Reporting and Scorecarding for Municipal Government



CITIZEN-CENTRIC Performance Improvement BY JOHN CLAYTON THOMAS, GEORGIA STATE UNIVERSITY



About the author



Dr. John Clayton Thomas is a professor in the Andrew Young School of Policy Studies at Georgia State University in Atlanta. With three books and more than fifty articles in print, John is known internationally for his research on public administration and public policy. Much of that research focuses on how citizens connect with their governments and how those connections can be improved. His articles have appeared in such journals as *Public Administration Review*, the *Journal of Public Administration Research* and *Theory, Administration & Society*, and *Urban Affairs Review*.

John has extensive experience in applied research and consulting with government agencies, including extensive work on measuring public performance and on using that measurement to improve public management. He has conducted research for governments in Ohio, Missouri, Kansas, and Georgia, and provided training for state and local officials in Georgia, New York, Pennsylvania, South Carolina, and Texas.

John also serves as one of three editors of the *American Review of Public Administration*, one of the elite journals in public administration. He holds a Ph.D. in Political Science from Northwestern University and Bachelor's and Master's degrees in Journalism and Mass Communication from the University of Minnesota

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Introduction

Local governments have entered an enormously promising new era in the measurement, monitoring, and improvement of service performance. Prodded by a battery of new public policies and facilitated by advances in technology, local governments now can collect, analyze, and act on measures of their performance in ways unimaginable only a few years ago.

One of the most prominent public policies underlying this changing environment is the U.S. Government and Performance Results Act of 1993. This act requires governments at all levels to attend seriously to the task of tracking public performance. But those policy initiatives, like earlier policy encouragements, might have failed but for the arrival of new technologies—new performance measurement and management systems—that greatly simplify the tasks of collecting, analyzing, and making sense of measures of local government service performance. As local governments adopt these new systems, they can expect to see substantial benefits. Initial benefits usually include improvements in public program performance, since having better data on hand sooner lets local governments modify programs in ways that enhance performance. Citizens will also see the benefits, both as the recipients of improved public services and, eventually, as consumers themselves of the better and more accessible performance data.

The purpose of this paper is to explore the benefits as experienced by local officials. The benefits, detailed below, reflect the experience of the local administrators who have been most extensively involved in the recent implementation and ongoing administration of new local government performance measurement systems. These officials speak for overall municipal and county governments, for school districts, and for some highprofile specific local services, including law enforcement and social services.

The new performance measurement systems

Measuring the performance of local public services has long concerned local governments. Recent decades have seen periodic initiatives to develop and institutionalize better measures and better measurement systems. Successful initiatives in the past have been few, however. The resulting measures have proved to be of variable quality, implementation has been inconsistent across departments and divisions, and analysis and use of the data has been limited, at best. With each successive initiative, though, the message is clear. Local governments need performance measurement systems that are comprehensive in scope, consistent in quality, easily analyzed, and built for the long haul. The past decade or so has seen new performance measurement and management approaches that meet those criteria. A few examples include systems such as Balanced Scorecard, dashboards, and New York City's Real Time Crime Center. Underlying all of these systems is business intelligence (BI) software, such as that provided by Cognos, an IBM company.

Components of the new systems

While varying in many respects, the new systems all function as management tools that provide a data-driven view of an organization's performance. The systems provide that view both for the organization as a whole (city, county, or school district) and for specific agencies within the larger organization (such as police or parks and recreation).

These new systems typically feature a number of common components, including:

- 1. A foundation in organizational strategy: The central strategic goals of the organization—the particular local government or service area—provide the foundation for the entire system. These goals enable top management to focus more on achieving the mission and less on the performance of specific activities. For example, the system would draw more attention to progress towards the goal of "creating a thriving cityscape" than to the individual work of separate departments such as parks and recreation, highway maintenance, trash collection, and code enforcement. Yet departmental measures should link in some manner to one or more aspects of the core strategy.
- 2. A concern for all aspects of the organization's performance: The systems take a 360-degree perspective on the organization's performance. They focus on the key aspects of a) external impact on citizens and other stakeholders, b) internal management, and c) financial performance. The graphics below illustrate how these different aspects might play out for municipalities and school districts.



The strategy map for core municipal performance drives performance in all supporting departments.

3. A limited set of performance measures for each part of the organization: Each department or agency within the organization should produce a small number of performance measures that both reflect the key aspects of the department's mission and link to the strategy of the organization as a whole.



The strategy map for K-12 performance links to core strategy. Creating productive citizens results in a safe and thriving city.

