

# PERFORMANCE MEASUREMENT AND BENCHMARKS

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Florida Government  
Finance Officers Association

EDUCATION

NETWORKING

LEADERSHIP

INFORMATION

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**CITY OF MIRAMAR**

# PERFORMANCE MEASUREMENT & BENCHMARKS

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- INTRODUCTIONS
- WHAT IS YOUR CURRENT BUDGET STRUCTURE LIKE?
- DO YOU CURRENTLY HAVE BENCHMARKS?
- WHAT IS YOUR MOTIVATION FOR CHANGING YOUR BUDGET?

# PERFORMANCE MEASUREMENT & BENCHMARKS

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- WHAT IS PERFORMANCE MEASUREMENT?
- WHAT CONSTITUTES GOOD BENCHMARKS?
- WHAT NEEDS TO BE DONE FIRST BEFORE YOU CAN MEASURE PERFORMANCE? **STRATEGIC PLANNING**

# GFOA BEST PRACTICES: PERFORMANCE MGMT

		Background	Recommendation
2011	The Overview of Performance Management: From Measurement and Reporting to Management and Improving	<p>GFOA has long urged state and local governments to incorporate performance measurement as an integral part of their budget process, as recommended by the National Advisory Council on State and Local Budgeting. Likewise, the GFOA is persuaded that the full benefit of performance measurement can only be achieved when performance measures and performance reporting are further integrated into an overall framework of performance management. The National Performance Management Commission, representing eleven national public interest organizations of elected and appointed state and local government officials (including the GFOA), issued a report in 2010, <i>A Performance Management Framework for State and Local Government: From Measurement and Reporting to Management and Improving</i>.</p>	<p>The purpose of public-sector performance management (shown throughout the commission's report) is to provide a systematic approach to managing performance through concepts, practices and processes that align governments' efforts to achieve the best possible results for the public within available resources. Performance management emphasizes the importance of continuous learning, improvement, and accountability for results.</p> <p>Therefore, the GFOA strongly endorses the work of the National Performance Management Commission and encourages state and local governments to implement performance management systems consistent with its recommendations.</p>

# A Performance Management Framework for State and Local Government: From Measurement and Reporting to Management and Improving

A Performance Management Framework  
for State and Local Government:

From Measurement and Reporting to  
Management and Improving

National Performance Management Advisory Commission

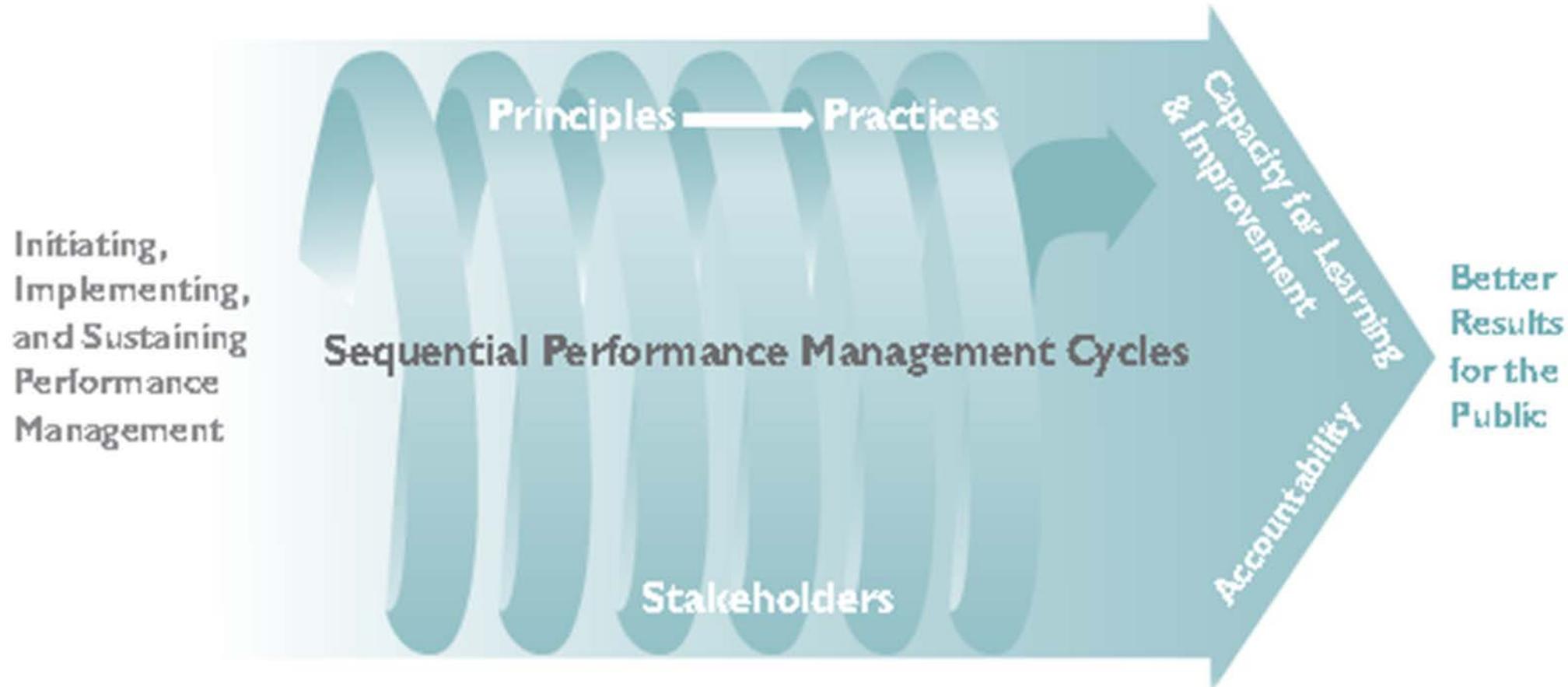
## 7 Principles

- Results Focused
- Relevant
- Transparent
- Alignment
- Data Driven
- Sustainable
- Transformational



# The Overview of Performance Management: From Measurement and Reporting to Management and Improving

## Performance Management Framework



# STRATEGIC PLANNING IN MIRAMAR

- First and foremost, the effort needs to be driven by the top executive of the municipality.
- Buy in and commitment from department directors and upper management is key to success.
- Feedback from a broad spectrum of stakeholders will help to ensure buy in.
- The City needs to have a clear updated vision of the future as a foundation.
- The Strategic Plan has to work in tandem with the budget in order to drive the annual allocation prioritization.
- A Business Plan needs to be developed to tackle the challenges uncovered by the strategic planning process.
- The progress of strategic initiatives needs to be tracked through performance measures, staff meetings, financial reports, scorecards, Gantt charts, etc.
- All directional statements, decisions, objectives, directives, or imperatives are supported by statistical data, demographic information, survey results, or benchmark data.
- External expertise is critical to ensure proper baseline training and guidance on the development and implementation of this new initiative.
- An outside consultant facilitates all retreats, sessions and meetings that include elected officials as an outside authoritative voice that keeps the conversation on track.

# STRATEGIC PLANNING IN MIRAMAR

## Scan

- Determine: 1) mandated core services 2) choice core services 3) quality of life services 4) community add-ons
- Conduct stakeholder analysis
- Conduct stakeholder survey
- Update City's Mission, Vision & Values statements
- Gather economic & demographic trend data
- Conduct environmental scan

## Meet

- Hold strategic priorities gathering/prioritization retreat
- Set overarching goals and objectives

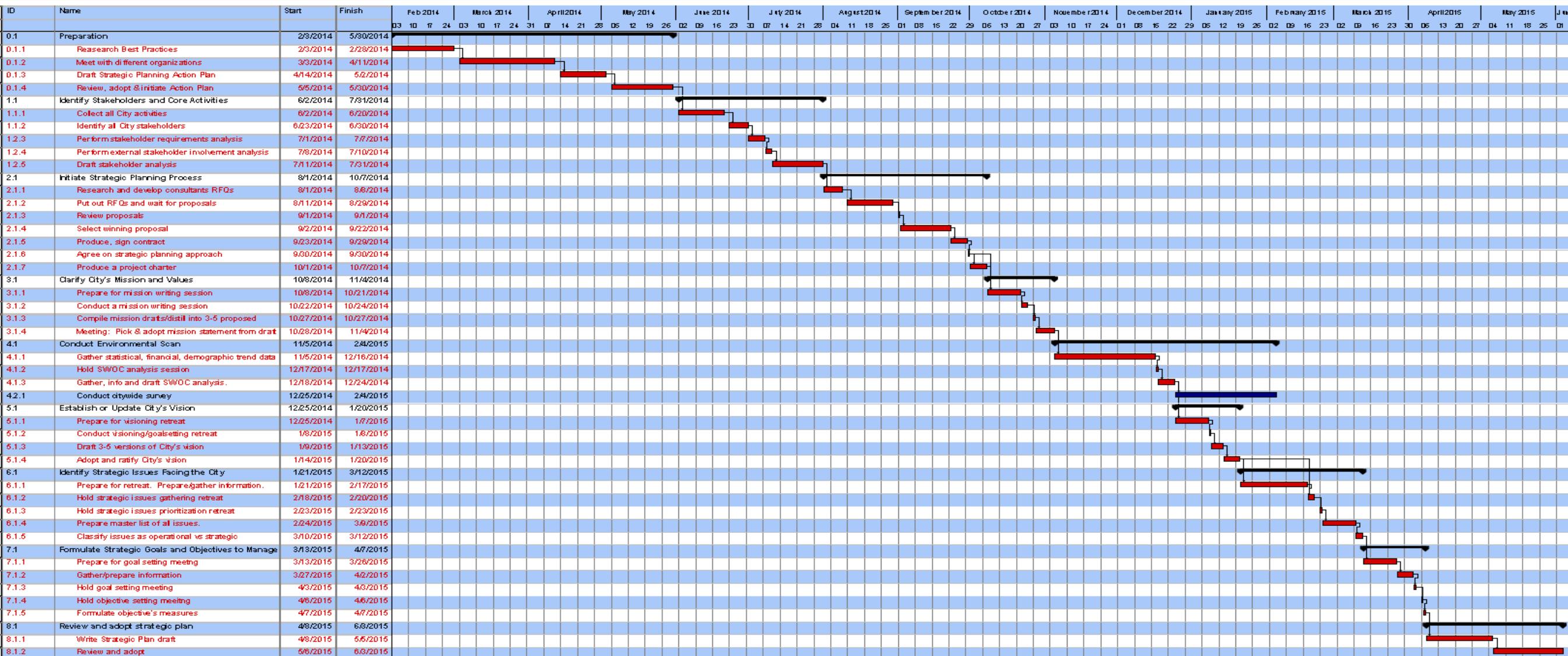
## Plan

- Draft strategic plan of goals and objectives
- Choose relevant performance measures
- Gather departments' set of initiatives that align w/ goals and objectives
- Pick priority initiatives
- Draft Business Plan from top initiatives

## Do

- Put Business Plan into action
- Allocate budget for Business Plan initiatives
- Monitor objectives' performance measures
- Track progress of strategic initiatives
  - Monthly meetings
  - Reports

# STRATEGIC PLANNING IN MIRAMAR



# STRATEGIC PLANNING IN MIRAMAR

- 0.1 Preparation
- 1.1 Identify Stakeholders and Organization Activities
- 1.2 Stakeholder Analysis
- 2.1 Initiate and Agree on a Strategic Planning Process
- 3.1 Clarify Organizational Mission and Values
- 4.1 Conduct an Environmental Analysis Including a SWOC Analysis
- 5.1 Establish / Update an Organizational Vision
- 6.1 Identify the Strategic Issues Facing the City
- 7.1 Formulate Strategic Goals and Objectives to Manage Issues
- 8.1 Review and Adopt the Strategic Plan

# PERFORMANCE MEASUREMENT & BENCHMARKS

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## **PERFORMANCE MEASUREMENT**

# Why Measure Performance?

- To evaluate
- To control
- To budget
- To motivate
- To promote
- To celebrate
- To learn
- To improve

# Performance Management Model



# Performance Measurement: Accountability & Improvement

## Demonstrate:

- Effective use of funding
- Effective decision-making processes

## Demonstrate:

- Understand strategies that work
- Processes are **improved** based on feedback from performance data



## Proven through:

- Consistent data easily consolidated
- Transparent processes
- Regular reporting

## Proven through:

- Qualitative and quantitative analytical methods
- Diverse research tools

# Performance Measurement: Accountability & Improvement

- What conditions/issues are we working to address and what is the intended outcome of programs?
- How are conditions/issues prioritized? How much funding is focused on achieving desired outcomes?
- What results are being achieved?
- How can we learn from our experiences, and improve?

Accountability

Learning

# What is Performance Measurement?

- A system of measurement on a regular basis of the results and the efficiency of services or programs.
- Helps to tells the public and elected officials how they benefit from our services.
- Provides more insight into the extent to which our services help accomplish our mission.



# Why Performance Measurement is Important

- What gets measured, gets done.
- In order to improve something, you have to change it . . . In order to change something, you have to understand it . . . In order to understand something, you have to measure it.
- It is better to make decisions on the basis of data than on “gut feelings”
- If you can demonstrate results, you can increase public support.



# Categories of Information Used in Performance Measurement Systems

- **Inputs**  
Resources used in producing an output or outcome
- **Outputs**  
Completed activity, amount of work done within the organization
- **Outcomes**  
Assess the effect of the output
- **Efficiency or Unit-Cost Ratio**  
Relationship between the amount of input and the amount of output or outcome



# What is Benchmarking?

- Selection of a reference point to make comparisons or measurement against
- A standard that we measure ourselves against
- Benchmarking should motivate people to improve toward a goal



# Beginning to Benchmark

**To really improve your performance, you have to ask yourself:**

- Why are others better?
- How are others better?
- What can we learn?
- How can we catch up?
- How can we become the best in our peer group?



