Learning to Use Your Instrumental Panel During Times of Extreme Turbulence:

Performance Measurement & Benchmarking in Ohio

March 9, 2012

By Tom Carroll
Loveland City Manager

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Presentation Overview

- Three reasons why local governments must measure performance.
- How Loveland uses performance measurement and benchmarking
- Discussion

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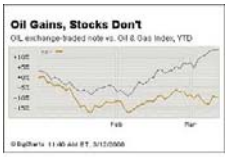
Performance measures are all around us.



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The Loveland Performance Measurement Experience

- Began with 2007 Budget.
  - Robert Weisgerber, Mayor of Loveland
  - Tom Carroll, City Manager
- Start with the data you have
- Begin collecting what else you want moving forward
- Year over year benchmarking at first

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ICMA CPM – Ohio Members

- Deerfield Township
- City of Dublin
- City of Fairfield
- City of Dublin
- City of Hamilton
- City of Loveland
- City of Monroe
- City of Montgomery
- City of New Albany
- City of Piqua
- Sylvania Township
- City of Upper Arlington
- City of West Carrollton
- City of Westerville
- City of Worthington

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Measuring Results....

1. ... = Results
2. ...Demonstrates Value
3. ....Guides Policy

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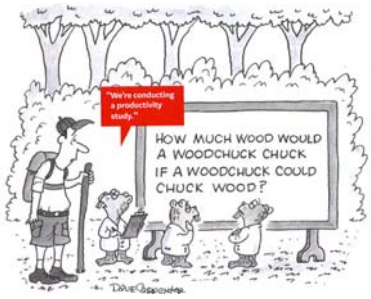
Measuring Results = Results !



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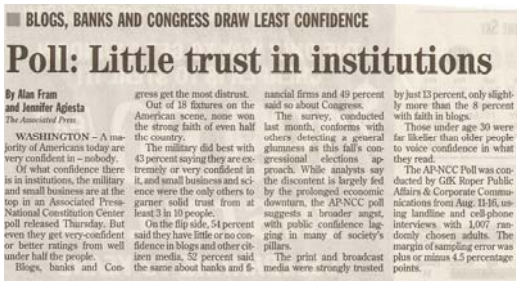
Measuring Results Demonstrates Value



BLOGS, BANKS AND CONGRESS DRAW LEAST CONFIDENCE

Poll: Little trust in institutions

By Alan Fram and Jennifer Agiesta
The Associated Press

WASHINGTON – A majority of Americans today are very confident in – nobody.

Of what confidence there is in institutions, the military and small business are at the top in an Associated Press-National Constitution Center poll released Thursday. But even they get very-confident or better ratings from well under half the people.

Blogs, banks and Congress get the most distrust.

Out of 18 fixtures on the American scene, none won the strong faith of even half the country.

The military did best with 43 percent saying they are extremely or very confident in it, and small business and science were the only others to garner solid trust from at least 3 in 10 people.

On the flip side, 54 percent said they have little or no confidence in blogs and other citizen media, 52 percent said the same about banks and financial firms and 49 percent said so about Congress.

The survey, conducted last month, conforms with others detecting a general glumness as this fall's congressional elections approach. While analysts say the discontent is largely fed by the prolonged economic downturn, the AP-NCC poll suggests a broader angst, with public confidence lagging in many of society's pillars.

The print and broadcast media were strongly trusted by just 13 percent, only slightly more than the 8 percent with faith in blogs.

Those under age 30 were far likelier than older people to voice confidence in what they read.

The AP-NCC Poll was conducted by GfK Roper Public Affairs & Corporate Communications from Aug. 11-16, using landline and cell-phone interviews with 1,007 randomly chosen adults. The margin of sampling error was plus or minus 4.5 percentage points.

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Measuring Results Guides Policy

"The glass is neither half empty nor half full, Hargrove. The glass is too small."