4. The translation of measures to metrics: Those performance measures must be translated to metrics. Metrics reflect expected or desired levels of achievement on the measures.

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The K-12 scorecard follows key metrics.

- 5. The use of scorecards or dashboards: Data should be reported and tracked in summary graphic form. This is analogous to how data readouts appear on dashboards of automobiles or planes. The organization as a whole may have one or more dashboards. Individual units within the organization may also have dashboards reflecting their own relevant data.
- 6. A regular monitoring process: Measures should be tracked, reported, and reviewed on a regular basis. This may happen as frequently as daily for some measures such as crime reports or as infrequently as annually for others such as student performance on standardized tests.
- 7. Periodic meetings to discuss the data: In addition to monitoring the data, officials should meet periodically—from weekly to monthly to quarterly to analyze trends in the data and to discuss possible actions to respond to problematic trends. In overall local government, leaders of specific departments might meet as frequently as weekly amongst themselves and quarterly with officials from the mayor's or city manager's office.

Effective systems in operation

In practice, the best performance management systems embody a number of other characteristics as well.¹ In particular, these systems are:

- Strategic, not merely operational: At the ground level, the systems focus on the operational, on measuring the achievement of desired service outcomes. But all of those outcomes derive from organizational strategy. In a municipal performance measurement system, for example, most outcome measures would ultimately trace to one of the city's few strategic goals, such as "ensure a safe city," "create a thriving cityscape," or "attract new business." Outcome measures that do not trace to those goals should be given less weight in a department's thinking.
- 2. Evolving and dynamic, not static: As an organization's strategy changes, what is measured also changes. Thus, if a city adds a new priority—say, "maintain a strong infrastructure"—the city's departments and divisions will modify what they measure to address that strategic goal as well.
- 3. Participatory and iterative, not top-down in development: Although top management must ultimately decide what to measure, all levels of the organization have input to those decisions. Such a participatory process both maximizes information for top management's decisions and increases likelihood of buy-in from the departments and their employees. In addition, once a system becomes operational, its iterative nature assures that input from the ground level continues.
- 4. Tightly hierarchical, not loosely distributed in administration: These systems follow a traditional hierarchical process in administration. In this process, departments and even specific supervisors and employees are held accountable for performance on specific measures and metrics.

5. Transparent, not opaque: These systems are also easy to understand, even by people with little or no knowledge of the specific government. That ease of understanding is facilitated by the presentation of data in visually interesting scorecard and dashboard formats.

As that listing suggests, performance measurement systems facilitate thinking about performance in terms of strategy, rather than along traditional departmental lines. Changing mindsets in that matter is crucial since achieving strategic goals often requires inter-departmental cooperation. This is illustrated in the graphic below of "old" and "new" budgeting formulation processes for two environmental functions within the U.S. Fish & Wildlife Service. Where a traditional budgeting process would focus on "habitat conservation" and "refuges" separately, a strategic concern for "wetlands restoration" requires that they be addressed in combination.

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The U.S. Fish and Wildlife Service has evolved from traditional expense-type budgeting to new activity-based costing.

A performance measurement system makes this possible. As a result, the work of both habitat conservation and refuges should become better aligned to the organization's strategic goals.

¹ Edwards, David J., and John Clayton Thomas. "Developing a municipal performance measurement system: Reflections on the Atlanta Dashboard." *Public Administration Review*, 65 (2005), 369-376.

The measures and their reporting

The specific measures these systems capture will vary depending on both the particular system and the strategy of the overseeing government. Those measures are likely to include the desired outcomes of services (such as improving student achievement) and the service outputs (such as percentage of core classes taught by high performing teachers) that are thought to be necessary precursors to achieving the outcomes. The measures also often include aspects of employee behavior (such as absences or overtime), financial performance (such as spending levels), and other measures.

The work of the police service in Ottawa, Canada illustrates how various kinds of measures may be organized under different dashboard rubrics to serve different purposes in a performance measurement and management system. According to Randy Mar, Director of Corporate Planning for the Ottawa Police, Ottawa organizes its data with the assistance of Cognos systems under these three dashboard rubrics:

- **1. Executive dashboard:** Data on the workforce, finances, strategic initiatives, and risk management
- 2. Operational dashboard: Data on performance in emergency response, crime prevention, and criminal apprehension
- **3. Community dashboard:** Data on performance relative to the concerns of citizens.

Data within these different dashboards can then be reviewed separately or in combination to think about different aspects of organizational performance.