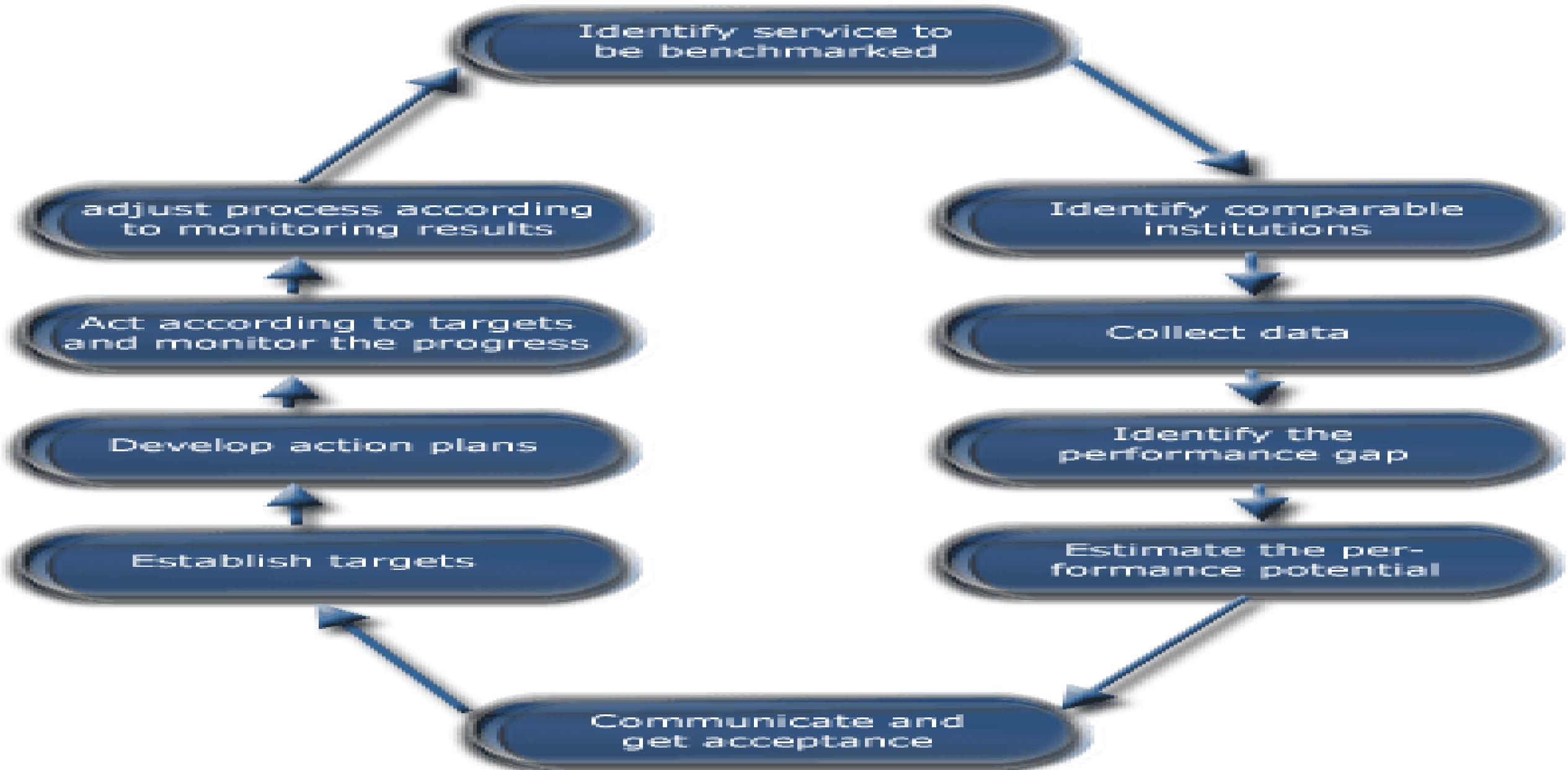
# Most Common Areas to Benchmark

## Five areas to benchmark

- Historical trends
- Our goals to our results
- Internal components, i.e. between departments or between neighborhoods
- Our community's service level to similar communities' level of service
- Comparisons to other entities, i.e. larger communities, private business



# The Benchmarking Process



# Benchmarking – What to do...

- Be proactive – select your benchmarks before they are selected for you
- Be sure to compare apples to apples
  - Common definitions
  - Common data elements
  - Common time frame
- Establish criteria for selecting benchmarking partners before selecting those partners
- Remember it isn't about “who's first and who's last”, it's about your organizations priorities.



# Telling Your Story with Data

## Accountability & Transparency

- Can you demonstrate to citizens and elected officials that your department, agency, program provides: efficient, effective and quality services?
- Can you tell your story?
- How do your departments and services compare overall to other local governments?
- Do you have departments or services that are exemplary?



# Telling Your Story with Data

- ❑ Identify what questions need to be answered in your jurisdiction
  - Peer Groups
  - Performance targets and status
  - Best practice tracking
  
- ❑ Benchmark against peers on actual work performed and actual cost of performing that work
  
- ❑ Identify a target performance (estimate # of work orders that can be completed based on budget)

# The Benefits

- Accurately measure organizational performance
- Opportunity to learn from similar organizations
- Quantifiable, verifiable, relevant data to present to management
- First collection cycle may be challenging, successive cycles will be easier
- More participation in a larger group (like FBC), better results!



**FLORIDA  
BENCHMARKING  
CONSORTIUM**

# Summary of Benchmarking

- Benchmarking should motivate people to improve toward a goal.
- If you don't measure it, you don't know if it works.
- Used wisely, benchmarking can be a powerful change management tool.
- Long term process that takes TIME!
- "If we do not change our direction, we might arrive where we are moving towards "  
(Chinese Proverb)



**FLORIDA  
BENCHMARKING  
CONSORTIUM**

# Overview: The Difference Between Performance Measurement and Benchmarking

## Performance Measurement

Focuses on measuring what is occurring, but does not ask why or how it is occurring

## Benchmarking

Comparing your performance to yourself (over time) or to other similar governments, programs or services



# Examples of Output Measures

## Looking at Fleet Management

- Vehicle turnaround time
- Unscheduled work orders completed
- PM/scheduled work orders completed
- Gallons of fuel dispensed
- Annual new vehicles purchased
- Annual vehicle disposition

# Examples of Quality Measures

## **Looking at Fleet Management**

- Customer satisfaction measures
- Repetitive maintenance statistics
- Mean time between failures
- Warranty statistics
- Average maintenance cost per vehicle

# Examples of Outcome Measures

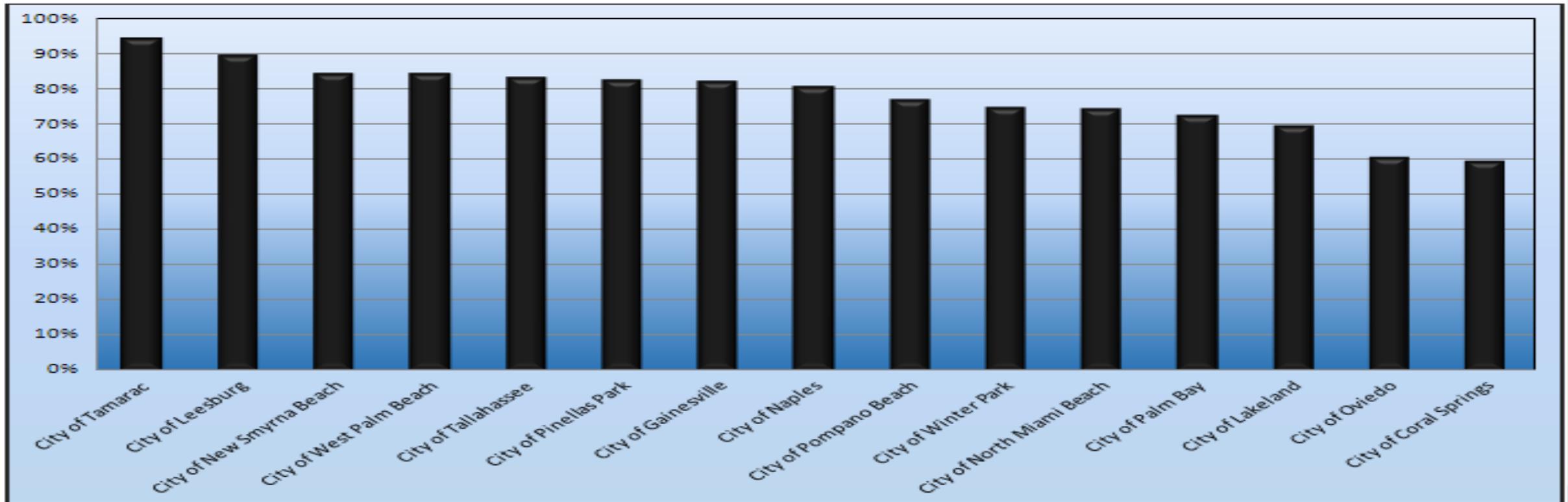
## *Looking at Fleet Management*

- Daily vehicle availability
- Fuel consumption reductions
- Percentage of replacement eligible vehicles
- Revenues (direct labor/material sales)
- Customer mission completion statistics

# Fleet Management – Example of Outcome Measure

**CI.FM052**

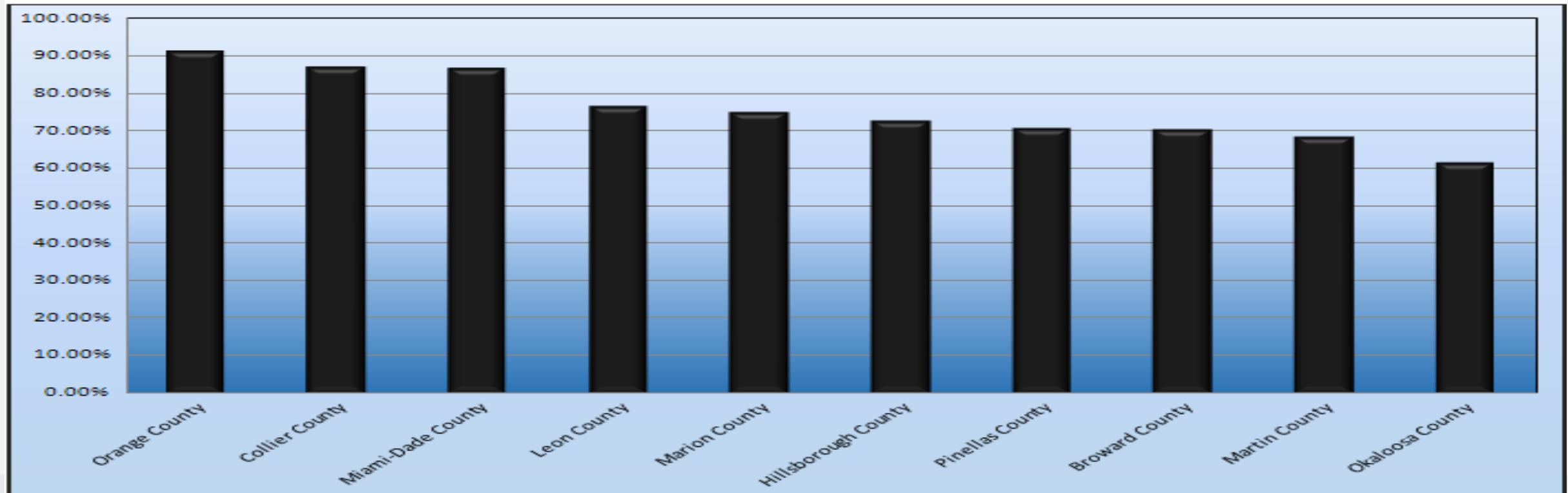
**Percentage of Direct Labor Hour Billing Achieved at End Reporting Period**



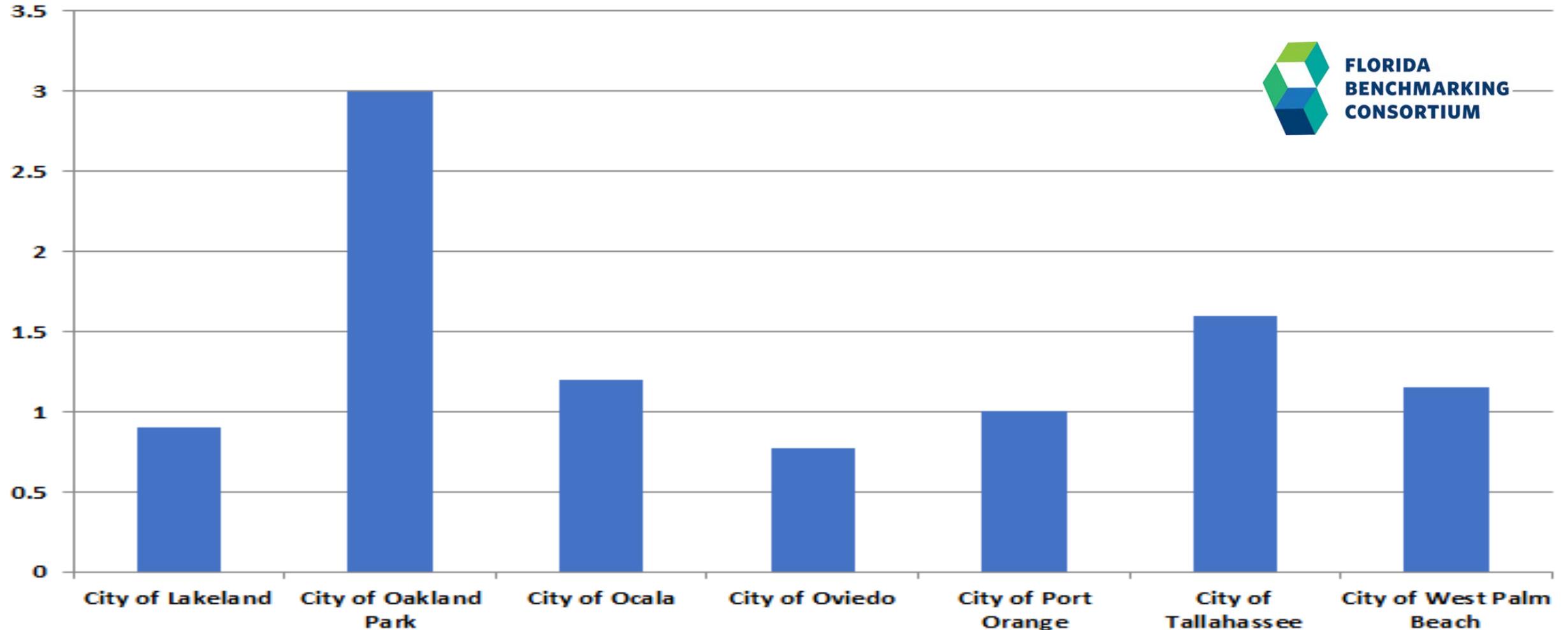
# Fleet Management – Example of Outcome Measure

**CO.FM052**

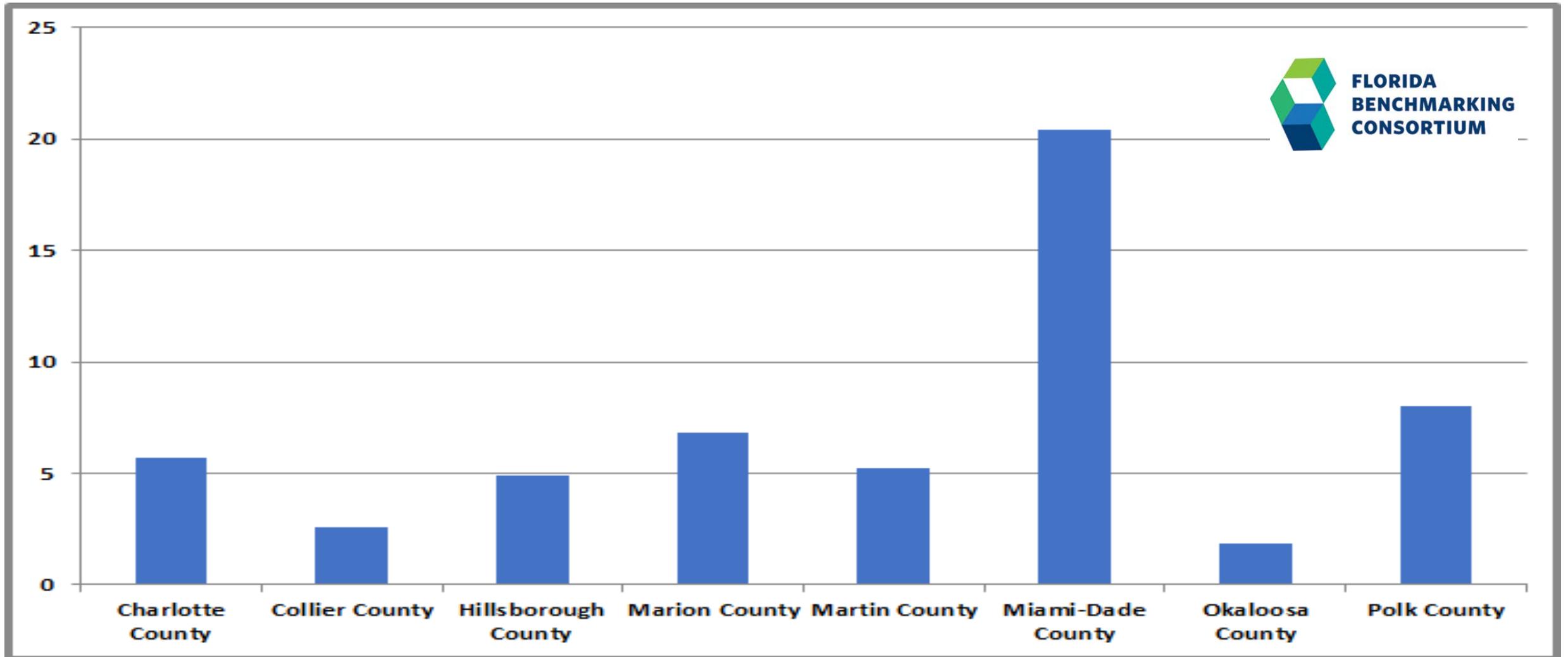
**Percentage of Direct Labor Hour Billing Achieved at End Reporting Period**



