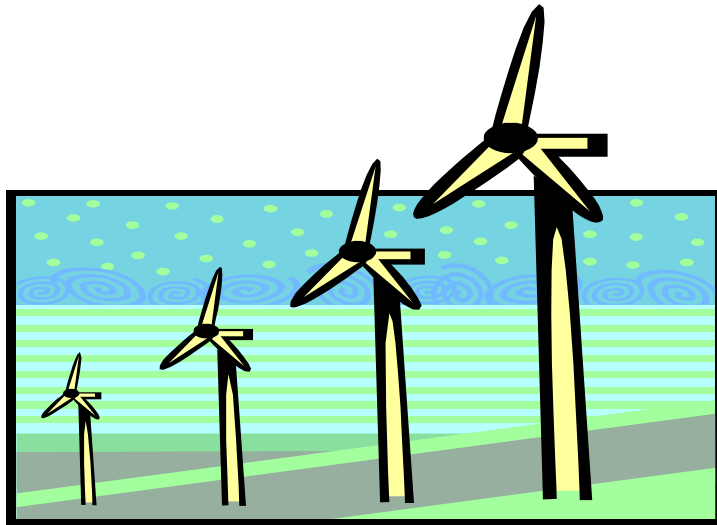


# Facilities Development and Operations Department

Capital Improvements, Property and Real Estate Management, and  
Facilities Services Divisions

## HOP PHASE 1 PERFORMANCE MEASUREMENT ASSESSMENT AND EVALUATION



*(Project No. 2003-P-02.17)*

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<b><i>Introduction</i></b>	1
Level 1 Evaluation – Department Mission Statement	8

## Capital Improvements Division

<b><i>Level 1 Evaluation: Mission Statement</i></b>	
Content & Structure: Findings and Recommendations 1	11
Objectives Linkage: Findings and Recommendations 2	14

<b><i>Level 2 Evaluation: Performance Measures</i></b>	
Mission Linkage: Findings and Recommendations 3, 4	17

<b><i>Level 3 Evaluation: Performance Measures</i></b>	
Objectives Linkage & Types: Findings and Recommendations 5–8	19

<b><i>Level 4 Evaluation: Performance Measures</i></b>	
Business Perspectives: Findings and Recommendations 9	25

## Property and Real Estate Management Division

<b><i>Level 1 Evaluation: Mission Statement</i></b>	
Content & Structure: Findings and Recommendations 1	26
Objectives Linkage: Findings and Recommendations 2, 3	29

<b><i>Level 2 Evaluation: Performance Measures</i></b>	
Mission Linkage: Findings and Recommendations 4	33

<b><i>Level 3 Evaluation: Performance Measures</i></b>	
Objectives Linkage & Types: Findings and Recommendations 5, 6	35

<b><i>Level 4 Evaluation: Performance Measures</i></b>	
Business Perspectives: Findings and Recommendations 7	39

<b><i>HOP Project Summary</i></b>	41
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<b><i>Appendix</i></b>	42
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# Facilities Development and Operations Department

## Capital Improvements Division, and Property and Real Estate Management Division

### Phase 1 Assessment and Evaluation

*An overview survey of the current state of performance measuring and the degree of linkage present among mission statement, organizational objectives, and specific performance indicators in the department*

**T**his publication contains the results of a structured process for evaluating the current state of program performance measurement in a county department. The process was designed and developed by the Management & Program Analysis Section of OFMB/Financial Management Division (MPA) to facilitate an agency-wide review of the county's performance measurement system. Harnessing Organizational Performance—or HOP—is a collaborative initiative with Palm Beach County's departments. The HOP methodology involves an initial evaluation of the current performance measuring system in a department, and assesses the system according to a common set of HOP criteria. In the process, the work incorporates national benchmark and subject-matter best practices into findings and recommendations concerning the department's existing performance measures. This initial phase of the project is intended as a diagnostic phase; subsequent phases will help guide the department into a re-structuring of its performance measurement program in contextually relevant ways. The long-term objective of the HOP initiative is to verify that the Palm Beach County performance measurement program is:

- A positive tool in gauging organizational achievements;
- An important management tool to aid decision-making;

- A way to connect staff-level activities to higher-level organizational missions and statements of objectives.

The methodology employed in the HOP initiative is designed to allow for a collaborative process of evaluation and assessment of the client department’s current performance measurement system. To this end, MPA has created and utilizes a Client Workbook to take a team comprised of the client representatives and the Budget Division representative through a series of facilitated workshops.

Following the two 3-hour workshops, a consensus point of view emerges concerning the current state of the client’s performance measurement system. In addition, the two HOP workshops provide the MPA consultant with useful operational insights and client-specific performance measurement information. The MPA consultant utilizes these insights and information to complete relevant best practices research.

Each of the HOP workshops covers two “levels” of evaluation. Each level of evaluation utilizes a different criterion by which to gauge the current performance measurement system. The primary criteria utilized for this evaluation are 1) linkages between the clients’ mission statements, objectives and performance measures, 2) a balanced use of the HOP defined “types” of performance measures, and 3) a balanced use of the HOP defined business “perspectives” of performance measures. The HOP defined “types” and business “perspectives” are described in greater detail below.

The HOP performance measurement program concentrates on three types of performance measures.

Measurement “Types”	Output performance measures - represent the department’s workload, amount of service or production, not the consequences of performing or processing the workload.
	Efficiency performance measures – represent the ratio of <u>service unit output</u> to <u>resource input</u> ; usually cost per unit of service, or unit of service per resource (FTE’s or dollars expended).
	Outcome performance measures – represent the consequences or effects of specific actions or initiatives focused primarily on improving the citizen’s condition.

The HOP performance measurement program then employs four business “perspectives” by which organizational performance is to be guided.

Business Perspectives	Customer satisfaction perspective –performance measures that are created to indicate the customer’s perspective of “how they rate the county in the delivery of services” or those measures where the use of the service indicates the customer chooses the county service over other available options.
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<b>Business Perspectives</b>	Internal process (operational) efficiency perspective –performance measures that are created to “indicate” the efficient use of resources involved in the delivery of services.
	Financial accountability perspective –performance measures that are created to “indicate” the financial accountability of the organization, stewardship of the public trust, or delivering services in a cost efficient manner.
	Employee learning & growth perspective –performance measures that are created to “indicate” employee development – development which will enable the organization to succeed in its mission and/or that increases employee productivity, employee retention, career enrichment, and job satisfaction.

This publication reports on the consensus assessment developed by the HOP Team and the best practices research conducted by the MPA consultants to document findings, observations and recommendations pertaining to the client’s performance measurement system.

The Management & Program Analysis Section is leading this effort, together with our partners from the Budget Division, to establish common performance concepts and an understanding of performance measurement purposes throughout all county departments and divisions. When the three-phase HOP program is fully implemented, specific outputs of the Harnessing Organization Performance initiative will be:

- Standardizing performance measurement terminology;
- Establishing a collaborative, interactive approach towards performance measurement;
- Recommending improvements to the current performance system to decrease time and effort required by the system, while improving its management usefulness.

### **PHASE 1: “EVALUATING EXISTING MEASURES”**

This is the first phase of the HOP program. This report contains the results of the phase 1 evaluation and assessment of the Facilities Development and Operations Department mission statement, current year (FY2006) objectives and performance measures for the two participating divisions: Capital Improvements, and Property and Real Estate Management. The Facilities Services division also participated in the HOP workshops, working with the aforementioned divisions to assess and evaluate their performance program elements.

Current performance measures that cannot be linked to, or do not support, the mission statement or statement of objectives will not be required as part of the county’s official performance measurement program, although they can be maintained for departmental purposes, if desired. This phase also establishes the common terminology that will be used throughout the HOP project, as it

relates to performance measures, linkages and relevant business perspectives. During this phase, the department will probably experience a reduction in the number of “required” performance measures, thereby reducing the time and effort spent in gathering and reporting on departmental performance.

## **PHASE 2: “MANAGING FOR HIGH PERFORMANCE”**

The second phase will include documenting and communicating to every level of the department the linkage and relevancy among mission statement, objectives, performance measures, and stakeholder desires. Where the first phase is primarily a diagnostic step to establish the current state of the department’s performance measuring program, during the second phase a number of linked and highly relevant performance measures will be developed for the department’s meaningful use.