The Ottawa Police Service monitors performance through three interconnected dashboards.

Benefits of performance measurement systems

Whatever the measures collected, the bottom line for all of the systems is to improve government performance and to enhance the quality of life for residents of the jurisdiction. Those improvements may come about in many different ways, such as:

- 1. Uncovering unacceptable performance: In the early days of a new system, initial baseline data may highlight previously unrecognized problems. The initial measurement of some aspect of performance may reveal performance levels below what officials view as minimal, prompting action to improve that performance.
- 2. Identifying undesirable trends: Combining trend data on different output and outcome measures may suggest sources of those trends and possible actions to address the problems.
- **3. Calling out low performing offices:** Comparisons between different divisions of an agency—for example, between different district offices—may uncover low performing offices as well as suggest how those offices can be improved.
- 4. Improving services: As a result of these analyses and improvements, citizens and other stakeholders may receive faster and better services and responses to inquiries.

Those possible improvements become more real when they are illustrated through examples of specific gains experienced by particular local governments from their use of performance measurement systems. The profiles below detail a variety of gains as reported by local government officials who have implemented Cognosbased performance measurement and management systems. Profiles focus first on the two service areas that have received the most attention around performance measurement issues: law enforcement (in Ottawa, Canada; Los Angeles County, California; and Atlanta, Georgia) and schools (in Palm Beach County, Florida). The focus will then shift to social services in two county governments (L. A. County, California, and Clark County, Nevada), before concluding with examples from two overall municipal governments (Atlanta, Georgia, and Albuquerque, New Mexico).

Police and law enforcement: Ottawa, Los Angeles County, and Atlanta

Probably no single event stands out more prominently in the development of public sector performance measurement systems than the introduction of the CompStat system for police in New York City in 1994. Using CompStat, an abbreviation for comparative statistics, police officials reviewed crime data and trends in different areas of the city to identify problems. Their use of that data is often cited as figuring prominently in the substantial reductions in crime that New York City experienced during the 1990s. Police and law enforcement continue to benefit today from the introduction of new performance measurement and management systems, as the cases below illustrate.

Improved patrolling in Ottawa

According to Randy Mar of the Ottawa Police Service, police benefited from using their Cognos-based system to analyze two years of data on patrol workload assignments across the city's various patrol zones. The data revealed that in-service time, the time between beginning to respond to a call and completing action, was substantially longer in some parts of the city. The difference was great enough to suggest an imbalance in the allocation of emergency response resources. As a result, the service decided to create four new patrol zones, reallocating and enhancing patrol resources to those zones in order to repair the inequity.

Better and faster data for municipal officials in Los Angeles County

In Los Angeles County, many cities contract with the county for police services. According to County Associate Chief Information Officer Jim Hall, using a new Cognosbased performance measurement system, the county now provides each of those cities with daily data on criminal activities in that city the previous evening, as well as trend data for longer periods. This data allows city managers and administrators to become aware of possible crime issues in the community sooner, allowing them to ask for assignment of additional officers to the community. These managers also benefit by being able to respond more rapidly and more accurately to questions about crime issues that might be raised by city council members or by citizens at large.

Retention of officers in Atlanta

The city of Atlanta has launched a new "ATLStat," a comprehensive performance monitoring tool used to increase departmental efficiencies, covering all of the city's departments and divisions. Data from that system is now helping the Atlanta Police Department address problems with retention of officers in the department. In a November 2007 monthly meeting with the mayor's staff, police officials reported an annual attrition rate of 15 percent, well above the desired metric of 8.6 percent and the 5 to 6 percent rates in many other municipalities. The new ATLStat system had already helped to identify attrition as being highest in the first year of service but also substantial in years two through five. Based on the data, police officials are now designing strategies to better retain officers during those first five years.

Benefits for citizens

All of these gains could benefit citizens as well as their police departments. Residents should benefit if the size of the police force and the allocation of its patrolling are improved, as in Atlanta and Ottawa. They should benefit if crime issues can be addressed sooner rather than later, as in Los Angeles County.

Citizens should benefit further once police departments add "Community Dashboard" components to their performance measurement systems, as under development in Ottawa. That community dashboard will serve as the third component in the dashboard trio alongside executive and operational dashboards. According to Randy Mar, a Citizens' Advisory Board of community representatives in Ottawa is working with police staff in defining the measures and metrics they want the department to report regularly to the community.

