

# Developing Performance Measures



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## Introduction

Welcome to the Developing Performance Measures training. The intent of this clinic is to provide an overview of how to develop relevant performance measures. You will learn how to develop performance measures that make sense to the community, to the county, to your department all the way down to you as an individual. There is a natural hesitancy to come up with performance measures that tie into you as an individual. The fear of the unknown and circumstances beyond your control can impact the achievement of your assigned performance measures. The natural tendency is to develop performance measures that are easy to manage and quantify. This tendency provides shortcomings in how we can use all of our capabilities in meeting the needs of our community. This is why we need to ensure that we provide accurate performance measures that provide maximum benefit for our customers. In addition, performance measures that tie the department's goals and objectives to employees' specific goals and objectives are crucial for organizational success.

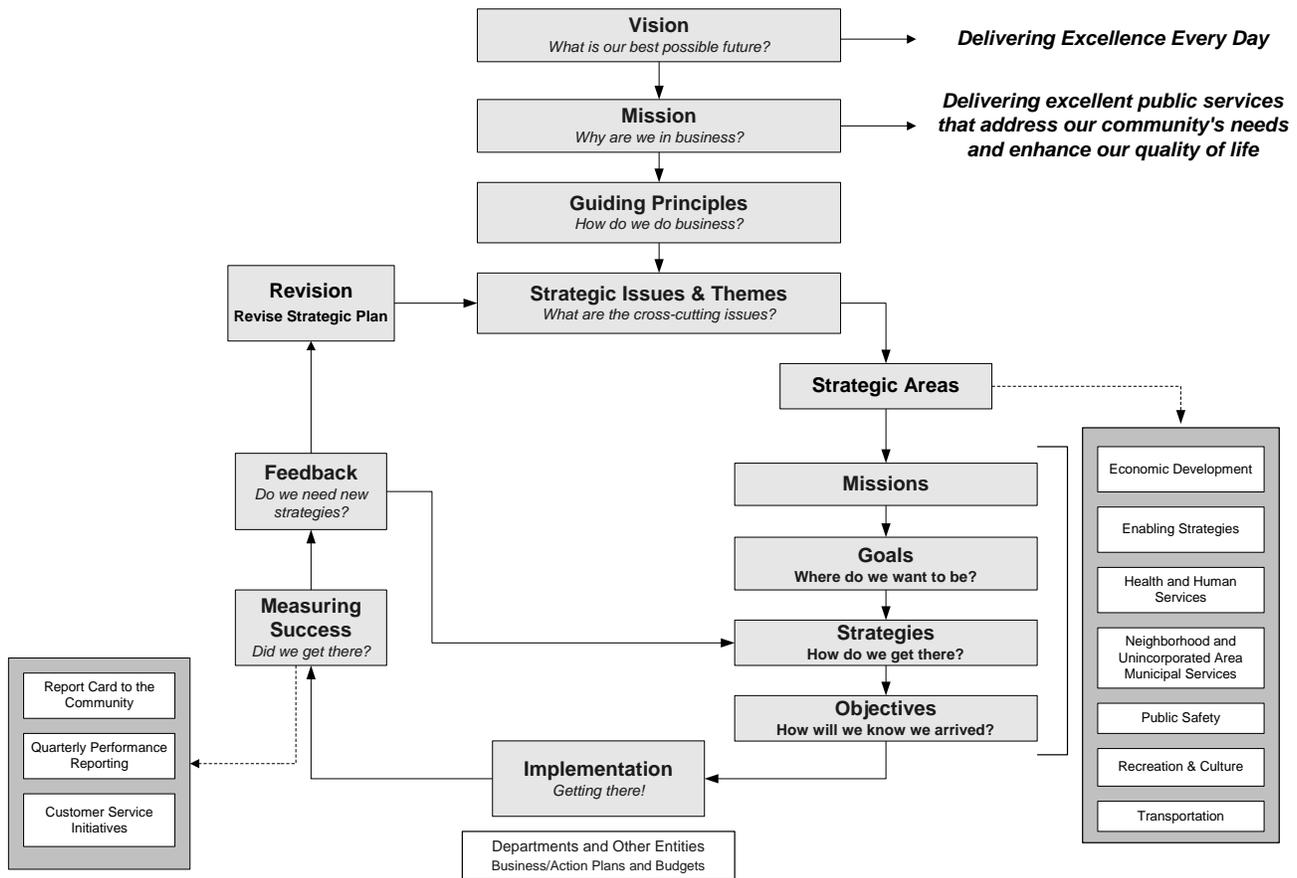
The learning objectives in this manual address the key concepts of developing performance measures and its impact on the Results Oriented Government environment that Miami-Dade County government operates under.

Some of the questions answered in this course are listed below.

- ❖ Why do we use performance measures?
- ❖ What is the County' Strategic Planning Model?
- ❖ What are the County's Vision Statement, Mission Statement, Guiding Principles, and Strategic Themes?
- ❖ What are Strategic Area Goals, Outcomes, and Strategies?
- ❖ What are Objectives and Actions Plans and how are they used?
- ❖ How does one develop Performance Measures?
- ❖ What are the different Types of Performance Measures?
- ❖ What are the resources used for this document?
- ❖ Any other questions you may have?

