Performance Management Information System

Finance, Audit and Accountability Committee Briefing
August 29, 2006
Purpose
Goals
Procurement Process
System Features
Dashboard Capabilities
Metrics Management Example
Projected Schedule
Project Cost
Questions
A Performance Management tool enables us to manage our strategic objectives in a standard and consistent manner.
Performance Management Information System

GOALS

- Provide a consistent methodology to measure and compare performance over multiple years
- Provide data to benchmark best practices to continually improve service delivery
- Improve organization
  - Strengthen staff accountability
  - Enhance decision making
  - Improve customer service
RFCSP issued January 5, 2006
- Solicitation included a pre-proposal conference with vendors
- Issued 1 addendum to initial RFCSP to fully answer vendor questions

Evaluation Criteria

<table>
<thead>
<tr>
<th>Evaluation Criteria</th>
<th>Weight</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost to the City</td>
<td>25%</td>
</tr>
<tr>
<td>Capability, Credibility &amp; Expertise of the Proposer</td>
<td>10%</td>
</tr>
<tr>
<td>Functional Match to City Requirements</td>
<td>20%</td>
</tr>
<tr>
<td>Technical Match to City Requirements</td>
<td>10%</td>
</tr>
<tr>
<td>Configuration Options within the system</td>
<td>10%</td>
</tr>
<tr>
<td>Data Conversion</td>
<td>10%</td>
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<tr>
<td>Training and Ease of Use of the System</td>
<td>15%</td>
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</tbody>
</table>
Departments represented on Voting Committee formed in January 2006:
- Office of Financial Services
- Public Works and Transportation
- Street Services
- Human Resources
- Communication and Information Services

Vendors Cognos Corporation, Hyperion Solutions Corporation and Active Strategy Inc. demonstrated their systems during the first week of February 2006

Two proposals received February 10, 2006
Voting Committee scored Cognos Corporation the most advantageous proposer in March 2006
Key items Evaluation committee assessed:

- Functionality, Reliability, Supportability
- Configuration Options
- Conversion Capabilities
- Integration with Other Systems
Web based system with easy to use features and functionality
Consistent metrics and measurements for key performance indicators
Forecasting and trend analysis capabilities
Customized views for all levels of the organization
Administrative, security and system audit capabilities
Automated notification of variances
Property Taxes - School/Colleges

- $1,293,556,200
- $1,250,402,921

Total

Sales-Use/Vehicle

Total Sales/Use Tax & Vehicles Fees

- Total Sales & Lic: $117,314,975
- $70,388,985
- $0

San Diego

Top 5 Tax Property Tax Payers

Amount of Tax

- $35,000,000
- $30,000,000
- $25,000,000
- $20,000,000
- $15,000,000
- $10,000,000
- $5,000,000
- $0

KILROY REALTY L P
- PACIFIC BELL TELEPHONE COMPANY
- QUALCOMM INC
- SAN DIEGO GAS & ELECTRIC COMPANY
- SOUTHERN CALIFORNIA EDISON CO.

Property Owner

Total Property Tax

- County
- City
- Elementary School
- High School
- Unified School Community College
- School Fund
- Special Districts
- Sales, Use Tax/License Fees

- $0
- $100,000,000
- $800,000,000

Example from San Diego
Performance Management Information System

DASHBOARD SAMPLE – JILL JORDAN’S VIEW

Citizen Satisfaction Survey
August 2006

CMO Service Measures | Value | Trend
--- | --- | ---
Average CRMS Response Time | 5 hrs | ↓
Time to complete Priority I calls | 2 hrs | ↑
Initiatives Completed this FY | 22 | ↑
Revenue for the City | 165M | ↑
Citywide Complaints | 101 | ↓

