



# ClearPoint Strategy: How to gain organizational buy-in



# Where we started

- No overarching County Strategic Plan
- No County Performance Management strategy
- No Centralized person or office for Strategy and Performance Management
- No internal Department Performance Management system in place
- Department Strategic Plan existed, no system by which to monitor and report progress

# Which strategy model are you?



Public Service, Public Value, Public Leadership

# Gaining Buy-in

Why a unified strategy helps much like flying a V formation

- Conserves their energy. Each bird flies slightly above the bird in front of him, resulting in a reduction of wind resistance. i.e. Not everyone has to blaze a new trail and design a new process. Benefit from those ahead of you.
- Flying in formation makes it easier for birds to track one another and may assist with the communication and coordination within the group. i.e. Administration and staff know their part in this process and where they can expect to be as the journey progresses.

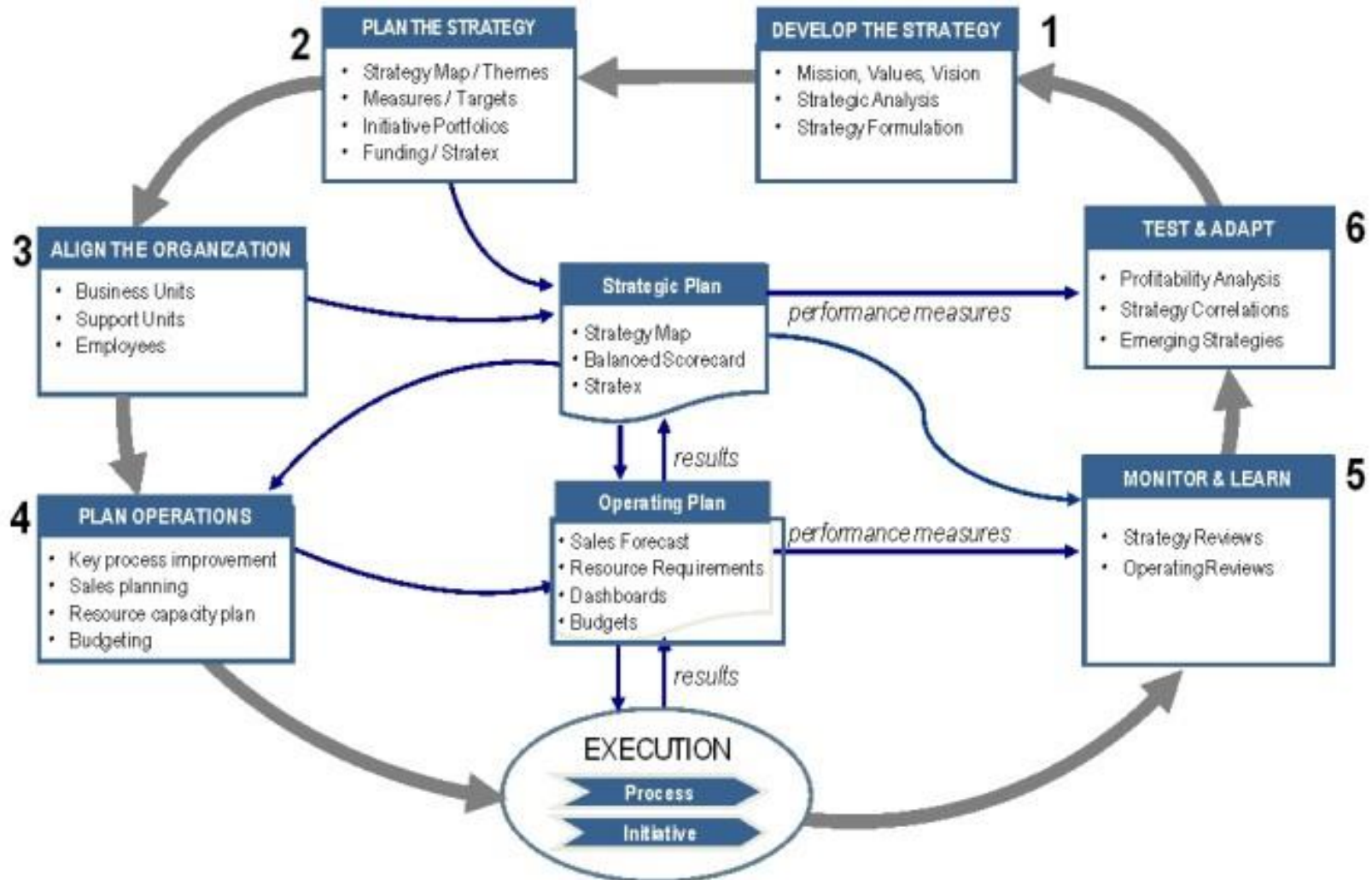
# Which strategy model are you?