## **PHASE 3: “PUTTING IT INTO PRACTICE”**

Finally, in this stage of the project, the required performance management infrastructure is established to permit the meaningful tracking and reporting of the department’s performance. Formal guidelines will be developed and adopted regarding, (1) validation of acceptable measures, (2) reporting mechanisms and schedules, (3) accuracy verification techniques, (4) approval of goals, targets, and benchmarks, (5) incentive programs to reward the attainment of high performance, (6) internal financial control uses, and (7) ways and means of carrying out periodic reviews of performance indicators and targets to keep them current and relevant.

## **OVERVIEW OF PHASE 1 FINDINGS**

The findings and recommendations summarized below provide an overview of the performance measurement program assessment conducted for the Facilities Development and Operations Department’s participating divisions (Capital Improvements, and Property and Real Estate Management).

The performance measurement program consists of the department’s mission statement, departmental objectives and the department’s performance measures, along with the processes for tracking and reporting on the department’s success in achieving those measures. The findings and recommendations are based on the evaluations of the HOP team, made up of the directors of the participating divisions and/or their staff, and MPA consultants from OFMB/Financial Management Division. The HOP Team used the performance elements from the narrative submitted for the FY06 Annual Budget Book to perform the HOP Assessment & Evaluation.

The summary of findings and recommendations is followed by detailed findings and recommendations for the two divisions whose performance programs were evaluated. Each division’s detailed assessment is based upon the structured, four levels of evaluation conducted by the HOP team. Each level of evaluation was accomplished by use of evaluation tools designed expressly for that purpose by the MPA Section. In addition to the conclusions reached by using the 4-level

evaluative tools, the MPA consultants performed “best practices” research involving similar operations nationwide, and cited examples from this research which the divisions can use as a starting point for their own further efforts. That research also forms an important foundation and knowledge base for the work yet to come in phase 2 of the HOP project.

### General Findings

- The current department mission statement meets the HOP criteria for identifying the purpose of the organization; there are five service topics that are easily identified. Structurally, the mission statement consists of three descriptive sentences.
- Mission statement descriptive detail using the statements “quality as cost effectiveness,” and “operational appropriateness when measured by the public, the user, and the community” provides proper emphasis for the department’s divisions (although the term “operational appropriateness” may be too vague).
- The department mission statement, along with each division’s “Definition of Programs and Services” fulfills the HOP criteria for providing mission-level guidance, thus enabling each division to create cohesive and linked division objectives and performance measures.
- There are elements of the current mission statement that lack clarity and department-wide meaning.
- There is good linkage between “mission topics” and objectives statements in the Capital Improvements division with all three of the current objectives linked to the department’s mission. The Property and Real Estate Management division was able to link one of its two objectives to the department’s mission.
- There is good linkage between the current “mission topics” and performance measures of the Capital Improvements division. However, the Property and Real Estate Management division directly linked only one of its five performance measures, observing that three performance measures could be indirectly linked and one performance measure was not linked.
- There is good linkage between the current objectives and performance measures of the Capital Improvements division. There is fair to poor linkage between objectives statements and performance measures of the Property and Real Estate Management, only two of five performance measures were directly linked.
- There is a poor balance of performance measurement “types.” Eight of the participating divisions’ nine performance measures are of the output (workload) type. The sole outcome performance measure resides in the Capital Improvements division. There are no efficiency type performance measures.
- Neither division has performance measures developed from a HOP business perspective. However, the existing performance measures and associated subject matter could be easily converted to provide input from one of the four business perspectives.

## General Recommendations

- Review the structure and content of the Facilities Development and Operations department mission statement per the HOP defined criteria. Investigate the use of a concise mission statement offering general guidance applicable to all of the Department’s divisions. Update the department mission statement as appropriate.

The current initial sentences of both the Capital Improvements, and Property and Real Estate Management division’s “Definition of Programs and Services” conforms to the HOP definitions and guidelines regarding a mission statement (each division essentially has already created a divisional tailored “statement of mission”). This is very positive and allows the department mission statement become broad in its scope, yet concise in its wording.

- Review the performance measure types (output, outcome, efficiency) with an eye toward developing a better mix of measures.
- Determine which current performance measures can be restated (if any) to achieve a better balance across the four HOP business perspective categories for each of the participating divisions. Consider replacing those that cannot be meaningfully updated with new performance measures that provide meaningful input from these business perspectives.

In the course of the first phase evaluation, the following divisions identified a series of important, FY06 operational initiatives. These initiatives are ideal starting places from which each division can develop meaningful objectives and linked performance measures. In addition, the narrative of the FY06 Budget submission offers environmental scans of the divisions – identifying focus areas, as well as factors that are influencing division operations. Displayed in brackets are the business perspectives that could potentially be used in creating performance measures for the stated initiatives. Each performance measure should be created from primarily one business perspective.

### Capital Improvements Division:

- Develop policies and procedures to effectively integrate new personnel into the existing workforce so as to maximize productivity and to decrease lead times in the areas of regulatory/permitting requirements. [employee growth and learning, operational efficiency, financial accountability]
- Work with client agencies in a professional manner to ensure timeliness and effective response in the scheduling, bidding and construction process. Major projects in this area include the Scripps Biotechnology Research Park and the Library expansion bond. [operational efficiency, customer satisfaction]

### Property and Real Estate Management Division:

- In order to better serve emerging priority areas, develop a staffing plan to effectively allocate resources from areas of decreasing workload (acquisitions through tax foreclosure) to areas of increasing workload (general property management, construction coordination, etc.). [operational efficiency, employee growth and training]

- Develop and track the results of initiatives aimed at reducing the PREM lead time on priority projects, by analyzing job responsibilities and processing methods. Priority projects include the Marina bond issue, and Scripps Biotechnology Research Park projects. [operational efficiency, employee growth and training, financial accountability]
- Develop and implement the Countywide Real Estate (CO.R.E) database that will increase the efficiency of division operations and improve the capabilities of the division to provide real estate information on county owned and operated properties to client/consumers of this information. [operational efficiency, customer satisfaction]

Facilities Services Division:

- Complete the decentralization of the construction procurement process by moving this responsibility to the division from the Purchasing Department. The decentralization of this process is expected to be a more efficient way of carrying out this function by utilizing the division's expertise in the areas of zoning, permitting, insurance and construction purchasing. [employee growth and learning, operational efficiency, customer satisfaction ]
- Implement an upgrade to the Job Order Contract software that will allow construction quotes to be expedited and by identifying quantities of construction requirements will ensure an apples-to-apples submission of construction quotes. [employee growth and learning (training), operational efficiency, financial accountability]

We recommend that the department utilize these initiatives to develop meaningful objectives and performance measures.

The detailed recommendations that follow are supported by references to the HOP Client Workbook and to the best practices research. The recommendations are presented for each of the four levels of evaluation performed by the HOP Team. The Best Practices research is drawn from public sector entities that are recognized as leaders in their operational fields and in the measurement of performance. A listing of best practices Internet sites and contact information is included (Appendix A) to give the divisions a ready resource for assistance in developing modifications to their performance measurement programs.

## LEVEL 1 EVALUATION – ALL DIVISIONS

### Department Mission Statement

The Level 1 evaluation begins by examining the content and structure of the published “mission-level” material that guides each division. The department’s mission statement offers this type of guidance to each division, as do the divisions’ definitions of programs and services; both are published in the county’s annual budget document.

From the two published sources, the HOP methodology identifies “mission level topics”. These are macro-level, topical areas that communicate direction or guidance to each division. Division objectives and performance measures flow from the mission level topics to ensure the divisions’ operations strive to meet the department’s mission. Currently, each division within the Facilities Department also has a division mission statement; however, to maintain consistency across all of the county departments participating in HOP, the division mission statement was not part of the HOP assessment and evaluation workshops. The workshops focused on the performance elements that are currently published in either the annual budget book or in the two Administrator semi-annual reports.