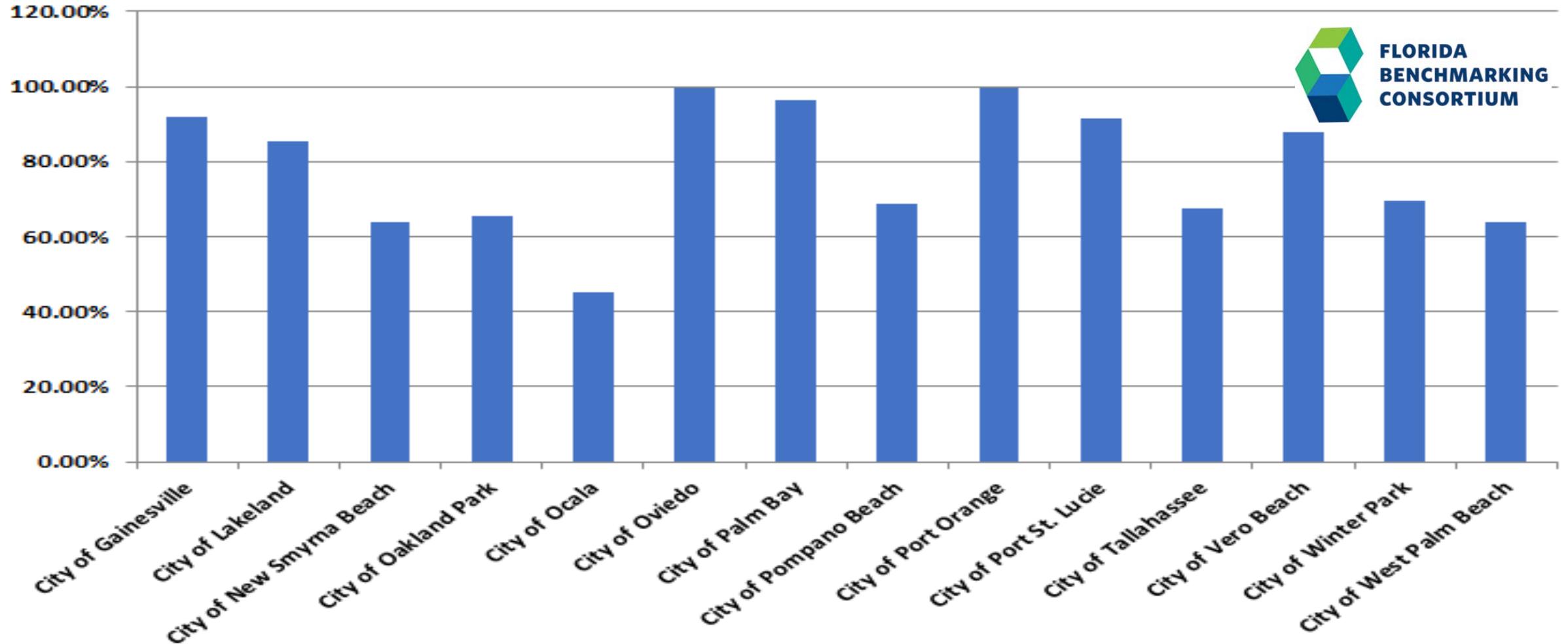
# Average Days from Complaint to First Inspection (Cities)



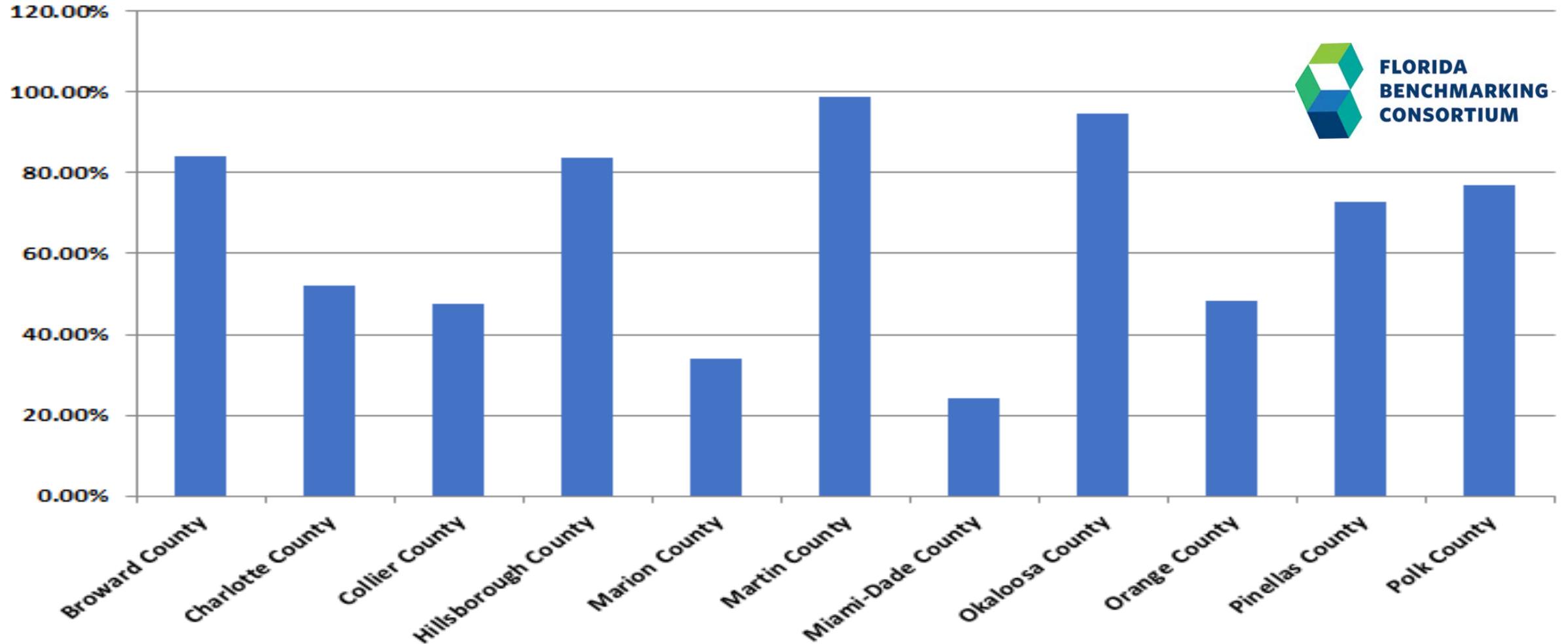
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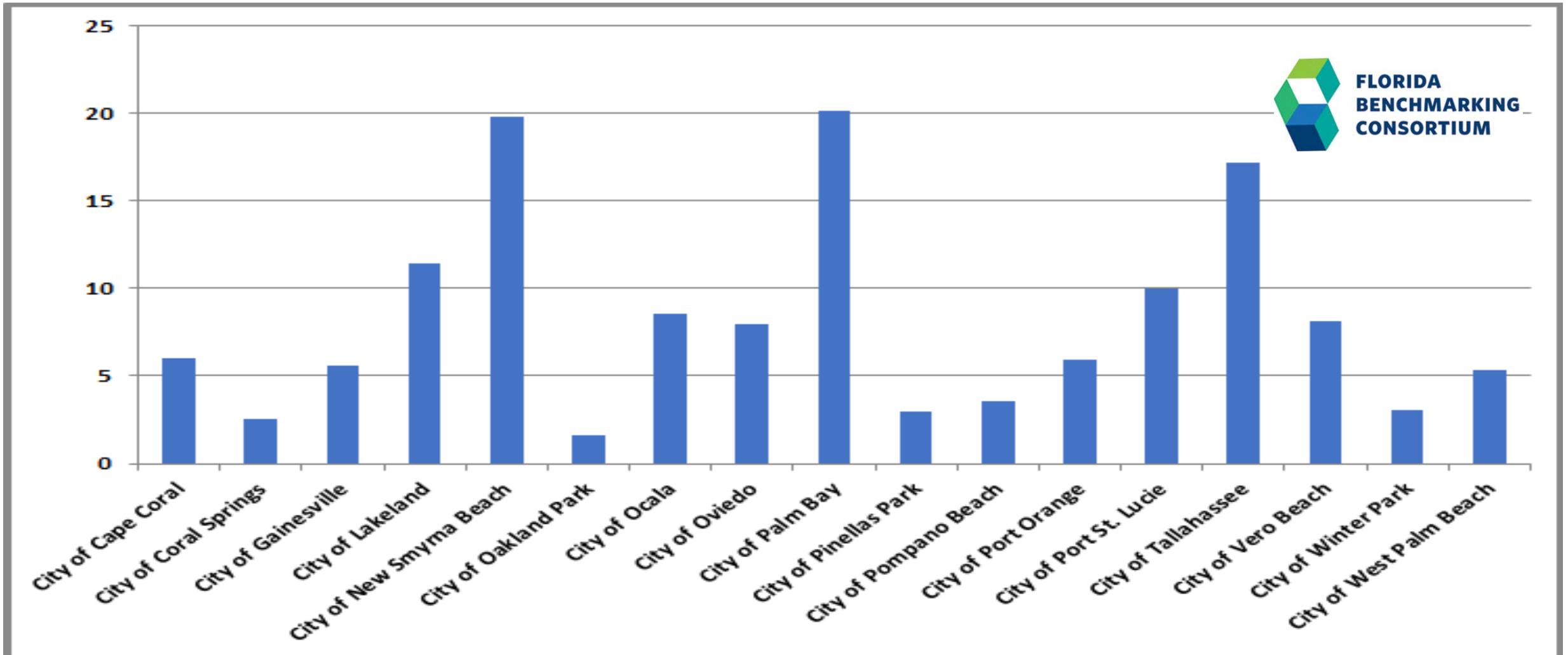
# Percent of Cases Brought Into Compliance (Cities)



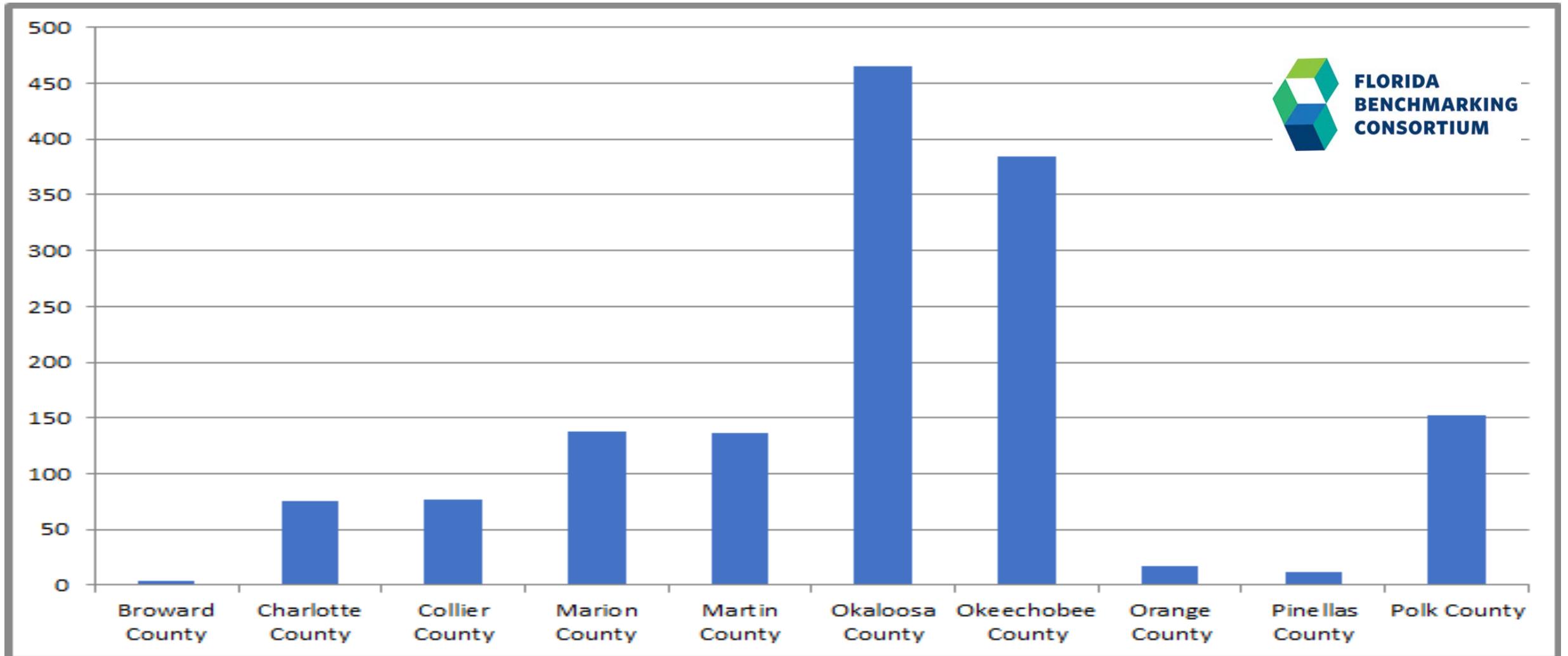
# Percent of Cases Brought Into Compliance (Counties)