Public Service, Public Value, Public Leadership

# Kaplan/Norton Strategy Execution Loop

**Figure 1: The Management System for Strategy Execution Links Strategic Planning and Operational Execution**



# Trying Hard Is Not Good Enough



*How To Produce Measurable Improvements  
For Customers and Communities*

Mark Friedman

# Results Based Accountability

	Quantity	Quality
Effort		
Effect		



# Results Based Accountability

## How much did we do?

# Customers served  
(by customer characteristic)

# Activities  
(by type of activity)

## How well did we do it?

% Common measures  
Workload ratio, staff turnover rate, staff morale, percent of staff fully trained, worker safety, unit cost, customer satisfaction: *Did we treat you well?*

% Activity-specific measures  
Percent of actions timely and correct, percent clients completing activity, percent of actions meeting standards

## Is Anyone Better Off?

# Skills / Knowledge

# Attitude / Opinion

# Behavior

# Circumstance

% Skills / Knowledge

% Attitude / Opinion  
including customer satisfaction:  
*Did we help you with your problems?*

% Behavior

% Circumstance

# Kaplan/Norton Strategy Map

- **Vision Statement**
- **Mission Statement**
- **Four Perspectives**
  - Identify performance categories from the viewpoints of various stakeholders – Financial, Customer, Operational, Employee
- **Key Performance Areas (KPAs)**
  - Key business objectives identified by the organization that are measured through an aggregation of Key Performance Indicators and non-Key Performance Indicators
- **Key Performance Indicators (KPIs)**
  - The most important metrics of an organization that demonstrate how effectively the organization is achieving key business objectives
- The Organizational Scorecard should link to organizational goals listed in the Strategic Plan
- All performance measures (KPIs and non-KPIs) link to a KPA

# Drilldown Relationship

**JOHNSON COUNTY**  
Mental Health

## Organizational Scorecard

**Vision** Placing the needs of our clients first, we are committed to creating a high performing organization that builds a healthy community through excellence in mental health care.

**Mission** Improve the mental health and quality of life for Johnson County residents by providing mental health and substance use services tailored to the needs of those we service, which are of the highest quality and easily accessible.

