measures per strategic area that clearly show the difference you are making. Would you rather have a dashboard with 100 measures where a user just skims over all of them but doesn't really see anything or a dashboard with 30 key measures that tell a concise accessible story to the reader?

Once you've prioritized your measures, the next step is to then turn them into visuals. Visuals will help you spot trends and outliers. If we want to go to the next slide, communicate more clearly and engage decision makers quickly. Busy leaders don't want to take their time sifting through spreadsheets. They need a snapshot of progress. If you need some help creating visuals, check out our guide on data storytelling for the public sector to get started. You want to pair these visuals with a clear narrative from your strategic plan. So thinking about what actions are you taking, what successes have you seen and what challenges remain. Together, visuals and context can tell a really powerful story of impact.

Next slide, please. I know that that was a lot of ground to cover in 10 minutes. So here are a couple of key takeaways. You don't need to start from scratch here. Most departments are already collecting data, so begin with what you have and build from there. Keep it simple. Add only a few new measures where needed. Avoid overloading staff or systems. Start with your early adopters to build momentum. Not everyone will move at the same pace, and that is okay. The goal here is progress, not perfection. We also do have a guide that can help you work through these steps. No, we're not expecting you to just walk away and do this whole process on your own, and we'll do a quick recap on those resources at the end of our call.

Next slide, please. If you do feel like you want some help getting started, we have a plug and play series of templated measures. These are pre-built templates grounded in best practices that you can immediately use or adapt for your department or service areas. Whether you are starting from scratch or looking to strengthen your current measures, this toolkit will help you move forward with confidence and start using data in your organization.

For our Envisio customers on the call today, we create the data sources, the visuals, and the dashboard for you, incorporating open source data wherever possible. Typically, in at least five of these measures. That means that this dashboard will be ready for you to use share with your organization and start tracking the impact you are having immediately.

Next slide, please. Just a quick preview here. These measures have been grouped into six key strategic areas in alignment with some of the most common strategic plan strategies we see across our customer base. We've identified some key metrics that are tracked by almost all the cities we work with across these six areas. And I just wanted to round out here by highlighting a couple of quick examples of these measures to show you why these are important and how easy it can be to get started.

Debt per capita is a classic indicator of a city's financial sustainability and fiscal responsibility. It helps residents, elected officials and credit rating agencies assess how much long-term debt is being carried per resident. This is a measure that is simple to calculate, widely understood and easy to benchmark,

and it really demonstrates transparency and accountability around capital spending and long-term liabilities.

Housing affordability is one of the most visible and pressing issues facing municipalities. Average rent is a straightforward, accessible indicator that reflects the local cost of living and housing market pressure. This measure will resonate strongly with both residents, council and elected officials, and it's a leading indicator of housing stress, gentrification or displacement.

Governments need to build and maintain public trust, and effective two-way communication is key. Social media engagement, not just your follower count, indicates how well the city is reaching and resonating with its community. So this measure shows you whether residents are engaging with city content effectively.

People are the backbone of service delivery, as you all know. So high turnover is a red flag for organizational health and morale. It's valuable for both HR and executive leadership and increasingly for elected officials interested in organizational resilience and workforce stability.

For participants who may not be Envisio customers yet, you can still make use of this set of measures. These are easy to implement to begin tracking data and start tying progress to your strategic goals. For those of you who are an Envisio customer, you can reach out to your customer success manager to request a dashboard.

Now that we've gone through the process of how to create measures, I'm going to go ahead and pass it off to Alex from the City of Corona. He has a dashboard that many of you are likely familiar with as an example of best practice to talk about his process.

Alex Mercado:

Thank you so much, Meghan. And hello, everyone. My name is Alex Mercado. I'm the senior applications' analyst at the City of Corona, and I'll be speaking to you about government performance measures and how the City of Corona leveraged Envisio to streamline our processes.

Before going into the specifics, I want to do a brief overview of performance measures for our city. We currently compile metrics and KPIs from various citywide applications, and that's because a lot of our metrics are operational metrics that reside in systems we use day-to-day, so like our ERP system, utility billing system, enterprise asset management system. So we have a lot of systems throughout the city where we pull the data that generates our metrics in Envisio. We have internal dashboards that we use for management and leadership to monitor performance for those operational metrics, as well as projects. We have a public-facing dashboard that reflects our progress on various things like our city strategic plan that we have published to be able to monitor how we're doing for the very high priority projects that we're undertaking at the city. We have a strong culture of performance tracking as well, and we accomplish that by doing surveys for our employees and residents. So although that's not operational metric or project metric, that's still a metric to us nonetheless to see how we are performing from those that are outside our organization. We have metrics such as how safety residents feel in their neighborhoods, the quality of city services being provided, the quality of our parks. So it's really helped us understand areas for improvement, as well as been candidates for metrics themselves.