# Strategic Planning Model

## Miami-Dade County Strategic Planning Model



In late 2001, Miami-Dade County government initiated its first-ever countywide strategic planning process known as “The People’s Vision: The County’s Mission.” During the early stages, the County carried out thousands of interviews and surveys, and dozens of focus groups and workshops to learn what our elected officials and the community believed was important. A core team of leaders taken from a diverse cross-section of the community helped guide the process to ensure understanding of issues important to the community.

Strategic planning is a process for identifying answers to four key questions:

1. Where are we now?
2. Where would we like to be?
3. How do we get there?
4. How do we measure our progress?

Strategic planning examines the current environment within which the organization operates, identifies the organization's strengths and weaknesses, agrees on five to seven major areas on which to focus in the near future, sets goals and objectives for these areas, lists specific action steps to accomplish the goals and objectives, and establishes some means of measuring progress towards the desired future.

The Strategic Plan for Miami-Dade County government includes:

- Vision Statement
- Mission Statement
- Guiding Principles
- Strategic Themes
- Goals and desired outcomes, strategies to achieve these, and measurable objectives by which to evaluate success

Department business plans and a fresh approach to the County's budgeting process are designed to ensure that financial resources, policy decisions, department operations and County staff are all aligned to achieve the results outlined in the County Strategic Plan.

# Vision Statement

## Our Vision

A vision statement should reflect our best possible future. It should be brief, memorable, appealing, inspiring, challenging, and enduring. It should also describe our future services levels. "Delivering Excellence Every Day" has been adopted by the Commissioners as Miami-Dade County's vision for its employees and the organization.

<b>Vision Statement:</b> a statement that communicates to our organization the hopes and desires for the future of the community we serve.	
<b>Our Vision Statement is</b>	<b>Simply Put</b>
Delivering Excellence Every Day	Some would argue that government, or any organization, doesn't deliver excellence every day. And they may be right. But a vision is where we want to be, what we are working toward. There may not be a single County employee that does not want to deliver excellence, but sometimes things don't go as planned. Maybe excellence is hampered by factors outside of our control. It's hard to deliver excellence every day. But every day we must, because each interaction we have with the public has the potential to formulate their opinion of our entire organization. That may sound odd, but it is true. Most citizens don't deal with government very often. If their interaction isn't frequent, and they happen to encounter a County employee who is having an off day, they may be forever cynical of County government. Everything you do matters every time.

# Mission Statement

## Our Mission

Having a clearly defined mission helps us focus on what the community believes our role and responsibilities should be. With the community's help we identified our mission as "delivering excellent public services that address our community's needs and enhance our quality of life." Here is how we see that mission in simply put terms.

<b>Mission Statement:</b> identifies overall purpose of organization, identifies customers/stakeholders, helps identify customer and stakeholder needs, expectations, and requirements and leads to the development of performance measures.	
<b>Our Mission Statement is</b>	<b>Simply Put</b>
Delivering excellent public services	Responding promptly with quality services
that address our community's needs	As we carry out our work, our "little voice" inside should be saying: "Okay, now why am I doing this?" "Because Mr. and Ms. Resident said it was important."
and enhance our quality of life.	Make life better, easier for our residents; not more complicated

# Guiding Principles

## Value Statements (Guiding Principles)

Value statements express basic beliefs about conditions under which people work best. They steer leaders to establish the structures and systems to make the [vision](#) a reality. Value statements address weaknesses, decision-related behaviors. We use the term value statements interchangeably with guiding principles.

**Value Statement:** a statement of an organization's core beliefs; doctrine. Also known as guiding principles.

<b>Our Value Statements are</b>	<b>Simply Put</b>
Customer-focused and Customer-driven	The customer is always at the top of our "to-do" list. Our business and action plans should answer the question: "How does this affect the customer?"
Honest, Ethical and Fair to All	We build credibility when we act legitimately. We balance logic with compassion, listening, being attentive to all employees.
Accountable and Responsive to the Public	Own the problem. Return calls. Answer letters. Follow up on complaints.
Diverse and Sensitive	We recognize and respect and seek out the unique gifts, talents and backgrounds of our workforce. We understand that in order to serve our community, we must understand our community. Our workforce ought to reflect the community we serve.
Efficient and Effective	Understand and carry out our purpose promptly.
Committed to Development of Leadership in Public Service	Mine and foster leadership, understanding that a title is not the measure of leadership potential.
Innovative	Monitor trends, market forces, technology and apply the good ones.
Valuing and Respectful of Each Other	Allow for the possibility that an idea may be ahead of its time and that the person offering the idea is a visionary.
Action-oriented	Walk the talk. Do more than acknowledge a good idea. It is not enough to ask, "What if?" Make it so.

