



# CLIENT CASE STUDY

## Using Covalent to manage performance across multiple City departments

The City of Orlando, located in Central Florida, operates a 'strong mayor' form of government and employs 3,172 staff to provide municipal services to over 235,823 citizens. The City went live with Covalent in late 2008 following a competitive bidding process involving all the leading vendors.

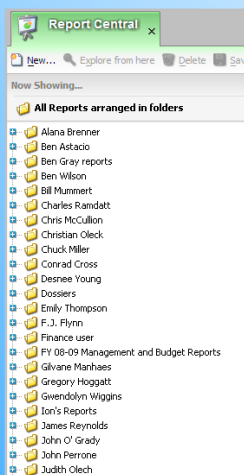
*"The City of Orlando initially purchased Covalent as a tool to track implementation of the City's Strategic Plan, a concept that was new and uncharted territory for us. Covalent did allow the City to overcome huge challenges, build employees trust and to redirect its efforts on improving its Performance Management system."*  
**Ion Luchin, Management Analyst, City of Orlando**

Orlando is now managing over 1,150 performance measures on Covalent across multiple departments, notably Economic Development, Transportation, Fire, Police and Public Works. Over 50% of the 120 licensed users on the system log in at least once a month, with a growing number of more frequent users, including a few who visit daily.

Each user has a folder in **Reports Central** where they can access personalized reports for their areas of responsibility.

"The City of Orlando is very focused on developing PIs that will allow managers and supervisors, at all organizational levels, to monitor and control their work processes. One of our goals is to integrate the internal data reporting systems with the Performance Management (PM) system. This way, the City's PM system could function as an integral mechanism where the entire operational activity is reflected and tracked."

**Ion Luchin, Management Analyst, City of Orlando**



**Monthly Department Analysis**  
Has each department stayed within their budget  
Report Author: Barbara Moore  
Report Type: FI Report  
Generated on: 27 May 2009

PI Status	Long Term Trends	Short Term Trends
<ul style="list-style-type: none"> <li>This PI is significantly below target.</li> <li>This PI is slightly below target.</li> <li>This PI is on target.</li> <li>This PI cannot be calculated.</li> <li>This PI is a date only PI.</li> </ul>	<ul style="list-style-type: none"> <li>The value of this PI has improved in the long term.</li> <li>The value of this PI has worsened in the long term.</li> <li>The value of this PI has not changed in the long term.</li> </ul>	<ul style="list-style-type: none"> <li>The value of this PI has improved in the short term.</li> <li>The value of this PI has worsened in the short term.</li> <li>The value of this PI has not changed in the short term.</li> </ul>

Cannot group these rows by: Portfolio Owners

Managed By	PI Code & Short Name	Trend Arrow	Last Update	Current Value	Current Target
Mik Staker	FIN/PUR/01 Fire Department Publics Within the "Normal" Range as Enclosed by Monthly Budget	▲	03/2008/09	Yes	Yes
Mik Staker	FIN/PUR/02 Police Department Publics Within the "Normal" Range as Enclosed by Monthly Budget	▲	03/2008/09	Yes	Yes
Mik Staker	FIN/PUR/03 Public Works Department Publics Within the "Normal" Range as Enclosed by Monthly Budget	▲	03/2008/09	Yes	Yes
Mik Staker	FIN/PUR/04 Transportation Department Publics Within the "Normal" Range as Enclosed by Monthly Budget	▲	03/2008/09	Yes	Yes