We implemented Envisio in 2022 with the goal being that we have a one-stop shop for some of the most critical city measures that can be accessed by various staff and leadership. Some examples here on the right-hand side are metrics that we use right now to monitor police response times, fire activity, as well as acres of land cleared. And so having these visuals really assist in being able to quickly understand what is happening and to be able to follow up on any particular next steps. A good example there is acres of land cleared. We are in a fire hazard zone, so it really helps us be able to monitor how we're performing against being able to clear land in order to combat forest fires.

Next slide, please. What really got us started on this was our new city manager and our IT department. Our city manager joined the city in 2019 and he had a lot of very ambitious ideas for moving the city forward, but first needed to understand what are the projects we're working on? How are we performing? So after doing that assessment, we contracted with the firm to do a city strategic plan, which comprised of the most important projects we as a city need to undertake across five fiscal years. So it wasn't just the projects that were part of that plan, it was also performance measures that would allow us to understand how we're performing against that plan.

For the city strategic plan, we wanted to make that public-facing as well because of our city manager's really strong focus on transparency and accountability. So we really wanted to be able to show our constituents how we are performing, that way. It's transparent to them when we go through these projects, how it's impacting them. The other thing is we really wanted to have a better understanding of the data so we can make more informed decisions. So we have a strong culture now of being able to understand the data so we can make decisions on them. This could be for looking at performance measures and being able to justify certain expenditures if we identify that there's certain volumes of work growing in certain areas that might result in needing to get a position, but it's much easier to have the data behind that to be able to justify a decision like that than to just say you want an additional position.

We also use data for making decisions about which projects to prioritize and which initiatives to undertake. And again, this has helped us be able to make informed decisions across all levels of our organization. You can see here there's a snippet of our public facing city strategic plan and one of our components in there. So it does include response time to fire incidents. So it's really meant to be like a small dashboard for the public to be able to assess how we're performing from a fire perspective.

How did we get started? Our first year of the city strategic plan was very manual and challenging. We used PowerPoints to measure different metrics so that they were readily available to be presented. We did a lot of emails back and forth for various folks that were contributing to performance measures in our city strategic plan, which was a big challenge. We had issues with file versioning, duplicate files, corrupted files. So it was definitely a lesson learned in that we needed to use a tool to be able to assist us with tracking our projects and our performance.

For the second year, we did a significant amount of research and identified Envisio as the tool that would help us get there. So we have all our projects from our city strategic plan and Envisio now, alongside with the planning metrics. You could see here on the right-hand side, this is just a snippet from a report that we run internally to show us how we're performing on our city strategic plan. So there's about 138 high

priority projects and we could report on different levels of our city strategic plan down all the way to the projects.

We also use Envisio for our department work plans. So those are for... Each fiscal year, we have departments indicate which projects they're going to work on. We get them into Envisio, and then we're actually able to run performance on projects for departments as a whole for individual divisions as well as individual projects. So it's really helped us get a better feel for how we are performing day-to-day, week-to-week, month-to-month.

Where are we today? Today we are compiling hundreds of performance metrics in Envisio and almost all of those metrics are public-facing. And how we display those to the public varies. You could see here on the top right, there's what is called a scorecard and we're able to compare year-over-year data, as well as have formulas in Envisio that automatically detect the trend. So it's really more about just being able to get our numbers in there and the rest is pretty much handled within Envisio.

We also have dashboards that the public sees. For instance, here is for the most recent quarter that was finished, there are certain metrics that we share with the public. We also enable hyperlinks underneath each one of those particular measures where the public could actually drill down and view historical performance related to each metric.

We also use automated reminders to remind our staff to be able to populate some of these metrics. We do have some capabilities to pull in metrics via integrations, but also, we have enabled quite a few automated reminders to staff where we specify who's the owner of a certain metric and it reminds them every so often to be able to update their metrics before a deadline. So it's really helpful with getting compliance from different folks throughout the organization and be able to maintain all this that we have helped build.