**Business Objectives and Strategic Goals**      **Key Performance Indicators**

<b>Financial Stability</b>	<p><b>Strengthen Our Financial Position</b></p> <ul style="list-style-type: none"> <li>Fee for service dollars</li> <li>Account receivable balance over 90 days</li> <li>% of fund balance to current year budget</li> </ul>
<b>Client Satisfaction and Quality Care</b>	<p><b>Advance Quality of Care</b>      <b>Enhance Client Satisfaction/Engagement</b></p> <ul style="list-style-type: none"> <li>Total unique clients served</li> <li>Client suicide</li> <li>% of adults competitively employed</li> <li>% of CBS youth living in permanent home</li> <li>% of youth regularly attending school</li> <li>% clients showing improved CAFAS/DLA scores</li> <li># Crisis calls and Contacts</li> <li>% of medical clients not keeping medical appointments</li> <li>% of adults and children not keeping appointments</li> </ul>
<b>Operational Effectiveness</b>	<p><b>Capitalize on Technology</b>      <b>Maximize Data and Information</b></p> <ul style="list-style-type: none"> <li>% of clients with myiP portal account</li> <li>% of clients accessing myiP within past 30 days</li> <li>% of measures not meeting target that show improvement</li> <li>% of appointment reminder calls completed via automation</li> </ul>
<b>Organizational Development</b>	<p><b>Improve Staff Satisfaction</b>      <b>Build Community Partnerships</b></p> <ul style="list-style-type: none"> <li>Composite % of employee satisfaction on annual gauge survey</li> <li>Total # of Community Presentations</li> <li>% of participants reporting increase in suicide prevention related skills, knowledge, and awareness (2-annual measure)</li> </ul>