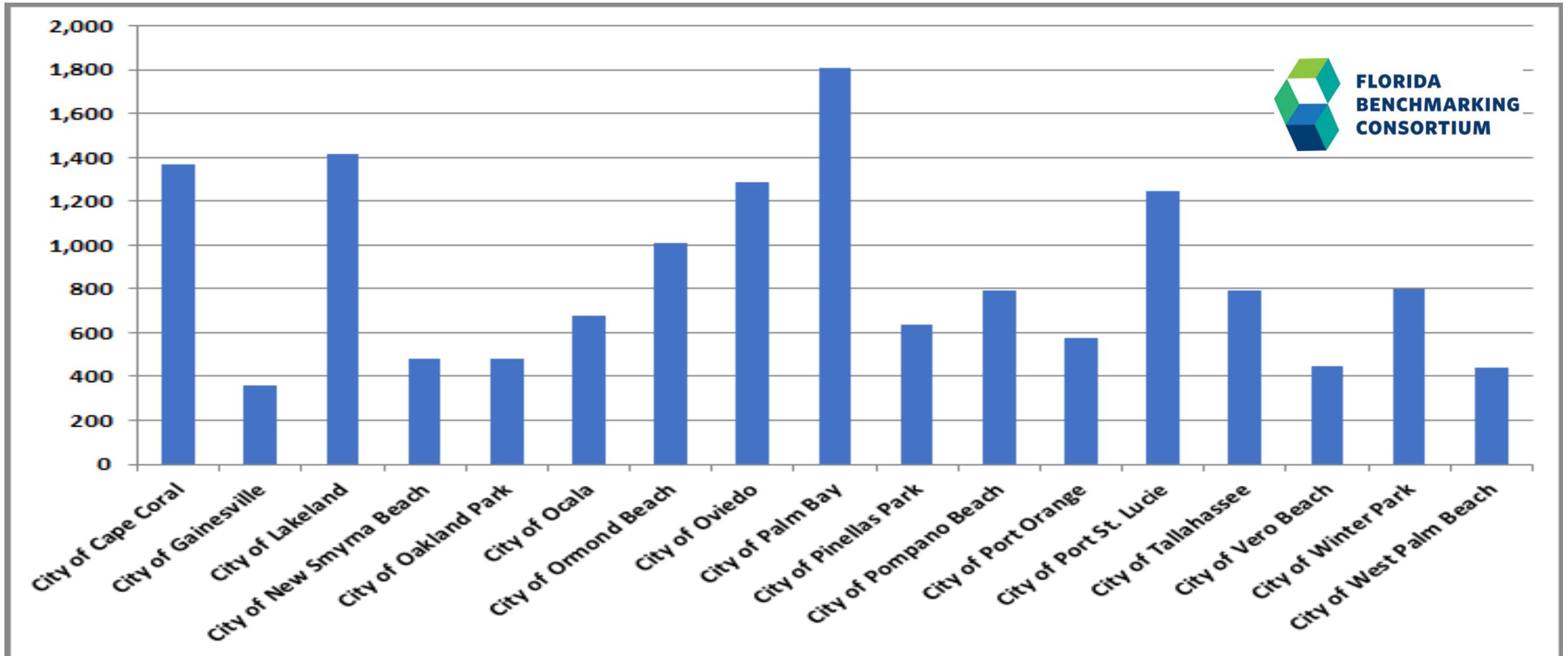
# Square Miles per Officer FTE (Cities)



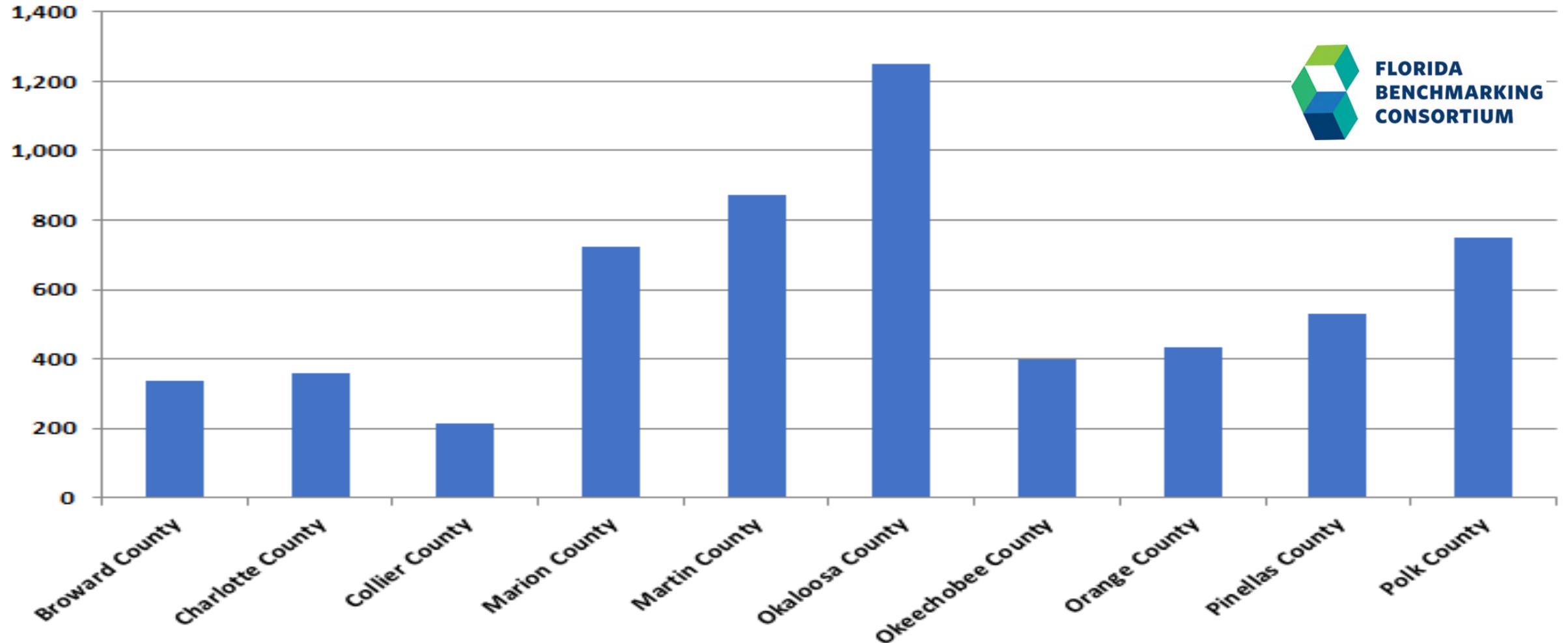
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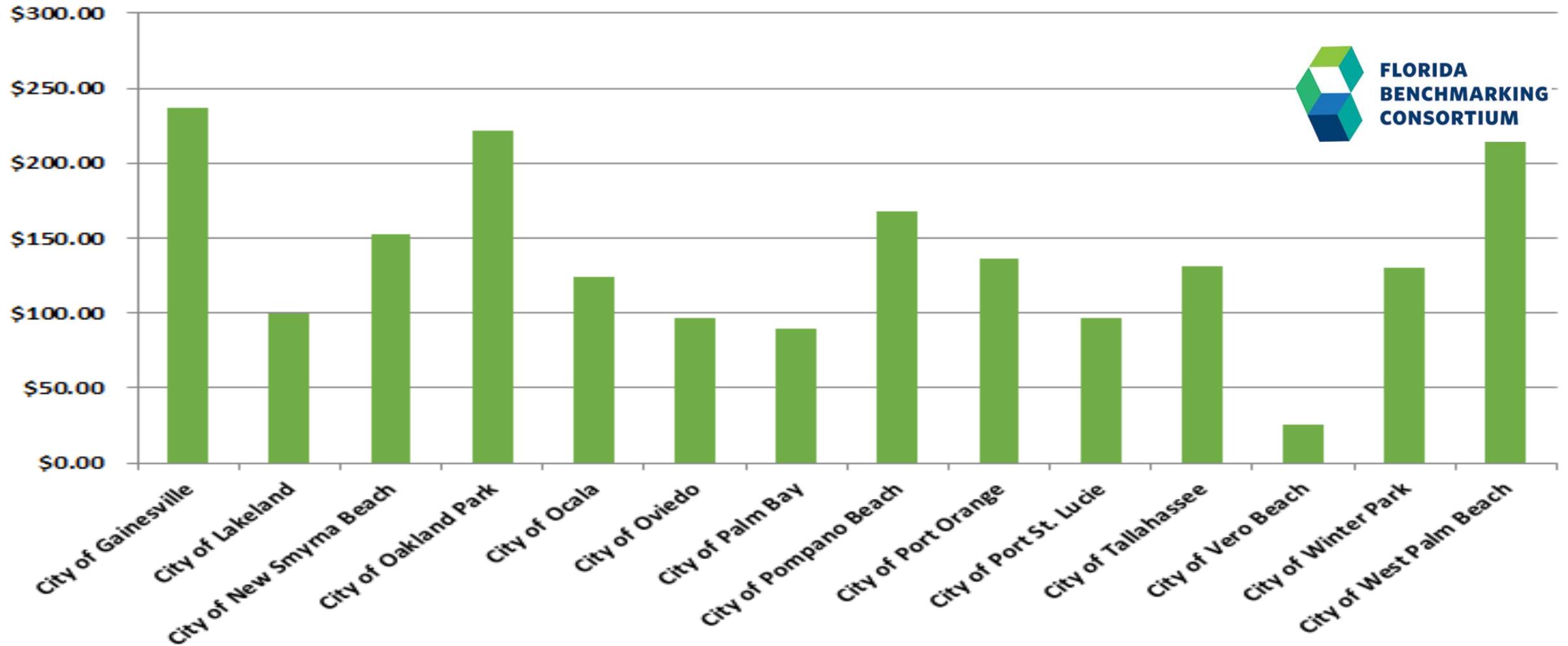
# Cases per Officer FTE (Cities)



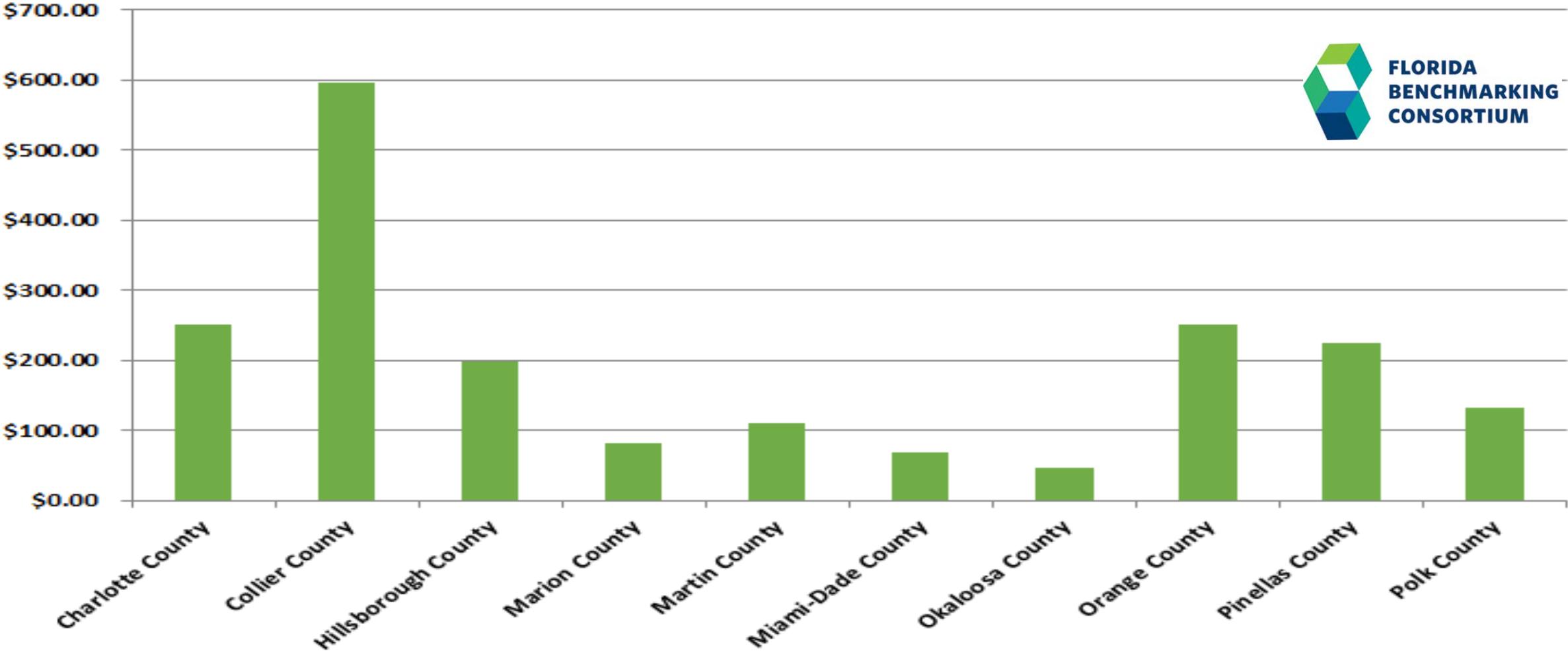
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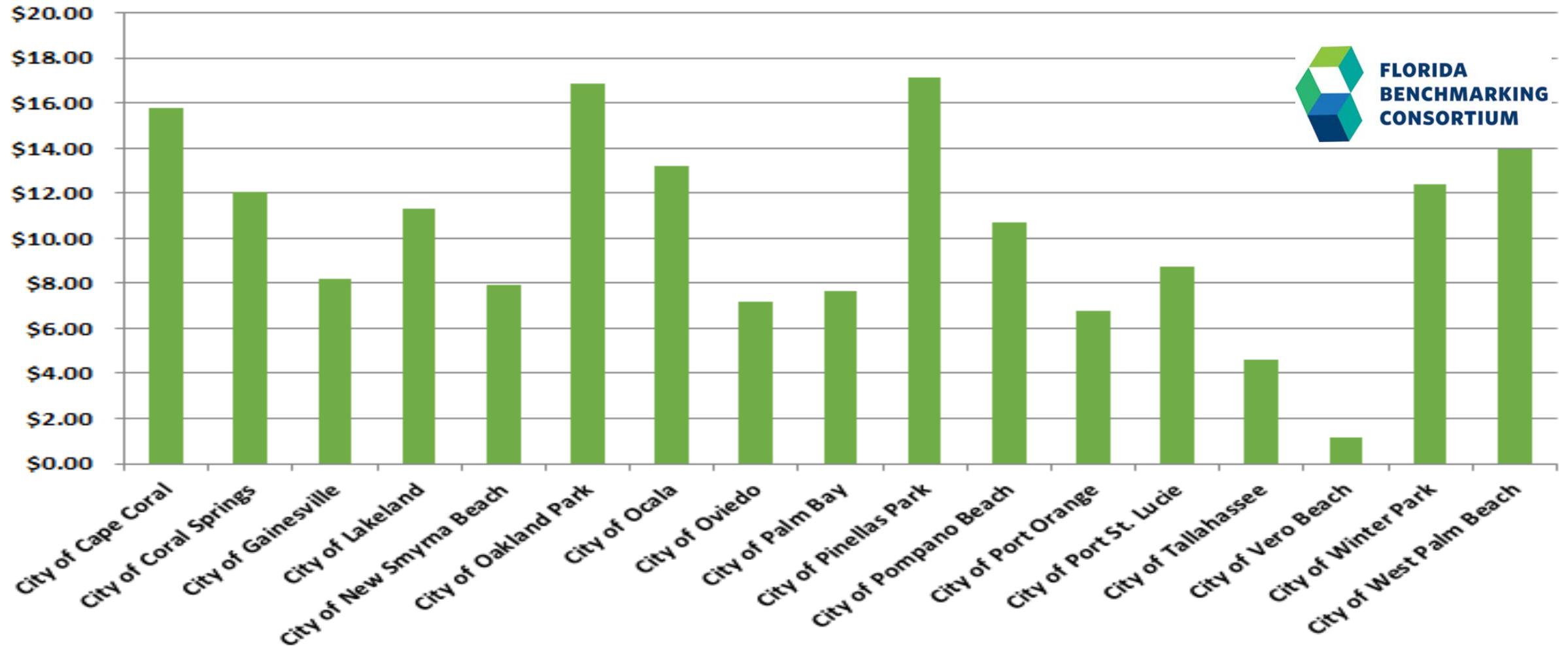
# Cost per Case (Cities)