For the purpose of the HOP evaluation, “mission level topics” (from the department’s mission statement) are listed as the first component of the divisions’ over-all performance programs, followed by the divisions’ objectives and performance measures. This methodology allows a consistent approach to creating and defining departmental mission statements and divisional programs and services definitions throughout all county departments.

The convention of using the department’s name within the mission statement should be incorporated in the published performance measurement documents - the annual budget book and semi-annual reports.

### *Performance Component*

#### Department Mission Statement

To build and operate facilities’ development projects and undertake facilities and fleet operations that meet the highest quality test in both the short and long term. To define quality as cost effectiveness and operational appropriateness when measured by the public, the user, and the community. To use each individual’s experience and knowledge to create high performance teams.

### *Recommendations*

- Enable the department mission statement to become broad in its scope, yet concise in its wording. The first sentence of each division’s “Definition of Programs and Services” is already essentially a *divisional* statement of mission, so the department mission statement need not try to encapsulate the mission of individual divisions. The department mission statement can be updated to provide concise, general guidance applicable to all divisions.

- In both the department and the division mission statements, clearly identify the customers who directly interact with the department/division or receive the services that are specified in mission statements as well as the general end user citizen.
- Consider possible strategic uses of the department mission statement such as, 1) actively using the verbiage as the “directional compass” for decision making, and 2) placing this macro-level statement of mission on the backside of business cards and on department letterhead or on other public “forms.” A concise, broad-termed department mission statement is easily used to promote the mission to employees, customer-citizens and other important stakeholders.

1

Finding and Observation	Recommendation
<p>The HOP Team expressed varying opinions as to the effectiveness and adequacy of the department mission statement.</p> <ul style="list-style-type: none"> <li>- The mission statement attempts to identify the major areas of department operation, but inevitably is unable to capture all of the important areas of such a large and diverse department.</li> <li>- The use of multiple descriptive word phrases, across five distinct topical areas, actually may decrease the clarity of the mission – especially to those department areas not specifically mentioned.</li> </ul>	<p>The departmental mission statement ideally is an organizational mission. One that expresses in broad terms what the department does, as well as broadly defining the department’s customers.</p> <p>For such a large department, create a concise department mission statement that offers general “operating” guidance across all divisions – supplemented by <i>divisional</i> “statements of mission” in the definition of programs and services section of the annual Budget.</p> <p>Create divisional statements of mission where, a) the broad mission of each division and b) the customer of each division’s services are expressed. The division’s statement of mission clarifies how the department mission is manifested at the division level.</p>

*Resources*

HOP Client Workbook: Reference **Section IV. HOP Definitions and Concepts**, mission statement definitions and examples (page 13).

Best Practices Research: An example of a *broadly worded, yet concise* mission statement is listed below.

**Maricopa County, Arizona**

- “The mission of the Facilities Management Department is to provide buildings and grounds to appointed and elected departments so they can work in a safe and efficient environment.”

**Fairfax County, Virginia**

- “With the aim of providing safe, comfortable and well maintained County facilities that fulfill the needs of our customers, Facilities Management (FMD) provides a full range of facility and property management services in a reliable, efficient, and cost conscious manner.”

**Franklin County, Ohio**

- “The purpose of the Department of Public Facilities Management is to provide quality facility management services to Franklin County employees and the general public so they can conduct business in a safe and comfortable environment.”

## LEVEL 1 EVALUATION – CAPITAL IMPROVEMENTS DIVISION

### A. Definition of Programs and Services

*Recommendations*

- It appears that the division has already developed a divisional statement of mission that it has placed as the first sentence of the Definition of Programs and Services section of the annual budget book. Review the division’s current mission statement to verify conformity to HOP mission statement concepts and definitions. Update the division’s mission statement as necessary.

To achieve consistency throughout the county, this “statement of divisional mission” should: 1) include the name of the mission owner (Capital Improvements), 2) broadly describe services provided and/or over-all mission outcomes desired, and 3) identify direct customers and/or important stakeholders.

- By including a divisional statement of mission in the published performance program (the annual budget book – Definition of Programs and Services section), this will enable the department mission statement to become even more concise, providing general descriptive guidance applicable to all divisions, versus a department mission statement that attempts to describe the department mission in terms of each of its divisions.
- Consider possible strategic uses of the statement of division mission such as, 1) actively using the verbiage as the “directional compass” for decision making, and 2) placing this macro-level statement of mission on the backside of business cards and on division letterhead or public forms to promote the mission to employees, customer-citizens and stakeholders.

1

Finding and Observation	Recommendation
<p>The current “Definition of Programs and Services” for the Capital Improvements division does clearly state the purpose in terms of identifying <u>what</u> the division does. It provides excellent descriptive adjectives indicating the level or degree of service to provide – “highest possible quality and value.”</p> <p>The division does not specify its customers (or <u>who</u> is impacted, although one can somewhat indirectly infer this from the phrase “County capital projects”). Also, the name of the division is not specified in the statement of divisional mission found in the description of programs and services.</p>	<p>Review the examples researched at the best practices sites listed below for examples of identifying division customers in the mission statement.</p> <p>Add the division’s name to the opening paragraph (the division’s statement of mission) of the “Definition of Programs and Services”.</p>

*Resources*

HOP Client Workbook: Reference **Section IV. HOP Definitions and Concepts**, mission statement definitions and examples (page 13).

Best Practices Research: The following examples can be used to develop a *divisional* statement of mission that specifies its customer. Examples of Capital Improvements division mission statements researched at best practices sites:

### **Orange County, Florida**

- “The Capital Improvements division will effectively manage and deliver Capital Improvement Projects relating to the design and construction of facilities ... for the benefit of Orange County agencies and its citizens.”

### **Maricopa County, Arizona**

- “The mission of the Capital Facilities Development Department is to deliver large, fiscally responsible capital facilities so that occupants may successfully achieve their missions in an efficient, enjoyable, and stimulating environment.”
- “The purpose of the (Capital Improvements) program is to provide facility CIP services to appointed and elected departments so that County capital improvements result in properties that are utilized to their maximum potential.”

### **Franklin County, Ohio**

- “The purpose of the Contract Construction Program is to provide construction services in the permanent improvement projects (PIP) budget to the Franklin County Commissioners so they can receive completed projects on time and on budget.”

### **Broward County, Florida**

- “The (Capital Improvements Division) provides the County with in-house engineering and planning capability for project design, construction management and contract administration with a staff of architects, engineers, planners and environmentalists.”

### **City of Austin, Texas**

- “The purpose of the Capital Projects Delivery Program is to implement infrastructure projects for City departments so they can deliver programs and services to the public.”

## **B. Statement of Objectives**

The Level 1 evaluation next examined the linkages between the department mission level topics and the division’s objectives. This ensures that there is continuity of purpose between these two important components of the performance program. An assessment of the content and structure of the statement of objectives was also performed.

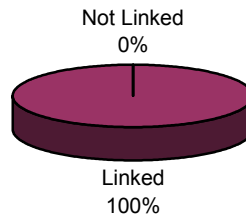
*Performance Component*

<b>Mission Level Topics (From Department Mission Statement)</b>	<ul style="list-style-type: none"> <li>➤ Build &amp; operate facilities’ development projects</li> <li>➤ Undertake facilities and fleet operations</li> <li>➤ Define quality throughout</li> <li>➤ Use individual’s experience and knowledge</li> <li>➤ Create high performing teams</li> </ul>
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*Performance Component*

<b>Division Objectives</b>	<ol style="list-style-type: none"> <li>1. Increase the quality of the building turnover/commissioning by reducing the number and value of follow up projects required to address contractor deficiencies and meet operating requirements of FMD/ESS and project user. Continue improvements, enhancements, and planned renewal of buildings and external properties.</li> <li>2. Support the Library Expansion Program by complying with the established schedule.</li> <li>3. Comply with the Biotechnology Research Park development schedule milestones.</li> </ol>
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**Capital Improvements Division  
Objectives  
Linkages to Mission Level Topics**



As the chart indicates, the division’s objectives exhibit 100 percent linkage. The HOP Team linked all three objectives to mission topics. No objective linked directly to the mission topics, “use individual’s experience and knowledge,” and “create high performing teams.”

