Session 2: Performance Management Over Time and Across Communities

No AI Needed!

Quick Poll: PollEv.com/stephaniehirsch900

3. Origin Story for Stat Programs

CompStat: NYPD

1994

4. Origin Story for Stat Programs

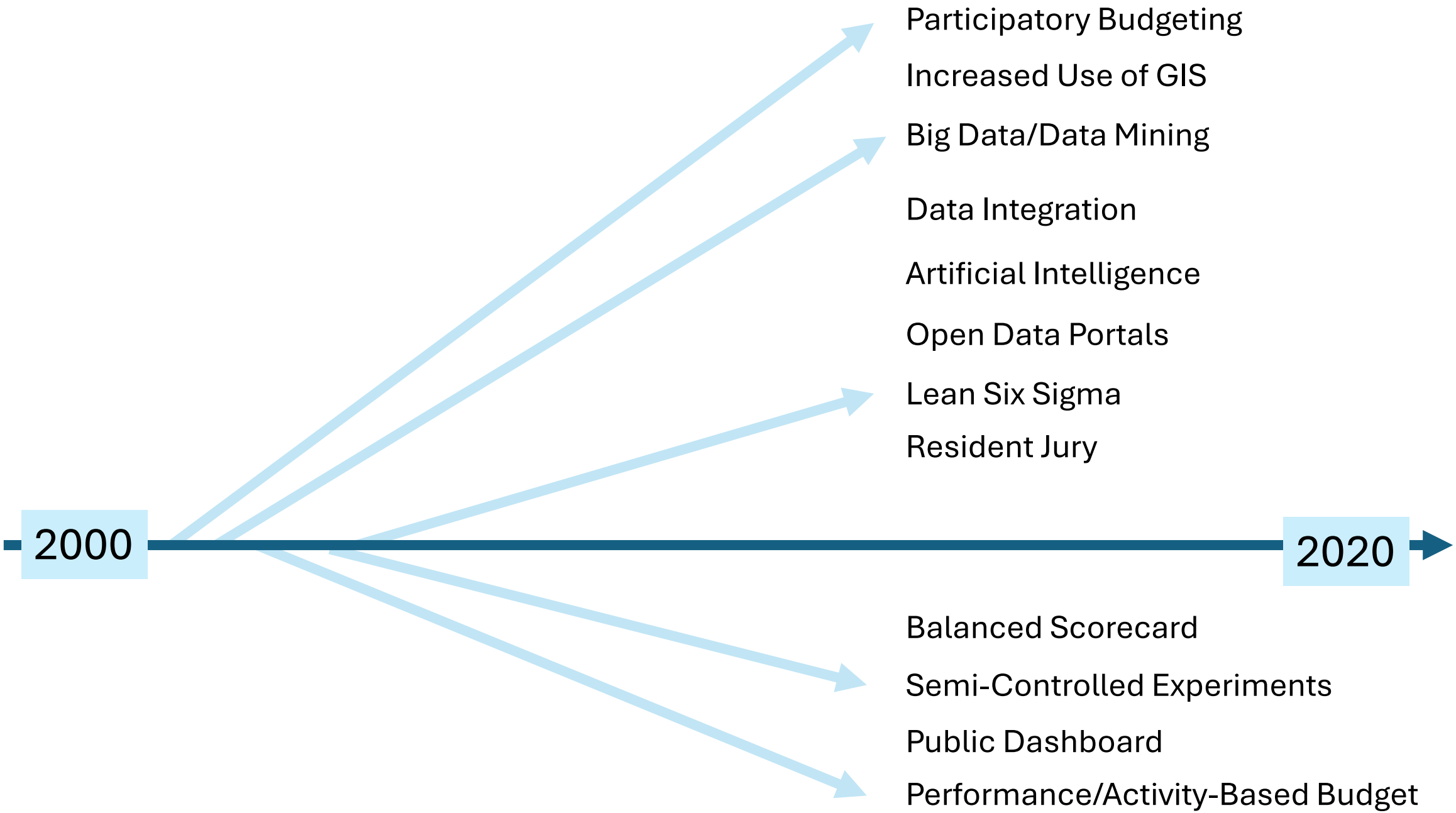
CitiStat: Baltimore

1999

SomerStat: Somerville

2006

6. Origin Story for Stat Programs



EauStat: Eau Claire

2022

8. Most Basic Ingredients

- Standing (at least quarterly), structured meetings with all divisions.
- Attended by representative from each core admin area, plus related/interested staff.
- Structured and consistent agenda for each meeting, with material prepared in advance.
- Integrates and helps inform other planning/management/engagement initiatives.
- May (or may not) take the place of other supervisory meetings.

9. Why Stat? Local Government is Portfolio of Unrelated Functions

DEVELOPMENT & OPERATIONS

- Engineering
- Community Development
  - Inspections
  - Housing
  - Planning
  - Economic Development
- Community Services
  - Forestry
  - Streets
  - Utilities
  - Parks
  - Recreation
  - Transit

CORE ADMIN DEPARTMENTS

- Finance
  - Financial Ops
  - Assessing
  - Purchasing
  - Accounting
- City Attorney
- Human Resources & Risk Management
- Information Technology

CITY MANAGER'S OFFICE

- Clerk & Elections
- Media/ Communications
- Equity, Diversity, & Inclusion
- EauStat
- Neighborhood Services
  - Code Enforcement
  - Parking
  - Customer Service

COMMUNITY

- Library
- Health

PUBLIC SAFETY

- Police
  - Communications Center
  - Patrol
  - Investigation
  - Professional Standards
- Fire
  - Rescue
  - Fire Suppression
  - Fire Prevention

10. Standing (at least quarterly), structured meetings with all divisions

Monthly (48 Meetings Annually)
- Neighborhood Services
- Human Resources & Risk Management
- Information Technology
- EDI