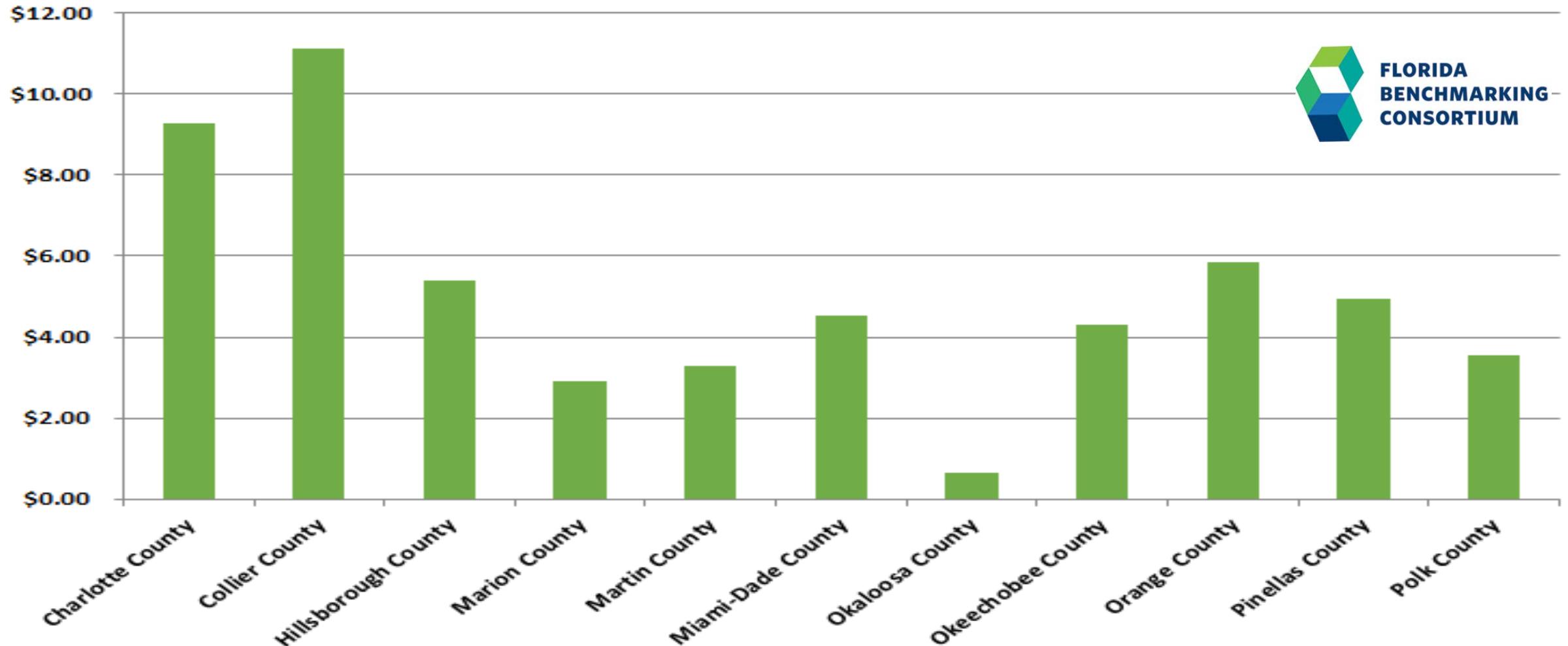
# Cost per Case (Counties)



# Cost per Citizen (Cities)



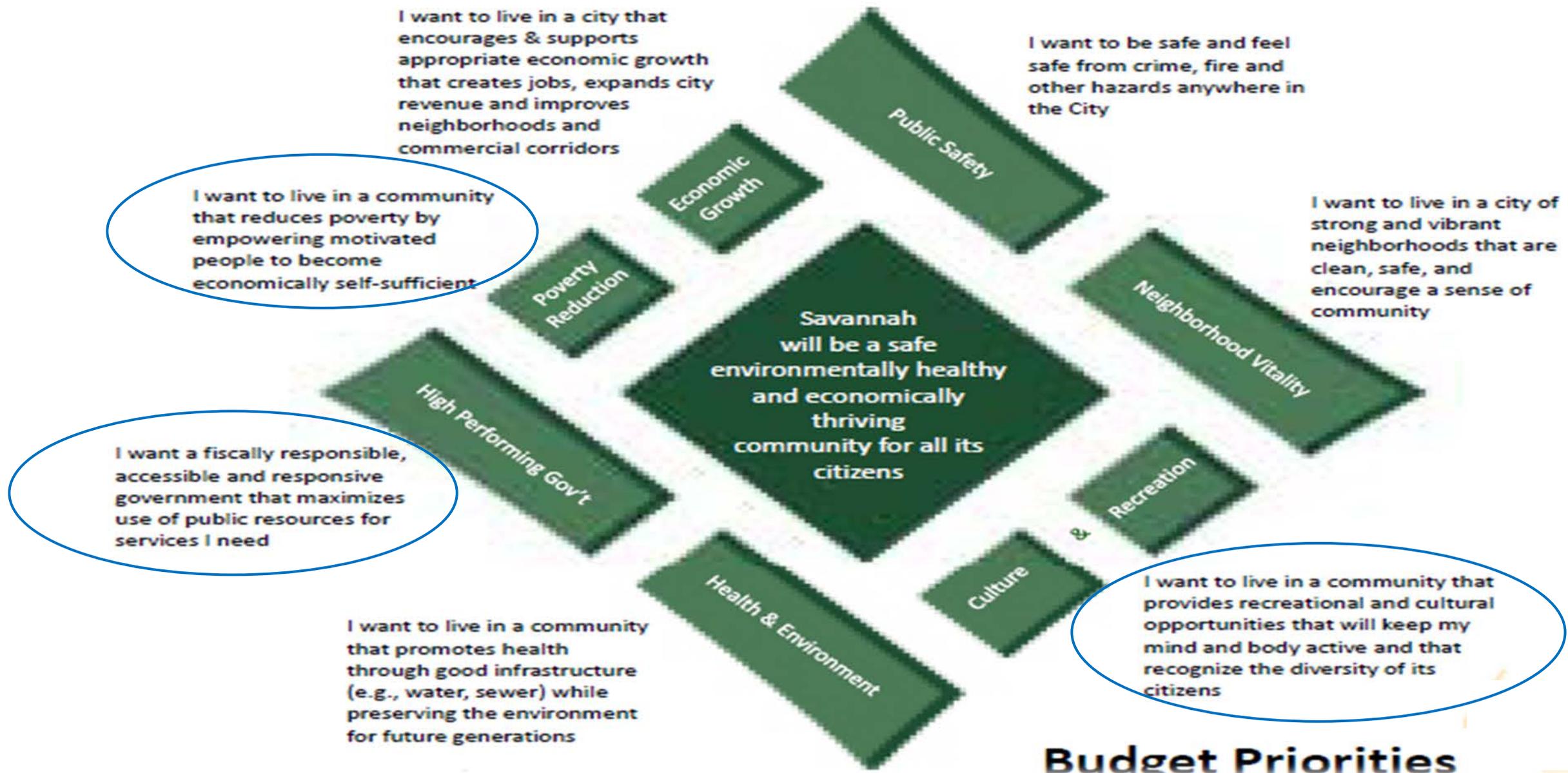
# Cost per Citizen (Counties)



# PERFORMANCE MEASUREMENT & BENCHMARKS

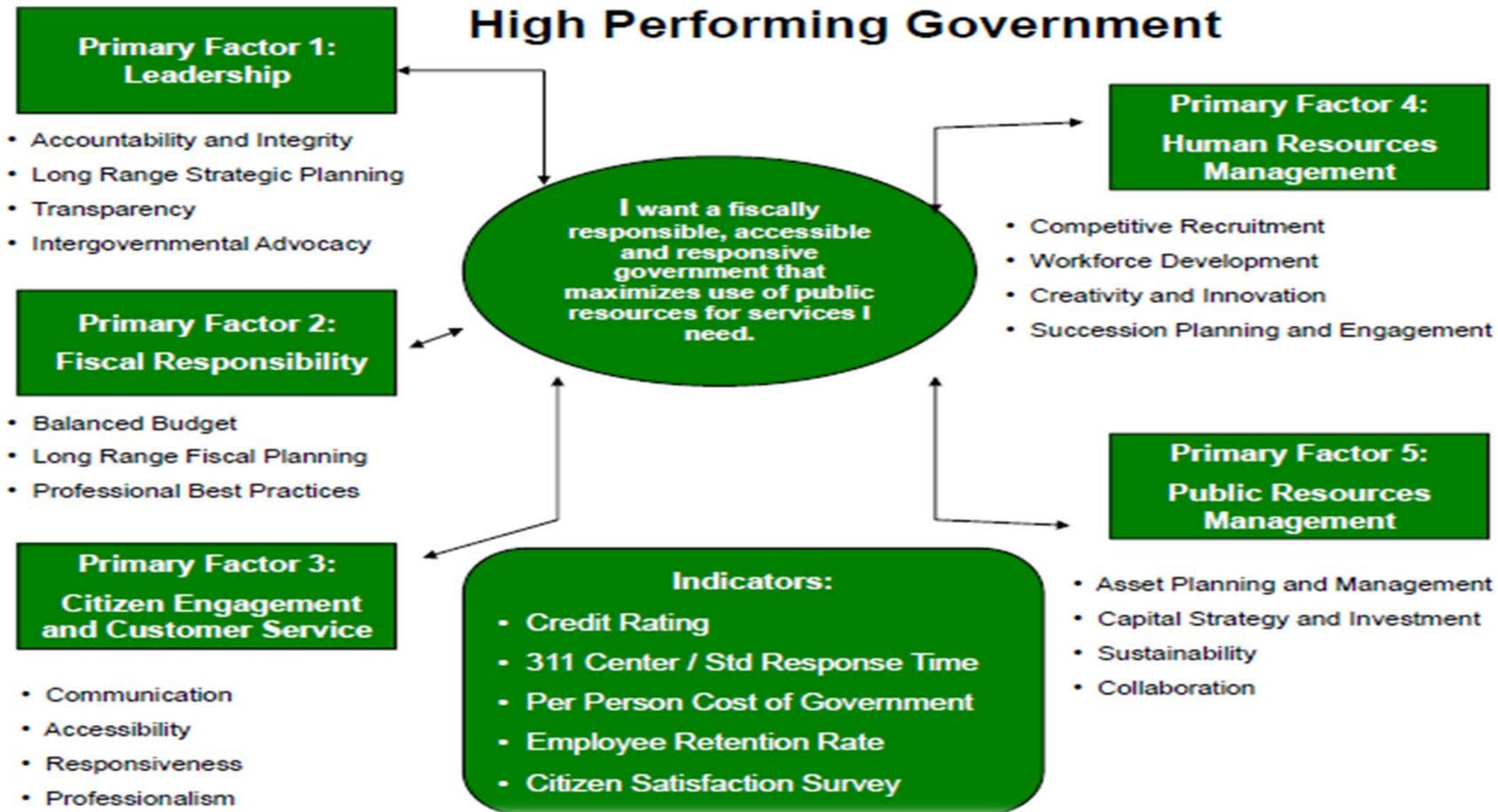
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## **EXAMPLES**



## Budget Priorities

# High Performing Government



**POVERTY**

**I want to live in a community that reduces poverty by empowering motivated people to become economically self-sufficient**

**REDUCTION**

**Primary Factor 1:  
SKILLED AND EDUCATED  
WORKFORCE**

- ▲ Education/GED
- ▲ Workforce Development
- ▲ Entrepreneurial Programs

**Primary Factor 2:  
SUPPORT SERVICES**

- ▲ Childcare
- ▲ Housing
- ▲ Family Planning
- ▲ Food
- ▲ Transportation
- ▲ Healthcare

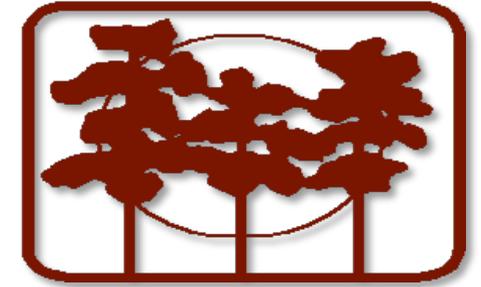
**Primary Factor 3:  
WEALTH DEVELOPMENT**

- ▲ Financial Education
- ▲ Bank the "unbanked"
- ▲ Home Buyer Programs
- ▲ Free Tax Preparation (EITC application)

**INDICATORS**

- Poverty rate
- Self-sustaining wage rate
- Unemployment rate
- Wealth accumulation

 WELLINGTON



Great Neighborhood

Great School

Great Parks

**A Great Hometown**

**Let Us Show You!**

# Business Service Hierarchy

## Funding Priority

4

### Community Add-ons

Leisure & Culture  
Community  
Beautification  
Community Events &  
Festivals

3

### Quality of Life Services

Security and Safety  
Parks & Recreation Facilities  
Trails: Multi-purpose & Equestrian  
Regulating for Community Benefit

2

### Choice Core Businesses

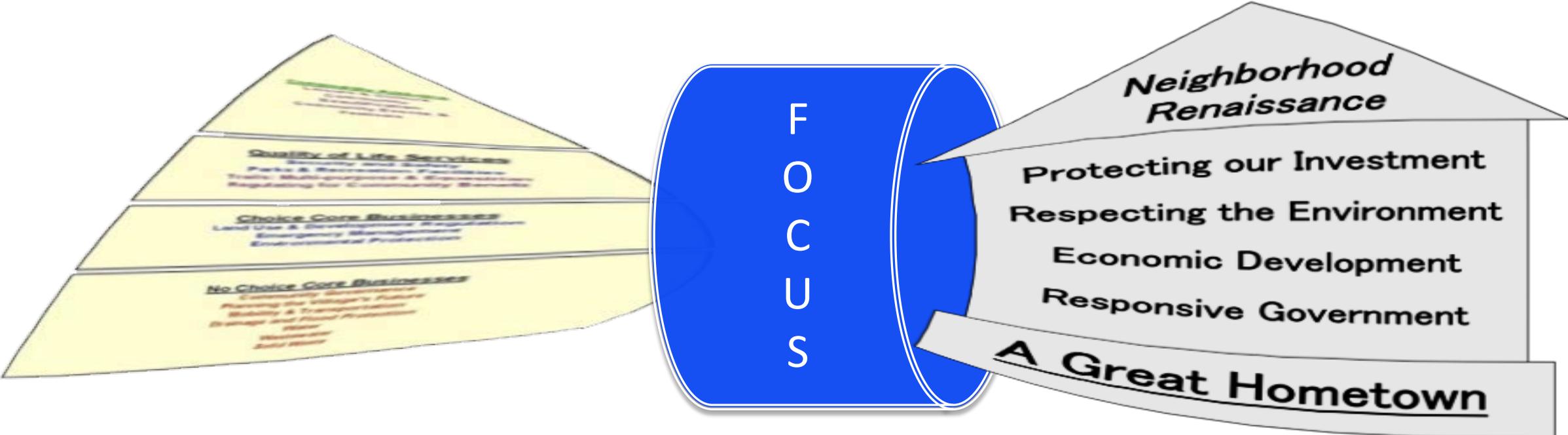
Land Use & Development Regulation  
Emergency Management  
Environmental Protection

1

### No Choice Core Businesses

Community Governance  
Planning the Village's Future  
Mobility & Transportation  
Drainage and Flood Protection  
Water  
Wastewater  
Solid Waste