## Strategic Themes

- *Fiscally responsible*
- *Improve quality of life*
- *Protect the County's neighborhoods*
- *Maximizing technology, fostering innovation, increased access to services*
- *Promote healthy economy*
- *Promote responsible and comprehensive policy development through effective planning for land use, transportation, and growth management*
- *Develop & maintain effective transportation system*
- *Protect and preserve our unique environment*
- *Promote cooperation and coordination among all government services*

## Strategic Area Goals, Outcomes, and Strategies

### Strategic Area Goals, Outcomes, and Strategies

Strategic Plans have been developed in seven service delivery areas supporting the County's Mission Statement: Delivering excellent public services that address our community's needs and enhance our quality of life. These contain strategic area mission statements, goals, key outcomes and preliminary performance measures in the following areas:

1. Economic Development
2. Health and Human Services
3. Neighborhood and Unincorporated Area Services
4. Public Safety
5. Recreation and Culture
6. Transportation
7. Supporting Priorities or Enabling Strategies

For each of the seven strategic areas, specific goals, and desired outcomes have been defined. Goals and the associated desired outcomes can be thought of as guides or milestones toward the desired future. Goals identify the direction you want to take. Desired outcomes identify the desired results that are required to achieve the goal. Both are more precise statements than the mission statement, but not as specific as objectives.

To recap, mission statements declare the County's or the department's long-range intent, its fundamental purpose, its reason for being. Goals and intended outcomes are slightly more specific expressions coming out of the mission statement. Goals and intended outcomes help shape the department's values and organizational culture and will link the mission with more measurable objectives.

## **Objectives & Action Plans**

Objectives are clear statements of the department's performance intentions, expressed in measurable terms, usually with an implied or explicit timeframe. Embedded within objectives will be the performance measure of interest. Objectives set the performance targets you are trying to reach or standards you are trying to maintain.

Objectives are precise statements of measurable targets that describe the end results of a service or program that should be achieved in a specific period of time. You should create objectives to be SMART (Specific, Measurable, Attainable, Results oriented, Time bound).

Keep in mind that to the public, elected officials and senior managers, the ultimate results (the desired outcomes) are those they want reported. These results relate to the mission of the organization. As managers, you will have an interest in other results-oriented objectives that will help you achieve the desired outcome. These objectives naturally come out of the operational processes you use to do your work, and they provide the balance you need to be more effective employees.

Objectives set the targets you want to achieve or the standards you want to reach. Many people establishing objectives for the first time set the targets too low. Everyone wants to make dramatic improvements in performance. Performance improvement, especially significant improvement, does not happen by accident. You must do something different to increase your performance. Generally, you have two ways to improve performance: 1) increase the resources you have to do the job or 2) change the way you provide the service or product. Think back over your management history. How often in the past have you received substantial new resources, particularly people, who helped you improve your performance? What are the chances that you will get substantial new resources in the future for this purpose? Then ask yourself, can I change the way I do business? How hard will this be? With answers to these questions in mind, you are much more likely to set realistic objectives. It helps, of course, to have historical performance data as a reference in setting SMART objectives. If you do not have historical data, you may have to wait to create objectives while you collect data over 3 to 6 months. Remember, when using SMART for your objectives this entails:

- **Specific** – Stated clearly, easy to understand -> one concept per objective.
- **Measurable** – Objectives have to be quantifiable in order to create measures.
- **Attainable** – Set objectives to challenge yourself, but do not set objectives that are impossible to reach or too easily achieved; they should be a challenge to you, but potentially within your reach. Front-line workers, supervisors, and managers should agree upon objectives. Use a strong verb or verb form to start the objective.
- **Results oriented** – Focus on the outcome: Keep your eye on the prize, especially for measures reported to the public.
- **Time bound** – Objectives should be accomplished within a set time.

Strategic objectives should be established throughout the development of action plans. You need to determine who will be responsible and accountable for implementation of each objective. Providing detailed action plan steps is crucial creating accountability and focus.

Steps to consider include:

- Define each action step that must be completed.
- Organize these action steps so that they make sense.
- Assign an owner for each action step to ensure accountability.
- Set specific start and completion dates for each action step to ensure focus. The individual action steps should add up for the overall time frame of the entire action plan.
- Identify any resources that are needed and any savings that may be anticipated.

## **Performance Measures**

Performance Measures are a part of any action plan. The intent is to compare actual with expected results and there should be at least one outcome per objective. Therefore, performance measures are quantifiable, enduring measures of inputs, outputs, outcomes, efficiencies, and any other core items that relate to your business. Sometimes we call them performance indicators. Performance measures by themselves are only a word or two or a phrase that captures an important dimension of your work. Performance measures are embedded within objectives, and it is through the objective that the measure takes on value.

The performance measure itself does not address what you are trying to achieve or accomplish. It merely indicates what information you need to collect in order to measure progress toward achieving stated objectives and goals. In summary, each performance objective is comprised of a measure with associated performance targets.

## Processes & Actions

What processes should we take to developing performance measures? The following six steps will assist you in developing performance measures that tie into your department's mission statement. How do we act on this? There are several actions you can take to gather this information and develop relevant performance measures.

Step 1 Process: Define the desired performance measures based on department's mission, goals and objectives.

Step 1 Actions:

- Obtaining input from staff members at all levels
- Obtaining input from customers
- Obtaining input from policy makers
- Making sure performance measures represent a balance of different types of measures

Step 2 Process: Assess each performance measure.

Step 2 Actions:

- Is it meaningful?
- Is it focused on customer needs and demands?
- Is it accurate and are reliable data available?
- Is it simple enough to be understood?
- Is it cost effective to collect and report the data?
- Can the data be compared over time?
- Is the measure compatible with other performance measures?
- Is the measure useful to others?

Step 3 Process: Select key performance measures to be reported to external customers, stakeholders, and policy makers.