Every Other Month (66 Meetings Annually)
- Housing
- Inspections
- Planning & Zoning
- Police
- Parks, Forestry, Cemeteries, B&G
- Recreation
- Streets Operations, Fleet, and Central Equipment
- Transit
- Utilities
- Engineering
- Fire and EMS

Quarterly (24 Meetings Annually)
- Assessing
- Finance Administration
- Financial Operations
- Purchasing
- Accounting Services
- Library

Not Yet Scheduled (TBD)
- City Attorney's Office
- City Clerk/Elections
- Housing Authority
- Health

11. Attended by representative from each core admin area, plus related staff

- Finance Department
- Human Resources
- City Attorney
- City Manager's Office
- EauStat Analyst
- Managers decide who else to invite from their division
- Related Staff, depending on meeting, such as…
  - Communications and Media attends Neighborhood Services meetings
  - Engineering Director attends Streets and Utilities meetings
  - Recreation Director attends Parks meetings

12. Structured and consistent agenda for each meeting, with material sent in advance.

- Financial Data, with year-end projections
  - Expenditures
  - Revenue
- Staffing Data
  - Benefit day usage
  - Overtime usage
- Current organizational chart with any hiring updates
- Activity data
- Others, as available…
  - Metrics
  - Goals
  - Survey Results
- Tasks

13. Examples of Finance Data - Fire

Review of Finances - Expenditures

FIRE

SUPPRESSION OPERATIONS

		CURRENT YEAR				PRIOR YEARS		
		Budget	YTD	Projected	Difference	2023	2022	2021
100 .55.556.1832.601	PAYROLL WAGES	$5,271,755	$1,253,087	$3,580,248	**$1,691,507**	$4,394,150	$4,430,168	$4,302,641
100 .55.556.1832.604	HEALTH INS(ER)	$1,320,814	$277,506	$792,874	**$527,940**	$1,072,147	$1,139,537	$1,099,257
100 .55.556.1832.604	WRF(ER)	$994,823	$278,806	$796,589	**$198,234**	$951,775	$904,223	$879,099
100 .55.556.1832.603	SPECIAL PAYS	$295,900	$40,494	$115,698	**$180,202**	$356,349	$373,285	$361,504
100 .55.556.1832.602	PAYROLL OVERTIME	$224,800	$164,072	$468,778	**($243,978)**	$531,984	$652,192	$622,436
100 .55.556.1832.635	INSURANCE	$119,100	$29,775	$85,071	$34,029	$119,100	$119,100	$119,100
100 .55.556.1832.604	EMPLOYER PAID BENEFITS	$99,674	$22,142	$63,262	$36,412	$74,791	$77,708	$75,265
100 .55.556.1832.613	FLEET REPAIR PARTS	$70,000	$18,234	$52,098	$17,902	$114,684	$98,218	$61,738
100 .55.556.1832.604	HEALTH INSURANCE DEDUCTIBLE	$63,954	$15,989	$45,681	$18,273	$65,300	$65,200	$69,600
100 .55.556.1832.613	FLEET FUEL	$50,000	$4,735	$13,528	$36,472	$54,951	$62,559	$40,138
100 .55.556.1832.644	UNIFORMS	$40,100	$5,516	$15,760	$24,340	$61,566	$33,263	$32,435
100 .55.556.1832.613	REPAIRS TO BUILDINGS	$40,000	$10,095	$28,842	$11,158	$41,432	$38,353	$29,088
100 .55.556.1832.646	REPAIR PARTS & SUPPLIES	$18,000	$5,692	$16,262	$1,738	$13,288	$15,916	$13,018
100 .55.556.1832.607	EDUCATION REIMBURSEMENT	$15,400	$1,153	$3,295	$12,105	$9,339	$6,362	$9,296
100 .55.556.1832.646	BLDG MTRLS & JNTRL SUPPLIES	$10,500	$2,712	$7,748	$2,752	$14,303	$10,684	$11,302
100 .55.556.1832.649	EQUIPMENT PURCHASES (<	$10,000	$6,047	$17,278	**($7,278)**	$5,375	$1,622	$1,701

14. Examples of Finance Data - Fire

Review of Finances - Revenue

FIRE

		CURRENT YEAR				PRIOR YEARS		
		Budget	YTD	Projected	Difference	2023	2022	2021
100 .01.000.0000.462	SERVICE CHARGE-HAZ MAT A	$0	($750)	($2,143)	$2,143	($3,000)	($3,000)	($3,000)
100 .01.000.0000.443	AMBULANCE FEES-HOSPITALS	$0	$0	$0	$0	$0	($51,250)	($102,500)
100 .01.000.0000.443	FIRE DEPT FEES-NON TAX	($7,500)	($2,835)	($8,099)	$599	($12,041)	($26,357)	($16,678)
100 .01.000.0000.443	FIRE DEPT FEES-TAXABLE	($10,000)	($1,841)	($5,261)	($4,739)	($12,099)	($10,579)	($5,531)
100 .01.000.0000.460	HAZ MATL "B" CONTRACT-E.C. CO.	($20,000)	$0	$0	($20,000)	($41,894)	($1,641)	($20,400)
100 .01.000.0000.414	STATE AID-PYMT FOR AMB SERVICE	($157,000)	$0	$0	($157,000)	($161,815)	($157,556)	($158,496)
100 .01.000.0000.461	AMBULANCE FEES-TOWNSHIPS	($631,000)	($499,334)	($1,426,669)	$795,669	($400,582)	($319,979)	($244,572)
100 .01.000.0000.443	REGIONAL AMBULANCE SERVICE	($950,000)	($171,925)	($491,214)	($458,786)	($1,294,856)	($979,296)	($972,666)
100 .01.000.0000.443	AMBULANCE SERVICE	($2,100,000)	($433,374)	($1,238,211)	($861,789)	($2,229,739)	($2,326,602)	($1,874,941)
Total		($3,875,500)	($1,110,059)	($3,171,597)	($703,903)	($4,156,025)	($3,876,261)	($3,398,784)