We do have multiple public-facing portals right now regarding our performance measures. One is the city strategic plan, as I mentioned. Another is our police department has certain initiatives that they've made public for residents. Sorry. And then we're also working on developing a benchmark portal for cities located in our county. That'll include demographic data, economic data, public safety data. So with that, we'd have not just the ability and awareness of how we're performing with cities in close proximity to us, but also allows us to collaborate with them in case there are certain things they're doing better than us, we could learn from each other and be able to instill some of those insights into our cities.

We track metrics for projects, as I mentioned with the department work plans, so like percentage of completion for projects, completed milestones, overall plan progress. And that has been really helpful for our directors and deputy directors to be able to quickly assess how we're doing for a division and for their own department.

We also have a process where we review metrics with our leadership and city council to be able to identify potential increases, decreases in metrics and how we should address those changes. So it's really helpful to be able to address this with our city council. And we're also very proactive with residents. When we have sessions where we cover performance measures with city council, it's in a public meeting

and we also distribute even pamphlets to be able to share with residents. So keep them informed on how we've been doing.

And then lastly, we are in the planning for our next city strategic plan that'll cover the next few fiscal years. So now we have a better framework of how we've used metrics, and we're also going to incorporate some other ways of improving those metrics, whether it's targets that we have to shoot for or, thresholds that we're meeting or averages. So a lot of the charts we use now, it's informational, but again, we're going to incorporate more of those types of items into our metrics to give them more meaning for the public as well.

And that's all I had. Thank you.

Liz Steward:

Thank you so much, Alex. Thank you, Meghan. Thank you, David. Fantastic presentations. We're going to jump into Q&A. We're going to do a poll in a minute. There was just a couple of things I wanted to pick out from the presentations that we didn't cover in as much detail today. So Alex, this will probably make you smile. I was presenting at a conference just a few days ago, and I used the City of Corona's dashboard as part of that presentation to really talk about data in context. And you did cover this, but I just wanted to highlight it.

You have 200 plus performance measures and they are largely public-facing. What I think Corona does so incredibly well is organize that information, tell a story with it and put it into context. So all those departmental measures like why do we track this? What does it mean? What's the trend on those? So not just a single data point in time. So I would absolutely encourage everyone to go and look at Corona's dashboard, and I believe it will be in the follow-up email that we send as well.

And then one other piece. Meghan touched on budgeting and tying budget to your performance measurement program, and how do we answer this question of how do my budget dollars affect community outcomes? How do I know if the money that I'm spending is actually making our community safer or our city's more walkable? We are not going to touch on that in this webinar. Obviously it's a big topic, but anyone who's interested in sort of tying their budget to their strategy and their performance measures, please come and talk to us. We are doing a lot of work in this area, a lot of insight into priority-based budgeting and how you can tie that also into your strategic plan and specifically within Envisio as well. So my details are going to be in the slides for anyone who's not an Envisio customer, and for everyone who has a customer success manager. Obviously please chat to us if you're interested in really closely tying your budget priorities to your strategic plan and to your performance measures.

So with that said, let's do this last poll and then we'll go into our Q&A. We have a little guest Q&A panelists as well. So what's next? What's your next step with performance measurement? This really just helps us know whether to follow up with you with anything specific, any of our free resources, whether you want our coaches to give you a call. So let's bring this back to my leadership team. I'm going to start drafting and refining our measures. Exciting. I want to talk to our coaching team, share these templates, or you're not sure yet, which is also totally fine. Okay. Just 10 more seconds on this one. Okay, I think that's everyone. Thank you, Tabby, in the back room. You can close that one.

Okay, so we're going to move to Q&A. I'm just going to ask our panelists to turn their cameras on. We're going to take the slides down as well. Oh, actually... Oh, sorry. Thanks, Tabby. I think we've covered everything here. We're going to send all of these materials out in an email after this webinar. We'll add the plug and play measures. We'll add the data storytelling guide for the public sector. Our guides and content, we have a lot of it, and it is largely technology-agnostic. It is educational. You can use it whether in a physical customer or not. So we'll send out everything that we've talked about in this session today via email. So thank you for the reminder, Tabby.

Okay. I'm going to invite our panel back for our Q&A. We have an extra guest panelist. So Tala Kasko is from the City of Corona who works in the city management's office is also going to join us and she can help us answer questions around exactly how they use their data to make decisions at the City of Corona. So welcome, Tala. Thank you so much for joining us, and we will dive into our Q&A.