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Loveland Police Division

Part I Crime	2008	2009	2010	2011	Forecasted 2012	Trend
Murder	0	0	1	0	0	
Rape	3	4	6	1	3	
Robbery	2	3	2	4	2	
Aggravated Assault	0	3	4	5	3	
Burglary, Breaking and Entering	34	41	45	37	37	
Theft/Larceny	111	152	196	201	195	
Motor Vehicle Theft	2	1	4	6	3	
Arson	4	1	2	0	0	
Total Part I Crime	155	205	260	254	243	
Part I Crime / 1,000 residents	12.9	17.0	21.5	20.9	19.8	

ICMA Center for Performance Measurement Benchmark (Mean)

All Jurisdictions:	36.66	34.75
Cities under 25,000:	31.17	28.66

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Loveland Police Division

Police Department	2008	2009	2010	2011	Forecasted 2012	Trend
Loveland Population	11,990	12,057	12,081	12,160	12,256	
Police Expenditures Per Capita	$231.14	$216.34	$214.74	$226.62	$214.49	

ICMA Center for Performance Measurement Benchmark (Mean)

All Jurisdictions:	$219	$219
Cities under 25,000:	$243	$237

Mayor's Court	2008	2009	2010	2011	Forecasted 2012	Trend
Mayor's Court Revenue	$119,080	$102,218	$141,982	$123,204	$140,000	
Mayor's Court Expenditure	$130,138	$119,603	$119,602	$113,891	$115,000	
Court Cost Recovery Ratio	0.92	0.85	1.19	1.08	1.22	

[1] 2009 figures include a 27th pay period which skews the results upward.

Loveland-Symmes Fire Department

EMS Incidents	2008	2009	2010	2011	Forecasted 2012	Trend
Total EMS Responses	2,495	2,348	2,469	2,596	2,726	
Cardiac Arrests	18	27	23	25	22	
Hydrants Serviced	3,486	3,486	3,500	6,141	6,141	
Fire Inspections	1,007	1,097	1,100	1,043	1,042	
Total Training Hours	7,783	7,000	7,100	7,500	7,500	
Hours per Employee	135.8	114.5	140	160	160	
Total LSFD Budget	$4,051,037	$3,869,929	$3,982,218	$4,181,329	$4,390,395	
Expenditures per Capita	$145.58	$138.58	$148.79	$155.67	$162.76	

ICMA Center for Performance Measurement Benchmark (Mean)

All Jurisdictions:	$192.30	$164.23
25,000-100,000:	$146.60	$166.40

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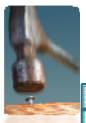
Building & Zoning



Permits and Valuation	2008	2009	2010	2011	Forecasted 2012	Trend
New Housing Unit Starts	28	10	22	33	40	
Residential Permits	124	114	115	90	125	
Commercial Permits	71	48	42	50	50	
Residential Inspections	274	205	141	140	200	
Commercial Inspections	240	54	89	50	75	
Residential Investment Valuation	$8,098,355	$4,575,818	$4,552,307	$8,128,270	$7,985,337	
Commercial Investment Valuation	$6,118,988	$1,808,771	$2,804,861	$1,300,000	$2,313,918	
Total Property Investment	$14,217,343	$6,384,589	$7,357,168	$9,428,270	$10,299,255	
Total Expenditures	203,071	215,258	237,247	204,440	184,896	
Total Revenues	92,605	57,371	81,992	66,502	84,000	
Cost Recovery Ratio	46%	27%	35%	33%	45%	

Finance

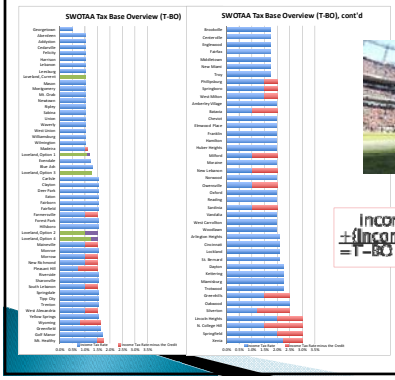
Finance						
Utility Department	2008	2009	2010	2011	Forecasted 2012	Trend
Number of Utility Billing Accounts	4,860	4,855	4,858	4,830	4,870	
Sewer Delinquency Revenue as % of All	1.79%	1.44%	1.63%	1.44%	1.16%	
Sewer Revenue Total Utility Bill Collections	$5,073,219	$5,179,837	$5,707,521	$6,211,340	$6,584,400	
The Average Monthly Utility Bill for City Residents *	$87.23	$95.45	$97.91	$107.17	$112.67	

* Assumes 8,000 gallons of usage per month

Income Tax	2008	2009	2010 *	2011	Forecasted 2012	Trend
Income Tax Collections (after refunds)	$2,974,562	$2,914,889	$2,799,933	$3,165,452	$3,085,000	
Tax Collection Costs	$314,280	$319,588	$166,338	$95,552	$93,000	
Tax Collection costs as a Percent of Net Collections	10.57%	10.96%	5.94%	3.02%	3.01%	