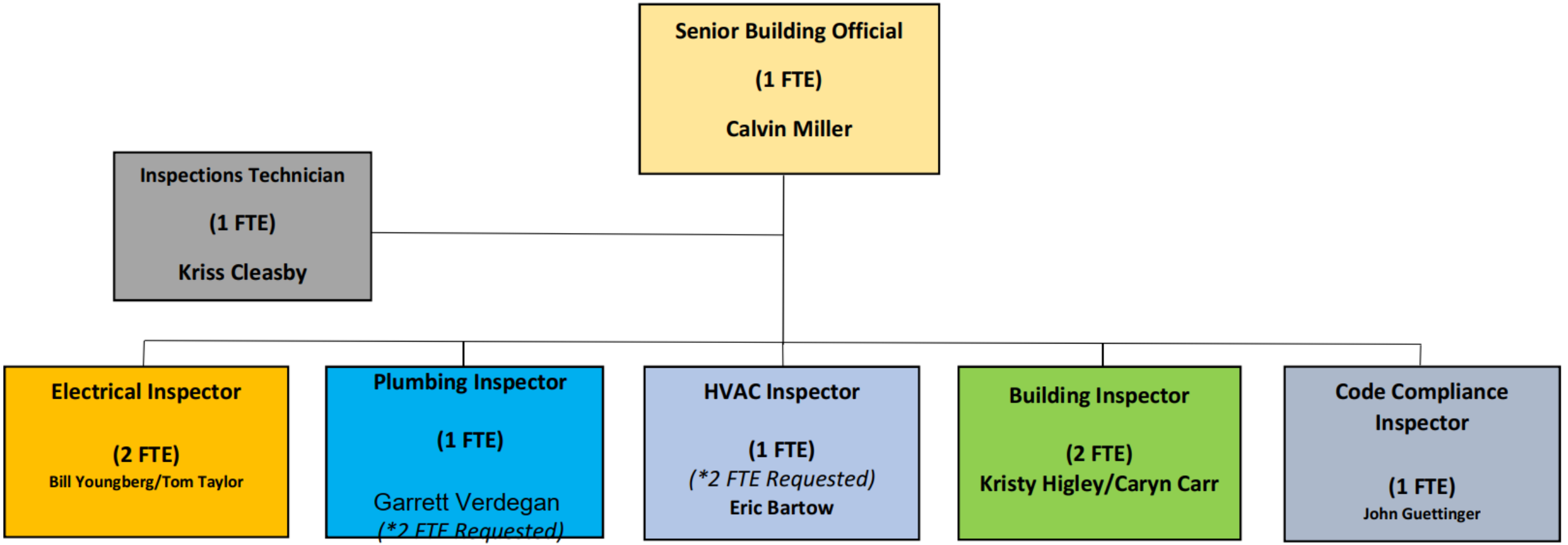
15. Examples of Finance Data - Inspections

