

Union County Performance and Budget

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April 12th 2021



UNIONCOUNTY
north carolina

BoCC Strategic Objectives

- Public Safety
- Community Consensus
- Economic Development
- Sustainability
- Organizational Strengthening

Performance and Budget

Performance and Budget

Performance Measurement

Performance Budgeting

Performance Budgeting in Union County

Performance and Budget

Imagined as a concept to promote more effective allocation and management of budgetary resources:

- 1921 Budget and Accounting Act – Created the Bureau of the Budget (OMB)
- 1937 President's Committee on Administrative Management (moved OMB from Treasury Dept.)
- 1940's Hoover Commission – Focused on Performance Budgeting (resources and activities/Inputs and Outputs)
- 1960's Planning-Programming Budgeting System – connect resources with results (DoD then civilian agencies)
- 1970's Management by Objectives – Nixon era strategic planning efforts
- 1970's Zero Based Budgeting - Carter administrations attempt to systematically review existing programs during the budget process
- 2014 Better Budget Initiative – Bipartisan/Non-profit (congressmen, OMB/CBO/Fed Reserve directors) to develop concrete ideas to reform the Federal budget process

Performance and Budget

Connecting Performance and Budget is well established Nationally and Locally:

- City of Charlotte – 1996 (1st in the nation to establish a “Corporate” Scorecard)
- Gaston County – 2000
- Mecklenburg County – 2002
- Cabarrus County – 2011
- City of Monroe – 2014
- Union County – 2020

Performance Measurement

Performance Measurement is the practice of establishing quantitative indicators to track progress against strategy

Performance Measures are:

- Numeric descriptions of a departments work and the results of their daily activity
- Based on data and tell the story of the department's achievement of its objectives

Good Performance Measures cover a wide variety of activity types:

- Output/workload (measures of total volume: # of cases, # of transactions, # of applications processed, etc.)
- Efficiency (expressed as ratio: # of cases per case worker, cost per case, # of inspections per week, etc.)
- Outcome (measure of improvement: # of cases leaving case load, reduced recidivism, higher library usage)
- Customer Service Measures (measure of service quality: voice of customer, respect, timeliness, quality, etc.)
- Financial Measures (GF debt per capita, GF expenditures per capita, Bond Rating, etc.)

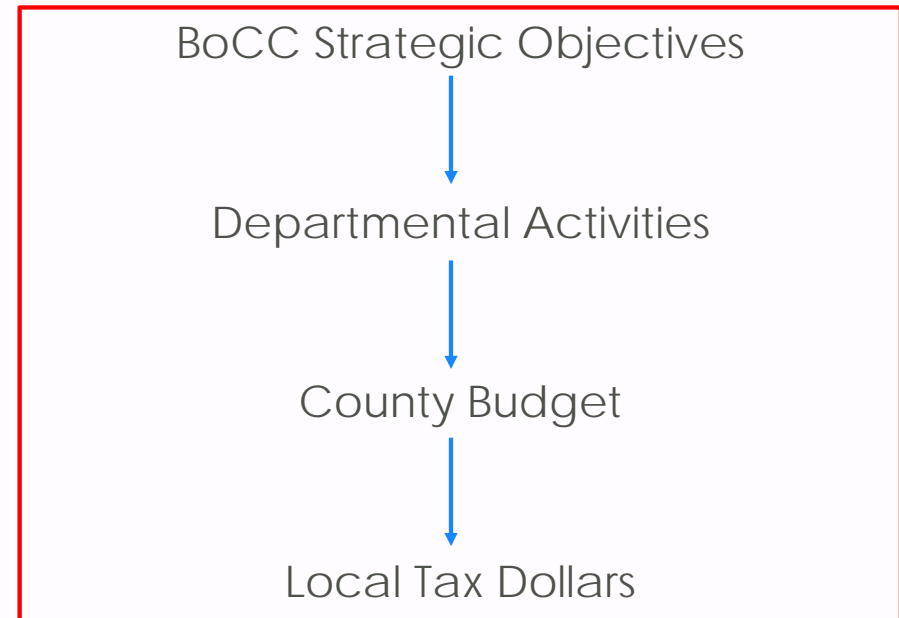
Performance Measurement

Performance Measures create the following opportunities:

