

**City of New Orleans
Chief Administrative Office**

POLICY MEMORANDUM No. 126

May 6, 2013

TO: All Departments, Boards, Agencies and Commissions

FROM: Andrew D. Kopplin, First Deputy Mayor/ Chief Administrative Officer

SUBJECT: Performance Management Policy

I. Purpose

To establish a policy governing performance management as an ongoing, systematic approach to improving results through evidence-based decision making, continuous organizational learning, and a focus on accountability for performance.

II. Scope

The policy applies to all City offices, departments, and boards receiving an appropriation from any operating fund of the City, and focuses on strategic planning, performance planning, performance measurement and review, performance reporting, and data quality.

III. Strategic Planning

To map out the City's overall direction and serve as the foundation for performance management, the CAO or his/her designee(s) shall lead and coordinate the development and periodic revision of a citywide strategic plan or framework, to be made available on the City's public website. The strategic plan or framework is intended to be used to align resources, foster the development of departmental operational plans, guide decision-making to attain goals and improve outcomes, and serve as a communication tool for all stakeholders.

IV. Performance Planning

In conjunction with the preparation of the annual operating budget, departments, offices, and boards seeking an appropriation from any operating fund of the City shall develop:

- Performance measure(s), or indicator(s) of results, demonstrating alignment of department, office, or board activities and resources to achieve the City's result-oriented goals and objectives.
- Annual targets, generally quantifiable, that communicate the extent of planned program accomplishment. Quarterly or semiannual targets may also be required. In the absence of at least one full year of baseline data, a target is not required in the first year of measurement.

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Department, office, and board performance measures may include indicators of outputs, efficiency, customer service, and/or intermediate outcomes.

V. Performance Measurement

Throughout the year, departments and offices shall monitor progress on performance measures for funded budget offers and report the results to the CAO or his/her designee(s) no more than 15 days after the end of each quarter, if available.

VI. Performance Review

To support operational decision-making in order to improve results, not less than quarterly, the CAO or his/her designee(s) shall, with the appropriate City leaders and managers, review and assess progress towards strategic goals, and make adjustments to operational plans, as appropriate.

VII. Performance Reporting

To account to the residents of New Orleans and the City Council for the spending of resources provided, the CAO or his/her designee(s) shall, not less than annually, lead and coordinate the development of a performance report, to be made available on the City's public website no more than 150 days after the end of the reporting period. Performance reporting shall adhere to the ***Suggested Guidelines for Voluntary Reporting of Service Efforts and Accomplishments (SEA) Performance Information*** as defined by the Governmental Accounting Standards Board or any successor organization. A copy of this document can be obtained by contacting the Chief Administrative Office.

VIII. Data Quality

City employees shall not knowingly report false or misleading performance data. To support the general accuracy and reliability of performance information, reduce the risk of inaccurate performance data, and provide a sufficient level of confidence to the public that the information presented in City performance reports is credible; the City shall implement procedures to address data quality. Procedures shall include the following basic steps:

- Build data quality.
 - Departments and offices shall document data collection and reporting procedures, and create standard definitions for all terms. **(See Attachments A and B)**
 - The CAO's designee(s) shall complete a review of the internal controls over the data collection and reporting procedures to ensure that departments and offices document adequate procedures.

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- Validate and verify data.
 - The CAO's designee(s), with consideration of cost effectiveness and prioritization, shall periodically review source data for consistency with reported data and provide feedback to departments on types of errors found and recommendations for improvement.
 - Departments and offices shall maintain performance result supporting documentation for four years, and in accordance with applicable City document retention policies.
 - Disclose limitations of data in performance reports.

IX. Inquiries

Should you have any questions relative to this policy, please contact the Chief Administrative Office at (504) 658-8600.

ADK/OJW/rth

Attachments