Review of Finances - Revenue

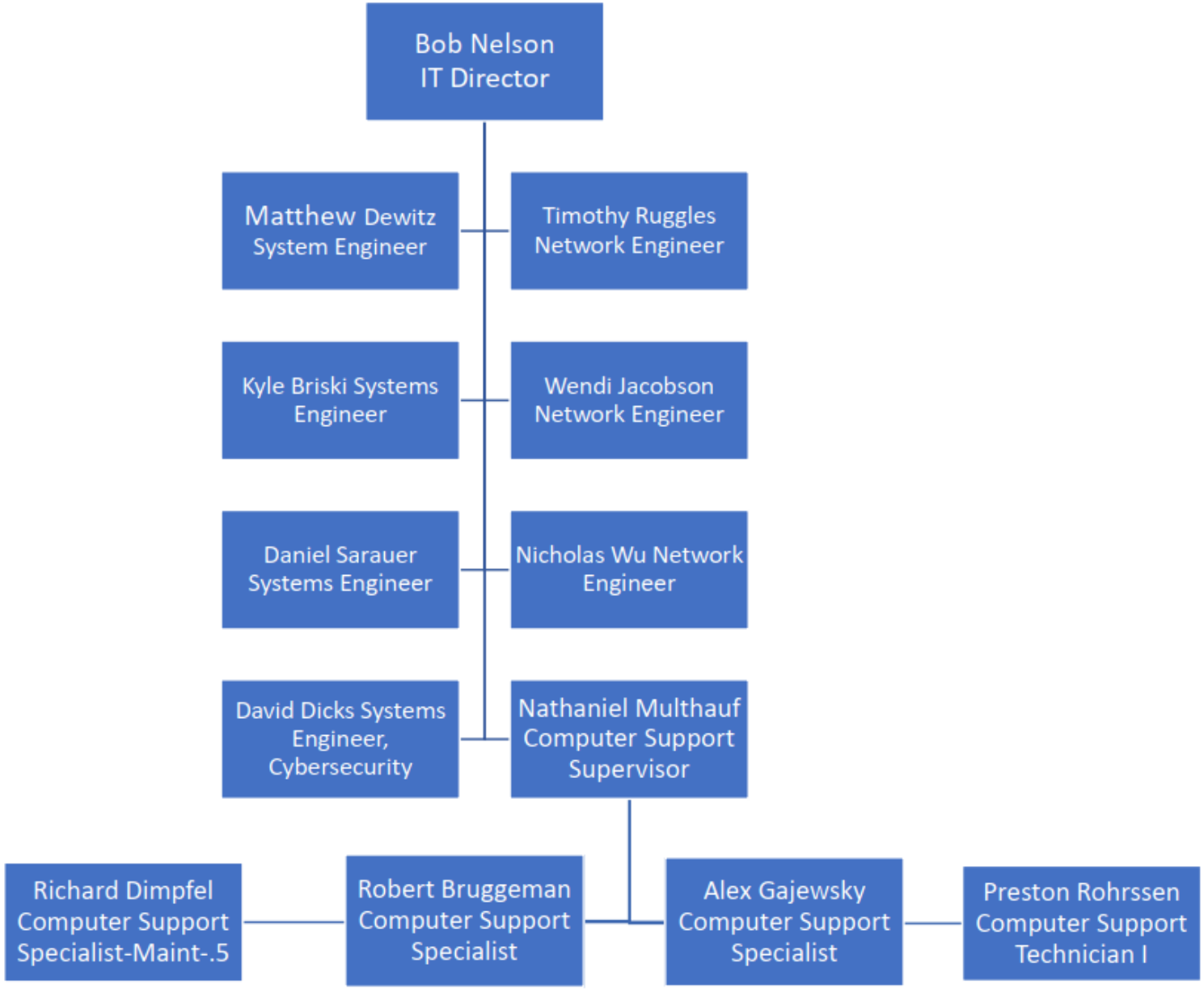
COMMUNITY DEVELOPMENT

		CURRENT YEAR				PRIOR YEARS		
		Budget	YTD	Projected	Difference	2023	2022	2021
100 .01.000.0000.440	DEVELOPMENT REVIEW FEE	($12,000)	$0	$0	($12,000)	($3,638)	($9,884)	($4,700)
100 .01.000.0000.426	BILLBOARD & SIGN PERMITS	($13,000)	($5,310)	($15,171)	$2,171	($13,917)	($11,035)	($13,365)
100 .01.000.0000.429	OTHER PERMITS	($35,000)	($1,877)	($5,363)	($29,637)	($4,531)	($28,344)	($15,664)
100 .01.000.0000.440	SITE PLAN FEES	($59,000)	($2,280)	($6,514)	($52,486)	($32,198)	($46,938)	($31,665)
100 .01.000.0000.425	ELECTRICAL PERMITS	($140,000)	($32,711)	($93,460)	($46,540)	($129,413)	($111,794)	($104,219)
100 .01.000.0000.425	HEATING/AIR COND PERMITS	($220,000)	($86,959)	($248,454)	$28,454	($194,659)	($175,946)	($156,405)
100 .01.000.0000.425	PLUMBING PERMITS	($315,000)	($67,705)	($193,443)	($121,557)	($78,891)	($251,740)	($214,885)
100 .01.000.0000.425	BUILDING PERMITS	($816,000)	($131,442)	($375,549)	($440,451)	($668,858)	($653,561)	($639,382)
Total		($1,610,000)	($328,284)	($937,954)	($672,046)	($1,126,105)	($1,289,241)	($1,180,284)

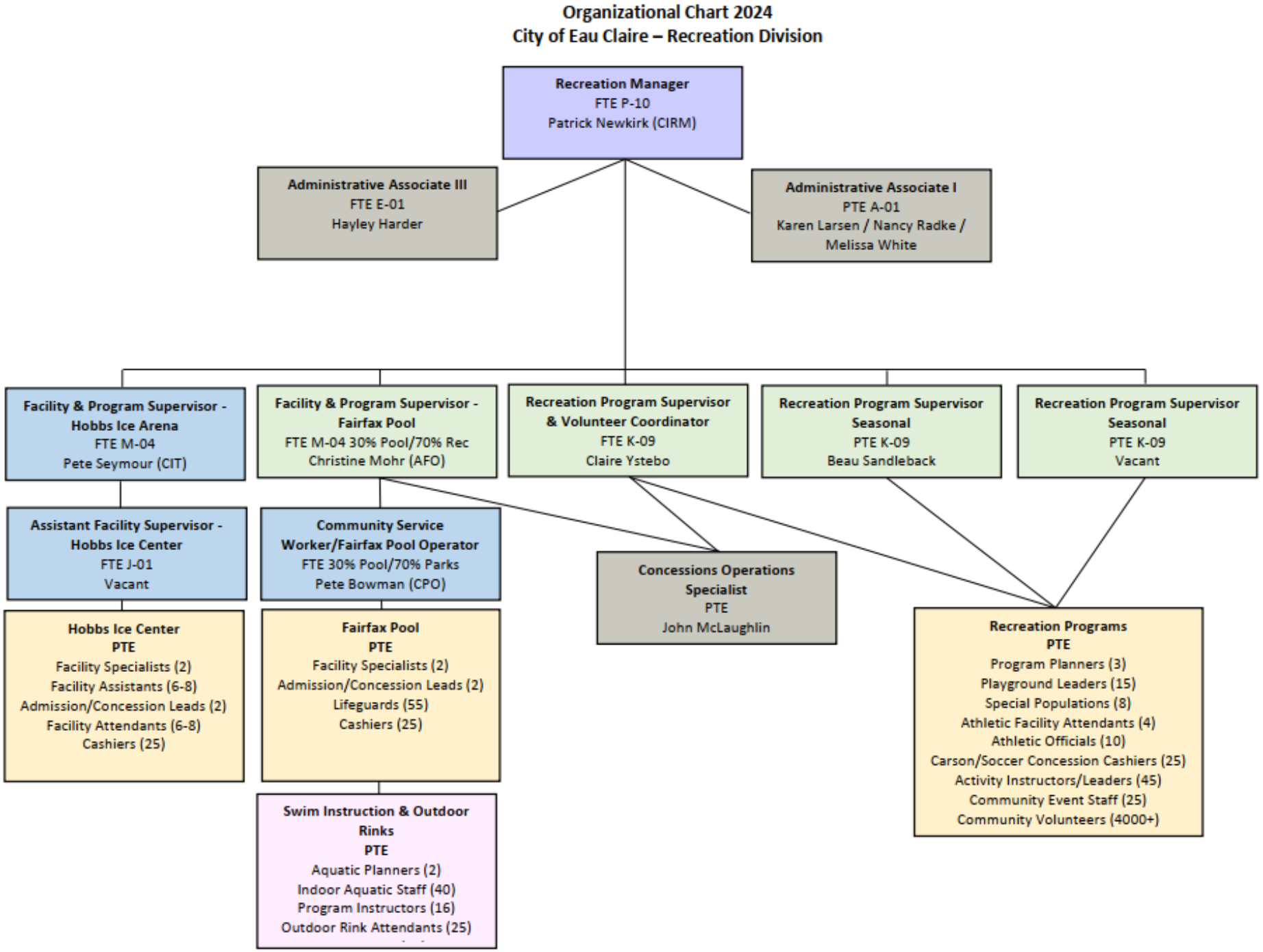
16. Examples of Staffing Data - Inspections