- Quantify efficiency and effectiveness of county services and activities
- Establish framework to set meaningful operational targets towards goals across departments
- Demonstrate progress towards organizational goals
- Establish organizational standard of excellence
- Compare departmental performance to other peer County's (common measures)
- Allows County Manager and BoCC to make data driven decisions
- Establish common language between departments, management, BoCC and residents

Performance Budgeting

Performance Measures Connect the Organizational Vision to Allocated Resources:

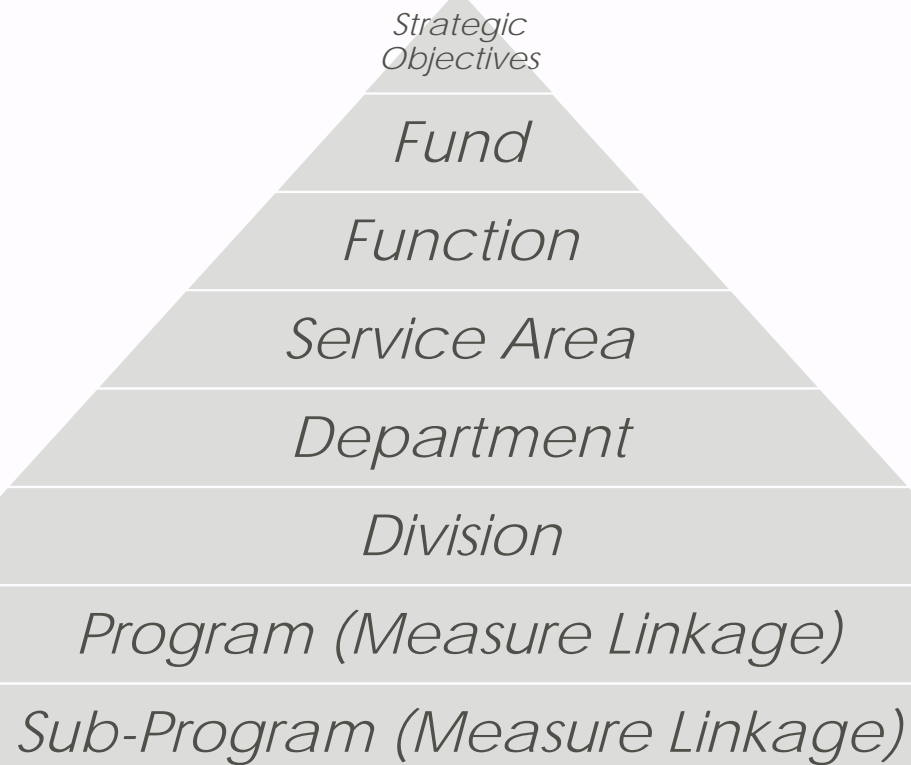


Performance Budgeting in Union County

Performance Budgeting links service delivery results to departmental budgets:

- Connects the input of resources (local taxes) to the output of services (dept. activities)
- County chart of accounts realigned five-years ago to make performance budgeting possible
- Performance Measures link to departments at the program and sub-program level
- How much does a service cost vs. what value is being provided at that price?

Performance Budgeting in Union County



Performance Budgeting in Union County

Fall 2019 - Initial consulting with departments to develop performance measures

Spring 2020 - Presented List of Proposed Measures to Management Team for Review

Fall 2020 - Met and consulted with Departments and Management Team to Narrow Down List of Measures

Spring 2021 - Establish Performance Measures and incorporate into FY 2022 Budget Process
Departments collecting data for performance measures

Summer 2021 - Work with departments to identify or develop targets
Departments complete data collection and report results for FY 2021 performance
Create departmental performance dashboards using FY 2021 performance data
Create annual performance report to be included in the FY 2022 budget document

