OPENGOV

Implementing World-Class Performance Management in Bernalillo County, NM

Challenge

Needed an accessible, easy-to-use performance measurement system

Solution

Drive change management across the culture and work with OpenGov customer success teams to transition from traditional performance measurement to cloud-based software

Results

✓ Reduced data prep time from 4 hours to 5 minutes

✓ Saved 128 hours of business analyst time per year

✓ Implemented 300 performance measures for 35 departments

✓ Transitioned to cloud-based performance measurement in 9 months

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MARIA ZUNIGA
BUSINESS IMPROVEMENT & PERFORMANCE ADMINISTRATOR, BERNALILLO COUNTY, NM

About Bernalillo County

The most populous county in New Mexico, Bernalillo County has a rich cultural history that includes both Spanish colonial and Mexican rule. Today, Bernalillo County is a thriving and active community with diverse economic opportunities and a government committed to operating a high-performance organization. With 35 County departments – each with 10-12 specified key performance measures and objectives – Bernalillo County's staff sought a way to track and ensure effectiveness and accountability while also making that information available to the public. Their full solution story is featured in this case study where we explore how they effectively track performance measures.

Tell us about your OpenGov journey.

We launched OpenGov in October 2016. Our main focus initially was on performance measures. We have 35 departments at the county with 300 performance measures that we track. This work was previously done in spreadsheets and PDF books. When we chose OpenGov, we wanted to bring the numbers to life in a graphical format that was easy to understand. Now, we're focused on using visualized stories for each of our departments. Revenues, expenses, and special graphs for overtime are all added in along with some additional reports. All departments will use stories for quarterly department hearings.

What was your methodology and programmatic approach for engaging departments in performance management?

This has been the most fun and the hardest part. We faced all degrees of engagement and participation. Before, departments were checked out -- they only did performance measurement because they had to. We heard a lot of complaints that they felt no one was looking at it and that it didn't matter. We tried to turn that completely around so that they knew this is important, and that we ARE looking at it. We also made it transparent to the public so they're looking at it, too. Now we meet once a month with departments, which is no small feat. We've seen a big turnaround in engagement. We're still not at 100 percent, but some people did 180s- they didn't want to talk about it in the past and now they are coming to us and making suggestions for performance measures that they believe will have impact.

How did you turn people around?

A lot of it was getting the right people in the room. Once we get data into OpenGov, we send a link to the webpages and tell them 'here's your data'. We show them the benefit and the results of collecting the data from them. Seeing their data live on OpenGov has been eye-opening and gives them more ideas on how they can improve their work. They can also show their department heads what they're doing. Having the right technology has helped -- now we're able to show them graphs and the target lines. In the past, it was hard to see trends when looking at a table of numbers -- it's much easier to see trends and patterns in a graph.
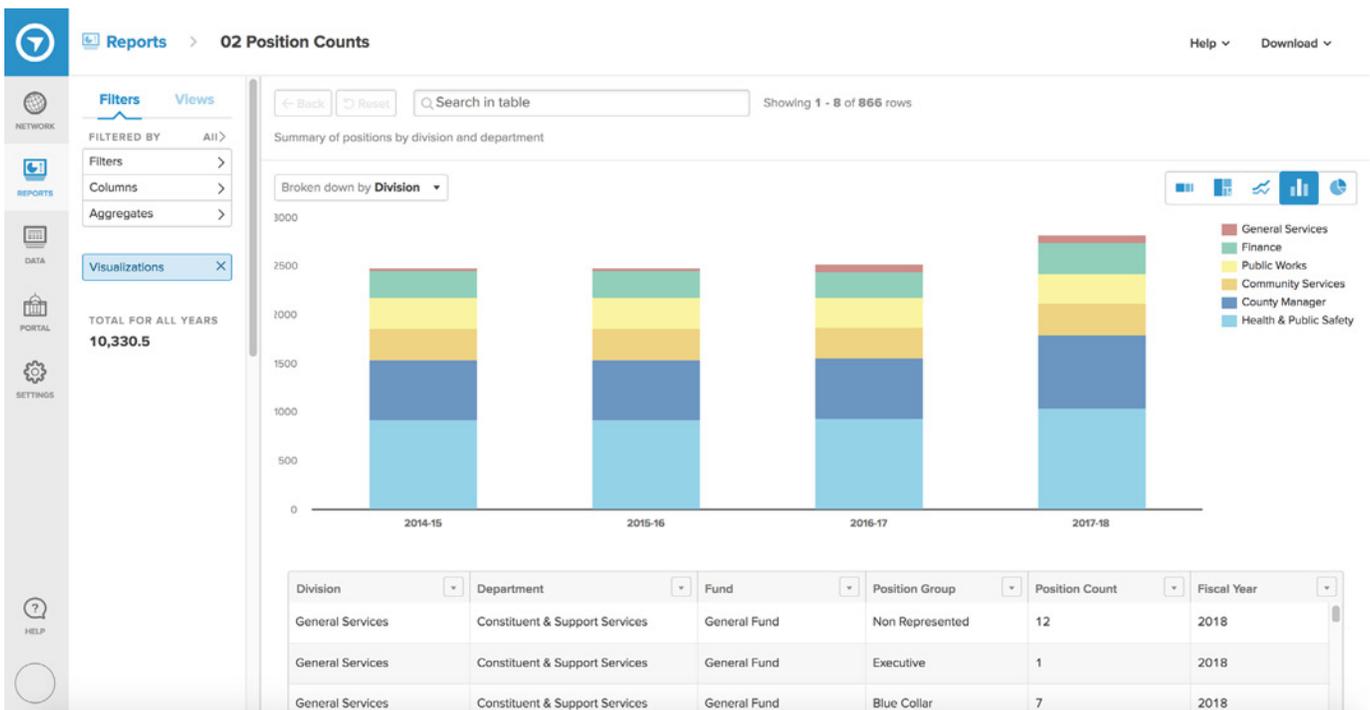
How did you build your program, and what did it take to get here?