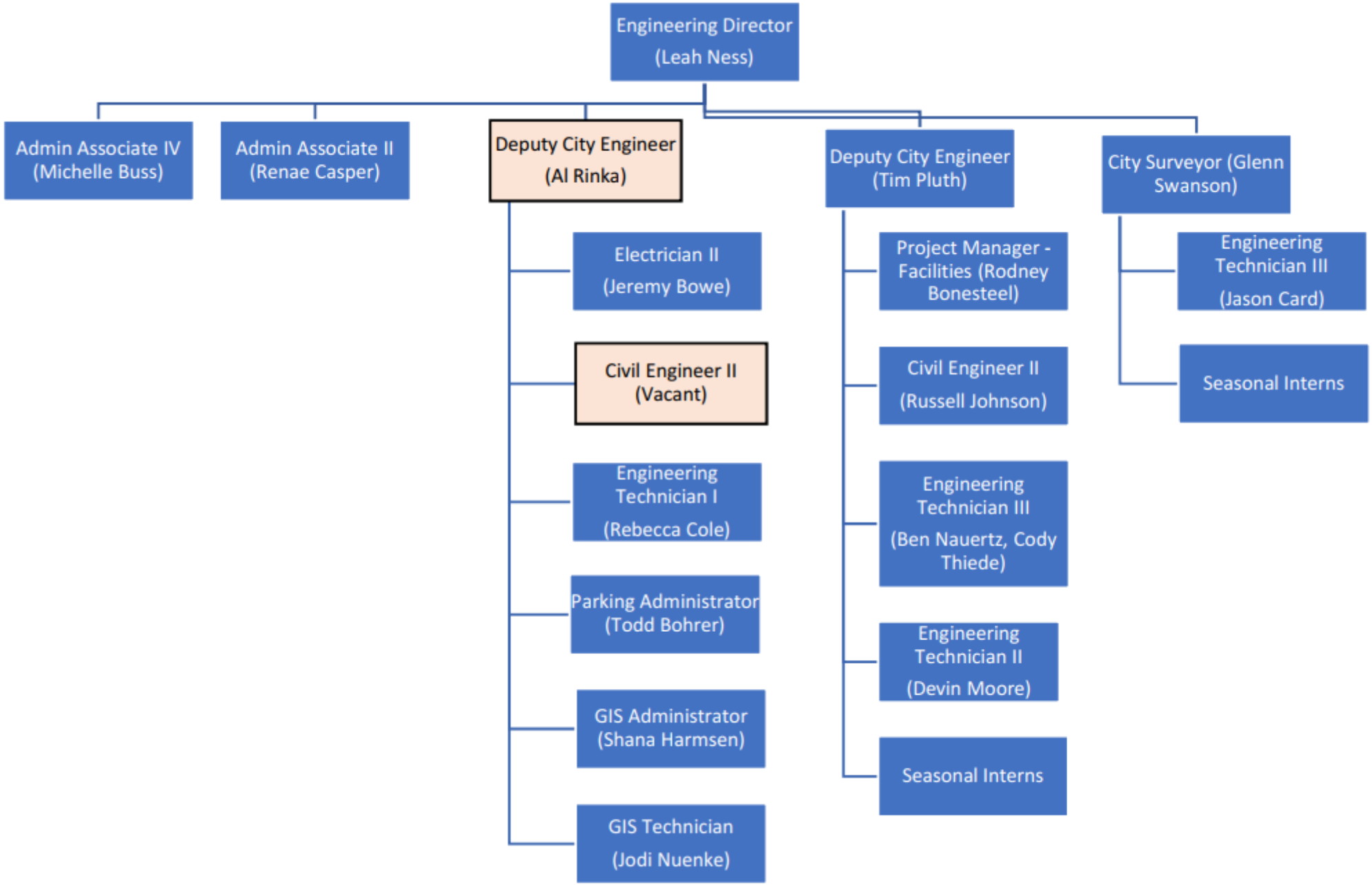
17. Examples of Staffing Data - IT



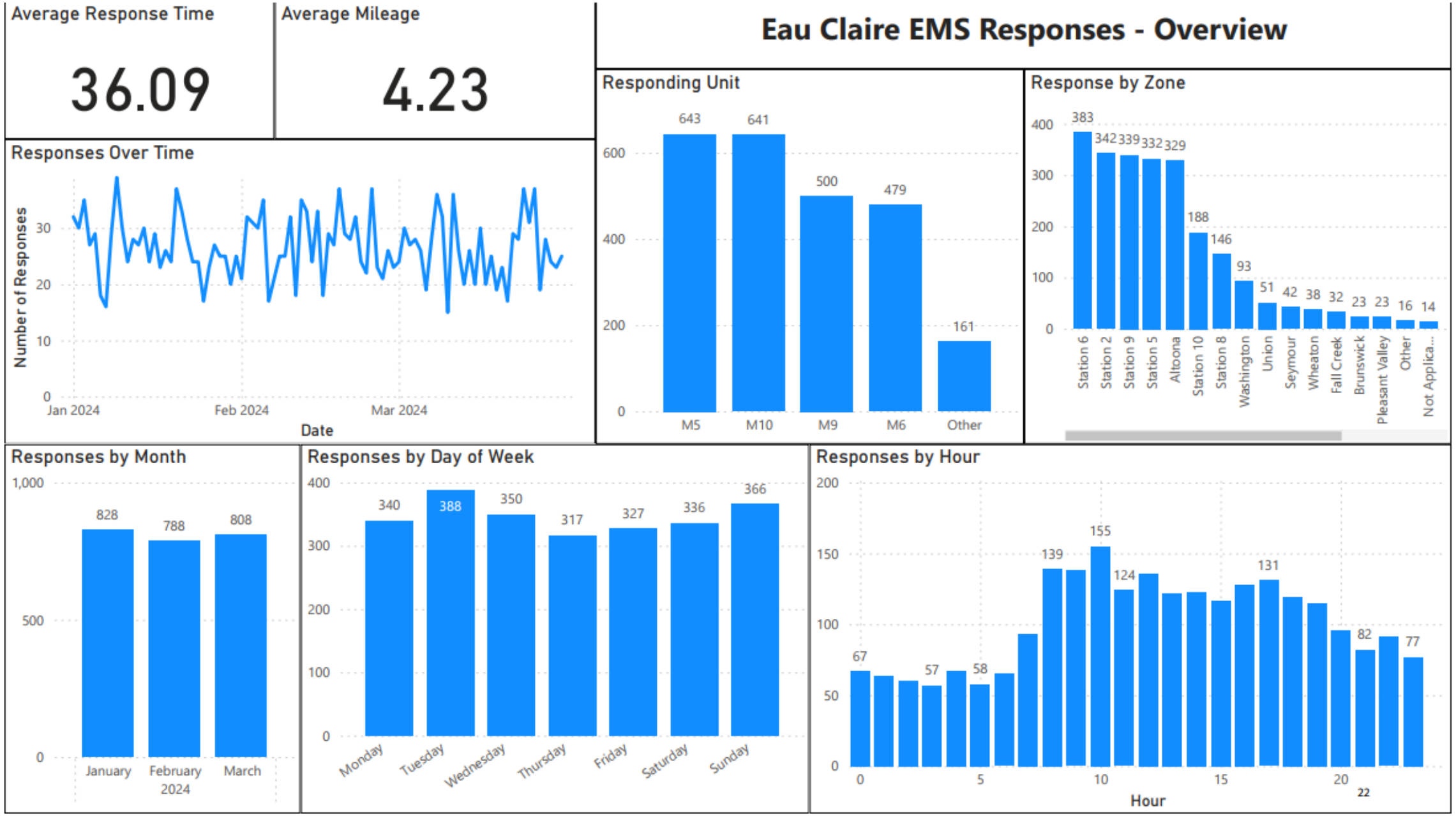
18. Examples of Staffing Data - Recreation



19. Examples of Staffing Data - Engineering



20. Examples of Activity Data - Fire



21. Examples of Staffing Data - Inspections

Permits by Type and Year through 5/10				
Report Code	2023	2024	Change	% Change
Residential HVAC	156	190	34	22%
Residential Plumbing	115	134	19	17%
Right-of-Way	113	128	15	13%
Fire Department Burning 1 Day	108	86	-22	-20%
Residential Electrical	65	62	-3	-5%
Commercial Electrical	52	66	14	27%
Building Exterior	47	54	7	15%
Commercial HVAC	38	60	22	58%
Residential Remodel/Alteration	49	41	-8	-16%
Commercial Plumbing	13	61	48	369%
Wall Sign	29	43	14	48%
Commercial Remodel/Alteration	28	24	-4	-14%
New 1 & 2 Family Home	19	21	2	11%
Fire Department Burning 3 Day	20	15	-5	-25%
Footing & Foundation	13	13	0	0%
Accessory Structure	11	14	3	27%
License Inspections	10	14	4	40%
New Commercial Building	10	11	1	10%
Ground Sign	7	13	6	86%
Lane Closure Encroachment	9	10	1	11%

22. Examples of Staffing Data - Recreation

FAIRFAX PARK MUNICIPAL SWIMMING POOL

HISTORY OF OPERATIONS

	2018	2019	2020	2021	2022	2023
Revenues	$328,763	$298,582	$9,293	$299,946	$327,070	$397,316
Expenses	$398,140	$470,381	$149,547	$390,352	$472,269	$553,527
Net	**-$64,957**	**-$167,155**	**-$136,619**	**-$86,671**	**-$145,199**	**-$156,211**

STAFF POSITIONS

	2018	2019	2020	2021	2022	2023
Total Staff Part-Time	79	79	0	55	66	96
Total Staff Full-Time	0.5	0.5	0.5	0.5	0.5	0.5

