

'Data & Information at the Coalface'

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City of Stonnington*



- In 2000 State Government introduced concept of Best Value for Council Services.
- Emphasis was to be on continuous improvement.
- Whole of service and user perspective review. Performance monitoring required.
- We chose a modified form of balanced scorecard.



The Stonnington Best Value Model

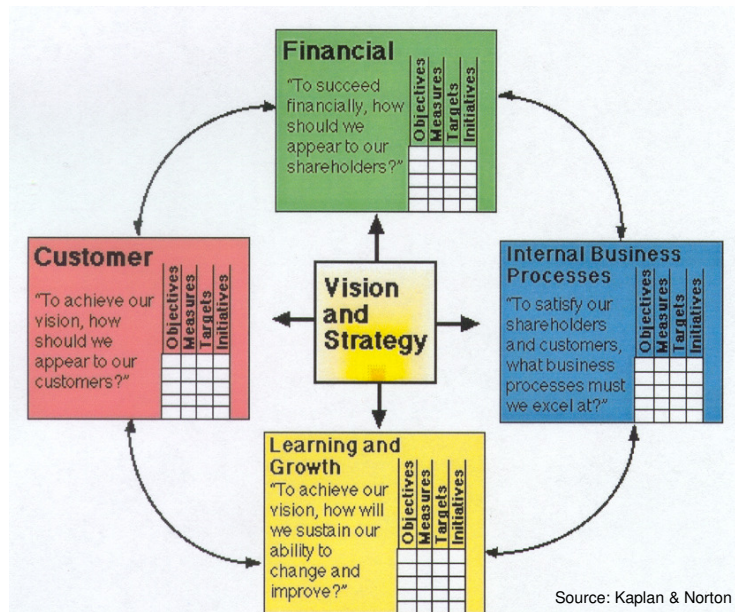


A Better Way to Service our Community

STONNINGTON
STAGE

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Generic Balanced Scorecard Model

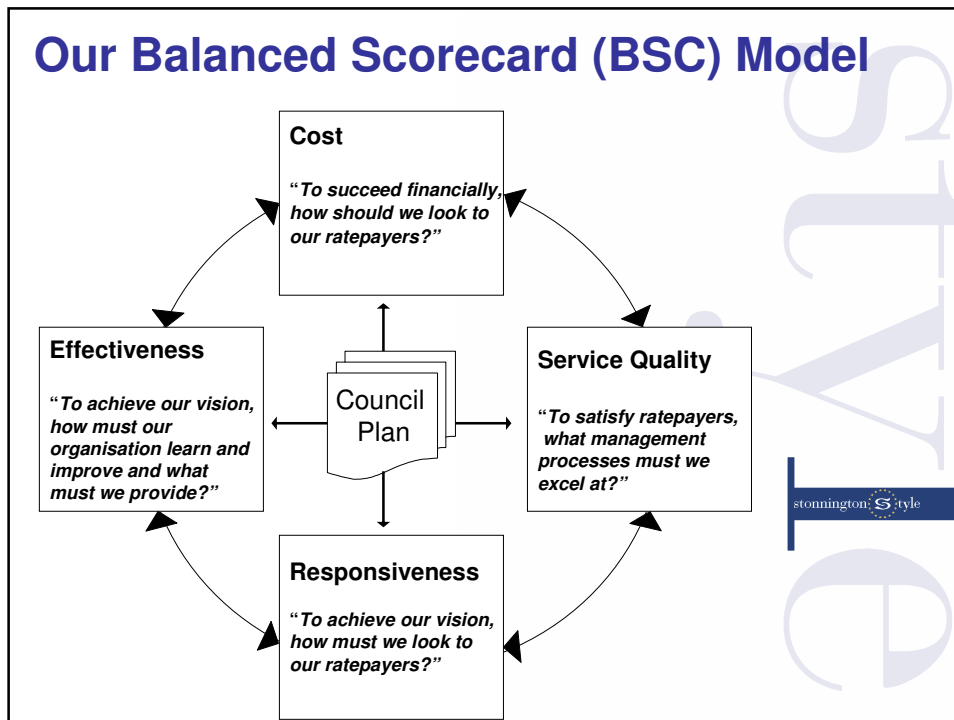


Source: Kaplan & Norton (1996)

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Our Balanced Scorecard (BSC) Model



Steps to building a BSC:

- Form diverse team
 - Scope whole of service
 - Get the balance right – “weighting”
 - Choose KPIs for each perspective
 - Benchmark - set best and worst case
 - Build BSC
 - Simplify
- A "stonnington style" logo is visible on the right side of the list.