**PIs update status**  
Report Author: Ion Luchin  
Report Type: FI Report  
Generated on: 23 July 2009

PI Code	PI Short Name	Ownership PI Manager	Assigned To	Trend Light Status
FIN/PUR/4	Dollar Amount of Purchases per Program Full Time Employee (FTE)	Rhonda Scott	Vigandine Gungor	▲
FIN/PUR/5	Average Cost to process One Commodity/Services Purchase Transaction	Rhonda Scott	Vigandine Gungor	▲
FIN/PUR/6	Average Cost to process One Contract Management Transaction	Rhonda Scott	Vigandine Gungor	▲
FIN/PUR/7	Percent of Original Purchase Price of Vehicles Returned in Sale	Rhonda Scott	Vigandine Gungor	●
FIN/PUR/8	Average Time to Add a Capital Asset to the System	Rhonda Scott	Vigandine Gungor	▲
FIN/PUR/9	Number of Sole Source Requests Processed	Rhonda Scott	Vigandine Gungor	▲
FIN/PUR/10	Number of Times Inventory is Turnover in One Fiscal Year	Rhonda Scott	Vigandine Gungor	▲
FIN/PUR/11	Average Cost to Receive, Store, & Deliver Parts (City Stores)	Rhonda Scott	Vigandine Gungor	▲
FIN/PUR/12	Average Time to Conduct Physical Inventory	Rhonda Scott	Vigandine Gungor	▲
FIN/PUR/13	Number of Purchases per Program Full Time Employee (FTE)	Rhonda Scott	Vigandine Gungor	●
FIN/PUR/14	Number of New Annual Solicitations Executed	Rhonda Scott	Vigandine Gungor	▲

# Managing performance on citywide and departmental goals using SCORECARDS

The screenshot displays the 'Scorecards' application window. The main content area shows a tree view for the 'SFA Scorecard'. The hierarchy is as follows:

- SFA Scorecard
  - SFA1 Character, Culture and Place
  - SFA2 Civic Engagement, Caring and Pride
  - SFA3 Governance and Public Productivity
  - SFA4 Healthy Natural Environment
    - 4.I1\_Parks, Recreation & Open Spaces
    - 4.I2\_Greening of Orlando
      - 4.I2.G1 Make "green" thinking part of the way the City does
      - 4.I2.G2 Foster and promote "green" thinking among develop
      - 4.I2.G3 Help reduce future energy demand and consumption
      - 4.I2.G4 Protect, enhance and manage Orlando's water resources including ensuring a sufficient supply of
      - 4.I2.G5 Improve and protect water quality in City Lakes by developing programs to meet Federal Total M
      - PWK06 Percent compliance with Federal & State permit standards regarding industrial contamination
      - PWK16 Percent of lakes with degrading water quality.
      - PWK17 Average annual cost per acre to maintain lake water quality.
      - PWK19 Volume (in cubic yards) of trash and debris collected from lakes and stormlines
    - 4.I3\_Regional Environmental Leadership
  - SFA5 Safe Community
  - SFA6 Strong Economy

The City of Orlando uses the flexibility of Covalent to progress track goals in a three level hierarchy: Strategic Focus Areas (SFAs), Initiatives and Goals. A number of performance indicators are then aligned to each goal to provide a means of tracking goal achievement.

The screenshot displays the 'Scorecards' application window. The main content area shows a tree view for the 'Departmental Scorecard'. The hierarchy is as follows:

- Departmental Scorecard
  - CTX – Orlando Venues Scorecard
  - EDV – Economic Development Scorecard
  - EXO – Executive Offices Scorecard
  - FIN- Office of Business and Financial Services Scorecard
  - FPR – Families, Parks and Recreation Scorecard
  - H5G – Housing Department Scorecard
  - OFD - Orlando Fire Department Scorecard
  - OPD - Orlando Police Department Scorecard
    - Customer
    - Employee Learning & Growth
    - Fiscal
    - Internal Processes
      - OPD01/IA Percentage of Formal Investigations completed in 90 calendar days or less (reported YTD)
      - OPD04/Comm Average Code 2 call queue time in minutes (excludes Airport)
      - OPD07/Comm Average response time for Code 2 calls for service- excludes Airport calls (Communications que
      - OPD09/Comm Average response time for Code 3 calls for service- excludes Airport (Communications que
      - OPD11/CID Percentage of cases cleared
      - OPD22/CID Number of Crimeline tips resolved with an arrest
    - Outcome & Mission
  - PWK – Public Works Department Scorecard
  - TRN – Transportation Department Scorecard

Department Scorecards are used in a similar way, but this time the PIs are organized in a **Balanced Scorecard** across five perspectives. Using the Covalent "Status" overlay provides a traffic-lighted overview of each department's performance along with achievement on each of the scorecard perspectives.

## Each department uses Covalent for its own particular purposes

### The Legal Department uses Covalent Action Central...

...to track key milestones relating to the quasi-judicial hearings, plats and ordinances actions. Each action has an assigned owner and a specified due date, against which it is traffic-lighted. Red actions indicate a missed deadline.

**Action Central**

New Action Explore from here Delete Save Refresh

Now Showing...