POOL ACTIVITY

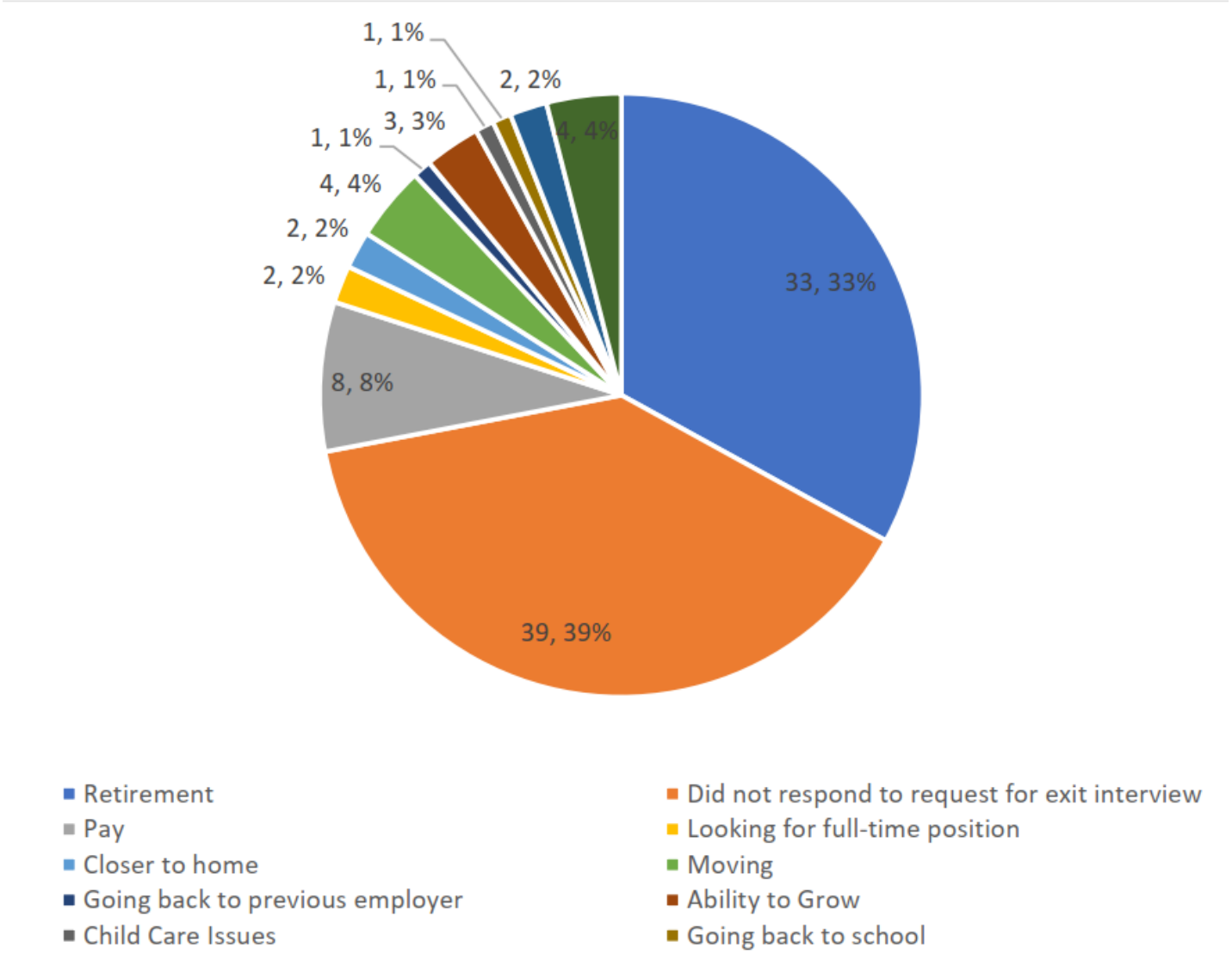
	2018	2019	2020	2021	2022	2023
Attendance	65,574	58,002	0	61,336	54,561	62,929
Season Pass Sales	2,837	3,141	0	2,897	2022	3197
*Scholarships	467	455	0	396	510	419
Days Open	97	95	0	83	78	84

