

TO: BOZEMAN PLANNING BOARD
FROM: CHRIS SAUNDERS, COMMUNITY DEVELOPMENT MANAGER
JON HENDERSON, DIRECTOR OF STRATEGIC SERVICES
TOM ROGERS, SENIOR PLANNER
RE: COMMUNITY PLAN UPDATE – INDICATORS (METRICS)
DATE: JUNE 18, 2019

Based on direction of the Board from the June 3, 2019 meeting staff has revised the indicators and metrics document to reflect Planning Board action on June 4th to create version 8, attached. The board concluded their discussion after completing review of Theme C. Please continue starting at Theme D.

The memo prepared for the June 3 meeting remains relevant and provide direction for the Boards effort. The memo is included below.

June 3, 2019 memo

Staff has revised the original proposed indicators (or metric) and integrated them with the goals and objectives as discussed at the May 21, 2019 Planning Board meeting. Each metric is located under a goal that reasonably relates to the desired outcome. Not all indicators fall neatly under a goal or objective. Not all goals have a directly relevant measure(s). Perhaps most importantly, not all goals and objectives should be quantitatively measured.

Memo outline:

1. Direction and questions for the Board
2. Indicator background and selection criteria
3. Policy and relationship to goals
4. Implementation
5. Document and Administrative Edits

Direction and questions for the Board

Board tasks:

- Verify draft metrics against each goal, ask questions, and suggest improvements.
- Identify missing indicators and propose ideas for consideration.
- Choose a maximum of two indicators per goal (exceptions will be allowed).

We are asking the Board to refine and prioritize these indicators. Tracking and managing a vast array of data may not improve the outcome of the plan. Carefully crafted and selected indicators under each theme are suggested. However, no one metric will capture the intent of the Community Plan. Citizens experience the community in qualitative ways, therefore considering only quantitative measures will not fully reflect plan outcomes. Additional qualitative measures may be needed in addition to any quantitative measures employed.

With respect to those goals that do not have indicators associated with them, if the Board believes one of these goals must be measured staff respectfully request the Board further refine and define the goal and identify possible data sets or metric to measure the desired outcome.

Indicators background and selection criteria

Strategic Services invested considerable time and effort to evaluate and refine the draft indicators presented to the Board for consideration.

The criteria of evaluation employed to identify and select an indicator was evaluated for its availability, accuracy, relevance, repeatability, durability of data (reasonable surety that the data will be available in the foreseeable future), and effort to gather on a timely basis. Data may become obsolete over time and need to be replaced, adjusted or eliminated.

It is important to understand how a data set is created to ensure the tool is relevant to our purposes. For data that is less commonly understood staff reviewed the sources and methods to better understand how the data is created. This process either eliminated a potential source or solidified its validity and is included in the indicators presented to you for your consideration. While effort was made to understand the scope of work involved to collect and maintain each metric, some indicators will require further investigation.

There is significant value in identifying data that is currently being utilized by the City to measure other initiatives to improve validity and leverage existing efforts. The Bozeman Strategic Plan list seven vision statements. Vision seven is “High Performance Organization.” Subsection 7.4, performance metrics, is to utilize key performance and cost measures to monitor, track and improve the planning and delivery of City programs and services, and promote greater accountability, effectiveness and efficiency. Learn from those outside city government and measure specific tasks for performance.

- a) Develop Data Analysis Tools** - Develop more sophisticated analytical tools to access, monitor, measure, and analyze data to inform decision making.
- b) Set Performance Measures** - Set performance measures that align with the Strategic Plan.
- c) Analyze and Collect Data from Performance Measures** - Analyze and collect data from performance measures to ensure implementation of the Strategic Plan, and redesign measures as needed.

- d) Strategic Municipal Service Delivery Expectations** - Strategically manage community and employee expectations about the City's capacity to deliver services.

Discussion of metrics for the Community Plan will be considered in context with this larger initiative. The Strategic Services Department is leading implementation of Strategic Plan 7.4. Some items may address both the Community Plan and another area of municipal operations. In such cases, the performance metric will be crafted to address both issues.

Effective indicators are:

- Relevant to the Plan's vision and goals to track meaningful desired outcomes;
- Clear and understandable and do not rely on overly complex definitions or calculations;
- Defensible and grounded in quality data that can be regularly reported and can be consistently and accurately tracked over time with a reasonable amount of effort;
- Useful in making decisions that affect the community, reflecting topics the community directly or indirectly addresses through local plans, policies or implementation programs;
- Interdisciplinary in that the same indicator can be used in conjunction with other City (and outside entity) plans and programs;
- Comparable to other regional, municipal, state or national benchmarks
- Supported by the community, staff and elected officials

A performance measurement system that requires excessive effort to implement will not continue over time as other priorities push it aside. In order to support long term success in implementation, Staff suggests that not more than two metrics be chosen for each goal in the Community Plan.

Policy and relationship to goals

The indicators are comingled below each set of objectives to capture the intent of the goal and not necessarily to an individual objective.

As a policy document the community has the ability to determine the meaning of the goal. The individual objectives are a temporal representation of its meaning and give some direction in how accomplishment of the goal can move forward. The objectives are not an exhaustive list of all possible implementation tools or efforts. The desire is to measure progress of the plan (or the City) overall.

Five goals do not have specific indicators associated with them. This is a result of three reasons:

- 1) Some goals are aspirational in nature for which a qualitative measure may not be possible or appropriate.
- 2) No agreeable or commonly accepted definition of the goal and, therefore, there is difficulty in measuring an outcome without a numerical definition.

- 3) Data needed to accurately measure progress does not exist or would be prohibitively difficult to incorporate.

Implementation

Identifying proper metrics and determining the current status is step one. Once a baseline is determined then we need to define what the target might be.

Developing common interpretation of the meaning of the goal and objective will be necessary. For example, Theme B. Goal 1. Commercial accessibility measure. How do we quantify ½ mile? By length of a physical sidewalk connection to the destination or as the crow flies? Additionally, are we measuring the *time* it takes to travel this distance?

Establishing these thresholds along with targets for each metric will occur once the overall plan is adopted.

Data must be tested and systemized for timeliness and consistency. In addition, as the City evolves its systems, developing capacity to manage, gather, organize, and present results may be necessary.

Document and Administrative Edits

Suggested changes to the Goals & Objectives V6 shown as ~~strikeout~~ and underline in the May 21, 2019 packet are hereby accepted in the June 4, 2019 V7 version. One exception, the phrase under Theme E, Goal 2, Objective “c” which stated “City to incorporate (adopt?) specific design guidance for multi-modal (check wording with Shawn K)” has been deleted.

All additions and subtractions based on the May 21 meeting are highlighted with ~~strikeout~~ and underline.

Attachments:

Integrated Goals & Objectives with supporting Indicators V8