



Office of the City Manager

July 2, 2018

To: Honorable Mayor and Members of the City Council
From: Dee Williams-Ridley, City Manager
Subject: Strategic Plan - Measuring Progress

Now that our [Strategic Plan](#) is adopted we are preparing to measure our progress on meeting its goals. Measurement will help us understand more concretely how much we do, how well we do it, and whether anybody is better off. We will develop outcome measures and implement simple, modern tracking and clear reporting processes over the next two years, as described in Attachment 1. A dedicated staff person will be coordinating these phases, working closely with a representative from each department. First, staff from each department will document, in a shared database, simple information common across projects, such as start and completion dates. Biannually, this information will be aggregated and reported to City Council. Over time, staff will develop outcome measures looking at the results of the work the City does. Finally, these outcome measures will be reported visually to the public through an online dashboard.

The Strategic Plan both shows where we are going and reflects our identity as a city. Most city strategic plans focus on things like improving infrastructure and quality customer service. Ours goes a step further and aspires to championing equity and addressing climate change, among other things. The Strategic Plan is the result of three years of collaboration and input from hundreds of staff, the community, and City Council. Staff from around the City identified themes and gave input on goals. The community, with participation from every Council district, reviewed and weighed goals in terms of priority. The City Council gave input, refined the goals, and adopted the Strategic Plan as a guidebook for the work of the City. For each of the Strategic Plan's nine goals, there are many two-year priorities. These priorities are projects the City will complete on its way towards achieving each goal. Once meaningful measurement is in place, the Strategic Plan can also be a guide for better understanding and continuously improving the work the City does.

Attachments:

1. Strategic Plan Implementation Overview

cc: Mark Numainville, City Clerk
Matthai Chakko, Assistant to the City Manager
Ann-Marie Hogan, City Auditor

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Strategic Plan Implementation

A strategic plan¹ sets out the vision for a city, defines what it is trying to do and how it is going to get it done. The Strategic Plan contains nine goals and 116 priorities. The next step is articulating our progress on the 2018-2019 priorities.

When a strategic plan becomes part of how a city does its work, it serves both as a guide forward and as a record showing how far a city has come. This means introducing **measurement**. In order to measure progress on 116 very different projects, we need to find a way to compare “apples to apples”. There are a few features common to all of the projects included as priorities:

- Support a particular Strategic Plan Goal
- Planned start and completion dates
- Actual start and completion dates
- Milestones

Priorities consist of projects which can be completed within a given two-year budget cycle.

Project Management Tool

Recording these features using a software project management tool will provide a single “source of record” for Strategic Plan data and consistency in what and how data is reported. The Berkeley Department of Information Technology (DoIT) implemented ServiceNow in early 2018. Although primarily being used for DoIT’s service provision to departments, it has the ability to track project data. The project management portion of ServiceNow is currently being tested by DoIT. In June, the 116 Strategic Plan priorities will be loaded into ServiceNow. By July, departments will be able to review their projects in ServiceNow, to add actual start/completion dates and milestones. Over the late summer and fall, departments will start regularly updating project information in ServiceNow, which will allow us to run reports and create data graphics. Then we can begin to communicate high level data, including the percentage of Strategic Plan projects completed on time.

Measuring Performance While we are using measurement to show progress on our priority projects (e.g., are they on time?), each department will also be developing its own key performance indicators (KPIs). For example, a KPI for the Police Department could be *response times* or *level of community trust*. Although not part of the Strategic Plan implementation, it will be happening at the same time.

¹ Strategic Plan Logo attribution: LadyofHats [CC BY-SA 3.0 (<https://creativecommons.org/licenses/by-sa/3.0/>)], from Wikimedia Commons

Outcomes Dashboard

Besides tracking project information and looking at high level data, it is also important to examine outcomes, the *results* of the work we do. For example, if within two years we completed eighty percent of projects relating to the goal “Provide state-of-the-art, well-maintained infrastructure, amenities, and facilities”, what does that really mean? We may repair 295 miles of road, which would result in an outcome of less potholes and lower damage to vehicles from driving rough roads. Outcomes are something we would report to the public via an online “dashboard” which could translate our outcomes into easy-to-understand visuals. Although ServiceNow provides some dashboard-like features, it is not a dashboard software. After we have started tracking projects in ServiceNow, we will procure dashboard software, define outcomes for different goals, and report those outcomes publicly using the dashboard.