As a result of the division’s good linkage of objectives to mission topics, the recommendations concentrate on the HOP Team’s findings concerning the content and structure of the objectives statements.

*Recommendations*

- Based on the division dynamics anticipated in FY2005-06 (see page 6), and any ongoing initiatives identified in current objectives, two to three divisional objectives statements seem appropriate. The division’s current second and third objective statements could be combined into one objective dealing with meeting scheduled milestones of high profile projects. Modify the current objectives statements or create anew using the HOP definitions for content and structure to guide development of objectives.

Examples of objectives statements that conform to HOP definitions concerning content and structure follow the findings and recommendations generated from the HOP Team’s assessment of existing objectives. An example of a HOP defined objective statement is, “Meet the scheduled milestones of projects (the “what”) by, 1) using a more realistic project scheduling approach, 2) through proactive project management, and 3) by quickly responding to project interruptions (the “how”) to ensure timely and “as budgeted” project delivery (the “why”).”

When reviewing the Findings and Recommendations below, please reference the HOP Client Workbook: **Section IV. HOP Definitions and Concepts**, the objectives definitions and examples (pages 14).

**2**

Finding and Observation	Recommendation
<p>The division’s objectives #2 and #3 both concern meeting project schedules; however the narrative description for each is quite dissimilar. Also, the two objectives do not specify why these two projects are of particular focus for the division.</p> <p>One HOP Team member stated that the meaningfulness and clarity of the division’s objectives could be improved by further elaborating on how the objective would be accomplished “by managing consultant and contractor teams effectively.”</p>	<p>Fully define all statements of objectives. Investigate whether the #2 and #3 objectives should be combined. Refer to the HOP manual page 14 and the best practices examples listed below.</p> <p>Objectives statements should identify the important focus areas of the division. To add to the clarity of a particular project and make the objective more meaningful, it is often helpful to identify why the objective is being undertaken!</p> <p>The division participant noted that the objective statements could be more meaningful and informative if they spelled out the reasoning behind efforts, like “to improve the transparency of a high profile project that is under the public scrutiny” or by specifying how an objective will be attained, such as specifying, “by effectively managing consultant and contractor teams.”</p>

*Resources*

Best Practices Research: Examples of Capital Improvements objectives statements researched at best practices sites:

**Fairfax County, Virginia**

- “(To ensure that capital projects are started on a timely basis, and to attain the best prices for construction, we will strive) to expend and/or contractually commit 90 percent of the Capital Renewal funds appropriated each year.”

### **Broward County, Florida**

- (The division will) improve construction management efficiency and accountability in job-site management, and ensure completion of projects on time and within the approved budget. This will be accomplished by holding project management workshops to increase the proficiency of our project managers. (Paraphrased)
- “In fiscal year 2005 we will continue the promotion of technical competence for construction project managers while maintaining our emphasis on the development and utilization of programs and reporting systems in order to complete projects within budget and on time.”

### **Maricopa County, Arizona**

The first three examples illustrate how a multi-year objective can be updated from year to year.

- Perform a needs evaluation and explore options to create a database that will track historical trends, that will promote the development of improved budgeting and scheduling methodologies in order to deliver projects within the Board of Supervisors approved budget and timeline. (Paraphrased FY05 objective)
- Implement the new software, Construction Manager, that will serve as the database for CIP and major maintenance projects. This will promote the development of improved budgeting and scheduling methodologies in order to deliver projects on time and within budget. (Paraphrased FY06 objective)
- Fully train staff to use “Construction Manager” to increase the number of milestones met and to decrease the amount of cost overruns. (Paraphrased FY07 objective)
- “By the end of FY07, we will have a database in place that will track project and operating historical trends ... to promote the development of improved budgeting and scheduling methodologies in order to deliver projects within the Board of Supervisor’s approved budget and timeline.”
- “By the end of FY08, improve the average County Facility Condition Index (FCI) by 4% by developing appropriate annual major maintenance and preventative maintenance programs to reduce future operating costs by \$.20 per square foot.”
- “The Capital Improvements division will begin developing a Countywide Master Plan addressing the capital improvement needs of all County departments in order to develop a strategic and comprehensive Capital Improvement Plan. This will be done within the annually approved budget.”
- Provide a facilities master construction improvements plan to (the County Commission) so that they can assess and prioritize the development of future (construction project needs). (Paraphrased)

**Charlotte/Mecklenburg County, North Carolina**

- “Include the use of GIS technologies in project development and coordination with other city CIP projects in support of the City’s Smart Growth Initiatives.”
- Advance the City’s transit, land use and economic development strategies along the south transit corridor by partnering with the Engineering Services Division to complete capital infrastructure projects as scheduled. (Paraphrased)
- Achieve internal and external non- CIP service delivery targets to positively impact the quality of the work environment for all city staff and the quality of life of our citizens. (Paraphrased)

**LEVEL 2 EVALUATION – CAPITAL IMPROVEMENTS DIVISION**

**Performance Measures**

The Level 2 evaluation examined the linkages between the department mission level topics and the division’s performance measures. This ensures that there is continuity of purpose between these two important components of the performance program.

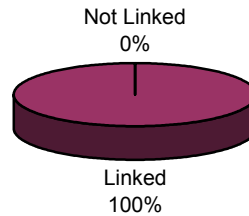
*Performance Component*

<b>Division Performance Measures</b>	<ol style="list-style-type: none"> <li>1. Percentage of building turnovers requiring significant follow-up projects</li> <li>2. Complete design documents for library projects for permitting and bidding</li> <li>3. Number of new libraries and additions/renovations projects started</li> <li>4. Percentage of Milestones with the Biotechnology Research Park</li> </ol>
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*Performance Component*

<b>Mission Level Topics (From Department Mission Statement)</b>	<ul style="list-style-type: none"> <li>➤ Build &amp; operate facilities’ development projects</li> <li>➤ Undertake facilities and fleet operations</li> <li>➤ Define quality throughout</li> <li>➤ Use individual’s experience and knowledge</li> <li>➤ Create high performing teams</li> </ul>
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**Capital Improvements Division  
Performance Measures  
Linkages to Mission Level Topics**



As the chart indicates, the division’s four performance measures exhibit 100 percent linkage. The HOP Team linked all four performance measures to the first mission topic. No performance measure linked directly to the mission topics “use individual’s experience and knowledge” or “create high performing teams.”

**3**

Finding and Observation	Recommendation
The HOP Team observed that both the #3 and #4 performance measures indicated compliance to a project schedule; however the #3 measure is expressed in a number (of projects...) and the #4 measure is expressed in a percentage (of projects...). Counting the number of projects meeting the schedule does not indicate the number <u>not</u> meeting the schedule; whereas a percentage allows a better indication of success.	<p>Unless there is an overriding rationale, both performance measures indicating compliance to a project schedule should be expressed as a percentage (or as a number if the number targeted is either benchmarked or contained within a linked objective statement).</p> <p>The HOP Team felt that “projects meeting a schedule” should be expressed in a percentage to maximize the information provided.</p>

**4**

Finding and Observation	Recommendation
<p>The HOP Team observed some clarity issues in the following wording of the division’s performance measures:</p> <ul style="list-style-type: none"> <li>– Performance measure #1, the terminology “significant follow-up projects” is somewhat ambiguous and, as a result, the corresponding number may be somewhat useless in determining performance.</li> <li>– In performance measures #2, #3, and #4 the narrative is not as clear as it could be.</li> </ul>	<p>Review the narrative of each performance measure and check clarity “for a reader external to the division.” The calculation or count of the performance measure should be easily determined. The reader should easily be able to determine which way the number part of the performance measure should go for increased performance.</p> <p>The HOP Team indicated that performance measure #2 could add “number of complete..” to add clarity. Likewise, #3 could be re-worded, “library <u>construction</u> projects...” and adding the phrase “milestones <u>met</u>” or even adding “<u>Scripps</u> Biotechnology Research Park” to add clarity to the fourth performance measure.</p>

*Resources*

HOP Client Workbook: Reference **Section IV. HOP Definitions and Concepts**, the performance measure definitions and examples (page 15).

Best Practices Research: Examples of performance measures researched at best practices sites are provided at the end of the Level 3 Evaluation.