* Year the City converted to the Regional Income Tax Agency (RITA)

Finance: Tax Burden Overview



Income tax rate
+(income tax rate – credit)
=T-BO

Finance

Treasury	2008	2009	2010	2011	Forecasted 2012	Trend
Treasury & Cash Reserve Management	$4,233,700	$5,131,078	$4,085,683	$4,264,587	$4,000,000	
Interest Income	$169,710	$125,800	$41,730	$64,354	$30,000	
City Annual Yield on Treasury	3.07%	2.69%	0.91%	1.54%	0.73%	
STAR Ohio Yield	2.26%	0.12%	0.11%	0.06%	0.03%	
Basis Points Above/ Below LoveDEX *			0.32%	0.25%	0.21%	

* The LoveDEX is a customized benchmark to monitor outside investment services overtime. It consists of Star Ohio, multiplied by 125%, plus 18 basis points. This accounts for the notion that the City of Loveland has historically beaten Start Ohio by 125%, and the City is paying a total of 18 basis points to Fort Washington and US Bank (the custodian). If the LoveDEX is not outperformed over time, than the City would be better either to invest for itself rather than use Fort Washington or hire another firm.

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City Manager's Office

Human Resources and Personnel	2008	2009	2010	2011	Forecasted 2012	Trend
Number of full time employees				45	44	
Total City Salary and Wages	$3,218,713	$3,330,135	$3,131,704	$3,063,692	$3,146,149	
Total City Paid Hours	110,633	128,377	107,299	94,846	100,000	
Open Recruitments	5	0	2	3	2	
Total Applications	503	NA	204	127	200	
Applicants per Job	101	NA	102	42	100	
Average Tenure of Full time City Employees (yrs)	8.57	7.86	8.48	9.09	9.98	
City Health Insurance Expenditures **	$537,971	$519,761	$481,027	$523,804	$509,291	

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Risk Management

Risk Management	2008	2009	2010	2011	Forecasted 2012	Trend
Total Property Loss, Premiums, and Expenditures per $1,000	$0.95	$1.39	$0.68	$0.52	$1.00	
ICMA Center for Performance Measurement Benchmark (Mean)						
All Jurisdictions:		$3.75	$3.10			
Cities under 25,000:		$3.10	$5.51			
Expenditures for Liability Claims Per Capita	$1.93	$0	$0	$0	$0	
ICMA Center for Performance Measurement Benchmark (Mean)						
Cities under 25,000:			$3.18			
Workers Comp Claims per 100 FTEs	8	6	3	2	1	
Expenditures for Workers Comp per $100 of Total Wages and Benefits *	$0.62	$0.89	$0.78	$1.16	$0.94	
ICMA Center for Performance Measurement Benchmark (Mean)						
Cities under 25,000:	$2.03	$1.62	$1.89			

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Recycling

Recycling	2008	2009	2010	2011	Forecasted 2012	Trend
Total Tons of Recycling Collected	973.08	1,039.61	1,180.53	1,224	1,400	
Recycling as a % of Waste Stream	16.12%	16.85%	19.98%	22%	24%	
ICMA Center for Performance Measurement Benchmark (Mean)						
Cities under 25,000:		17%	15%			
Loveland's Rank in Hamilton County for Recycling Percentage	9th	10th	11th	11th	10th	

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Water

Water	2008	2009	2010	2011	Forecasted 2012	Trend
Millions of Gallons of Water Pumped Per Year	535.12	626.81	625	494.34	495	
Millions of Gallons of Water Billed Per Year	477.54	425.3	493.17	449	450	
Unaccounted For Water (UW)	10.80%	32.10%	26.73%	9%	9%	
AWWA Best Practice Benchmark For Unaccounted for Water			10%			
Linear Feet of Water Distribution System Replaced	0	0	3,371	2,100	2070	
% of Water System Replaced	0%	0%	0.85%	0.53%	0.52%	
Linear Feet of 4" Diameter Water Line in System	16,685	16,685	13,065	10,975	8,905	
Average Remaining Useful Life, Water Distribution System	32.85 years	31.85 years	31.82 years	31.36 years	32.90 years	

* In 2009, the City replaced its SCADA and telemetry systems, and this project included installing two meters at the water plant. These meters were not properly calibrated and account for the sharp spike in 2009 and 2010 water loss. The meters have been recalibrated and now accurately measure water generation.

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Discussion

"The numbers aren't working."

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