Roles

Each director will serve as a **Goal Champion** for a particular goal. Essentially, the Goal Champion is the public face of the goal, attending bi-annual City Council meetings², providing guidance on the development of measures and outcomes related to it, and ensuring that staff makes progress on the goal’s priorities. Each director also will select a **Priority Lead** to represent their department. The Priority Lead should be a high-level staff person able to help shape performance measures and outcomes,³ know or be able to find out who is working on which priority projects, and ensure project data is reliably and consistently reported in ServiceNow. The **Strategic Plan Coordinator** develops a plan for oversight of Strategic Plan implementation. This includes identifying and defining roles and responsibilities, establishing the team of Priority Leads, developing tracking and reporting models, and creating schedules and milestones. The following figures describe responsibilities of each role, indicate Goal Champions and their respective goals, and provide a high-level timeline.

² One meeting at the middle and one at the end of each fiscal year. Typically this would be in late June and then again in late December or early January.

³ Prior to meetings, Priority Leads will receive proposals, criteria, or other such frameworks. At meetings, the Leads will provide reactions, feedback, and suggestions in response, on behalf of their departments.

Responsibilities

GOAL CHAMPIONS

- ✓ Promote institutionalizing the Strategic Plan and related reporting as a top priority.
- ✓ Foster an appreciation of the value of the Strategic Plan.
- ✓ Monitor work and achievement of milestones for Strategic Plan priorities in your department.
- ✓ Ensure that all your Goal's projects are consistently reporting on progress.
- ✓ Present updates to City Council on the progress of your Goal's projects.
- ✓ Assist in the development of performance outcomes related to your Goal.
- ✓ Allocate and assign a high-level analyst to act as a Priority Lead.

PRIORITY LEADS

- ✓ Provides data on progress of all Strategic Plan projects for which your department is lead.
- ✓ Meets bi-monthly to develop measures, outcomes, process.
- ✓ Provides content for biannual report to City Council on Strategic Plan.

STRATEGIC PLAN COORDINATOR

- ✓ Develops a plan for oversight and coordination of Strategic Plan implementation.
- ✓ Establishes team of Priority Leads.
- ✓ Develops tracking and reporting models.
- ✓ Defines roles and responsibilities.
- ✓ Creates schedules and milestones for implementation.
- ✓ Develops Strategic Plan Performance Outcomes and Dashboard.
- ✓ Develops ongoing process to renew Strategic Plan priorities, in alignment with the two-year budget.



STRATEGIC PLAN
GOALS
CHAMPIONS

Provide state-of-the-art, well-maintained infrastructure, amenities, and facilities.

Department of Public Works

Create affordable housing and housing support services for our most vulnerable community members.

Department of Health, Housing, & Community Services

Create a resilient, safe, connected, and prepared city.

Fire Department

Champion and demonstrate social and racial equity.

Police Department

Foster a dynamic, sustainable, and locally-based economy.

Department of Parks, Recreation & Waterfront

Provide an efficient and financially-healthy City government.

City Manager's Office & Finance*

Be a global leader in addressing climate change, advancing environmental justice, and protecting the environment.

Planning Department

Attract and retain a talented and diverse City government workforce.

Human Resources Department

Be a customer-focused organization that provides excellent, timely, easily-accessible service and information to the community.

City Clerk & Department of Information Technology*

*Alternating fiscal years. CMO and IT even, Finance and City Clerk odd.

Timeline

DISCOVERY DISCUSSION DECISION IMPLEMENTATION

JAN	City Council Work Session (process overview)	2016
JAN-MAY	Listening Sessions (staff, CC, union)	
JUN	Staff Appreciation Event/staff review & input on goals	
JAN	Berkeley Considers launch/community input, City Council Work Session (review draft goals)	2017
SEP	City Council Special Session (provide input on goals)	
NOV	Work Plan Meeting (finalize proposed goals & priorities)	
JAN	City Council Work Session (adopt proposed strategic plan)	2018
JUL-FEB	Priority Leads & Goal Champions provide input & identify outcomes	
AUG	Priority Leads document progress in ServiceNow (monthly going forward); Departments review/edit info on priorities in ServiceNow	
OCT	Work Plan Meeting (renew priorities)	2019
DEC	City Council Staff Report (1st report on priority progress/outcomes)	
MAY	City Council Work Session (review FY19/20 priorities)	
JUN	City Council Special Session (adopt FY19/20 priorities), City Council Staff Report (2nd report on priority progress/outcomes)	2019
APR	Priority Leads provide input on dashboard selection	
MAY-OCT	Priority Leads provide input during dashboard configuration	
NOV	Priority Leads assist in testing dashboard	
DEC	City Council Staff Report (3rd report on progress, include dashboard launch)	