“Weighting” BSC Perspectives

BALANCED SCORE CARD PERSPECTIVES FOR SELECTED SERVICES

PERSPECTIVE	HOME CARE	TOWN PLANNING	WASTE COLLECTION	LIBRARY
COST	20%	20%	25%	15%
SERVICE QUALITY	30%	25%	35%	30%
RESPONSIVENESS	30%	25%	25%	25%
EFFECTIVENESS	20%	30%	15%	30%
TOTAL	100%	100%	100%	100%

Greater weight is given to those perspectives which matter most to our customers.

Customers of our Library Services place most value on Service Quality and Effectiveness.

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Key elements for each KPI

- In our BSC, each KPI has:
 - **“Defined”** KPIs – the calcs are clear
 - **“Weighting”** attributed
 - **“Service level”** currently achieved
 - Benchmarked “best practice” standards as **“worst case”** and **“best case”** scenarios
 - Automatic **“scoring”** for current service assessed against these standards
 - **“Automatic classification”** of KPIs against Stonnington’s Best Value service standards
 - Best Value Green (75% +)
 - Value Amber (65 - 75%)
 - Below Value Red (< 65%)



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Cost KPIs: (15% of total)

LIBRARY SERVICES BALANCED SCORECARD
MAR 2008

Measures and Performance Indicators
Measures with Actual Data
Measures with "Estimates"

Best Value : 75% plus
Value : 65% - 75%
Below Value : <65%

	Weight	Current MAR	WCS	BCS	Current	Best Value	BV Score
Cost KPIs	15%						
1.1 Budget and Cost Management							
1.1a % Variance from Operating Budget	40%	0.0%	50%	0%	40.00	30.00	100.0%
1.2 Activity Levels							
1.2a Operating Expenditure per Active Member	30%	\$7.42	\$15.00	\$5.00	22.73	22.50	75.8%
1.3 Capital & Materials Budget Management							
1.3a % of Materials Budget spent vs target YTD (quarterly)	15%	90.0%	0%	100%	13.50	11.25	90.0%
1.3b % of Capital Projects Completed YTD (quarterly)	15%	80.0%	0%	100%	12.00	11.25	80.0%
Total for Cost Perspective	100%				88.23	75.00	88.2%

Comprising:

- Budget / Cost Management 40%
- Per Capita Expenditure 40%
- Capital Investment 30%

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Service Quality KPIs: (30% of total)

	Weight	Current MAR	WCS	BCS	Current	Best Value	BV Score
Service Quality KPIs	30%						
2.1 Policies, Programs, Information & Guidelines							
2.1a Strategic Plans, Policies, Objectives and Work Plan	25%	80%	0%	100%	20.00	18.75	80.0%
2.2 Service Performance Levels							
2.2a Visits per Month	30%	48,955	10000	60,000	23.37	22.50	77.9%
2.2b Hits on WEB Home Page	10%	25,888	0	28,000	9.25	7.5	92.5%
2.2d Activities Attendance	10%	1,539	0	1600	9.62	7.5	96.2%
2.3 History Service							
2.3a Number of History Enquiries	5%	82	0	120	3.42	3.75	68.3%
2.3b Visits to the History Catalogue	5%	585	0	700	4.18	3.75	83.6%
2.3c Number of Items Catalogued	5%	302	0	400	3.78	3.75	75.5%
2.4 IT & Management Systems							
2.4a Quality of IT&T systems, Quality Assurance and Management systems	5%	85%	0%	100%	4.25	3.75	85.0%
2.4b Quality of HR	5%	85%	0%	100%	4.25	3.75	85.0%
Total for Service Quality Perspective	100%				82.11	75.00	82.1%

Comprising:

- Policies, Programs, Information & Guidelines 25%
- Service Performance – Utilisation, Website Hits, etc 50%
- Systems Quality – Technological and Human 10%
- History Service 15%

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Responsiveness KPIs: (25% of total)