All Actions visible to you

- BRT Expansion Alternatives Analysis
- Chapter 59 Updates
- COV Covalent Software Implementation
- LEG/H Quasi-Judicial Hearings
- LEG/O Ordinances
- ABN 2007-00009 Events Center Street Abandonments
- ZON 2008-00038 1035 Lake Highland RZ
- LEG/P Plats
- TF Safe Orlando Task Force Recommendations

### Economic Development uses Covalent Scorecards...

...to monitor achievement of the department's five operational goals, with specified performance indicators aligned against each.

**Scorecards**  
Enhanced Service Scorecard

Add/Remove... Explore from here Delete Save Refresh Copy Paste Sta

Enhanced Service Scorecard

- Allow new commercial projects to get off the ground
  - EDV/PER0121 Percentage of New Commercial Plans review completed in 5 business days
  - EDV/PER0122 Percentage of New Commercial Plans review completed in 6 or more business days
- Expedite residential construction
  - EDV/PER0021 Percentage of new Single Family Plan Reviews completed in one day
  - EDV/PER0031 Percentage of new Single Family Plan Reviews completed in two or more days
  - EDV/PER0051 Percentage of Accessory Structures, Pools, Additions, Solar Panels, Windows and D
  - EDV/PER0061 Percentage of Accessory Structures, Pools, Additions, Solar Panels, Windows and D
- Reduce plan review times
  - EDV/PER0091 Percentage of Commercial Plan Revisions completed in four business days
  - EDV/PER0092 Percentage of Commercial Plan Revisions completed in 5 or more business days
- Save the customer time and money
  - EDV/PER0211 Percentage of Sign Reviews completed in one day
  - EDV/PER0212 Percentage of Sign Reviews completed in 2 or more days
  - EDV/PER0213 Percentage of Sign Reviews completed in 2 or more days related to major projects
- Stimulate construction activity
  - EDV/PER0171 Percentage of Same Day Inspections completed on the same day
  - EDV/PER0172 Percentage of Same Day Inspections completed in 2 or more days

### Transportation Department uses Covalent Snapshots...

...to track progress on both Actions and PIs. In addition, to providing a color-coded status alert, a Snapshot provides the most current PI result, the target, short and long term trend behavior and the status of any driver PIs. You also have one-click drill down capability to access supporting information.

**Snapshots**  
Transportation snapshot

New Copy Delete Save Refresh

Snapshot Results Snapshot Info

Print Open Explore From Here Filter: Actions PIs Risks

**Actions**

Status	Action	Progress	Started	Due	Actions	PIs	Risks
In Progress	Chapter 59 Updates	44%	23/08/07	30/06/10			