season pass numbers reflect total number of people which hold a pass

BUS RIDERSHIP NO CHARGE

	2018	2019	2020	2021	2022	2023
Number of Riders	3,230	2,962	0	629	1,724	2,148

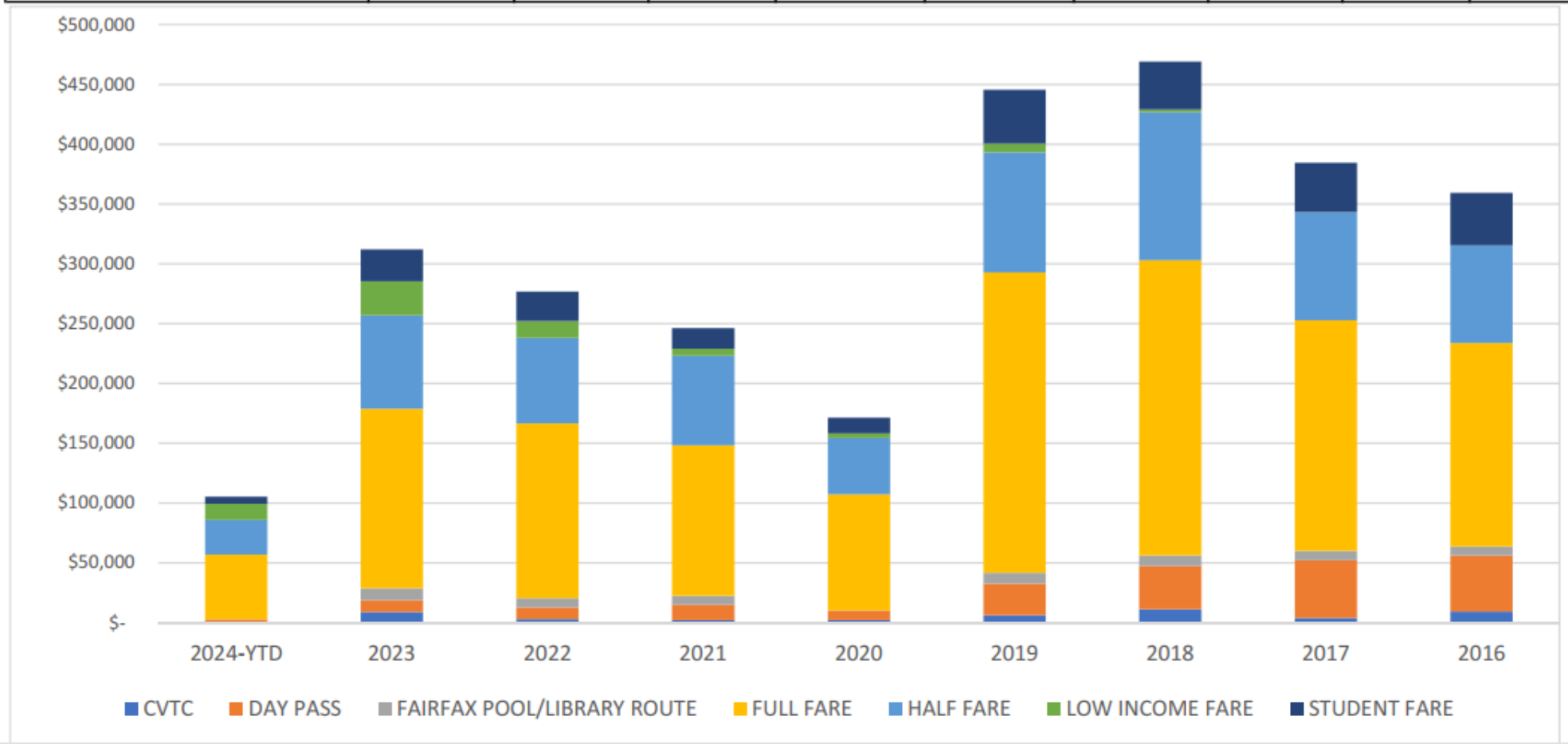
23. Examples of Activity Data - HR



Years of Service at Time of Resignation	
Under 1	17
1	17
2	4
3	1
4	6
5	5
6	6
8	2
9	1
10	1
11	2
12	2
13	1
14	1
24	1
	67

24. Examples of Activity Data - Transit

Revenue Line	2024-YTD	2023	2022	2021	2020	2019	2018	2017	2016
CVTC	$ -	$ 8,960	$ 2,940	$ 2,100	$ 2,240	$ 6,240	$ 11,295	$ 3,950	$ 9,310
DAY PASS	$ 2,906	$ 9,959	$ 9,911	$ 13,013	$ 8,127	$ 26,435	$ 36,146	$ 48,225	$ 46,980
FAIRFAX POOL/LIBRARY ROUTE	$ -	$ 9,953	$ 7,617	$ 7,460	$ -	$ 9,048	$ 8,792	$ 7,914	$ 7,371
FULL FARE	$ 54,025	$ 149,863	$ 146,126	$ 125,682	$ 97,019	$ 250,999	$ 246,762	$ 192,611	$ 170,185
HALF FARE	$ 28,826	$ 78,122	$ 71,387	$ 74,770	$ 46,972	$ 100,592	$ 123,693	$ 90,611	$ 81,572
LOW INCOME FARE	$ 13,634	$ 28,459	$ 14,144	$ 5,916	$ 3,860	$ 7,199	$ 2,358	$ -	$ -
STUDENT FARE	$ 5,905	$ 26,799	$ 24,616	$ 17,348	$ 13,183	$ 45,036	$ 39,961	$ 40,999	$ 43,785



25. Examples of Task Lists - Recreation

Task	Discuss?	Status	Entry Date	Source
Meet with Library to see if Recreation and Library can potentially collaborate on programming. Update 9/18/23: Key challenge is that Library does not charge for programming, while Recreation must charge for programming to cover costs.	Y	In Progress	14-Aug-23	EauStat
Consider charging clients for credit card convenience fee.	Y	In Progress	01-Jan-24	EauStat
Consolidate special event billing.	Y	In Progress	01-Jan-24	EauStat
Incororate part time staff into pay plan.	Y	In Progress	01-Jan-24	EauStat
Staff for concessions vs. paying organizations for volunteers. Update 10/26/23: Looking at different options. Payout to teams is currently high. Could be outsourced. Will look at data once season is over.	Y	In Progress	01-Jan-24	EauStat
Could there be a way for people to reserve fields real time and get an updated code for bathrooms?	Y	In Progress	01-Jan-24	EauStat

26. Examples of Task Lists - Engineering

Task	Discuss?	Status	Date	Source
Charge for street vacations when possible	Yes	In Progress	8/23/23	Other
Plan for opening of half moon trail. Update 4/24/24: Complete!	Yes	Complete	8/23/23	Other
PCI Data Analysis	No	Complete	8/23/23	Dave
Consider options for traffic calming and enforcement on Clairemont.	Yes	In Progress	9/18/23	Other
Next steps with "comprehensive multi-modal transportation joint session" for downtown.	Yes	In Progress	9/18/23	Other
Evaluate lowering trail and street lighting. Could match park hours. Used to have whiteway lighting assessment.	Yes	In Progress	10/26/23	EauStat
Consider adding additional hardware to allow for dimming of lights	Yes	In Progress	3/13/2024	EauStat
Apply for grant to address expensive lighting zones	Yes	In Progress	3/13/2024	EauStat
Consider adding lighting and traffic control boxes to caretegraph. Cartegraph has a module that supports this.	Yes	In Progress	3/13/2024	EauStat

27. Integrates and helps inform other planning/management/engagement initiatives.

- Strategic Planning
- Annual Budget Process
- Collective Bargaining
- Resident and Staff Surveys
- Information for City Council
- Weekly Newsletter
- Grant Writing

28. How to get it off the ground?

- Who prepares the slides?
- Does it need dedicated staff?
- Do you need to have already determined metrics?
- What would you do with existing management meetings?
- Do managers want to be part of a Stat program?
- How formal should it be?

LoGIC Cross-Community Data Sharing