Step 3 Actions:

- The key performance measures should reflect success of the objectives and should focus on achieving the expected results.
- Outcome, efficiency, and quality indicators will be most useful for external reporting.

Step 4 Process: Determine information needs.

Step 4 Actions:

- What performance information is accumulated currently? Is the information useful?
- What other information should be accumulated? Is the information readily available?
- Will new data collection processes be needed and what resources will be needed?
- How often will the information be collected?

Step 5 Process: Clearly define each performance measure so that all users can easily understand.

Step 5 Actions:

- The source of the data for the measure.
- The methods used to calculate the measure.
- The time frame for which the measure will be reported.

Step 6 Process: Establish the performance targets.

Step 6 Actions:

- What has past performance been?
- What is expected in the future?

## **Types of Performance Measures**

Performance measures can best be categorized as:

- Input
- Output
- Outcome
- Efficiency
- Explanatory Information

Not all of these measures focus on performance. Some focus on information that is important or of interest to the public, elected officials, and managers. Some are more useful when combined with other measures, such as the ratio of resources used to outputs. Such a ratio is an efficiency measure. The definitions below explain each category of measure and where they are most useful.

## ***Input Measures***

Input measures report resources consumed or used by a program – e.g. dollars spent, number of employees, employee hours, resumes received. Input measures have also been used to express the level of need or demand for a particular service, such as the number of students enrolled in a work-training program. Although such information is useful, it reflects service demand rather than performance. Its importance lies primarily as a comparative tool for you to assess changes over time or to compare resource use with another jurisdiction. For example, suppose the police department has a response rate of six minutes to emergency calls and a nearby county has a response rate of three minutes. There may be a number of reasons for the performance difference. If your resources for response indicated you had one and one-half response officers per thousand population and the other jurisdiction had three response officers per thousand population, you would have one way to explain the performance difference, at least as measured by response time: the other county has more personnel resources to deploy in responding to calls. Input measures are necessary for you to compute efficiency measures.

## ***Output Measures***

Output measures identify how much work was performed or how many units of service were provided. Typical output measures include the number of applications processed, the number of emergency units dispatched, the number of arrests made, and the tons of garbage collected. Comparison of current output with output from previous periods can reveal variations or stability in work activity. Output measures have also been called workload or product measures. While output measures tell how much was done, they do not reveal how efficiently or how well it was done. Output measures are necessary for you to compute efficiency measures, since efficiency is usually defined as the ratio of inputs to outputs.

## ***Outcome Measures***

Outcome measures focus on program results, effectiveness and service quality, assessing the impact of agency actions on customers, whether individual clients or whole communities.

Outcome measures relate to why you are in business, the mission, goal and purpose of your operation. These are the most important measures in managing for results. These are the measures that the public, elected officials and senior management are most concerned about. These are the measures that end up in scorecards and multi-jurisdictional comparisons where rankings are often reported. Here are some examples:

- Reduction in the incidence of fire-related deaths
- Percentage of citizens rating service as good or excellent
- Perception of personal safety in your neighborhood

Because some program results may take several years or longer to accomplish, you may choose to measure *intermediate* as well as *final* outcomes. The bottom line for you is that you may provide a service where the ultimate outcome is difficult to measure or over which you have little control. In this case, you need to step back a little and find an intermediate or some other useful proxy measure as the indicator of the results of your work.

## ***Efficiency Measures***

Efficiency measures relate the amount of work performed to the amount of resources consumed in doing it--typically stated in dollars or labor-hours. Often, expressed as unit costs such as *costs per application processed* or *cost per lane-mile paved*, efficiency measures can also take the form of units produced per \$1,000, units produced per labor-hour, or labor-hours per unit. Still, other forms of efficiency measures report labor or equipment production time as a percentage of full utilization, or compare actual production rates to an efficiency standard.

While efficiency measures are important in gauging whether or not you are using your resources wisely, you should be careful not to focus on efficiency to the exclusion of effectiveness. Some examples of efficiency measures are:

- Personnel hours per crime solved
- Operating cost per bus system mile

- Cost per ton of garbage collected

Efficiency measures are often used in comparing different jurisdictions. Such comparisons are often misleading because usually no effort has been made to ensure common definitions of the service, similar accounting treatment of costs, and to ensure events outside the control of the government are factored into the measures. Efficiency measures are likely to be more useful as an internal gauge of wise resource use over time. Often such measures show that indeed government is doing more with less, especially when adjusted for the effects of inflation.

### ***Explanatory Information***

Explanatory information provides additional key information that might impact an organization's performance such as environmental factors. This additional information may give a clearer picture of the reported measures and identify any variables that may affect performance. Quality indicators also can be further explained in this section to further describe how the end results came about.