I'm going to start with this question, and I think this is probably an Alex and Tyler question. So transparency is tricky for some local governments. How have you dealt with pushback on being transparent in the city? You've got any examples of an example where transparency has caused some concern?

Tala Kasko:

I can start on this one. I think a big part where transparency has had pushback especially is relating to police. In a lot of cities that we've been... Like Alex mentioned, we've been trying to create a regional platform with local cities, and a lot of pushback is regarding police not wanting to share because certain metrics do seem... If not done correctly, they might cause some concern. But a big thing that we strive with our strategic plan and with our metrics is ensuring that each quarter, we do our best to, for example, police response time. Thankfully we've had a decrease every quarter so far. So by being transparent and helps hold us accountable and helps hold our departments accountable. So although there is pushback, it does encourage support from the city and encourage us to stay on top of our goals and continue to hold ourselves accountable towards our residents.

Liz Steward:

That's great. Yeah, that seems like a place where there could be a little bit of friction with sharing a lot of information. I don't know if Meghan and David, from your experience, Meghan, working with customers, David, Valley Benchmark communities and a lot of the work that you do there, do you have any other experiences where the transparency has caused some trouble and then you've been able to overcome that?

Meghan Brodmann-Bishop:

I think it's normal. For most of the groups that we work with, it's stressful. It's a lot to put yourself out there and to share all that data. So not highlighting what I said, but I think engaging your departments in that process is so, so important, making sure that you're defining measures that they feel confident in,

that they know that they can track that are within their wheelhouse. It can cause a lot of emotions and a lot of underlying tensions to come up when we work through these processes. So I really believe in a bottom-up approach to performance measure development and really getting staff involved at every possible moment to make sure that you're on the same page. And when you are at that point of putting that out in the public, that everyone's had a say in that.

David Swindell:

I think another way of actually blunting some of the concerns by those who are recalcitrant about exposing the metrics is as you're communicating that stuff with the public, the communication is not just the metric itself, it's also what are you doing about it. So the communication is this is how we're going to use this, and if we are below our target, how are we going to get to the target? Or if we've done something wrong, how are we going to fix that in the future? And then part three is following up, this is what we did, this is where we are now. And so I think that you might get that initial reaction from the public potentially, but once you start actually making that a part of the ongoing process, that's what builds the accountability and transparency, which feeds into trust from the community into the institutions.

Liz Steward:

Yeah, absolutely. And it's adding that narrative piece to it as well, right? So it's not just just some data, but it's also like, here's why it may be going up or down. This is why we track it. This is what we're going to do to influence the numbers in future. Thank you.

I think this is probably one for Tala as well. How do you ensure that performance data is actually used to inform decisions and not just reported out? It's from Adrian.

Tala Kasko:

A big thing that we do is we check our data every single quarter and we create brochures that go out to residents, to council that they're presented at council meetings. So the way we ensure that they are actually being used correctly is that our city manager will review every metric that we're tracking, and then he'll meet with each department head individually to understand why these metrics are going up or why they're going down and how, for the next quarter, we can improve. So again, a big part of it is accountability. So we go through each and every single metric individually, understand why it's going up, and then track it again next quarter to understand what changes need to be made to improve the metric.

Liz Steward:

It probably helps you identify as well what's not a useful metric if you're doing that, right? Because if you're going to go through that many metrics, you want to make sure you're having the right conversations. I don't know if there's anything you want to add there. Meghan, I know we have a reporting framework, which is helpful for this.

Meghan Brodmann-Bishop:

Yeah, I mean, I think Tala really nailed it, where ultimately it's regardless of where you're tracking the data, if you have reporting right, we have recommended reports to use, but the best way to use data is to actually start looking at it. You can't make any decisions at it if you're not actually looking at it at a regular cadence and talking about it. So that's really the first step. So yeah, I think I'd really just mirror what Tala said.

Liz Steward:

Fantastic. We're actually at time, so this was the fastest Q&A ever. I have a bunch more questions over here that we're just not going to get to, so I apologize for everyone who's asked a question and hasn't had an answer. We will try and follow up with everyone. I just want to thank everybody again. Thank you for joining us. Thank you, Meghan, David, Alex, Tala. Really appreciate your time. I think this has been a really enlightening conversation. And we will reach back out to everyone with all the resources that we talked about today. Thank you.