## LEVEL 3 EVALUATION – CAPITAL IMPROVEMENTS DIVISION

### Performance Measures

The Level 3 evaluation examined the linkages between the division’s statements of objectives and performance measures. This ensures that there is documented progress or success in achieving objectives. An assessment of the “types” of measures being used in the division was also performed.

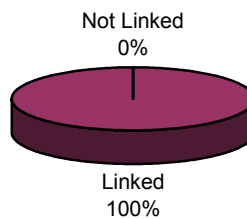
*Performance Component*

<b>Division Objectives</b>	<ol style="list-style-type: none"> <li>1. Increase the quality of the building turnover/commissioning by reducing the number and value of follow up projects required to address contractor deficiencies and meet operating requirements of FMD/ESS and project user. Continue improvements, enhancements, and planned renewal of buildings and external properties.</li> <li>2. Support the Library Expansion Program by complying with the established schedule.</li> <li>3. Comply with the Biotechnology Research Park development schedule milestones.</li> </ol>
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*Performance Component*

<b>Division Performance Measures</b>	<ol style="list-style-type: none"> <li>1. Percentage of building turnovers requiring significant follow-up projects</li> <li>2. Complete design documents for library projects for permitting and bidding</li> <li>3. Number of new libraries and additions/renovations projects started</li> <li>4. Percentage of Milestones with the Biotechnology Research Park</li> </ol>
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### Capital Improvements Division Performance Measures Linkages to Objectives



As the chart indicates, the HOP Team found that the division’s performance measures exhibit 100 percent linkage. The HOP Team linked all four performance measures to objectives.

*Recommendations*

- Review linkages between performance measures and objectives and determine if current linkages facilitate the proactive use of performance measures for decision making and/or communicating to stakeholders.

Evaluate existing performance measures and determine the importance of the information they convey in measuring the attainment of a stated objective. Update or replace those performance measures that are designed to link to an objective, but that may not fully indicate the achievement of the objective.

- Review the four performance measures and strive to update or change the measures to achieve a better mix of performance measure types (there are currently no efficiency types.) Based on the number of objectives and the size of the division, three to four performance measures is sufficient.

5

Finding and Observation	Recommendation
<p>The HOP Team linked performance measure #1 to the objective #1, although it is difficult to ascertain whether the objective of “reducing the number and value of follow up projects” is achieved by merely knowing the “percentage of turnovers requiring ‘significant’ follow-up.” The percentage, in and of itself, does not tell you if it has been reduced from the year before, or if it has achieved an acceptable or anticipated rate.</p> <p>A HOP Team member indicated that the objective could be stated in terms of an acceptable or targeted follow-up rate but that it currently is not written as such.</p>	<p>Investigate revising performance measure #1, or creating one anew; or revising the objective statement to establish a more direct linkage between the performance measurement and the achievement of all or part of the objective.</p>

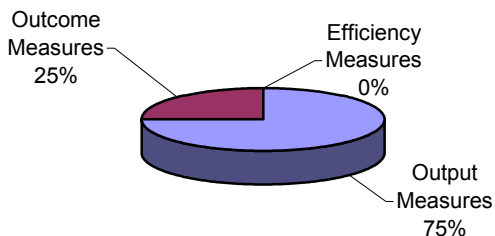
*Resources*

HOP Client Workbook: Reference **Section IV. HOP Definitions and Concepts**, the performance measure linkages definition (page 15).

*Evaluation Criteria*

PM “Types”	<ol style="list-style-type: none"> <li>1. Output</li> <li>2. Efficiency</li> <li>3. Outcome</li> </ol>
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### Capital Improvements Division Performance Measure "Types" Chart



*Recommendations*

- Create a balanced mix of the three performance measure types. Balanced use of the three types of performance measures creates complementary indicators of organizational performance. Ideally, each HOP defined objective statement would have a performance measure linked to it in a way that the measure would indicate the level of achievement of the objective.

Examples of performance measurement “types” conforming to HOP definitions would be “Number of capital projects completed” (indicates an amount of workload or production per some time period = **output measure**); “Initial in-house design cost per square foot” (resource (\$’s) per unit of service = **efficiency measure**); “Percent reduction in the time to prepare project specs for quote (from previous year)” (indicates the consequences of actions comparison with (measures results from) previous year = **outcome measure**).

**6**

Finding and Observation	Recommendation
<p>The HOP Team found the performance measures #1, #2 and #3 to be output measures. As such, these merely display a volume of workload or give a rough idea of an amount of something that has taken place.</p> <p>Performance measure #4 is an outcome type.</p> <p>The division representative noted that by expressing a) a meaningful cost per project, or b) the elapsed time (in staff hours) per some meaningful part of the project, useful efficiency performance measures could be created.</p>	<p>Use HOP criteria to revise and/or create performance measures that will achieve balance across the three HOP “types” of performance measures <u>and</u> effectively indicate achievement of the division’s focus areas or objectives.</p> <p>For example, the first performance measure could track the reduction in building turnovers requiring follow-up versus the previous year, or it could include the target percentage of follow-up projects within the narrative of the performance measure. In either case the performance measure would then be considered an outcome measure.</p>

7

Finding and Observation	Recommendation
<p>The HOP Team discussed that the narrative “significant follow-up” stated in the first performance measure does not indicate the impact of follow-up projects; however a performance measure dealing with the time or cost implications of follow-up projects would.</p> <p>It is reasonable to assume that follow-up projects play some role in determining whether the project recipient is satisfied with the project delivery.</p>	<p>Use HOP criteria to revise and/or create performance measures that will achieve balance across the three HOP “types” of performance measures <u>and</u> effectively indicate achievement of the division’s focus areas or objectives.</p> <p>For example, a performance measure ratio of average follow-up cost per completed project, or percentage increase in project lead-time due to follow-up projects might give more meaningful information because it allows management to see the impact and extent of follow-up projects.</p>

8

Finding and Observation	Recommendation
<p>The HOP Team indicated that often the lead time and cost of a project are determined by factors outside of their control.</p>	<p>Use HOP criteria to create performance measures that are within the majority control of management decision making and organizational performance.</p> <p>For example, a performance measure dealing with lead time could measure the lead time component that occurs within the department.</p>

*Resources*

HOP Client Workbook: Reference **Section IV. HOP Definitions and Concepts**, the performance measure definitions and examples (pages 15-19).

Best Practices Research: Examples of performance measures researched at best practices sites:

**City of Austin, Texas**

- “Percent increase in total construction contract awards due to change orders (for completed projects managed by Capital Improvements Management)” (OC)  
[Measures change order costs as a percent of original awarded construction costs]
- “Construction value of projects initiated (measured at time work order is set up)” (OP)  
[Measures the Construction value \$ of the project workload]
- “Project Management cost as a percent of project cost” (E)  
[Measures the total work order expenditure as a % of total project cost at completion]
- “Percent of projects that remain on schedule (as measured against schedule estimated at the beginning of Fiscal Year)” (OC)
- “Percent of projects that remain on schedule (as measured against original schedule)” (OC)
- “YTD spending as a percent of spending plan estimated at the beginning of Fiscal Year” (OC)

- “Percent of Project Management projects completed within budget (appropriated funding)” (OC)  
[Measures the percentage of projects that are "substantially" completed within the appropriated funding]
- “Construction value of projects managed” (OP)
- “Total value of projects managed” (OP)
- ”Activity cost per active project inspected” (E)  
[Measures the average cost associated for active projects inspected]
- “Inspection cost as a percent of construction contract costs” (E)  
[Total of Construction Inspection Division personnel costs charged to ongoing Capital Improvement Program construction projects as a % of the construction contract costs completed within that timeframe]
- “Number of active projects inspected” (OP)  
[Number of infrastructure projects under construction inspected each month not in the completion stage]

**Maricopa County, Arizona**

- “% of master plan projects (completed)” (OP)
- “% of master plan projects (completed) on-time” (OC)
- “Number of projects delivered on-time per project manager” (E)
- “Average cost per (type of capital improvements) plan” (E)

**Orange County, Florida**

- “Number of Capital projects managed” (OP)
- “Percent of completed projects meeting target schedule” (OC)
- “Percent of completed projects meeting target budget” (OC)

**Charlotte/Mecklenburg County, North Carolina**

- “Percent of South Transit Corridor Priority 1 (capital) improvement projects completed as scheduled” (OC)
- “Percent of non-CIP service delivery targets that are met” (OC)

**Fairfax County, Virginia**

- “Percent of Capital Renewal funds expended or contractually encumbered” (OP)

**Broward County, Florida**

- “Number of workshops designed to promote professional and technical competence of construction project managers” (OP)

- “Average percentage of change orders issued to the original contract amount for the fiscal year” (OC)

[The Board gives every construction project a 5% change order allowance. We strive to attain a lower percentage, so a reduction from 3.5% to 1.9% means that the project managers are doing their jobs. A reduction in change order percentage used is a desired result.]