Responsiveness KPIs		25%						
3.1 Opening Hours								
3.1a	Total Opening Hours Per Month	15%	666	0	900	11.10	11.25	74.0%
3.1b	Average No of Visits per Opening Hour	25%	73.51	0	90	20.42	18.75	81.7%
3.1c	Library Rating of Suitability of Opening Hours (Library Users Survey)	10%	86%	0%	100%	8.60	7.50	86.0%
3.2 Phone Answering								
3.2a	% of Calls answered within 30 secs	5%	93%	0%	100%	4.66	3.75	93.1%
3.2b	% of Abandoned Calls	5%	7%	15%	5%	4.05	3.75	81.0%
3.3 Requests Reservations & suggestions								
3.3a	Reservations - % of reservations provided within 28 days	15%	76%	0%	100%	11.40	11.25	76.0%
3.3b	IT & Library System responsiveness	20%	80%	0%	100%	16.00	15.00	80.0%
3.4 Complaint Rates								
3.4a	% of complaints as a proportion of visits	5%	0%	10%	0%	5.00	3.75	99.9%
Total for Responsiveness Perspective		100%				81.22	75.00	81.2%

Comprising:

- Opening Hours 50%
- Phone Answering 10%
- Requests, Reservations & Suggestions 35%
- Complaint Rates 5%

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Effectiveness KPIs: (30% of total)

Effectiveness KPIs		30%						
4.1 Membership & Usage								
4.1a	Items Loaned	5%	92,159	0	110,000	4.19	3.75	83.8%
4.1b	Loans % of Total Membership	5%	195%	0%	225%	4.32	3.75	86.5%
4.1c	Average Number of Library Visits per Member	10%	0.73	0	1.5	4.88	7.50	48.8%
4.2 Community Satisfaction								
4.2a	Library Users Satisfaction (Library Users Survey)	10%	99%	0%	100%	9.90	7.50	99.0%
4.2b	Annual Average Age of collection % over 5 years	10%	55%	100%	40%	7.50	7.50	75.0%
4.3 Innovation - Progress Towards the Vision								
4.3a	% Completion of the Services Improvement Plan (Quarterly Milestones)	20%	99%	0%	100%	19.80	15.00	99.0%
4.3b	Implementation of 5 innovation initiatives	20%	75%	0%	100%	15.00	15.00	75.0%
4.3c	Strength of partnership building mechanisms	20%	75%	0%	100%	15.00	15.00	75.0%
Total for Effectiveness Perspective		100%				80.59	75.00	80.6%

Comprising:

- Membership & Usage 20%
- Community Satisfaction Ratings 20%
- Service Innovation 60%

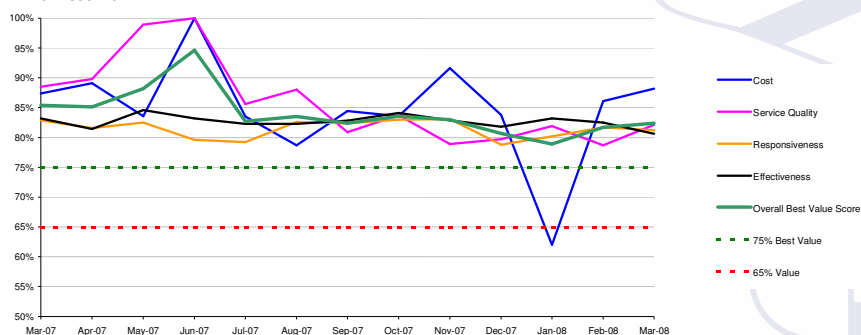
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Example of BSC Trend Chart:

Leisure and Libraries - Library & History Services

	Current	Previous	+/-	52w High	52w Low	Comments
Overall	82.4%	81.7%	0.7%	94.6%	78.9%	Drop in opening hours and consequently visits kept measure static despite good good cost and quality results
Cost	88.2%	86.1%	2.1%	100.0%	62.0%	Expenditure almost on budget this month.
Service Quality	82.1%	78.7%	3.4%	100.0%	79.7%	Improvement in History figures- combined service almost back to normal.
Responsiveness	81.2%	81.7%	-0.5%	84.8%	78.8%	Opening hours low due to Easter
Effectiveness	80.6%	82.5%	-1.9%	84.6%	80.0%	Drop in library visits due to Easter reduced hours

BALANCED SCORECARD



Important Lessons:

- Involve staff and customers
- Measure what matters
- Reflect function not organisation unit
- Make it visible
- Emphasise diagnostic value
- Not a league table
- Integrate into annual reporting
- Review regularly - simplify

***'Data & Information
at the Coalface'***

Thank you