Schools: The School District of Palm Beach County, Florida

Schools in K-12 levels represent another local public service sector that can benefit—and is benefiting—from new performance measurement and management systems. As a case in point, the School District of Palm Beach County, Florida, adopted Cognos software in 2002 to organize and report on performance data by district, school, subject area, and student sub-group. The district also makes use of School Advisory Councils, composed of administrators, teachers, parents, students, and community representatives, to review the data and school programs regularly, in part to recommend targets for action to improve student achievement.

The district's performance measurement and management efforts, while hardly the only factors, may help to explain the district's predominantly positive performance, as shown in the summary scorecard below. Across the various subject areas and student ethnic groups, there were 40 areas in which the district experienced statistically positive changes (indicated in green) and no areas of statistically negative change (red) from FY2005 to FY2006. The district is also the only urban school district in Florida that has been rated an "A" for its performance by the state of Florida for the past three years.

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The Palm Beach County School District used Cognos to examine student performance by ethnic group and found no statistically negative (red) results.

Benefits for citizens

Both students and parents, as well as society in general, benefit when student performance improves. Performance measurement systems have helped improve that performance in Palm Beach County by letting administrators and teachers know where change is needed.

Social services: Clark County, Nevada and Los Angeles County

Social services, including such functions as child support services and assistance for low-income families and individuals, represent a principal service area for county governments in most areas of the U.S. Two western county governments provide illustrations of how the implementation of new Cognos-based performance measurement systems can improve the quality of county social services.

Screening for possible investigations

Child and family services departments must find a balance in providing immediate service to children in dire need while ensuring adequate attention to those with less critical needs. The experience of the Department of Family Services (DFS) for Clark County, Nevada, illustrates how conversion to a performance measurement system can

help such a service find the right balance.

When Clark County's DFS receives reports of concerns about children, the report is handled first by hotline staff, who must decide whether the report should be referred to an investigation supervisor. Early on, the performance management system showed inconsistencies in the screening criteria that resulted in too many cases unnecessarily elevated to investigation and burdening investigators. According to Lori Higdon, a County Senior Business Systems analyst overseeing the implementation of the new measurement system, insight from the data prompted the department to redesign its policies and procedures. Data and root cause analysis has helped specifically with the hotline report screening process. Staff has received additional training to improve the screening process to better serve children in need.

Improved achievement on a primary metric

Clark County's new system also provides easy monitoring of key performance indicators for DFS. One of the department's principal metrics—maximizing the placement of children with parents and family—has improved over the monitoring period. According to Higdon, the new system has greatly improved the department's ability to analyze performance on the metric, suggesting some previously unknown trouble spots.

Prompted by that analysis, DFS leaders renewed efforts to underscore to their staff the priority of the metric and to suggest possible means to improve performance on it. According to Higdon, staff subsequently redoubled their efforts to locate and place children with parents or relatives and to record those placements more accurately, resulting in improved performance on the metric, as shown in the graph in the center of the department's dashboard below.



Clark County, Nevada's Department of Family Services (DFS) worked harder to place children with parents or relatives and followed the metrics as they improved.

Expediting welfare recipient interviews

One of the first departments to come under Los Angeles County's new Cognos-based performance measurement and management system was the Department of Public Social Services (DPSS), which is responsible for administering Food Stamps, Medicaid, and other social service programs in the county. The department's early experience with the new system produced one obvious benefit: expediting interviews with potential welfare recipients.

As is standard in implementing performance measurement systems, DPSS began by identifying a limited number of high priority metrics for the department. Among them was the goal of seeing every potential welfare recipient within 20 minutes of the individual's arrival at a departmental office. According to Jim Hall, the County's Associate Chief Information Officer, the department began to measure performance on that metric for all of its offices around the county. At the same time it examined data on possible factors (such as staffing differences) that might underlie better or worse performance on the metric. Managers of the offices receive that data on a regular basis, enabling them to identify problems sooner and more clearly than in the past. They also meet monthly to compare and discuss performance on that and other metrics. According to Hall, the data and those discussions have suggested corrective actions for offices that were slow in seeing potential welfare recipients, resulting in improved performance.

Benefits for citizens

Citizens and society clearly stand to benefit from these performance improvements. In the case of Clark County, improving investigation screening should help the county focus its resources more on necessary investigations, enhancing the attention children receive in those cases. As well, placing more children with their parents or other relatives represents gains for both the children and their families. In the Los Angeles County case, reducing wait times could mean a better experience, as well as less wasted time, for potential welfare recipients when they first visit DPSS district offices.