- “Number of Agenda Reports processed” (OP)
- “Number of deleted change orders processed” (OP)
- “Internal customer satisfaction rating of work product (%)” (OC)
- “Percentage of Agenda Reports processed within 7 calendar days from receipt to delivery to Purchasing” (OP)
- “Percentage of Delegated Change Orders processed within 3 calendar days or less from receipt to delivery to purchasing” (OP)
- “Percentage of Public Works Approved Change Orders processed within 4 calendar days or less from receipt to delivery to Purchasing” (OP)
- “New construction projects managed (>\$200,000)” (OP)  
[This example could just as easily deal with “renovation” projects vs. “new” – measure what is meaningful or a focus of the division]
- “Percent of new construction projects (>\$200,000) completed within budget” (OC)
- “Percent of new construction projects (>\$200,000) completed on schedule” (OC)
- “Number of space planning requests” (OP)
- “Percent of space planning projects responded to within 30 days” (OP)
- “Number of projects managed per project manager” (E)
- “Percentage of projects completed within original time frame” (OC)
- “Percentage of projects completed within the original budget allocation (including contingencies)” (OC)

## LEVEL 4 EVALUATION – CAPITAL IMPROVEMENTS DIVISION

### Performance Measures

The Level 4 evaluation examined performance measures as they relate to defined business perspectives. This ensures that there is a balanced approach in defining and utilizing performance measures to maintain high performance in several important focus areas.

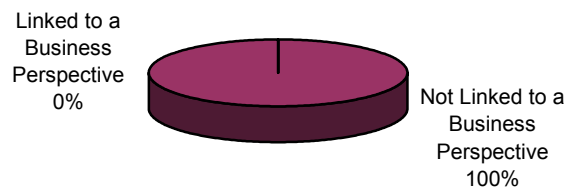
*Performance Component*

<b>Division Performance Measures</b>	<ol style="list-style-type: none"> <li>1. Percentage of building turnovers requiring significant follow-up projects</li> <li>2. Complete design documents for library projects for permitting and bidding</li> <li>3. Number of new libraries and additions/renovations projects started</li> <li>4. Percentage of Milestones with the Biotechnology Research Park</li> </ol>
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*Evaluation Criteria*

<b>Business Perspectives</b>	<ol style="list-style-type: none"> <li>1. Customer satisfaction perspective</li> <li>2. Internal process efficiency perspective</li> <li>3. Financial accountability perspective</li> <li>4. Employee growth and learning perspective</li> </ol>
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### Capital Improvements Division Performance Measures Linkage to Business Perspective



*Recommendation*

- Review any changes to the department’s mission statement, the division’s “Definition of Programs and Services” and the division’s objectives. Incorporate the updates in these areas into developing performance measures from the four business perspectives. The division should strive to have at least one performance measure developed from each of the four business perspectives.

*Resources*

HOP Client Workbook: Reference **Section IV. HOP Definitions and Concepts**, the performance measure definitions and examples (pages 20-22).

**9**

Findings and Observations	Recommendations
The HOP Team could not directly categorize any of 4 division performance measures into a HOP defined business perspective.	Modify the existing performance measures, or create anew, to achieve a balance across the four HOP business perspectives. Create performance measures that are meaningful displays of organizational performance.

Best Practices Research: Refer to examples from the Level 3 Evaluation, beginning at page 20.

The following examples of performance measures are created from the four business perspectives. Objectives statements are also displayed. The examples were developed with input from the Charlotte, NC best practices site.

Customer Satisfaction Perspective

- *Objective*: Be rated ‘extremely good’ or ‘good’ in overall service delivery by at least 80% of citizens surveyed in the biennial citywide phone survey.
- *Performance Measure*: Citizens responding that over-all service delivery is good or extremely good as reported in the biennial citywide phone survey.

Internal Process Efficiency Perspective

- *Objective*: Use technology to enhance information gathering and analysis by implementing an Information Technology Strategic Plan to facilitate improvements in service delivery, quality, timeliness, employee productivity and overall organizational effectiveness.
- *Performance Measure*: Number of service requests completed per service technician, per day.

Financial Accountability Perspective

- *Objective*: Deliver competitive services by implementing the five year competition plan to include optimization of all 3 Street Maintenance Districts and all of Transportation Operations City-wide.
- *Performance Measure*: Percent of total dollars subjected annually to competition, optimization, benchmark or bid-to-go.

Employee Growth and Learning Perspective

- *Objective*: Increase the capabilities of the inspection staff to respond to increasingly diverse and varied caseloads.
- *Performance Measure*: Percentage of inspector workforce that is cross trained and certified in two or more inspection disciplines.

**LEVEL 1 EVALUATION – PROPERTY AND REAL ESTATE MANAGEMENT DIVISION**

**A. Definition of Programs and Services**

*Recommendations*

- It appears that the division has already developed a divisional statement of mission that it has placed as the first sentence of the Definition of Programs and Services section of the annual budget book. Review the division’s current mission statement to verify conformity to HOP mission statement concepts and definitions. Update the division’s mission statement if necessary.  
  
To achieve consistency throughout the county, this “statement of divisional mission” should: 1) include the name of the mission owner (Property and Real Estate Management, PREM), 2) broadly describe services provided and/or over-all division outcomes desired, and 3) identify direct customers and/or important stakeholders.
- By including a divisional statement of mission in the published performance program (the annual budget book – Definition of Programs and Services section), this will enable the department mission statement to become even more concise, providing general descriptive guidance applicable to all divisions, versus a department mission statement that attempts to describe the department mission in terms of each of its divisions.
- Consider possible strategic uses of the statement of division mission such as, 1) actively using the verbiage as the “directional compass” for decision making, and 2) placing this macro-level statement of mission on the backside of business cards and on division letterhead or public forms to promote the mission to employees, customer-citizens and stakeholders.

**1**

Finding and Observation	Recommendation
<p>The current “Definition of Programs and Services” for the Property and Real Estate Management (PREM) division does clearly state the purpose in terms of identifying <u>what</u> the division does. It may be possible to add descriptive language to indicate the level or degree of service to provide.</p> <p>The division does specify its customers (or <u>who</u> is impacted).</p> <p>The name of the division is not specified in the statement of divisional mission found in the description of programs and services.</p>	<p>Review the examples researched at the best practices sites listed below for examples of descriptive language in the mission statement.</p> <p>Add the division’s name to the opening paragraph (the division’s statement of mission) of the “Definition of Programs and Services.”</p>

*Resources*

HOP Client Workbook: Reference **Section IV. HOP Definitions and Concepts**, mission statement definitions and examples (page 13).

Best Practices Research: Examples of Property and Real Estate Management mission statements researched at best practices sites:

### **City of Austin, Texas**

- “(The mission of the) Real Property Acquisition (Division) is to provide comprehensive real estate services to City departments so they can build their projects on time and within budget.”

### **Broward County, Florida**

- “(The Real Property division) acts as professional real estate advisors to the County Commission, Administration and Departments. We efficiently and professionally purchase real property...negotiate leases...and maintain inventory of all County-owned real property.”

### **Charlotte-Mecklenburg County, North Carolina**

- “(The Real Estate Services Department) will lead and manage the overall planning, coordination and development of Mecklenburg County facilities and real property.”