We spent the first couple months looking at our processes to evaluate what we were doing and what we wanted to be doing. Everything pointed to dashboards. We didn't want to track things that weren't meaningful, so we spent a lot of time working with departments on figuring out how to measure what matters. It took a year to work with them on that.

We also spent a lot of time on the business process side and studied cities and counties that did performance measures well. We knew we needed to improve processes and liked the idea of a system that features live interactive dashboards in real time versus having to do it manually. We also conducted industry research. OpenGov aligned with what we

wanted to achieve and offered the features we were looking for. It took about nine months to prepare and once we started using OpenGov, about five months to be up and running fully. We have 300 individual performance measures that we needed to build out graphs for, so the volume was big.

## Tell us about the implementation process with OpenGov.

We had great partners at OpenGov. Everyone was very helpful. We're a very hands-on group so we wanted to do as much of it ourselves, because we wanted to be self-sufficient. The training was super helpful. We watched a lot of training videos and used OpenGov University, plus the trainers took the time to walk us through it. We would come back with lots of questions, and we learned and built things as we progressed along. Now we can easily build graphs all the time; it's not scary anymore.

How did you roll out the program?

As part of our OpenGov implementation we loaded five years of historical budget and actuals into the system along with the current year budget and actual. We continue to load updates to this data on a monthly basis and are working with our ERP team and the OpenGov team to eventually automate this process. First, we built quarterly reports for each of the county's 35 departments in OpenGov and created views in those reports so that the department and their budget analyst could analyze trends in revenue, expenditures, and positions. These views replace the manual process that occurred each quarter where four budget analysts would run reports in the SAP system for each of the 35 departments, extract the data to Excel, format the reports and then send them to departments for review and response to variances. On average this process would take the four budget analysts eight hours each quarter for a total of 128 hours per year, which cost the county approximately $5,000 per year in staff time. Now the analysts can spend this time savings in analyzing the trends and working with the departments in areas that need focus.

The quarterly reporting process was further enhanced in the second quarter with the use of the OpenGov dashboards, where dashboard tiles were created for each of the views in the budget reports so that management and staff can have an at-a-glance view of the entire department's trends in revenue, expenses, positions. More reports were linked in as well, such as travel, purchase orders and contracts.