Parks and recreation: Atlanta, Georgia

Atlanta's new ATLStat performance measurement system has produced a number of benefits for the city's Department of Parks, Recreation, and Cultural Affairs, as suggested by the two examples below.

Improving the use of community service workers (CSWs)

The first example relates to the use by the Office of Parks of community service workers (CSWs), individuals whom courts have sentenced to perform community service. The Office of Parks relies heavily on these workers in its extensive mowing and mulching tasks, a principal activity of staff and a principal measure of staff performance. With the onset of enhanced performance measurement, according to Dorinda McCombs, the Department's Director of Management Services, Parks began to measure the use of CSWs by its different district offices around the city.

Parks realized early on that CSW usage varied enormously from district to district around the city, from as few as two in one district to more than 200 in another. When participants began to discuss reasons behind those variations, officials from divisions with high usage were able to explain how some CSW locations typically provide more workers. Helped by that counsel, the divisions with low CSW usage were subsequently able to increase their usage substantially, producing better performance in mowing and mulching.

Modernizing recreation centers

The many recreation centers of the Department's Office of Recreation illustrate the benefits that can come simply from transitioning to a new performance measurement system. According to McCombs, when Recreation officials began to contemplate bringing performance measurement to these centers, they found immediately that the existing recording systems at the centers were entirely manual. Registering a child for a recreation program such as football or swimming lessons always meant filling out a hard copy, which later required data entry if the data was computerized at all. As a consequence, Recreation lacked accurate and timely data on enrollments both overall and by specific activity area. In fact, according to McCombs, enrollment data was not comparable between centers because recreation centers varied in how they counted enrollments.

To address the problem, Recreation decided to take the very basic step of installing computers with online linkages at each of its 39 recreation centers. That action immediately raised another issue: most recreation staff either did not know how to use a computer or was not familiar with the department's computer system. As a result, the department decided to provide computer training for center staff.

The gains from all of those changes now appear to be substantial, however, according to McCombs. Recreation has a much better reading on the demand for its varying programs because all registration occurs in a consistent manner through the same system. Those better readings enable Recreation to do a much better job of providing an appropriate mix of activities and programs to its customers.

Benefits for citizens

Citizens should also benefit substantially from the changes in both Parks and Recreation. In the case of Parks, citizens who either live adjacent to city-owned parks or who visit the parks presumably benefit from seeing those grounds better maintained. In the case of the modernization of Recreation centers, the benefits may be even greater. For one thing, parents and their children can now save a great deal of time by going online to find which locations offer which programs and even to register for the programs. Even if they register on site, elimination of manual registration should expedite that process. Finally, the new system also permits multiple payment options, including by credit card, making the payment process much easier.

Various Functions: Albuquerque, New Mexico

Among municipalities, the City of Albuquerque stands out as one of the early innovators in performance measurement and management systems. Officials there cite a number of benefits as a direct result of using those systems.

Payments to vendors

As a first benefit attributable to the city's Cognos-based Customer Relations Management (CRM) system, payments to vendors have been expedited. According to

Brian Osterloh, Albuquerque's Customer Relations Management (CRM) and Business Intelligence Team Application Development Manager, faster payments result from two elements of the CRM system. The first element offers vendors a means to check online whether a payment has gone through. As a result, vendors no longer need to take the time to call city offices to check on payments, perhaps then having to wait as their queries are investigated. The second element provides regular reports to all departments on which payments have yet to be made and on how long any unpaid bills have been pending. Departments consequently are much less likely to be delinquent in their payments to vendors. Those expedited payments may be no small matter for many local businesses that can experience cash-flow problems if they are not paid promptly.

Large-item junk removal

The CRM system has also proved useful in improving large-item waste removal (such as old couches). According to Osterloh, the CRM system permits the creation, with just a click or two of the mouse, of a single work list on requests for large-item pick-ups. Previously one individual had to spend approximately six hours each day preparing the list. The expedited processing means that requests for a pick-up can be addressed if received as late as the morning of the day of pick-up. Earlier, calls had to be received two days prior to the pick-up date.

Solving the graffiti problem

Albuquerque's experience also provides an excellent example of how the performance measurement and management systems can be used as a sleuthing tool in solving complex problems. The specific problem in this case concerned graffiti removal, a high priority of Albuquerque's mayor. The mayor had set a public goal of removal of all graffiti within 24 hours of its being reported, but in February 2007 he complained to city administrators that the city appeared to lagging behind that goal.