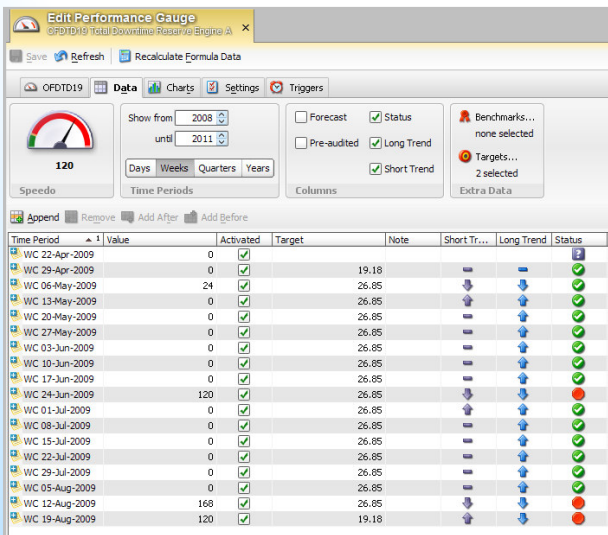
**PIs**

Status	Performance Indicator	Last Update	Current Value	Target	Short Tr...	Long Trend
✓	TRN25 Total number of miles of bike Lanes/Paths.	2007/08	252.36	245.59	↑	↑
✓	TRN28 Annual percentage of grant applications ...	2007/08	100%	100%		
✓	TRN29 Annual percentage of Transportation Ele...	2007/08	100%	100%		
✓	TRN30 Annual percent of roadways meeting Tra...	2007/08	95%	95%	↓	↓
✓	TRN32 Percentage of MPB Cases reviewed withi...	Q4 2008/09	100%	95%		↑
⚠	TRN3201 MPB cases with conditions	September 2009	14		↑	↑
⚠	TRN3202 Total new MPB cases	September 2009	14		↑	↑
✓	TRN44 Total number of ridership	Q3 2008/09	233925	166667	↓	↓
✓	TRN45 Number of Chapter Ordinance Updates f...	2007/08	3	3	↑	↑
✓	TRN34 Number of employees serving as member...	2007/08	5	5		
⚠	TRN2802 Number of grant submittals approved.	2007/08	3	4	↑	↑
⚠	TRN2801 Number of grant applications.	2007/08	3	4	↑	↑

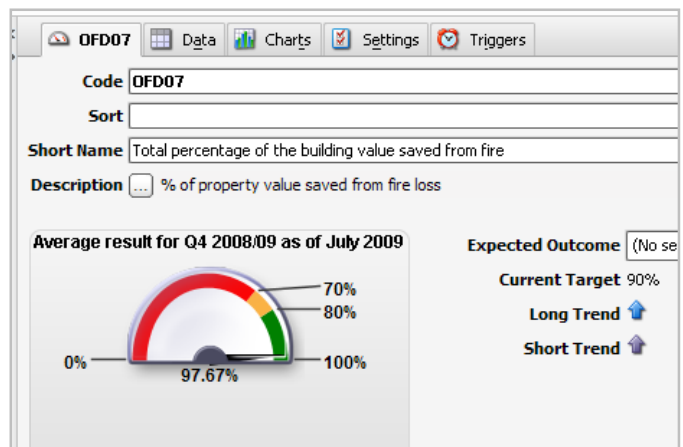
## The Fire Department uses Covalent to management operations at a very micro-level

The City of Orlando's Fire Rescue Department has nearly 450 performance measures on Covalent. Many of these relate to individual apparatus, for which the department monitors reliability, in-service time and various aspects of apparatus downtime on a weekly, sometimes, daily basis. Additionally,

the department monitors a number of traditional operational measures.



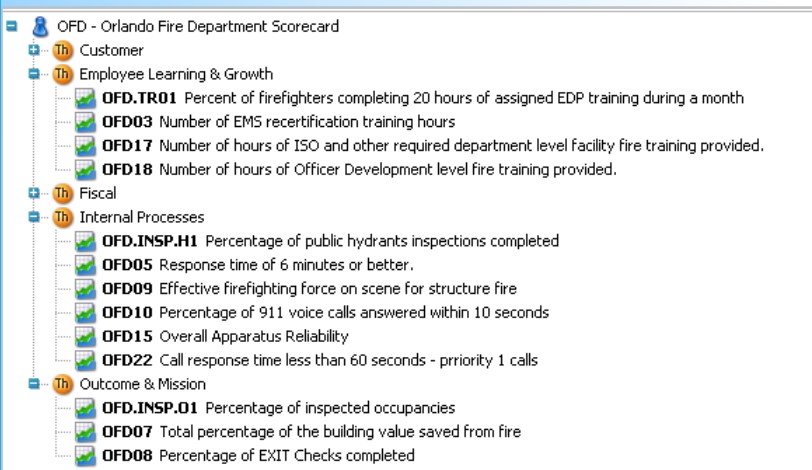
Above: Data table of Downtime for Engine A.



Above: Operational PI performance notebook.

The departmental scorecard provides a framework for assessing performance in a balanced manner, aligned with key operational priorities. This scorecard can then be used to create reports

that are available at a push of the button for many tasks, including the budget document.



**Fire Department Operational Performance**  
Balanced Scorecard Report

Employee Learning & Growth

Organizational Unit	Performance Indicator	2007/08	2008/09
		Value	Value
OPS/OFD - Fire-Support Services Bureau	Number of EMS recertification training hours	16	18
OFD/OFD - Fire-Rescue Operations Bureau	Percent of firefighters completing 20 hours of assigned EDP training during a month	97.67%	80.17%
OFD/OFD - Fire-Rescue Operations Bureau	Number of hours of ISO and other required department level facility fire training provided.	64	
OFD/OFD - Fire-Rescue Operations Bureau	Number of hours of Officer Development level fire training provided.	16	

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