# Refocused Vision



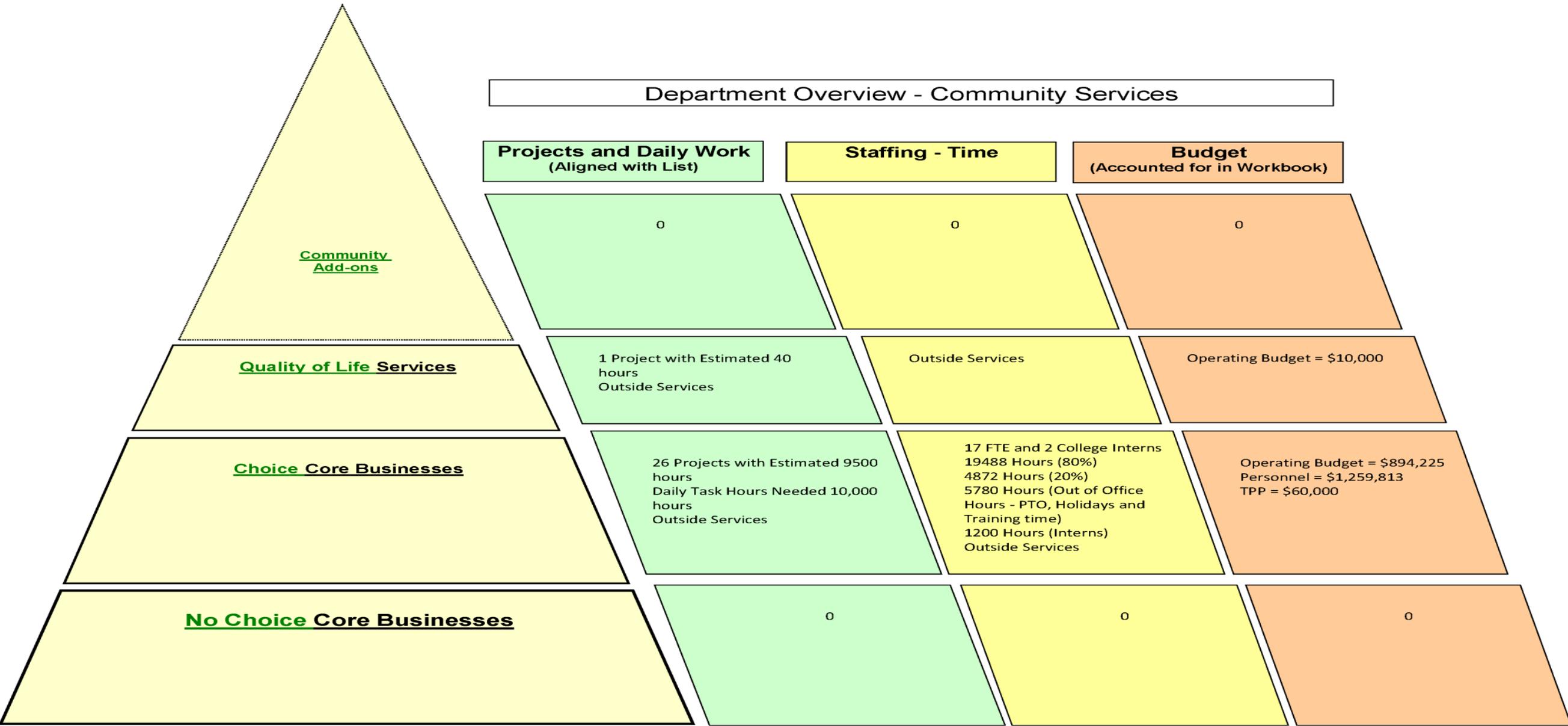
# Budget 2014: Budget

## Department Overview - Community Services

### Projects and Daily Work (Aligned with List)

### Staffing - Time

### Budget (Accounted for in Workbook)



# Budget 2014: Functions

- PBSO Contract
- Emergency Management
- Safe Neighborhoods Program
- Advocacy
- Landlord Engagement
- Community Engagement
- Public Safety
- Enhanced Code Enforcement
- Resident Needs
- Neighborhood Watch
- Grants programs
- Foreclosure Prevention/Assistance

Neighborhood Services

- Public Infrastructure projects
- Community Reinvestment
- Community Education
- Employment Training
- Public Services
- Youth engagement

CDBG

- Volunteer Coordination
- Committee Interaction
- Community Partners

Community Projects

- Senior Transportation
- Senior Recreation
- Senior Housing
- Senior Club Interactions
- Senior Committee

Senior Services



# Budget 2014 : Alignment

## COMMUNITY SERVICES

Fundamental	Four Questions	Goal	Objective	Project / Program	Project Linkage / Dependency	Measure(s)	Group(s) Served	Funding Level	Funding Year	Do Able	Council Discussed, Directed or Supported
Responsive Government	Promote Safe Neighborhoods	Public Safety					Community Council Employees	Core - 1	FY2014	Yes	Directed
Responsive Government	Promote Safe Neighborhoods	Improve quality					Community Council	Core - 2	FY2014	Yes	Directed
Responsive Government	Enhance Value of Community	Provide city-wide management structure		Emergency management	All Departments	EMA/ICS drill	Community Council Employees	Core - 1	FY2014	Yes	Supported
Neighborhood Renaissance	Enhance Value of Community	Engagement with					Community Council	Core - 3	FY2014	Yes	Supported
Neighborhood Renaissance	Enhance Value of Community	Engagement to HOA					Community	Core - 3	FY2014	Yes	
Neighborhood Renaissance	Enhance Value of Community	Engagement with					Community	Core - 3	FY 2014	Yes	Supported
Neighborhood Renaissance	Enhance Value of Community	Provide homeov					Community Council	Core - 2	FY2013	Yes	Directed
Neighborhood Renaissance	Enhance Value of Community	Neighborhood Enhancements	in multi-family neighborhoods				Community Council	Core - 3	FY2013	Yes	Directed
Protecting our Investment	Foster a family environment	Neighborhood E					Community Council	Core -2	FY2013	Yes	Directed
Protecting our Investment	Foster a family environment	Neighborhood E					Community Council	Core - 2	FY2014	Yes	Supported
Respecting the Environment	Enhance Value of Community	Neighborhood E					Community Council	Core - 3	FY2015	Yes	Council Discusse
Protecting our Investment	Promote Safe Neighborhoods	Promote safety initiatives	watch groups.				Community Council	Core -2	FY2014	Yes	Directed
Neighborhood Renaissance	Enhance Value of Community	Livable neighborhoods	Decrease the amount of trash and bulk trash complaints in multi-family neighborhoods	Trash Can Labeling	Code Compliance Services Code Compliance	1. Reduced code violations of bulk trash	Community	Core - 2	FY2014	Yes	Supported

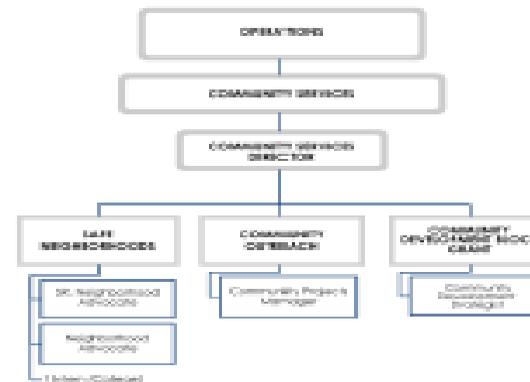
FUNDAMENTAL

GOAL

PROJECT

MEASURE

FUNDING LEVEL



## MISSION

Improve neighborhoods and increase safety

## FUNCTION AND OVERVIEW

The Community Services Department is comprised of Three functions: (1) Safe Neighborhoods, (2) Community Outreach, and (4) Community Block Development Grant administration. All functions work together to create safe and livable neighborhoods throughout Wellington focusing on the following main focus areas:

- **Reinvestment** – in public and private infrastructure in Wellington’s transitional neighborhoods, including sidewalks, streets, and other community assets (residential housing and neighborhood commercial centers). The Defensive Measures Grant program and Model Block program provides residents grant funds to do the following: install lighting and for CPTED projects (Crime Prevention Through Environmental Design, incentives to create neighborhood watch groups, and assist with exterior façade improvements.
- **Public Safety** – Code Compliance Officers and Community Oriented Police Officers reduce crime and ensure properties are maintained in accordance with to code to protect the health and safety of Wellington residents.
- **Leveraging** – The leveraging of Wellington’s public investment is accomplished through four main focus areas:
  - **Volunteer projects and programs** – Examples of these types of programs include neighborhood clean-ups, Interfaith service day projects, community event staffing, and opportunities to volunteer within Village offices.
  - **The Community Development Block Grant Program (CDBG)** – Beginning in 2012, Wellington received an annual allocation of CDBG funds to assist the Village in meeting community needs, including, but not limited to,

## COMMUNITY SERVICES

capital infrastructure investment and economic development programs that will retain and/or create education opportunities.

- o Youth Services – Youth programming helps insure that adolescents will be healthy and productive members of society. Wellington has developed youth engagement opportunities working with local schools and community groups. Opportunities include programs such as Civics 101, learn job skills through High School Summer Service, Youth Council and community service days. Youth outreach programming also includes fitness and learning programming such as flag football and tutoring. In addition, in 2014, Community Services will establish partnerships with at-risk youth non-profits that will address youth crime, violence, loitering and mentor programs.
- o Senior Services – The goal of Senior Services is to administer a comprehensive range of programs and services that provide for Wellington seniors 60 and older. Senior Services will work with various agencies and groups, including the Senior Advisory committee, to address issues facing Wellington seniors.

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### FUNDAMENTALS

- Neighborhood Renaissance
- Protecting our Investment
- Responsive Government

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### KEY MEASURES AND STANDARDS

The following measures indicate the effectiveness of the initiatives and goals for the department:

- Crime rates within the transitional neighborhoods
- Owner-occupancy rates
- Trend in neighborhood home values
- Perception of Safety

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### FY2012 & FY2013 ACCOMPLISHMENTS

Community Services has made the following significant accomplishments:

#### SAFE NEIGHBORHOODS

- Increased homeownership and stabilized home values in Wellington through the sale of five (5) homes utilizing the Neighborhood Stabilization Program (NSP) grant funds.
- Increased Defensive Measures grants given by 40%
- Completion of Neighborhood Enhancement Cluster Mailbox project in which cluster mailboxes were installed in five transitional neighborhoods

## COMMUNITY SERVICES

- Completion of 2 community Defensive Measures projects installing fences & hostile vegetation using crime prevention through environmental design techniques for the Yarmouth and Montauk neighborhoods.
- Home Owner Association Symposiums held quarterly for all Wellington association board members.
- 2 Wellington homes painted through Paint Your Heart Out
- Added 3 Watch group for a total of 6 Neighborhood watch groups in Wellington
- Neighborhood enhancement project Goldenrod Neighborhood park completed.
- Held quarterly neighborhood meetings for all transitional and pre-transitional neighborhoods.
- Implement the Responsible Landlord training program.
- Implementation of the Trash Can Plan where advocates and code work together to label trash cans and help reduce non-compliant trash placement, including bulk trash.
- Enhancements made to the Senior transportation program by installing an electronic swipe card system and allocated Community Block Development Grant funds to increase amount of vouchers available to Seniors.

### COMMUNITY PROJECTS (Community Service, Volunteer, and Education Outreach)

- Created and developed annual internship program for college students to offer service opportunities and invest in the community.
- Partner with the Boys and Girls Club to create youth summer work program.
- Complete eighteen month VIVA Florida project which highlighted Wellington's history and provided a \$250 scholarship for a high school student through the essay contest.
- Partnered with local educational institution to provide a \$15k full scholarship for a Practical Nursing Program.
- Increase attendance in youth centered programs such as High School Summer Service program and Civics 101 program.
- Partner with the Palm Beach County School District to have the Area 3 representative communicate and provide an update at the quarterly Education Committee meetings.
- Redevelop and enhance marketing and promotional materials, application and handbook for Volunteer Wellington.
- Partnered with the Wellington Art Society to implement the City Hall "Rotating Gallery" installment.

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### FY2014 ACTION PLANS

#### SAFE NEIGHBORHOODS

In an effort to reduce crime and affect change in the transitional neighborhoods the following projects will be implemented in the upcoming fiscal year:

## COMMUNITY SERVICES

Project / Program	Performance Measure/Metric	Primary Strategic Fundamental
Defensive Measures Program	Maintain participation of 35 properties receiving funds annually	Protecting our Investment
Neighbors of Wellington Grant Program	Hold 2 community block parties	Protecting our Investment
Great Hometown Grant	Hold 4 façade improvement projects	Protecting our Investment

- Reinvestment into public and private infrastructure in Yarmouth Neighborhood including street closures.
- Acquisition of land and completion of Yarmouth Neighborhood Park. Continue the Responsible Wellington Landlord training program.
- Maintain code enforcement number and actively pursue repeat code violators.
- Increase PBSO presence and patrols within the transitional neighborhoods.
- Provide Homeownership services and provide resources to distressed HOAs through the HOA symposium.
- Resident engagement through quarterly neighbourhood meetings and through the Helping Residents with Needs Hotline.

### COMMUNITY OUTREACH

- Conduct a village-wide external perception survey.
- Increase volunteer participation and develop new ways to utilize volunteers for educational and community outreach events
- Collaborate with one new non-profit community agency to implement an at-risk youth services program.
- Youth Services including Youth Council, High School Summer Service program
- Administer Volunteer Wellington! Program
- Liaison with local faith based community leaders through Wellington's Interfaith program
- Liaison for the education committee
- Leverage volunteer hours to facilitate neighbourhood and community clean-up projects through Great American Clean-up and Community Improvement Days.
- Increase ridership of the Senior Transportation and Rides (STAR) program by 10%.
- Utilize strategic partnerships that will focus on long term planning for senior housing and affordable housing.
- Develop partnerships with 2 new agencies that will build a coordinated system of information for awareness, education, information, assistance, benefits counselling, and seniors in need.
- Utilize grant funding to develop programming for topics such as Health & Wellness, Safety & Legal, and Benefits & Assistance.

## COMMUNITY SERVICES

### COMMUNITY BLOCK DEVELOPMENT GRANT

- Fund infrastructure improvements including public facilities, sidewalk improvements.
- Fund formal neighbourhood revitalization plans.
- Fund outreach and educational programs.
- Partially fund senior transportation program.
- Prepare CDBG Annual plan and CAPER report.

### BUDGET ISSUES

Many of the objectives of the Department could be impacted by sources outside of its control such as:

- Level of CDBG appropriation. The CDBG program funding is subject to annual appropriations by the U.S. Congress.
- Carry forward approximately \$300,000 for the Defensive Measures Grant; The Neighbors of Wellington Grant program; Model Block program, a proposed grant program designed to fund residential and commercial façade improvements and other neighborhood improvements; and Infrastructure related projects such as increased lighting in needed neighborhoods, and Yarmouth Park.