Performance Budgeting in Union County

Union County, NC FY 2022 Budget Workbook

Department Key Performance Indicators Report

Sheriff's Office

520

Sheriff's Office

| Strategic Objective | Program Name | Sub-Program Name | Performance Measure Name | Performance Measure Description | Performance Measure Type | Unit of Measure | FY19 | FY20 | FY21 |
|---------------------|--------------------|--------------------------|--------------------------|--|--------------------------|-------------------------------------|------|------|---------|
| Public Safety | Jail Operations | Administration, Jail | Inmates per Month | Average # of Inmate Intakes per month | Output | Inmate Intakes | N/A | N/A | 1,524* |
| Public Safety | Patrol Operations | Patrol, County | Patrol Events | Number of calls for service, self-initiated calls, and vehicle accidents | Output | Calls | N/A | N/A | 87,740* |
| Public Safety | Patrol Operations | Patrol, County | Crime Rates | Violent crime/property crime rates | Outcome | Number of crimes / Total Population | N/A | N/A | N/A |
| Public Safety | Investigations | Criminal Investigations | Drug Arrests | Drug Arrests | Output | Drug Related Arrests | N/A | N/A | 142* |
| Public Safety | Community Services | School Resource Officers | School Incidents | Number of school incidents | Output | Incidents | N/A | N/A | 96* |
| Public Safety | UCSO Services | Animal Services | Adoptions | Number of adoptions/rescues | Output | Adoptions/Rescues | N/A | N/A | 298* |

N/A - indicates new measure without historical data or data unavailable at time of report.

*Result provided represents data from July - December 2020.

Performance Budgeting in Union County

520 Sheriff's Office

Expense Type - Operating

Priority - Organizational Strengthening

Org# 10129715

101-420-08-510-03-01-Inmate Health Nurse

SL Type 03 Rank 08

Inmate Health Nurse

Narrative Discussion

Justification

Position request is due to an increase in medical acuity from chronic medical conditions, substance abuse, communicable disease control. Nurse time spent monitoring and evaluating patients has grown due to the increased complexity of needs and statutory requirements for local jails. NC jail statute requires nursing staff to promptly evaluate any inmate with suicidal ideation or history of suicide attempts. The statute increases the time a nurse spends with the patient on intake, documentation, and with physician consultation. COVID-19 mitigation increased workload through testing all new arrestees, court dates, outside providers, and before moving to another dorm. Additional nursing support is needed during evenings and weekends to meet the complex medical needs.

Impact

The impact of the position will ensure coverage to meet the day to day responsibilities of the medical staff and cover the increased clinical time spent managing the complexities of inmates with high risk medical conditions and mental health disorders. Continued focus on prevention of communicable disease in the jail and management of substance use disorders requires additional nursing time that is currently being spent on day to day medical management and tasks.

Performance Measure Connection

This request aligns with the Sheriff's Office Key Performance Indicator in Jail Administration for Inmates per Month.

Performance Budgeting in Union County

Sheriff's Office

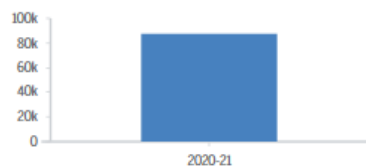
*includes UCSO performance data for the first half of FY 2021.

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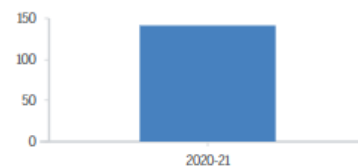
Patrol Events



87,740

Measure in 2020-21

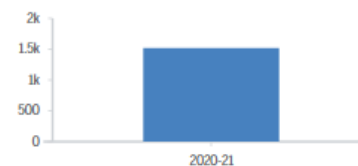
Drug Arrests



142

Measure in 2020-21

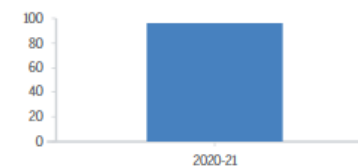
Average Inmate Intakes



1,524

Measure in 2020-21

School Incidents



96

Measure in 2020-21

OpenGov Dashboards - Cloud-based tool used to display financial & performance data, allowing data monitoring to support data driven decision making.



Thank You!



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