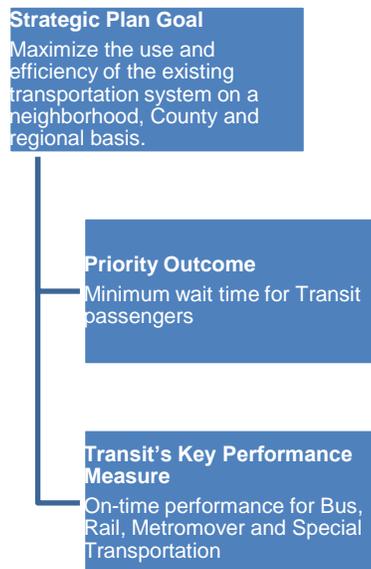
### ***Summary of Different Types of Measures***

While these common definitions of performance measures are useful in helping you create a set of measures for your operation, some people get confused over these terms. It is not necessary to adhere rigidly to these terms in developing your measures. What is important from a management perspective is that you have a set of limited measures that capture those dimensions of your operations that affect most, not all, of what you do. You should have what is called the *vital few* measures that drive your agency's business activities.

# Strategic Alignment

What is Strategic Alignment? Let's look at the example below that focuses on Miami-Dade Transit. Looking at the County's priorities, we wanted to make sure that Transit was focusing on its role in meeting countywide goals. The high-level diagram below shows how Transit's on-time performance metrics would align and support the County's Strategic Plan.

The Strategic Plan Goal is under the Strategic Service Area of Transportation. Miami-Dade Transit is a department that falls under the Strategic Service Area of Transportation. The Priority Outcome listed below is specific to Miami-Dade Transit. It is a key departmental measure that ties into Transit's mission statement of providing reliable transportation. Breaking it down further, a key performance measure for transit is on-time performance. As you can see from a hierarchical perspective (macro to micro), it is all tied together and flows from the County's Strategic Plan to the Individuals' Performance Objectives. To make this a reality of on-time performance depends on individuals. Individuals can easily be measured for their performance in either meeting or not meeting their goals and objectives with this methodology.



The screenshot on the next page is from Transit's scorecard. Transit tracks several measures to show on-time performance. The one that garners most attention is weekday on-time

performance for buses (arrow pointing upwards marked in “green”). As you can see in Section 1.2, one of the two “green” arrows pointing upwards for FYTD indicate that for the fiscal year to date the stated goal of 75% for on-time performance for weekday bus is currently at 77.18%. For the quarter of Dec 2008, they are in “green” status (arrow pointing upwards) which means that they are above their stated goal of 75% by achieving 78.29%. A “yellow” box with no arrow means that you have not achieved the stated goal but are very close to meeting it. It is a warning message to highlight that a little extra effort is needed to attain the stated performance measure. A “red” arrow pointing downwards means that the department has not achieved the stated goal. It is an immediate warning message to ensure that the department addresses this issue toward achieving that stated performance measure. When you see two arrows pointing upwards, it is a “blue” arrow which means you far exceeded your stated goal. You may need to review your target measures to ensure that they are not too conservative in nature.

*Terms on top of scorecard:*

- ❖ Actual: Performance value for the month of December
- ❖ Business Plan Target: Department goal for the month
- ❖ FYTD Actual: Average of “Actual” for period of October 2008 - December 2008
- ❖ FYTD Target: Average of Business Plan Target over October 2008-December 2008

## Strategic Alignment – Example (MDT)

### On-Time Performance for Buses

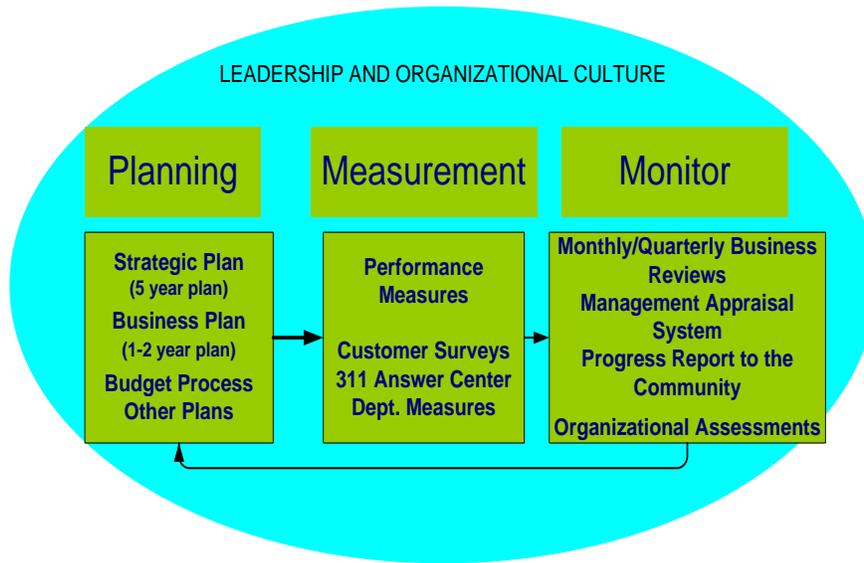
SCORECARD DETAIL–Miami-Dade Transit Department FY09					
Details - Base View			None <u>Initiatives</u> <u>Processes</u>		
Revised to align with objectives, programs/initiatives and measures as shown in November 2008 Department Business Plan for FYs 2009 & 2010. Department Vision (January, 2008) is "The #1 Transportation Choice in Miami-Dade County." Department Mission is "To meet the needs of the public for the highest-quality transit service: Safe, Reliable, Efficient and Courteous."					Default ▾
1.0 Customer 					
Name	As of Date	Actual	Business Plan Goal	FYTD Actual	FYTD Goal
1.1 <u>Increase Customer Satisfaction with Transit Service, FY09</u>					
<u>Total number of complaints for Bus, Rail &amp; Mover</u>	Dec 2008	656	n/a	657	n/a
<u>All Complaints per 100K boardings for Bus, Rail, Mover</u>	Sep 2008	6.79	n/a	6.60	n/a
<u>CEV - Secret Shopper Score (MDT)</u>	Cal08	 76	75	n/a	n/a
<u>Secret Shopper Phase 1 (MDT)</u>	Cal07	 67	75	n/a	n/a
<u>Secret Shopper Phase 2 (MDT)</u>	Cal08	 78	75	n/a	n/a
1.2 <u>Maximize reliability of transit system vehicles and infrastructure</u>					
<u>On-time Performance/Schedule Adherence - Weekday-Bus (Overall System)</u>	Dec 2008	 78.29 %	75.00 %	 77.18 %	75.00 %
<u>On-time Performance (Metrorail)</u>	Dec 2008	 96.05 %	95.00 %	 94.10 %	95.00 %
<u>On-Time Performance STS (New Standard)</u>	Dec 2008	 92.46 %	90.00 %	 92.61 %	90.00 %
<u>Mean Distance Between Failures (Bus)</u>	Dec 2008	 3,677	4,000	 3,667	4,000
<u>Mean Distance Between Disruptions (Rail)</u>	Dec 2008	 52,311	39,000	 45,285	39,000
<u>Mean Distance Between Failures (Mover)</u>	Dec 2008	 6,048	6,000	 6,306	6,000
<u>Total Number of doors completed for Phase II MetroMover Cars "Facelift"</u>	Jan 2009	 1	5	 1	5
<u>Elevator Availability (Metrorail &amp; Metromover)</u>	Dec 2008	 96.9 %	96.0 %	 97.6 %	96.0 %
<u>Escalator Availability (Metrorail &amp; Metromover)</u>	Dec 2008	 91.1 %	95.0 %	 92.6 %	95.0 %