Jill Jordan’s Watch List

<table>
<thead>
<tr>
<th>Status</th>
<th>Trend</th>
<th>Service</th>
<th>Budget Amt</th>
<th>Actual Amt</th>
<th>Variance Amt</th>
</tr>
</thead>
<tbody>
<tr>
<td>🔴</td>
<td>▲</td>
<td>Vendor Recruitment/Education</td>
<td>$179,632</td>
<td>$179,632</td>
<td>$0</td>
</tr>
<tr>
<td>★</td>
<td>▲</td>
<td>Department Support – Development Services</td>
<td>$3,027,916</td>
<td>$315,415</td>
<td>$2,712,501</td>
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<tr>
<td>✔</td>
<td>▲</td>
<td>Forward Dallas! Comprehensive Plan</td>
<td>$480,667</td>
<td>$480,667</td>
<td>$0</td>
</tr>
<tr>
<td>🔸</td>
<td>▼</td>
<td>Real Estate for Private Development</td>
<td>$765,617</td>
<td>$429,617</td>
<td>$336,000</td>
</tr>
<tr>
<td>✔</td>
<td>▲</td>
<td>Construction Plan Review and Permitting</td>
<td>$4,627,799</td>
<td>$0</td>
<td>$4,627,799</td>
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<tr>
<td>★</td>
<td>▲</td>
<td>Urban Land Bank</td>
<td>$250,232</td>
<td>$190,232</td>
<td>$60,000</td>
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<tr>
<td>✔</td>
<td>▲</td>
<td>Business Development</td>
<td>$900,234</td>
<td>$900,234</td>
<td>$0</td>
</tr>
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Performance Management Information System

DASHBOARD SAMPLE - DEPARTMENT VIEW

Department Watch List

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My Report

EXPENDITURE

Top 6 Variance from Budget Amt

- Finance Department
- Office of the General Council Department
- Council & Public Affairs App
- Office of the Auditor
- Regional Parks
- Business Support

Top 6 Variance from Budget %

- Finance Department
- Office of the General Council Department
- Council & Public Affairs App
- Office of the Auditor
- Regional Parks
- Business Support
## Economic Development - Priority 1

### Develop the Southern Sector, Water, West Dallas, Environmental Initiatives

<table>
<thead>
<tr>
<th>Status</th>
<th>Detail</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Green" /></td>
<td>Retail Development - City Manager</td>
</tr>
<tr>
<td><img src="image" alt="Green" /></td>
<td>Develop a regional Family Aquatic Center in the Southern Sector - City Manager</td>
</tr>
<tr>
<td><img src="image" alt="Green" /></td>
<td>Affordable housing developers for subdivision infrastructure street improvements - City Manager</td>
</tr>
<tr>
<td><img src="image" alt="Red" /></td>
<td>Acquire vacant, tax-delinquent lots for sale to developers for affordable housing - City Manager</td>
</tr>
<tr>
<td><img src="image" alt="Green" /></td>
<td>Fund Public Improvement Projects and Home Repairs/Replacements in targeted low-income neighborhoods - City Manager</td>
</tr>
<tr>
<td><img src="image" alt="Green" /></td>
<td>Develop Long Range Water Supply strategies for City of Dallas for Region C Water Plan - City Manager</td>
</tr>
<tr>
<td><img src="image" alt="Red" /></td>
<td>Complete and implement the 5-Year Water - City Manager</td>
</tr>
<tr>
<td><img src="image" alt="Red" /></td>
<td>Reduce the average life of the water/wastewater mains by replacing 50% of the system within 35 years - City Manager</td>
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**Trending (up or down)**
<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
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<tr>
<td>Council Approval</td>
<td>09/06</td>
</tr>
<tr>
<td>Begin Project: “Dallas Measures”</td>
<td>10/06</td>
</tr>
<tr>
<td>System Configuration</td>
<td>01/07</td>
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<td>Estimated Go Live</td>
<td>06/07</td>
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PROJECT COST – VENDOR TOTAL $661,020

◆ Project Vendor Cost - $661,020
  ◆ Software License       $300,000
  ◆ 5 Years Maintenance    $161,020
  ◆ Implementation Assistance $200,000
QUESTIONS?