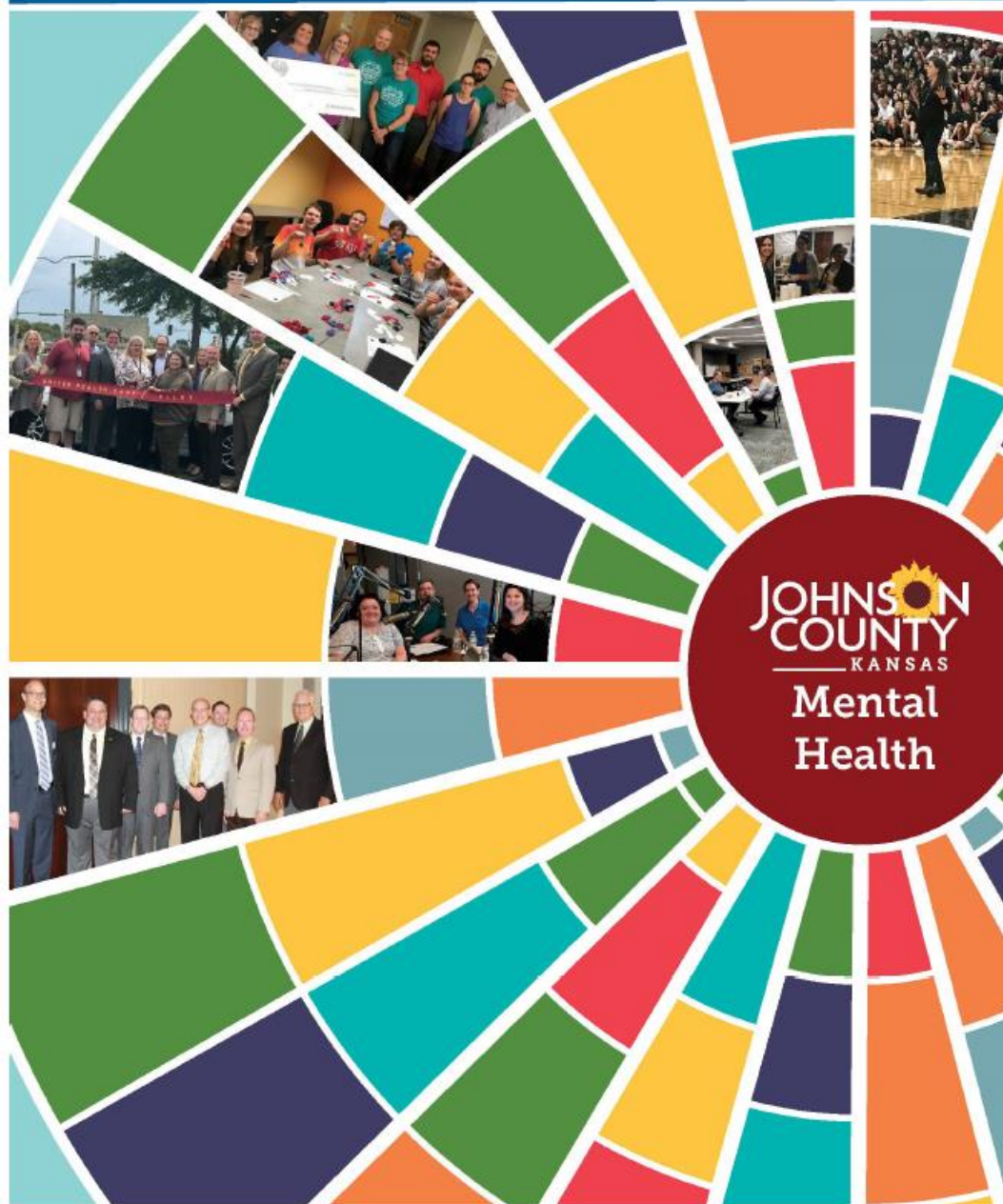
**JOHNSON COUNTY**  
Mental Health

## Dashboard of Key Performance Indicators

The Key Performance Indicator Dashboard represents a select set of 20 indicators that when looked at together, provide a snapshot of the overall health and well-being of Johnson County Mental Health. The measures selected contain 2 mix of key indicators from various department outcome measures. Prior year trend information is provided.