# Strategic Management Framework

The County's strategic management framework focuses on planning, measuring results and progress, and monitoring.

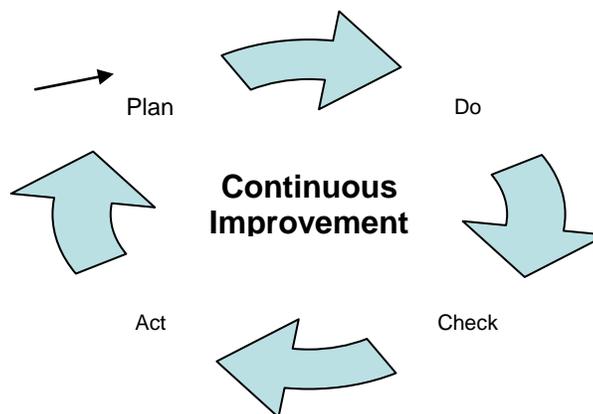
## Linking It All Together:

### Our Strategic Management Framework



TOOL BOX FOR CUSTOMER SERVICE AND INNOVATION  
 (Service Excellence Standards and Training Programs, Secret Shopper, Managed Competition, Targeted Savings Initiatives, Gainsharing, Employee Participation Programs, Process Reviews and Re-engineering)

**Another way in linking it all together.**  
 It all begins with a Plan



Results-Oriented Government links together many of the initiatives already underway such as:

- Planning
  - a. This includes the formal planning documents
    - 1. The Strategic Plan (5-year plan)
    - 2. The Department Business Plan (1-2 year plan)
    - 3. Budget Process and Other Plans
- Measurement
  - a. This includes key measurement tools
    - 1. Performance Measures
    - 2. Customer Surveys (internal and external)
    - 3. 311 Answer Center
    - 4. Individual Departmental Measures
- Monitor
  - a. This includes ways to follow up on progress
    - 1. Monthly/Quarterly Business Reviews
    - 2. Employee/Management Appraisal System
    - 3. Progress Report to the Community
    - 4. Organizational Assessments

**This strategic management framework provides the necessary linkage to ensure success in a Results Oriented Government environment.**

The same priorities in your strategic plan drive your department's business plan and budget. These priorities are also what we measure, what we report on in our quarterly reports, and what we use to evaluate employees. As you read through this material, you will clearly be able to see and understand how your performance measures and objectives are aligned to your department's business plan and the goals of our strategic plan.

## Automated Performance Management

Performance Management is being used in all three areas of the strategic management framework. The planning, measurement, and monitor components provide an environment where performance management is automated throughout the whole process of a results oriented government.