For the third quarter, we took it one step further and implemented Stories for all departments which bring together the dashboards with the analysts and departments' narrative updates that explain the trends and variances into once place that is accessible to the organization, easy to use and has links that can be used to drill to the report for more detailed analysis.
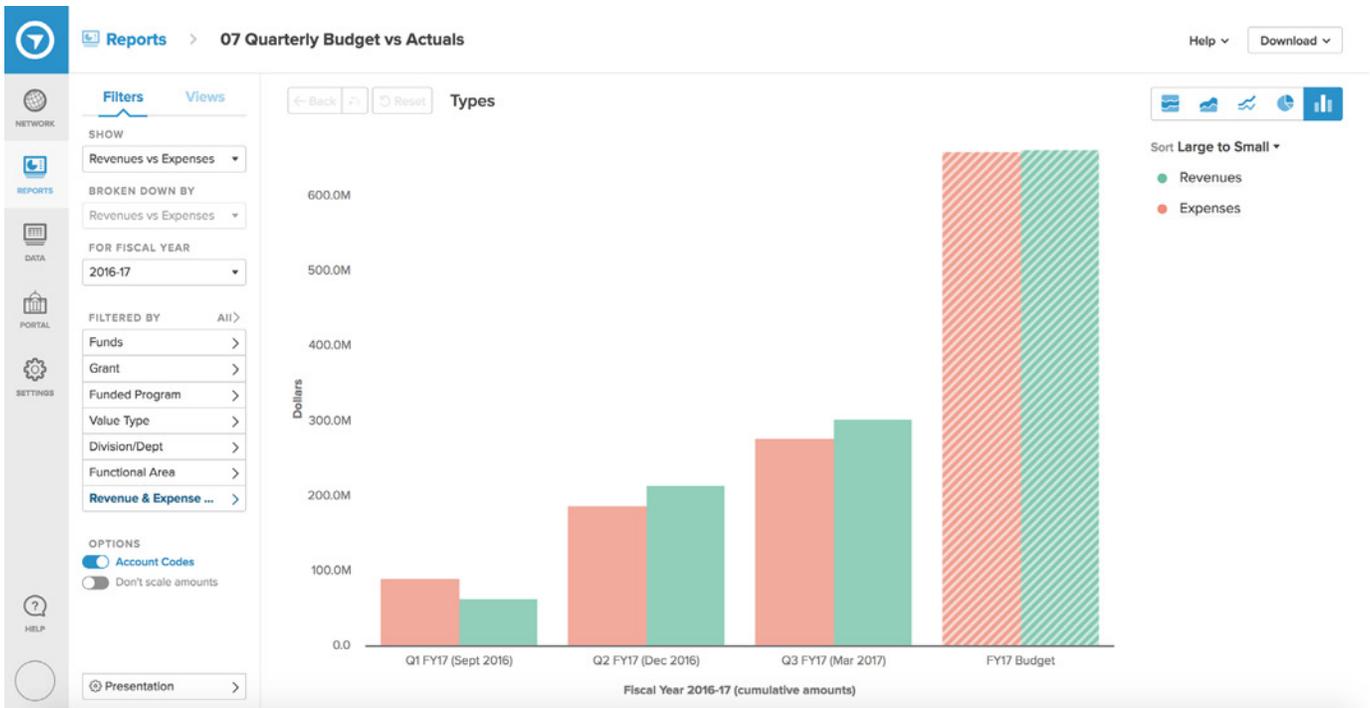
Please share your experience with OpenGov's customer support team.

The support team knows us very well! It's been great working with them; they're very responsive. We've worked with the same agents so they know what we're asking and why and we troubleshoot together, jump on a call, or screen share. It's very helpful when we're working on complex issues. We've been impressed with their response time and level of responsiveness and the quality of response -- and how they've taken the time to answer even our crazier questions.

We view OpenGov as a strategic partner. The response we've gotten from everyone at OpenGov has been impressive. They've taken the time to listen to what we wanted and built a partnership with us. You don't see that at other software companies -- especially bigger software companies like SAP where we never would get that interaction.

How did you measure success?

For us, participation and buy-in from departments is huge. When someone tells us they want to track a new measure -- we really see that as a sign of success. We wanted to make everything transparent including elected official's performance management -- which had been a sticking point in the past -- and we were able to implement that.

We've also experienced significant time savings. When launching our quarterly budget reports, it used to take half a day to prepare them, now we can do it in five minutes. We're much more time efficient and OpenGov saves us from having to rebuild graphs and recreate the wheel. Do it once and the template is there and you can use it whenever you need it.

For a government agency who may be considering implementing a new performance management program, what's your best advice on how to take the first step?

Start with industry research. A lot of people are doing it well, so don't reinvent the wheel.

Then tailor it for your organization. All of our processes and terminology is all tailored for how this county works and for our culture. We avoided the highly technical measurement terminology and made it more meaningful and kept it simple. We keep it user friendly for our people and the public as well.

If you share our priority of wanting a system that you can fully manage without needing to rely on your IT department, seek out a solution that allows that capability to be self-sufficient.

Lastly, you need to dedicate people to this if you're going to do it right. It would be a challenge for this to be a small part of someone's job because that person might have competing priorities. If you can dedicate one to two people working exclusively on this, you can generate much better results.

What's next for you?

Our goal is that this new process and using OpenGov will no longer be something different for people but will become the norm. And since we know we have better data now, we can make it easier for people to analyze and interpret it, thereby enabling them to make better data-driven decisions.