### BUDGET SUMMARIES

#### COMMUNITY SERVICES

	Actual 2011	Actual 2012	Budget 2013	Budget 2014	Change from Prior Year
Personnel	\$ 376,206	\$ 375,980	\$ 427,240	\$ 517,533	\$ 90,293
Operating	56,768	81,769	187,000	630,817	\$ 443,817
<b>SUBTOTAL</b>	<b>\$ 432,974</b>	<b>\$ 457,749</b>	<b>\$ 614,240</b>	<b>\$ 1,148,350</b>	<b>\$ 534,110</b>
Capital Outlay	9,703	-	-	-	\$ -
<b>TOTAL</b>	<b>\$ 442,677</b>	<b>\$ 457,749</b>	<b>\$ 614,240</b>	<b>\$ 1,148,350</b>	<b>\$ 534,110</b>
Positions	4	5	7	6	(1)



# Access Wellington



Wellington's Strategic Plan is captured in a 5-4-3-2-1 format: FIVE Fundamentals: (A) Protecting Our Investment, (B) Neighborhood Renaissance, (C) Responsive Government, (D) Respecting the Environment, and (E) Economic Development. Each fundamental has corresponding focus areas, projects and programs, and key measures. FOUR Principles: (A) Livable Neighborhoods, (B) Open Space, (C) Education, and (D) Employment. All of our projects and programs help to enable to continuation of these principles. THREE Initiatives: (A) Medical Arts District, (B) Equestrian Community, and (C) Midtowne. These will be the major focus areas over the next several years. TWO Funding Objectives: (A) Core Business and (B) Quality of Life. These serve as budgeting levels that each department use to determine in a line item is needed. All of these work together to help create ONE Great Hometown! To learn more about how our strategic plan is being implemented, how it affects each and every department, or just to learn more about your Great Hometown, select one of the options below.

**A Great Hometown...Let us Show You!**



Protecting  
our Investment



Neighborhood  
Renaissance



Responsive  
Government



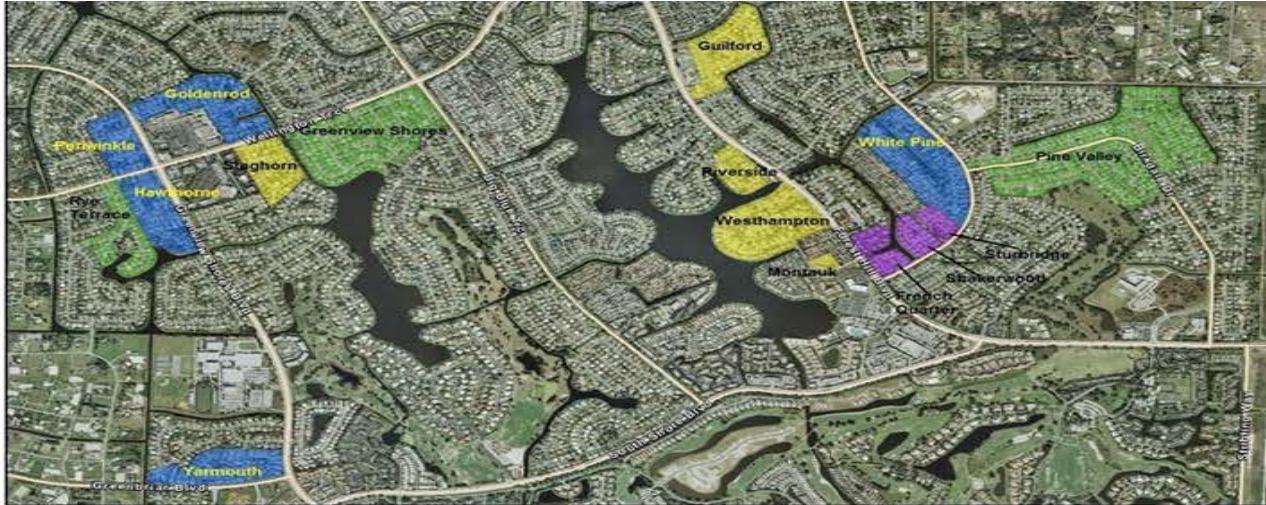
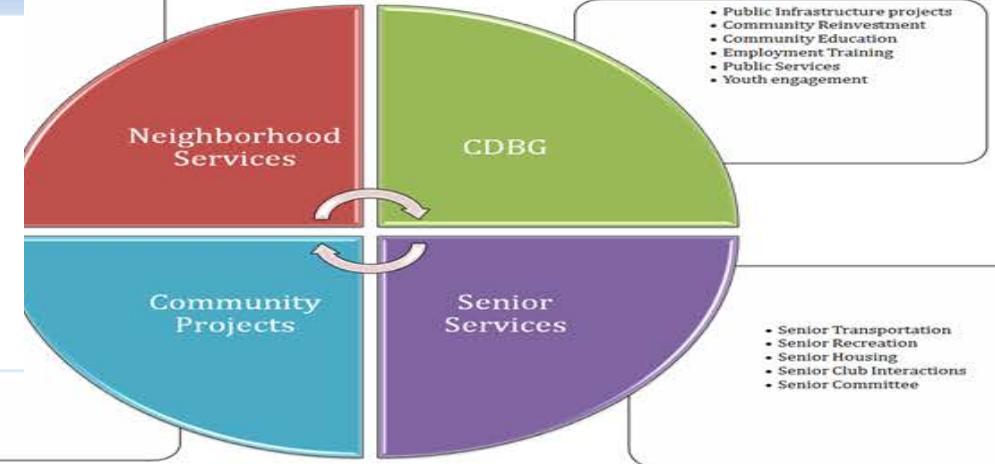
Respecting  
the Environment



Economic  
Development

# Access Wellington: Alignment

## Improve Neighborhoods and increase safety



Community Partners

Navigation

- Folkestone/Yarmouth Report
- Goldenrod/Hyacinth Report
- Morning Glory/Hawthorne Report
- White Pine/12th Fairway Report
- Periwinkle/Lily Court Report

COMMUNITY SERVICES SAFE NEIGHBORHOODS

	Actual 2011	Actual 2012	Budget 2013	Budget 2014	Change from Prior Year
Personnel	\$ 376,206	\$ 375,980	\$ 427,240	\$ 620,749	\$ 193,509
Operating	56,768	81,769	187,000	185,500	\$ (1,500)
<b>SUBTOTAL</b>	<b>\$ 432,974</b>	<b>\$ 457,749</b>	<b>\$ 614,240</b>	<b>\$ 806,249</b>	<b>\$ 192,009</b>
Capital Outlay	9,703	-	-	-	\$ -
<b>TOTAL</b>	<b>\$ 442,677</b>	<b>\$ 457,749</b>	<b>\$ 614,240</b>	<b>\$ 806,249</b>	<b>\$ 192,009</b>
Positions	4	5	7		(7)

COMMUNICATIONS

	Actual 2011	Actual 2012	Budget 2013	Budget 2014	Change from Prior Year
Personnel	\$ 443,923	\$ 159,051	\$ 245,957	\$ 216,741	\$ (29,216)
Operating	42,321	16,633	41,400	30,100	\$ (11,300)
<b>SUBTOTAL</b>	<b>\$ 486,244</b>	<b>\$ 175,684</b>	<b>\$ 287,357</b>	<b>\$ 246,841</b>	<b>\$ (40,514)</b>
Capital Outlay	5,766	7,488	8,000	-	\$ (8,000)
<b>TOTAL</b>	<b>\$ 492,010</b>	<b>\$ 183,172</b>	<b>\$ 295,357</b>	<b>\$ 246,841</b>	<b>\$ (48,516)</b>
Positions	5	3	3		(3)

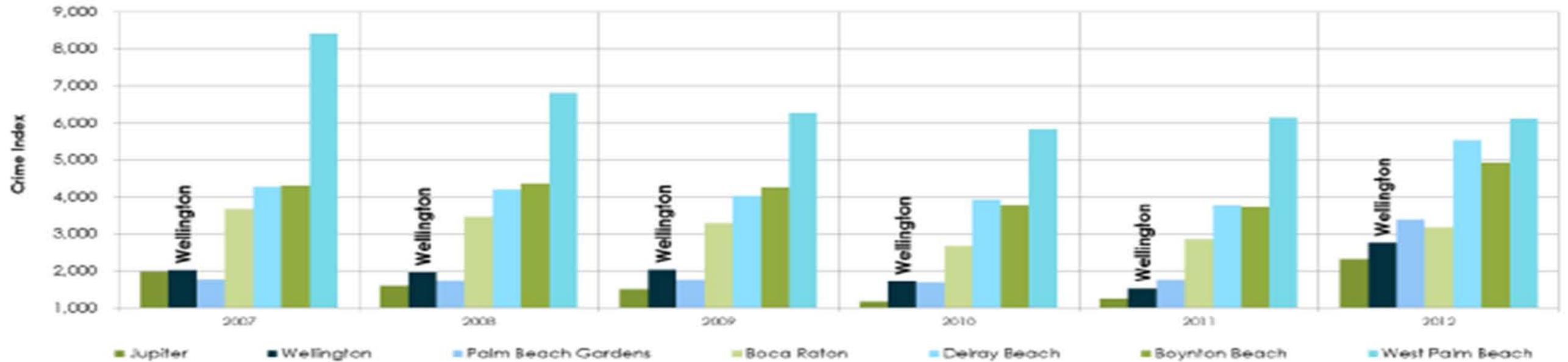
Includes Broadcasting division exp history for 2011 and 2012

TOTAL COMMUNITY SERVICES

	Actual 2011	Actual 2012	Budget 2013	Budget 2014	Change from Prior Year
Personnel	\$ 820,129	\$ 535,031	\$ 673,197	\$ 837,490	\$ 164,293
Operating	99,089	98,402	228,400	215,600	\$ (12,800)
<b>SUBTOTAL</b>	<b>\$ 919,218</b>	<b>\$ 633,433</b>	<b>\$ 901,597</b>	<b>\$ 1,053,090</b>	<b>\$ 151,493</b>
Capital Outlay	15,469	7,488	8,000	-	\$ (8,000)
<b>TOTAL</b>	<b>\$ 934,687</b>	<b>\$ 640,921</b>	<b>\$ 909,597</b>	<b>\$ 1,053,090</b>	<b>\$ 143,493</b>
Positions	9	8	10		(10)

# Access Wellington: Graphs

## NEIGHBORHOOD RENAISSANCE: PUBLIC SAFETY TOTAL INDEX CRIME – TOP 7 CITIES



Source: Uniform Crime Reports Program; Florida Department of Law Enforcement

# Access Wellington: Measurements

Core Objective	Performance Measure	Project
Increased owner occupancy	↑ % Transitional & Watch Housing as a Percentage of All Housing in Wellington	Neighborhood Stabilization Program (NSP)
	↑ Owner occupancy rate	
	↑ Total Number of Homes	
Increased Property Value	Avg Property Values	
Reinvestment (some functional some aesthetic) (roads, pathways, sidewalks, drainage, utilities, broadband)	Number of neighborhoods with cluster mailboxes	Cluster Mailboxes
Reduce Crime	Juvenile crime rate	
	Number of Defensive Measures grant recipients	
Increase Perception of Safety		
Increase Code compliance		
	Courtesy Notice Compliance Rate	Paint Your Heart Out
	Dollar value of donations	Volunteer Projects
	Number of Abatements	Neighborhood Cleanup
	Number of corrected code violations	
	Number of volunteer hours	
	Number of volunteer projects completed	
	Rental license compliance rate	
Civic Pride	Number of Block Party grants awarded; dollars spent	Trunk or Treat

Core Objective:  
Increase Owner Occupancy

Performance Measure:  
Owner Occupancy Rate

Project:  
Neighborhood Stabilization Program

# Access Wellington: Analysis

Scorecards > Core Objectives > Performance Measures > Projects > Action Items

White Pine and 12th Fairway Report

- Completed Project
  - Upgraded existing
  - New lights budge
  - NSP Garden Club
- Community Meeting
  - W:\Programs\NON-CI Fairway\Meetings
- Item of Note
  - None at this time.
- Neighborhood Stat
  - Performance Meas
    - Total Units
    - Owner Occupanc Rate

Scorecards > Core Objectives > Performance Measures > Projects > Action Items

Visual Attractiveness (Active Code Cases)

Calendar Year Quarterly (2011-2012) Q2-12

Scorecards > Core Objectives > Performance Measures > Projects > Action Items

White Pine/12th Fairway Crime Trends

Quarter	Veh Burg	Vandalism	Robbery	Drug Case	Res Burg
Q3-10	1	1	0	0	1
Q4-10	0	3	0	2	2
Q1-11	0	2	0	0	2
Q2-11	0	2	0	0	6
Q3-11	1	2	0	0	1
Q4-11	0	1	0	1	6
Q1-12	3	2	2	1	4
Q2-12	2	2	1	7	3
Q3-12					
Q4-12					

Scorecards > Core Objectives > Performance Measures > Projects > Action Items

Number of Code Cases by Type

Quarter	Rental License	Multi-Case	Maintenance	Vehicle	Landscaping	Solid Waste
Q3-10						
Q4-10						
Q1-11						
Q2-11						
Q3-11	120	25	10	5	10	5
Q4-11	110	20	10	5	10	5
Q1-12	65	20	10	5	10	5
Q2-12	45	20	35	5	10	5
Q3-12						
Q4-12						