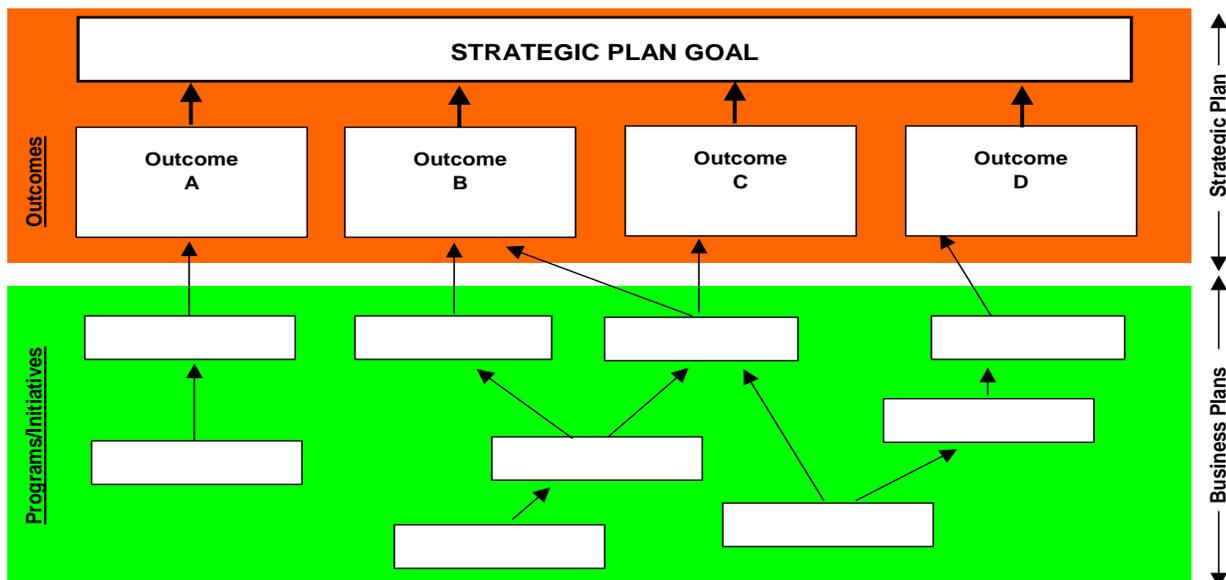
Automated Performance Management provides the following:

- linking key elements of strategic management into a single tool
- providing information on progress towards strategic plan and business plan objectives
- providing management with a snapshot of a department's health
- providing information on progress towards individual performance objectives

## Miami-Dade County's Planning Linkage

What do we mean by linking Individual Department's Business Plans to the County's Strategic Plan?

### Linking the Business Plans to the Strategic Plan



First of all, it is important to note that as one County entity, we are made up of over 50 different departments. However, we share the same values of the organization and additionally, we may share the same priority outcomes. As the County tries to meet our customers' needs, we

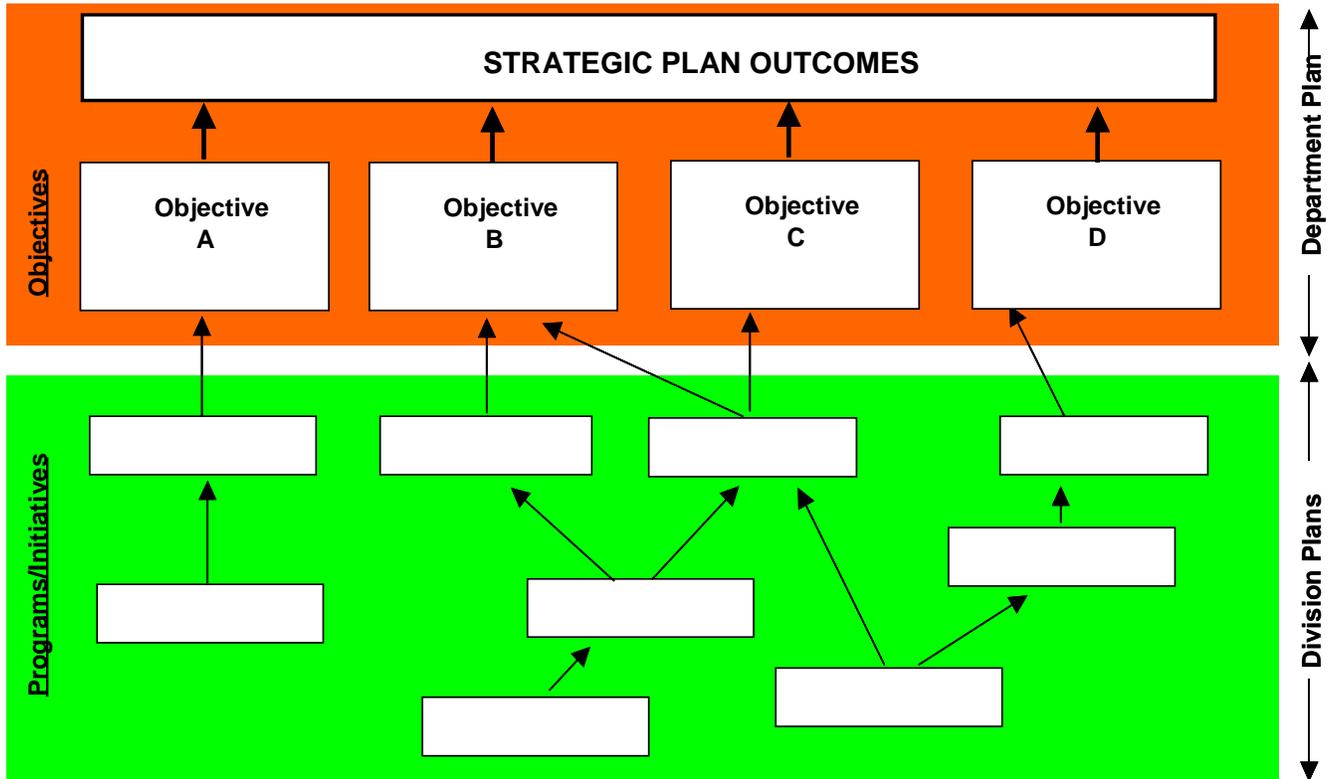
as an organization must work collaboratively to meet common goals and objectives. The chart above highlights this cross-sharing of programs/initiatives from a graphical perspective. We do not work in silos but as a cohesive team all focusing on our common vision and mission statements.