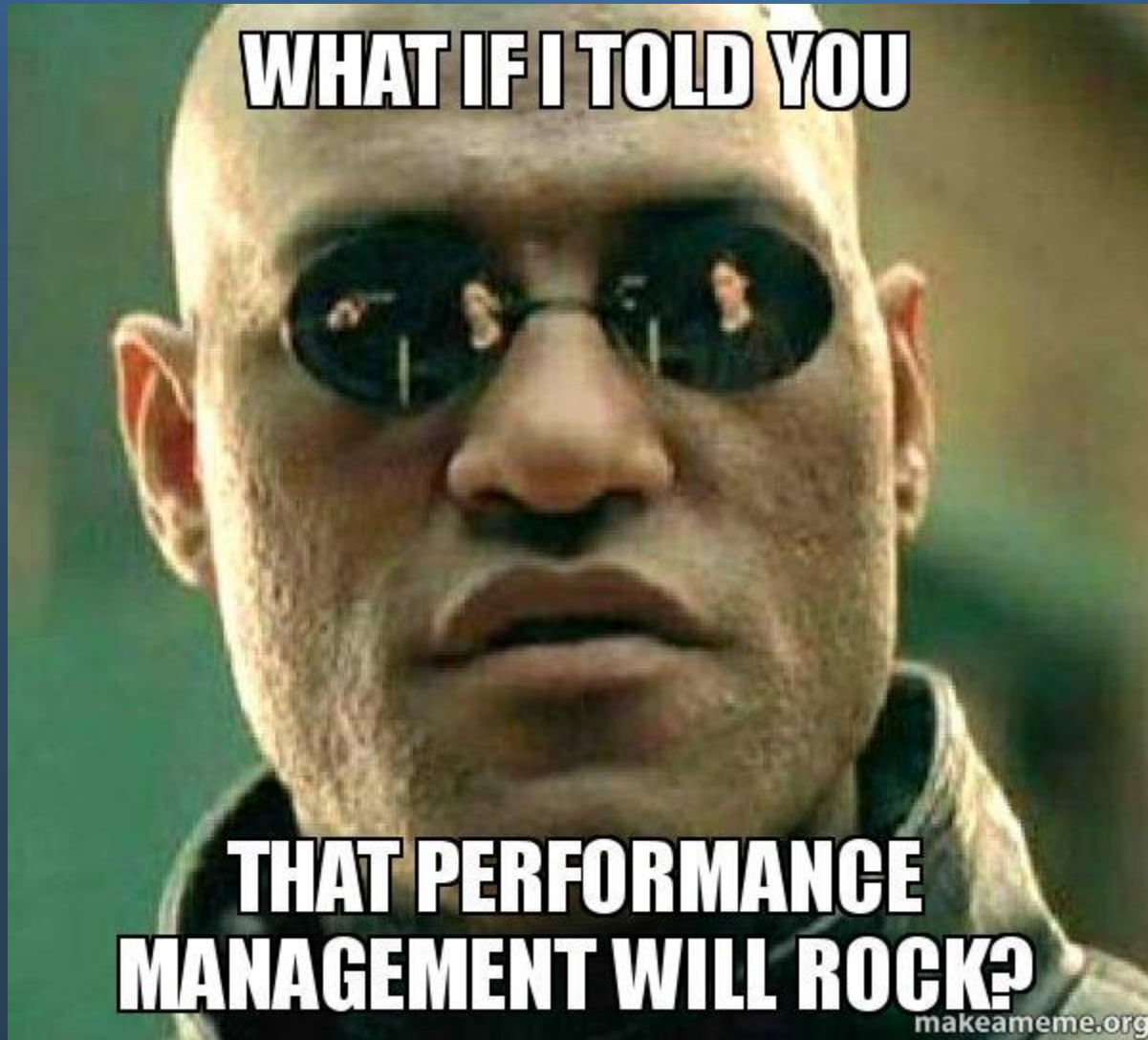
Key Indicator	2017	2018	2019	2019 Target	Met or Exceeded
1. Fee for Service dollars	\$6,136,473	\$7,242,344	\$7,822,000	\$7,822,000	⚡
2. % AR over 90 days	1.42%	2.04%	2.0%	1%	⚡
3. % of Fund balance to Current Year Budget	8.1%	4.4%	3.76%	1%	⚡
4. Total unique clients served	9,268	8,202	8,768	8,202	⚡
5. JCMHC Client suicide	21	22	16	10	⚡
6. % of Adult CBS clients competitively employed	40%	39%	38.96%	35%	⚡
7. % of CBS youth living in permanent home	70%	79%	80.24%	60%	⚡
8. % of youth regularly attending school	90%	90%	89%	85%	⚡
9. % of Clients showing positive change in CAPAS/DLA	53%	56%	59%	55%	⚡
10. TFCR calls and contacts	33,729	31,742	33,239	N/A	
11. % Medical Clients Not Keeping Medical Appointment	16.17%	15.06%	15.49%	1%	⚡
12. % Adult Clients Not Keeping Appointment	17.21%	18.18%	18.07%	1%	⚡
13. % Client Under 18 not keeping Appointment	12.87%	13.79%	14.4%	1%	⚡
14. % of Clients with myiP portal account	N/A	33.15%	52.36%	1%	⚡
15. % myiP clients accessing portal within past 30 days	N/A	10%	11.75%	1%	⚡
16. % of measures not meeting target that show improvement	55%	40%	32%	1%	⚡
17. % of appointment reminder calls completed via automation	N/A	80%	91%	80%	⚡
18. Composite % of employee satisfaction on annual Gauge survey	N/A	80%	81%	80%	⚡
19. Total # of community presentations per month	41	28	21	25	⚡
20. % of participants reporting increase in suicide prevention related skills, knowledge and awareness (2-annual measure)	97%	92%	100%	80%	⚡

# Mental Health 360 2020 Annual Performance Report



**SOUND STRATEGY, HIGH PERFORMANCE, TOTAL WELLNESS**

# Results Based Accountability



**WHAT IF I TOLD YOU**

**THAT PERFORMANCE  
MANAGEMENT WILL ROCK?**

makeameme.org

# County Department Implementation Plan

## Performance Measure/Scorecard Development Plan Update

### Phase I: Develop Balance Scorecards & Measures for Departments/Agencies

#### 1. Department Evaluations

- a. Schedule meeting with each dept/agency
- b. Determine which tier each dept/agency is in based on current process
  - Tier A: Dept/Agency has measures/good data collection, needs proper format
  - Tier B: Dept/Agency has few/no measures but moderate/good data collection
  - Tier C: Dept/Agency has no measures and little data collection and/or other factors that resulting a delay in starting this process