### **Orange County, Florida**

- “The Real Estate Management Division acquires real estate property for county purposes, handles title search/examination, appraisal/review, cost estimates, negotiations for acquisition, and condemnation suit preparation. In addition, this division maintains records and provides information regarding county-owned real estate and rights-of-way.”
- “The Real Estate Management program utilizes the Facility Master Plan to provide direction on space needs for Orange County departments and agencies, and manages the county’s need for leased space.”

### **State of Arizona**

- “(The Real Estate Division) manages State Trust lands and resources to enhance value and optimize economic return for the Trust beneficiaries, consistent with sound stewardship, conservation, and business management principles supporting socioeconomic goals for citizens here today and generations to come.”
- “The Real Estate Division provides support for State land in sales, commercial leasing and rights of way; and by preparing for State land disposition through planning and engineering studies.”

**B. Statement of Objectives**

The Level 1 evaluation next examined the linkages between the department’s mission level topics and the division’s objectives. This ensures that there is continuity of purpose between these two important components of the performance program. An assessment of the content and structure of the statement of objectives was also performed.

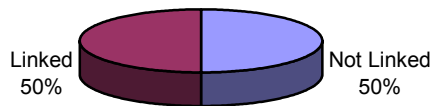
*Performance Component*

<b>Mission Level Topics (From Department Mission Statement)</b>	<ul style="list-style-type: none"> <li>➤ Build &amp; operate facilities’ development projects</li> <li>➤ Undertake facilities and fleet operations</li> <li>➤ Define quality throughout</li> <li>➤ Use individual’s experience and knowledge</li> <li>➤ Create high performing teams</li> </ul>
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*Performance Component*

<b>Division Objectives</b>	<ol style="list-style-type: none"> <li>1. Dispose of surplus properties.</li> <li>2. Acquire property for future use.</li> </ol>
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**Property and Real Estate  
Management Division  
Objectives  
Linkages to Mission Level Topics**



As the chart indicates, one of two division objectives are linked to the department mission statement. No objective linked directly to the mission topics, “use individual’s experience and knowledge”, and “create high performing teams.”

*Recommendations*

- Based on the division dynamics anticipated in FY2005-06, two to three objectives statements seem appropriate. To determine objectives to publish, review the current objectives statements and the division dynamics identified by the division’s participant in the HOP workshops (listed on page 6 of this report). Use HOP definitions for content and structure to guide development and selection of objectives.
- Objectives should be defined at a relatively high level (per HOP guidelines) to describe an area of focus or an important initiative. Objectives statements should not simply duplicate the ongoing definitions of programs and services. Develop the elements of a good objective by reviewing the mission statement and determining how the division achieves the mission, also review performance measurement business perspectives definitions, then apply these concepts to the development of objectives statements.

Also, objectives should not simply be target statements. Develop objectives statements for the major focus areas of the Division. Objectives that deal with “continuing” or “maintaining” may indicate ongoing activities that are not of particular focus. Determine the aspects of projects or activities within the control of the division and develop objectives for those areas. If the division undertakes initiatives to improve activities outside of the division’s control, then document those objectives as such.

Examples of objectives statements that conform to HOP definitions concerning content and structure follow the findings and recommendations generated from the HOP Team’s assessment of existing objectives. An example of the HOP content and structure criteria for a statement of objective is, “The (Property and Real Estate Management division) will develop staffing plans (the “what”) to effectively allocate resources from areas of decreasing workload to areas of increasing workload (the “how”). This will address service areas where current backlogs exist (the “why”).”

When reviewing the Findings and recommendations below, please reference the HOP Client Workbook: Section IV. HOP Definitions and Concepts, the objectives definitions and examples (pages 14).

2

Finding and Observation	Recommendation
<p>The current objectives #1 and #2 do not specify 1) why the objective is important, and 2) how the objective will be accomplished, through what means.</p> <p>The two division objectives do not indicate a special focus or initiative apart from daily operations. They appear to simply list ongoing or maintenance activities. The objectives are not described as striving to improve on an area of focus (there are no target levels of service or improvement expectations).</p> <p>Division participants indicated that they do have special focus areas, but that those areas are in constant flux due to outside forces and therefore difficult to describe in terms of expectations.</p>	<p>Enhance the objectives statements to provide 1) why the objective is important, and 2) how the objective will be accomplished, through what means.</p> <p>Fully define all statements of objectives. Refer to the HOP manual page 14 and the best practices examples listed below.</p> <p>Objectives statements should identify the important focus areas of the division for the year. Objectives that simply define “ongoing” activities (other than multi-year projects) can be eliminated from the published objectives statements. These might more appropriately be listed in the division’s “Description of Programs and Services.”</p>

3

Finding and Observation	Recommendation
The first listed objective is not linked to a mission topic. The second objective is linked to the first mission topic (“build and operate facilities”).	Review objectives that are not linked to the department’s mission statement. Revise, combine or eliminate the objective; or possibly revise the department mission statement to include the broad topic of “real estate services” or “processing property...”

*Resources*

Best Practices Research: Examples of Property and Real Estate Management division objectives statements researched at best practices sites:

**State of Arizona**

- “To implement a progressive asset management process, to improve the quality and efficiency of the Department’s decision making, and to meet the requirements of the Growing Smarter and Growing Smarter Plus Acts.”
- Enhance revenue production by improving the efficiency of processing revenue production activities. (This is a combination of two objectives, paraphrased)
- (The division will) incorporate environmental protection ... and effective land conservation (to) ensure increasing economic benefits to the Trust. (This is a combination of two objectives, paraphrased)
- “Continue to develop and implement measures to improve internal and external customer service including improving internal and external communication.”

**Maricopa County, Arizona**

- “By the end of FY07, we will (purchase and implement) a database that will track project and operating historical trends ... to promote the development of improved budgeting and scheduling methodologies in order to deliver projects within the Board of Supervisor’s approved budget and timeline.”

**Orange County, Florida**

- To develop and implement a paperless contracting system by fully exploiting the capabilities of the Internet and e-commerce. The result of this initiative will be timelier and more efficient support to our customers. (Paraphrased)
- (To improve the quality and proficiency of the division) all professionals within the division will be certified by ... and have at least an associates degree. To encourage this initiative, we will develop and implement monetary incentives for those obtaining and maintaining certification. (Paraphrased)

### **Broward County, Florida**

- “(The division will promote) technical competence for (type of project) project managers and maintain an emphasis on the development and utilization of programs and reporting systems in order to complete projects within budget and on time.”
- The (Property and Real Estate Management division) will reorganize certain sections by transferring existing staff to areas of increasing service volume. This will address service areas where current backlogs exist. (Paraphrased)

### **Charlotte/Mecklenburg County, North Carolina**

- “Implementation of new real estate acquisition management software and integration of acquisition data with the new Primavera Project Management system and GIS (will result in cost and timeliness/efficiency gains.)”
- “(We will) increase use of private contractors for right-of-way maintenance activities with closer inspection of contractor performance by city staff to maximize service value.”
- “Complete implementation and staff training on IPDS ensuring that landscape standards and coordination procedures are fully integrated into the IPDS process.”
- “Using current assets, we will develop alternative resourcing and scheduling strategies to meet building maintenance service needs.”
- “The division will improve customer service and employee efficiency through implementation of technology (KIVA Net, Remote Inspector, Web Page redevelopment, etc.)”
- “Develop ways to improve facilitation of land development permitting through coordination with other City/County departments and feedback from our stakeholders.”

## **LEVEL 2 EVALUATION – PROPERTY AND REAL ESTATE MANAGEMENT DIVISION**

### **Performance Measures**

The Level 2 evaluation examined the linkages between the department’s mission level topics and division’s performance measures. This ensures that there is continuity of purpose between these two important components of the performance program.