Asked to investigate, Brian Osterloh began by tapping the CRM system for trend data on the handling of graffiti complaints. That data showed him that the city had achieved a two-day average on graffiti removal at one point the previous year, but had regressed to an average of more than four days for closing out complaints, a pattern consistent with the mayor's concern. The data also revealed that the volume of 311 call center calls on graffiti had more than doubled over the previous year.

Osterloh then queried the CRM system on when the graffiti calls were received and how response might vary by time of call. A clear pattern emerged: Calls received between midnight and 7 a.m. were resolved on average a day earlier than calls received between 7 a.m. and midnight. Osterloh found out that the call center created a daily work list for graffiti removal at 7 each morning. Complaints received between midnight and 7 a.m. made that day's list, but complaints received after 7 a.m. got on next day's list.

The call volume data also revealed that many calls on graffiti problems came during weekend hours. By reviewing the CRM data on workload assignments, Osterloh could see that weekend crews were insufficient to address the volume in a timely manner.

Osterloh also used the CRM system to map reports of graffiti by location across the city. Graffiti was more common in certain areas of the city, but workload data showed that removal resources for those areas did not match problem occurrence.

Acting on what he had learned from these analyses, Osterloh recommended and the city adopted a number of changes in how graffiti complaints should be handled:

- 1. The work list process was modified to include regular updates during the day after the original 7 a.m. preparation.
- 2. Graffiti removal crews were reassigned to better match the actual incidence of graffiti across the city.
- **3.** Additional staff was added to weekend crews to address the high incidence of graffiti on weekends.
- **4.** A higher priority was given to graffiti in areas most visible to residents.

These changes produced substantial improvements in the city's performance in graffiti removal. Even as call volume on graffiti complaints has continued to increase and resources available for its removal have remained static, graffiti removal is now being completed on average within one day's time of the receipt of a complaint, well ahead of the two to four day clearance rate prior to the data analyses.

Benefits for citizens

The gains for the city from all of these improvements are substantial and important, but the gains for citizens may be equally or more important. In the case of graffiti removal, Albuquerque residents need no longer wait days to see unattractive and distasteful messages removed from sight. Similarly in the case of large-item pick-ups, residents must no longer plan days ahead to ensure that their largeitem waste is removed. Finally, companies that do business with the city can expect much more timely payment of their charges to the city, improving their financial well-being.

Conclusion

New performance measurement and management systems for local government offer the promise of substantial improvements in performance and service to their public. By greatly simplifying the tasks of collecting, analyzing, and making sense of the measures of local government service performance, these systems greatly enhance the ability of these governments to both identify and solve problems with local services.

The cases cited above reflect some of the variety of improvements possible from adopting and using these systems, illustrating the kinds of gains suggested at the outset of this paper. Specifically:

- "In the early stages of implementing a new system, initial baseline data may highlight previously unrecognized problems." The Palm Beach County School District saw in their baseline data where students were under-performing, leading to successful efforts to improve that performance. Clark County, Nevada, observed an unexpectedly low placement of children with parents in their initial data, prompting successful efforts to increase that placement.
- "Tracking data on a key performance measure across time may point to undesirable trends that call for action." The Ottawa Police Service learned from time-trend data that patrols should be reallocated to areas of higher needs, improving coverage by police patrols there.

- "Comparisons between different divisions of an agency—for example, between different district offices—may uncover low performing offices as well as suggest how those offices can be improved." District offices in Atlanta's Office of Parks learned from such comparisons how to improve their park maintenance work.
- "As the result of these analyses and improvements, citizens and other stakeholders may receive faster and better services as well as responses to inquiries about services." Potential welfare recipients in Los Angeles County are now seen more quickly when they visit district offices of the county's Department of Public Social Services. Citizen complaints about graffiti are now addressed much more rapidly in Albuquerque.

These improvements make local public functions more effective and efficient internally, and add to what governments provide to their constituents externally. Yet these improvements may only begin to tap the potential gains in performance possible from these systems. As local government officials grow in their understanding of how to use the new systems, and as data gradually accumulates over time, the eventual benefits should multiply for both local governments and their publics.

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GLOBAL

Cognos ULC 3755 Riverside Drive P.O. Box 9707, Station T Ottawa, Ontario Canada K1G 4K9

ASIA/PACIFIC

Cognos PTY Limited Level 2 110 Pacific Highway St. Leonards, NSW 2065 Australia

EUROPE

Cognos Limited Westerly Point Market Street Bracknell, Berkshire UK RG12 1QB

NORTH AMERICA

Cognos Corporation 15 Wayside Road Burlington, MA USA 01803



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