*This phase is completed.*

#### 2. Department Metric, Dashboard, & Balanced Scorecard Development

- a. Schedule meeting with each dept/agency
  - Meetings held with all except DA, District Cts, Election & Planning/Cont. Lic.*
  - Meetings will be held with remaining dept/agencies in 2021*
- b. Develop Balanced Scorecard, Mission & Vision, Key Performance Areas (KPA)
- c. Develop Dashcard and Key Performance Indicators (KPIs) for the KPA grouped by Financial, Customer, Organizational, Employee
- d. Load scorecard, dashboard and KPIs into Clearpoint
  - Once completed, dept/agencies will be able to do monthly/quarterly/annual reporting*

### Phase II: Develop County-wide Balanced Scorecard and Measures

- Identify departmental measures that will roll up into county-wide dashboard
- Create balanced scorecard/align Key Performance Areas with strategic plan
- Create dashboard & modify/replace existing Pulse measures as needed
- Will focus on this during 2021*

#### PULSE (current County-wide Measures)

- Measures to be updated with latest available data
- Vitals section to be updated with most recent reports
  - BOCC Priorities, Annual Report, Community Survey, Budget, CAFR, Trend, etc.*
- Infographics updated with data from latest Annual Report
- Will focus on this during 2021*

Agency/Department	Tier	comp	Mgr	Analyst
BOCC/Audit Services	B	Yes	Joe W	Mark
Budget	A	Yes	Joe C	Jack
Corrections	A	Yes	Maury	Ted
County Manager's Office	B	Yes	Joe W	Mark
Developmental Supports	A	Yes	Joe C	Jack
Emergency Mgmt & Comm	A	Yes	Maury	Ted
Facilities	A	Yes	Joe W	Gayle
Fleet Management	A	w/Fac	Joe W	Gayle
Health & Environment	A	Yes	Joe C	Gayle
Aging & Human Services	B	Yes	Joe C	Ted
JIMS	B	Yes	Maury	Mark
Library	B	Yes	Joe W	Ted
Mental Health	A	Yes	Joe C	Jack
Park & Rec	A	Yes	Joe W	Gayle
Public Works	B	Yes	Joe W	Gayle
Stormwater	B	w/PWK	Joe W	Gayle
Technology & Innovation	B	Yes	Joe W	Jack
Transit	A	Yes	Joe C	Gayle
Financial Mgmt & Admin	B	Yes	Maury	Ted
Risk Management	B	w/FMA	Maury	Robin
Wastewater	A	Yes	Joe W	Robin
Airport	C	Yes	Joe C	Mark
Appraiser	C	Yes	Joe C	Gayle
Med-Act (EMS)	C	Yes	Maury	Jack
Human Resources	C	Yes	Joe W	Ted
Treasury, Taxation & Vehicles	C	Yes	Maury	Ted
Sheriff	C	Yes	Maury	Gayle
Planning, Housing & Com Dev	C	Partially	Joe C	Mark
Contractor Licensing	C	w/PLN	Joe C	Mark
District Attorney	D	old PM	Maury	Gayle
District Courts	D	old PM	Maury	Mark
Election Office	D	old PM	Joe W	Gayle
Legal	D	old PM	Maury	Jack

We will reach our destination



Public Service, Public Value, Public Leadership



# What we learned

- Strategy and Performance Management can be achieved from the bottom up.
- While not ideal, lack of a Strategic Plan is not a show stopper. Seek out the unwritten goals.
- Build them an easy to understand framework. Good visual speed understanding.
- Make sure there is a win and appeal for everyone
- Gain some early champions
- Keep the education going to make it part of the culture
- Slow and steady wins the race





# Question/Discussion

## CONTACT

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Public Service, Public Value, Public Leadership