### ***Performance Objectives/Measures***

- Scorecards in ActiveStrategy Enterprise (ASE)
  - ASE is a software tool that is used for quarterly business reporting. Departments usually meet on an ongoing basis to ensure that they are on task with their goals and objectives. A quarterly meeting with the department director and their assigned Assistant County Manager or the County Manager is held to discuss the department's progress in meeting their business goals and objectives.
- Linkage to Strategic Plan
  - Each department business plan must have a clear linkage to the County's Strategic Plan that is specific, measurable, achievable, results oriented, and time bound.
- Departmental Initiatives
  - Departmental initiatives must also have a clear linkage into the department's business plan.

## Putting it all together

### Linking the Division Plans to the Department's Plan



The **Division/Section/Unit Work Plans** and **Individual Performance Appraisals** break down the department's goals into specific tasks and activities that are assigned to specific individuals to ensure accountability and focus.

## **Linking the Employee Performance Appraisal to the Business Plan.**

Think of your own goals and objectives and how they tie into your department's business plan. They should! Your goals and objectives should tie into your supervisor's goals and objectives, Your supervisor's goals and objectives should tie into his/her supervisor's goals and objectives and so on all the way to your department director to the department's business plan. There should be a direct correlation of what you contribute to your department to the overall department's goals and objectives. Desired outcomes and objectives should be aligned throughout the department. If an individual's performance objectives are not aligned to the department's goals, the likelihood of meeting the overall department's goals will be threatened. Without linkage, there is no success!



## **Resources**

If you have any further questions as it relates to Developing Performance Measures, please contact the Human Resources Department at (305) 375-5654 or the Office of Strategic Business Management, Management Planning and Performance Analysis Division at (305) 375-5143.

Human Resources Department

<http://www.miamidade.gov/hr/>

Office of Strategic Business Management

<http://www.miamidade.gov/mppa/>

# **Glossary of Terms**

## **ActiveStrategy Enterprise (ASE)**

ASE is an online performance management system used by Miami-Dade County that acts as a repository for all of the County's strategic and business planning information. ASE uses scorecards to track performance on objectives and measures related to strategic planning goals and objectives.

## **Business Plans**

The purpose of departmental Business Plans is to communicate the intended accomplishments for each department consistent with the strategic plan for the current and next fiscal year as well as describe any factors which may limit the department's ability to achieve these accomplishments.

## **Business Plan Targets**

Business plan targets are the performance levels required to achieve an objective.

## **Departmental Performance Indicators**

Departmental Performance Indicators are the measures that express the County's performance intentions directly related to the objectives and associated outcomes in the County Strategic Plan.

## **Goal Statements**

Provide direction to address the strategic themes and help guide us toward the desired future. For each goal statement we have defined a desired outcome or set of outcomes that the County must achieve to be successful in accomplishing the goal. These outcomes are from the customer/community perspective.

## **Initiatives**

Initiatives are specific coordinated efforts to improve performance.

## **Key Performance Indicators**

Key Performance Indicators are the measures that express the County's performance intentions directly related to the objectives and associated outcomes in the County Strategic Plan.

## **Mission Statement**

It serves to Identify Overall Purpose of Organization, Identify Customer/Stakeholders, Help Identify Customer and Stakeholder Needs, Expectations, and Requirements Lead to the Development of Performance Measures.

## **Objectives**

Objectives are statements of intent, linked to a scorecard, directly related to strategic plan goals or outcomes.

## **Performance Measures**

Performance Measures indicate how much or how well a department is doing, its success. It tracks the department's progress toward achieving its objectives linked to the goals and mission of the organization.

## **Resource Allocation Process**

The Resource Allocation Process emphasizes departmental program areas, assigning resource allocations to the priority outcomes identified in the strategic plan, linking those allocations to related performance measures and targets, and facilitating performance reporting mechanisms.

## **Results Oriented Government**

Miami-Dade County developed a framework of service excellence through results oriented government that is predicated on strategic and business planning, and is bolstered by performance management and feedback systems. Results Oriented Government focuses on achieving results for our customers; being responsive and accountable to the taxpayers.

## **Scorecards**

Scorecards are tools used to track a series of objectives and measures to gauge performance over time. A balanced scorecard contains objectives and measures in a number of key areas or perspectives.

## **Strategic Plan**

Simply stated, the Strategic Plan serves as the community's roadmap that will take us from where we are today to where we want to go in the coming years. Having a plan is as important to our future as architectural plans are to building a home.

## **Strategies**

Strategies summarize at a broad countywide level the actions that will be taken to achieve the outcomes. Business plans serve as a vehicle to fine-tune strategies at a department and division level.

## **Vision Statement**

A vision statement communicates our organization's hopes and desires for the future.