Scorecards > Core Objectives > Performance Measures > Projects > Action Items

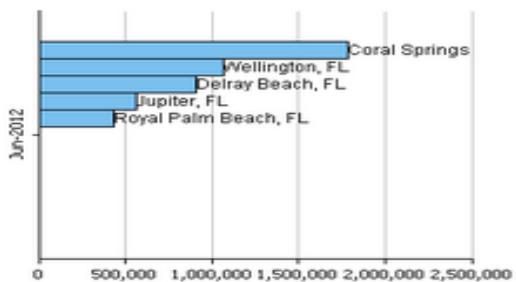
White Pine/12th Fairway

Server Time 10/1/12 1:53 P

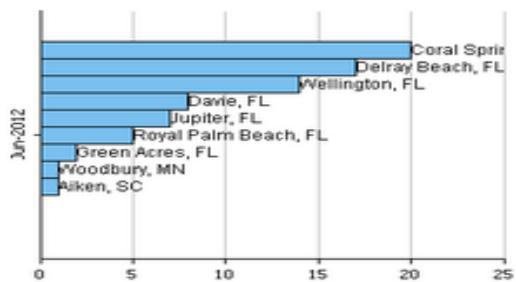
# Access Wellington: Benchmarking

## Code Compliance Dashboard

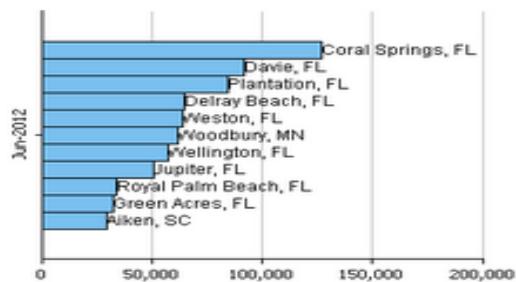
— Total Department Budget



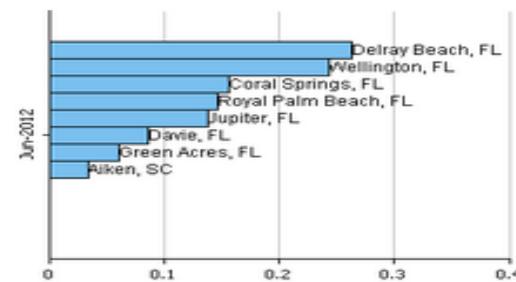
— FTE



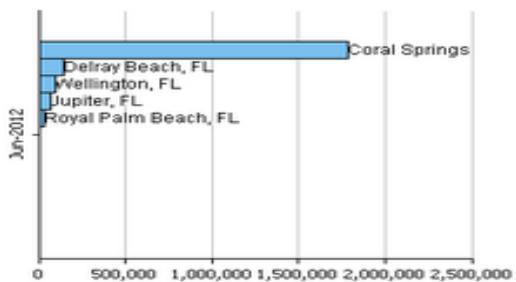
— Total Population



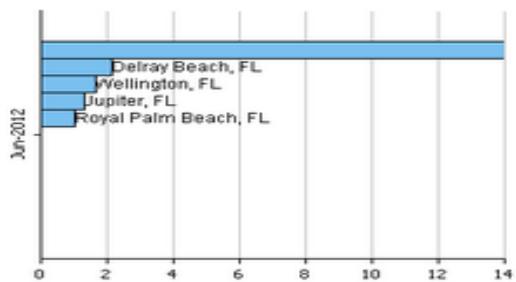
— FTE Per 1,000 Population



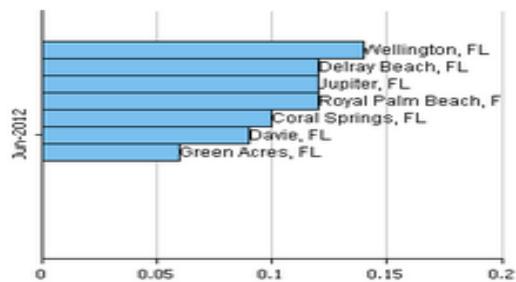
— Operating Expenses



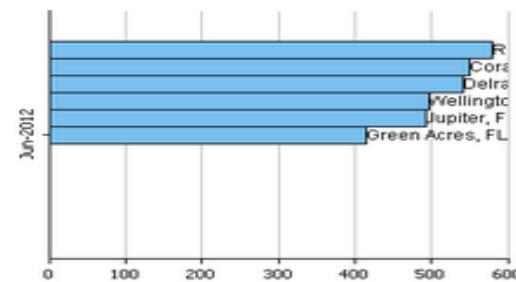
— Operating expenditures per capita



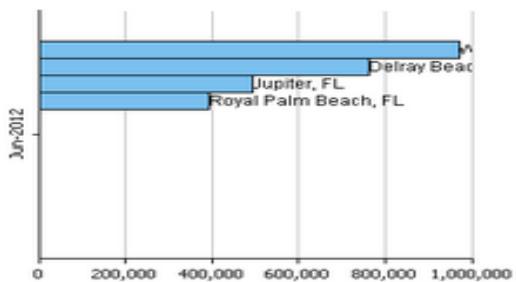
— FTE per 1000 capita



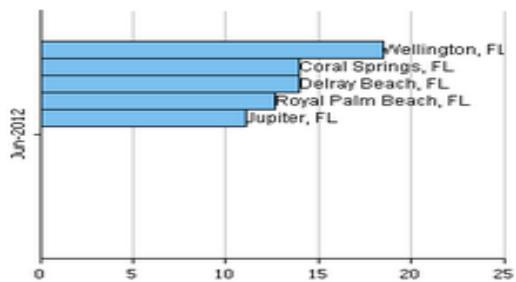
— Cases opened per FTE



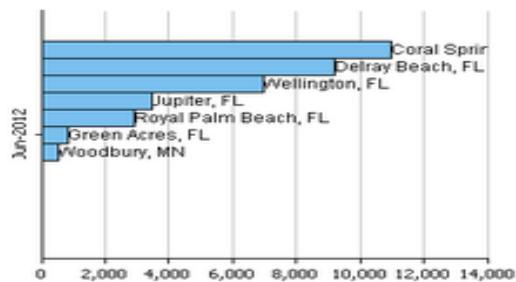
— Personal Services



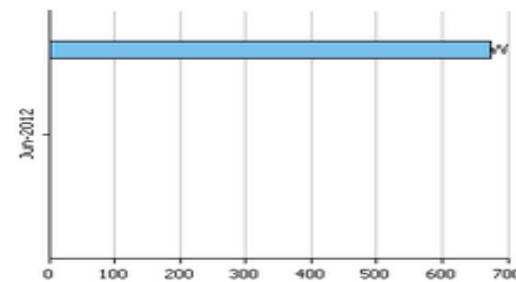
— Operating Budget Per Capita



— Total cases opened



— Code cases brought into compliance prior to NOV



**Mission**

*To provide comprehensive financial services to the City and its stakeholders; including accurate and timely financial reporting, safeguarding of financial and physical assets and providing outstanding customer service in a clean and enriched work environment.*

**Department Overview**

The Financial Services Department provides vital support services to both the City's internal and external customers. It is responsible for the coordination of all financial activities of the City by acting as liaison to the public, and to the administrative and department officials. This department also oversees the Utility Billing program which is funded by the Utility Enterprise Fund.

This department is comprised of 37 budgeted positions, 35 full-time, 3 part-time and 1 temporary part-time employees. The 4 major General Fund programs provided are:

1. Administration
2. Accounting and Revenue Enhancement
3. Reporting and Training
4. Grants Administration

**Objectives**

- Review current and past financial transactions for reporting accuracy.
- Review account balances for collectability.
- Continue cash/payment process review to reduce duplication and increase efficiency.
- Enhance current collection process to include increased in-house collection efforts as a first step and then forwarded to the outside collection agency.
- Continue to facilitate the implementation of the City-wide Enterprise Resource Planning (ERP) software, including conversion of data, workflow analysis, training and preparation of routine and customized reports.
- Continue to provide assistance to City departments with grant applications and writing, monitoring, training, reporting and compliance.

**Key Intended Outcomes of Investment**

- Promote the Finance Department as a strategic partner through meetings with and education of City department personnel.
- Financial transactions are reported accurately and in compliance with current accounting standards.
- The payment/cash receipt process ensures all City funds are received, recorded and deposited quickly and accurately.
- Increase collections on all funds owed to the City by those benefiting from the services provided.
- Implement the Munis ERP software to enhance efficient data entry, accurate and streamlined financial processing and accessible financial reporting.
- Enhance City revenues through grant awards, monitoring and compliance.

**Accomplishments FY 2014**

- Received the Certificate of Achievement for Excellence in Financial Reporting from The Government Finance Officer's Association (GFOA).
- Successfully implemented Munis modules for Fixed Assets, Business Licenses, General Billing and Cashiering.
- Implemented a city-wide training program for both Munis and Microsoft Office Products.
- Implemented electronic payment processing for payroll and accounts payable vendors.
- Transitioned stormwater billing from the monthly utility bill to tax bill as a non-ad valorem assessment.
- Instituted a City-wide Fee Booklet as a listing of all fees, rates and charges and method to approve same during the annual budget process.
- Expanded and enhanced financial reports to the City Commission and other department directors.
- Successfully integrated Cultural Arts Box Office activities with Finance cashier's staffing.

*Accounting and Revenue Enhancement Program*

**Description**

The Accounting and Revenue Enhancement Program provides accurate, complete and timely recording of financial data. This program ensures that the City's resources are collected, invested and then distributed as required for payroll, debt management, accounts payable and other obligations. It acts as the central collection point for cash receipts for all revenues of the City and collects and processes cash received directly from customers and other City locations. Credit, debit and lockbox payments are also processed. Business tax, lien searches and filing of liens, commercial sanitation billing and collections, false alarms and other miscellaneous billings are managed within this program. The Accounting and Revenue Enhancement Program operates at both the Multi-Purpose Center in East Miramar and at Town Center.

**Objectives**

- Record all financial transactions accurately and on a timely basis.
- All payments due to the City are processed and collected.
- Available funds are invested in accordance with the City's Investment Policy.
- General Ledger is closed by the 15th of each month.
- Ensure all City capital assets are accounted for and safeguarded.
- All City Debt is paid and managed in compliance with debt covenants and other external regulations.

**Key Intended Outcomes of Investment**

- Financial transactions are reported accurately and in compliance with current accounting standards.
- The payment/cash receipt process ensures all City funds are received, recorded and deposited as soon as possible and accurately.
- City funds are invested to ensure safety, liquidity and yield.
- City capital assets are safe-guarded and recorded in compliance with current accounting standards.
- Prepare and distribute timely financial statements to departments and City Commission.
- City debt is paid and managed in compliance with debt agreements and regulatory requirements.

**Goals for FY 15**

1. Continue to enhance internal controls related to processing of cash and other payments city-wide.
2. Upgrade cash collections technology at all City locations with ERP implementation.
3. Review and enhance collection efforts for past due accounts.
4. Ensure all balance sheet accounts are reconciled, collectible and properly supported.
5. Perform a timely close of the General Ledger to ensure accurate financial reporting.
6. Review payroll process to improve efficiency, reduce errors and enhance customer satisfaction.
7. Improve compliance and training on the city-wide capital asset program and software.
8. Continue, on a rotating basis, a capital asset physical inventory.
9. Cross train accounting staff to obtain task redundancy, skill development and increased productivity.
10. Review all current debt for refunding opportunities and compliance with continued compliance with covenants.
11. Review existing processes to identify areas for improvement and to optimize efficiencies.

**Performance Measures**

<b>Output</b>	<b>FY 2011 Actual</b>	<b>FY 2012 Actual</b>	<b>FY 2013 Actual</b>	<b>FY 2014 Projected</b>
Number of grants utilizing project accounting.	52	60	-	-
Percentage of CIP projects utilizing project accounting.	95%	100%	100%	100%
Number of accounts reconciled.	446	450	475	480
Maintain percentage of returned checks collected at 90%.	90%	90%	87%	89%
General ledger is closed by the 15th of the following month.	-	-	-	8 mths

*Accounting and Revenue Enhancement Program*

**Effectiveness/Efficiency**

Objective: Record all financial transactions accurately and on a timely basis.  
 Outcome: Financial transactions are reported accurately and in compliance with current accounting standards.  
 Goals: 1, 2, 3, 4, 5, 8, 11

	FY 2013		FY 2014		FY 2015
	Goal	Actual	Goal	Projected	Goal
Process ACH, online payments and lockbox by next business day after receipt.	98%	97%	98%	95%	99%
Perform process review of accounting functions.	3	2	3	3	3
Perform process review on billing functions.	3	2	3	3	2

Objective: All payments due to the City are processed and collected.  
 Outcome: The payment/cash receipt process ensures all City funds are received, recorded and deposited as soon as possible and accurately.  
 Goals: 1, 2, 3, 4, 11

	FY 2013		FY 2014		FY 2015
	Goal	Actual	Goal	Projected	Goal
Percentage of past due collections recovered.	12%	11%	12%	11%	14%
Review accounts receivable monthly for collectability.	12	12	12	12	12

Objective: Available funds are invested in accordance with the City's Investment Policy.  
 Outcome: City funds are invested to ensure safety, liquidity and yield.  
 Goals: 1, 2, 3, 11

	FY 2013		FY 2014		FY 2015
	Goal	Actual	Goal	Projected	Goal
Percentage of idle funds invested.	97%	97%	97%	97%	98%
Percentage of time portfolio met/exceeded benchmark.	95%	98%	95%	97%	98%
Update accounting and investment policies and procedures.	5	2	5	4	5

Objective: Ensure all City capital assets are accounted for and safeguarded.  
 Outcome: City capital assets are safeguarded and recorded in compliance with current accounting standards.  
 Goals: 1, 4, 6, 7, 8, 9, 11

	FY 2013		FY 2014		FY 2015
	Goal	Projected	Goal	Projected	Goal
Departments trained on following capital asset policy for acquisitions, transfers and disposals.	100%	100%	100%	95%	100%
Number of Capital Assets Physical Inventories performed.	2	1	2	1	2

Objective: All City Debt is paid and managed in compliance with debt covenants and other external regulations.  
 Outcome: City debt is paid and managed in compliance with debt agreements and regulatory requirements.  
 Goals: 1, 4, 9, 10

	FY 2013		FY 2014		FY 2015
	Goal	Actual	Goal	Projected	Goal
Debt accounts are reviewed and in compliance with covenants.	100%	100%	100%	100%	100%
All debt information updated on EMMA by due date.	100%	100%	100%	100%	100%

## Financial Services

FY 2015 Budget

### Accounting and Revenue Enhancement Program

Dedicated Revenues	Object #	FY 2012 Actual	FY 2013 Actual	FY 2014 Budgeted	FY 2014 Amended	FY 2015 Budget
Local Business Tax	316000	1,423,707	1,458,226	1,495,000	1,495,000	1,579,000
Bus Tax Background Checks	329103	170	50	500	500	500
Commercial Sanitation	341302	223,586	3,851	2,000	2,000	-
Lien Searches	349000	185,790	185,559	176,500	176,500	190,000
<b>Total</b>		<b>\$ 1,833,253</b>	<b>\$ 1,647,686</b>	<b>\$ 1,674,000</b>	<b>\$ 1,674,000</b>	<b>\$ 1,769,500</b>

### Expenditures by Category

Personnel Services	2,143,401	2,516,554	2,524,500	2,524,500	2,455,500
Operating Expense	371,598	355,845	488,400	488,400	532,700
Capital Outlay	2,015	3,016	-	-	-
<b>Total</b>	<b>\$ 2,517,013</b>	<b>\$ 2,875,416</b>	<b>\$ 3,012,900</b>	<b>\$ 3,012,900</b>	<b>\$ 2,988,200</b>

### Percent of Time by Position

Account Clerk I	5.0	5.0	5.0	6.0	6.0
Account Clerk II	2.0	2.0	2.0	2.0	2.0
Account Clerk III	5.0	5.0	5.0	5.0	5.0
Accountant I	2.0	2.0	2.0	1.0	1.0
Accountant II	1.0	1.0	1.0	1.0	1.0
Accounting Manager	2.0	2.0	2.0	2.0	2.0
Accounting Records Clerk* (1 FT, 2 Part-Time)	2.0	2.0	2.0	2.0	2.0
Accounts Payable Supervisor	1.0	1.0	1.0	1.0	1.0
Assistant City Manager-Chief Financial Officer	0.1	-	-	-	-
Assistant Financial Services Director	0.5	-	-	-	-
Assistant Grant Manager	-	1.0	1.0	-	-
Assistant Payroll Manager	-	-	-	1.0	1.0
Assistant Treasurer	1.0	1.0	1.0	1.0	1.0
Business Tax Specialist	2.0	2.0	2.0	2.0	2.0
Business Operations Accountant	-	-	-	1.0	1.0
Chief Accountant	1.0	1.0	1.0	1.0	1.0
Director of Financial Services	0.3	-	-	-	-
Executive Assistant	0.2	-	-	-	-
Grants Analyst - Part-time	-	0.5	0.5	-	-
Grants Assistant - Temp Part-Time	0.5	0.5	0.5	-	-
Grants Manager	1.0	1.0	1.0	-	-
Head Cashier	1.0	1.0	1.0	1.0	1.0
Senior Accountant	1.0	1.0	1.0	1.0	1.0
Senior Payroll Specialist	1.0	1.0	1.0	-	-
Treasurer/Retirement & Financial Planning Resource Manager	1.0	1.0	1.0	1.0	1.0
<b>Total</b>	<b>30.6</b>	<b>31.0</b>	<b>31.0</b>	<b>29.0</b>	<b>29.0</b>

# PERFORMANCE MEASUREMENT & BENCHMARKS

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To accomplish the implementation of strategic planning and performance measurement, you need:

- Buy-in
- Plan
- Time
- Staff



# Florida Government Finance Officers Association

EDUCATION

NETWORKING

LEADERSHIP

INFORMATION

# THANK YOU