

HATFIELD RESIDENT FELLOWSHIP PROJECT BRIEF

Case Study Research to Guide Metro's Development of a Performance-Based Management System

Project Dates: July 2023 - January 2024

PROJECT GOAL

With ongoing initiatives in strategic target setting, equity metrics, budget equity, process improvement, and diverse data analyses in various departments, the overarching goal of the project was to explore the development of a comprehensive performance management program that integrates and coordinates different performance-related projects at Metro. The research aimed to serve as a resource for decision-makers, offering guidance on shaping and implementing an effective program that aligns with Metro's goals.

CHALLENGES

The organizational scale added complexity, requiring nuanced understanding of Metro's multifaceted structure and unique service offerings. While each piece of the organization operates effectively on its own, the intricate task was discerning how these diverse components could benefit from and eventually integrate the recommendations developed in the report for a cohesive performance management program.

Delving into past efforts related to performance measures was another interesting challenge, requiring a comprehensive grasp of historical contexts and initiatives (plus ones currently underway but not directly connected to the project). The abundance of materials available for review required thoughtful navigation through documents such as annual reports, strategic plans, and various project frameworks, emphasizing the need to synthesize information effectively for informed decision-making.

STRATEGY

To establish a comprehensive understanding of current research related to performance management in the public sector, a thorough review of existing literature was conducted.

Semi-structured interviews with administrators from city and county governments throughout the US were conducted online to learn what best practices were developed across these diverse jurisdictions. Insights from these interviews were supplemented by findings from a thorough document and process review (encompassing materials and procedures within the target jurisdictions).

An examination of Metro's own documents and processes was conducted for comparative analysis. The overall goal of the mixed-methods approach was to identify commonalities, differences, and best practices that could be effectively applied to the context of Metro's performance management program.

RESULTS

At the completion of the fellowship, the HRF developed recommendations that strategically emphasized impact and presented a roadmap for Metro's journey towards heightened accountability, transparency, and the delivery of high-quality services with relevant metrics. Rooted in established principles and innovative strategies, these suggestions offer a multifaceted approach, recognizing the interconnected nature of performance management components.

- **Active Leadership Commitment & Support:** Ensure clear, top-down communication and active leadership involvement in program development.
- **Define Clear and Aligned Objectives:** Establish measurable, mission-aligned objectives; adapt as needed while addressing change management challenges.
- **Promote Data-Driven Decision-Making:** Invest in quality data capabilities, ensuring accessibility and addressing challenges related to incomplete or outdated information.
- **Facilitate Engagement and Collaboration:** Develop strategies for stakeholder engagement, transparency, and inclusion of residents, employees, and elected officials.
- **Cultivate a Continuous Improvement Culture:** Foster a culture of continuous improvement through feedback loops, adaptive strategies, and staff training resources.
- **Overcome Resistance to Change:** Implement comprehensive change management, addressing concerns about job security and transition disruptions.
- **Enhance Data Quality and Availability:** Invest in improving data quality and accessibility, regularly assessing needs and capabilities.
- **Mitigate Measurement Complexity:** Develop nuanced, regularly reviewed metrics capturing the complexity of public sector functions.

TAKE-AWAYS

The project findings highlight exciting opportunities for Metro's future growth. Optimizing the alignment of a performance management team, exploring collaborations with other local jurisdictions, and enhancing data capabilities were a few key areas identified for potential development in the future. These insights offer a peak into what performance management program development can look like at Metro and in the public sector's future too.