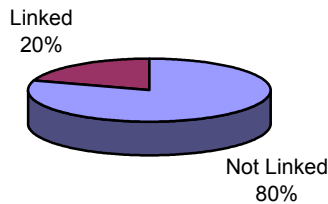
*Performance Component*

<b>Division Performance Measures</b>	<ol style="list-style-type: none"> <li>1. Properties acquired (purchased, dedicated or long term lease)</li> <li>2. Acquisitions avoided through the use of civic sites</li> <li>3. Number of County-funded property acquired at/below appraised value</li> <li>4. Revenues generated from sale/cash out of surplus/civic properties</li> <li>5. Number of properties disposed</li> </ol>
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*Performance Component*

<b>Mission Level Topics (From Department Mission Statement)</b>	<ul style="list-style-type: none"> <li>➤ Build &amp; operate facilities’ development projects</li> <li>➤ Undertake facilities and fleet operations</li> <li>➤ Define quality throughout</li> <li>➤ Use individual’s experience and knowledge</li> <li>➤ Create high performing teams</li> </ul>
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**Property and Real Estate  
Management Division  
Performance Measures  
Linkages to Mission Level Topics**



As the chart indicates, only 1 of 5 performance measures is directly inked to the mission topics. However the HOP Team determined that three of five performance measures are indirectly linked to mission topics. For these indirectly linked measures, narrative changes (at the mission level and/or at the performance measure level) could yield a more direct link.

*Recommendations*

- Evaluate existing performance measures and determine the importance of the information they convey in measuring attainment of the current mission level topics. They are to directly indicate the furtherance of a mission topic or the progress or success of current objectives (evaluated in Level 3).

- Check performance measures to ensure the clarity of information conveyed and meaningfulness in management decision making or communicating pertinent information. Reference the HOP Client Workbook, page 32, Step 3 and definitions/examples pertaining performance measure descriptions, page 15-18.

4

Finding and Observation	Recommendation
<p>The lack of direct linkage to the department mission statement is not of great concern because the performance measures would be linked if the HOP Team had taken into consideration the PREM division’s Definition of Programs and Services – where there is 100% linkage. The mission topics used in the HOP assessment are the ones identified by the department’s divisions that initially participated in HOP.</p> <p>The performance measure #1 “properties acquired” is linked to the department mission topic “build and operate facilities.” The HOP Team chose to indirectly link the second performance measure to the first mission topic.</p> <p>The HOP Team indirectly linked the #3 and #5 performance measures with the mission topic “define quality through effectiveness.”</p> <p>Performance measure #4 was not linked to a mission topic.</p>	<p>Consider updating the performance measures to indicate the results of activities that directly relate to one of the mission topics. Otherwise, to ensure meaningful linkage, update the department mission statement to include broad descriptions of services such as specifying “real estate services.”</p> <p>Also, be consistent in the words describing performance measures (for example, when describing the counting of an activity output, choose “Number of...”, or “No. of”, or “# of”, but not all three), you will increase the reader’s ease of determining what is being measured. Keep your customer–citizen–stakeholder reader in mind when choosing the narrative for performance measures, as well as the other performance program elements (missions and objectives).</p>

*Resources*

HOP Client Workbook: Reference **Section IV. HOP Definitions and Concepts**, the performance measure definitions and examples (page 15).

Best Practices Research: Examples of performance measures researched at best practices sites are provided at the end of the Level 3 Evaluation.

## LEVEL 3 EVALUATION – PROPERTY AND REAL ESTATE MANAGEMENT DIVISION

### Performance Measures

The Level 3 evaluation examined the linkages between the division’s statements of objectives and performance measures. This ensures that there is documented progress or success in achieving objectives. An assessment of the “types” of measures being used in the department was also performed.

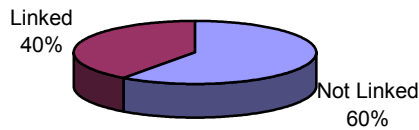
*Performance Component*

<b>Division Performance Measures</b>	<ol style="list-style-type: none"> <li>1. Properties acquired (purchased, dedicated or long term lease)</li> <li>2. Acquisitions avoided through the use of civic sites</li> <li>3. Number of County-funded property acquired at/below appraised value</li> <li>4. Revenues generated from sale/cash out of surplus/civic properties</li> <li>5. Number of properties disposed</li> </ol>
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*Performance Component*

<b>Division Objectives</b>	<ol style="list-style-type: none"> <li>1. Dispose of surplus properties.</li> <li>2. Acquire property for future use.</li> </ol>
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### Property and Real Estate Management Division Performance Measures Linkages to Objectives



*Recommendations*

- Develop performance measures that directly link to objectives. Evaluate existing performance measures and determine the importance of the information they convey. Update or replace those indicators that have lost importance, do not link to an objective or that do not convey meaningful information to customers/stakeholders.

5

Finding and Observation	Recommendation
<p>The HOP Team linked two of the five performance measures (#1 and #5) directly to a division objective.</p> <p>The performance measures #2, #3, and #4 were not able to be linked to either of the division's two objectives. The division representative indicated that these three may no longer represent significant priority areas for the division.</p> <p>There was discussion surrounding performance measure #3 pertaining to whether appraised value was more meaningful than some other benchmark. Discussion also centered on using a percentage versus "number of" to provide a better indication of success towards the target of "at/or below."</p>	<p>Review the HOP definitions and concepts that describe how to link performance measures to objectives (page 15 of the HOP Client Workbook).</p> <p>Evaluate the use and meaningfulness of the current performance measures. Update the subject matter of the performance measures to indicate organizational performance in key operational areas or in areas that are of high importance to customers/stakeholders.</p>

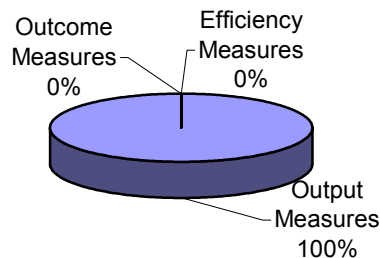
*Resources*

HOP Client Workbook: Reference **Section IV. HOP Definitions and Concepts**, the performance measure linkages definition (page 15).

*Evaluation Criteria*

PM "Types"	<ol style="list-style-type: none"> <li>1. Output</li> <li>2. Efficiency</li> <li>3. Outcome</li> </ol>
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**Property and Real Estate  
Management Division  
Performance Measure "Types" Chart**



*Recommendations*

- Evaluate existing performance measures and determine the importance of the information they convey concerning the attainment of a stated objective (or conveyance of information to customers/stakeholders). Update or replace those indicators that have lost importance or that are not the most meaningful. Based on the concept of a "vital few" and the number of division objectives, a total of three to four performance measures are recommended.

- Create a balanced mix of the three performance measure types. Balanced use of the three types of performance measures creates complementary indicators of organizational performance. Ideally each HOP defined objective statement would have a performance measure linked to it in a way that the measure would indicate the level of achievement of the objective.

Examples of performance measures that conform to HOP definitions concerning content and structure would be “Number of lease site selection requests” (represents workload or production over a time period = **output** measure), “Acquisition cost per parcel” (resource per unit of service = **efficiency** measure), “Percent increase in commercial leasing revenue” (indicates the consequences of actions performed from one year to the next to increase revenues = **outcome** measure).

6

Finding and Observation	Recommendation
<p>The HOP Team identified all five of the division’s performance measures to be output measures.</p> <p>It was noted that performance measures #2 and #4 deal with civic sites (cost avoidance or revenue generation). In addition, performance measures #3 and #5 deal with cost savings or revenue generating activities.</p> <p>The division representative indicated that the current performance measures were influenced by outside user departments, and because of this, most were not good measures of organizational performance. The division representative expressed difficulty the in creating indicators where decision making or “performance” has a majority control or impact in the performance measure.</p>	<p>Use HOP criteria to revise and/or create performance measures that will achieve balance across the three HOP “types” of performance measures (adding efficiency and outcome measures).</p> <p>Where applicable, develop efficiency measures: staff hours per project (or the part of the project within the staff’s control); or costs per project (or part thereof).</p> <p>Measure customer satisfaction, or compare the results of an area (or activity) over time to create outcome measures.</p> <p>Use the HOP Team conversation concerning creating performance measures to measure activities that are impacted by management planning and decisions, that measure focus areas or initiatives where management and staff actions have a registered impact.</p> <p>Use the Best Practices examples found below to stimulate thought and discussion about how to generate a balanced, meaningful, vital few performance measures to indicate organizational performance in key areas.</p>

*Resources*

HOP Client Workbook: Reference **Section IV. HOP Definitions and Concepts**, the performance measure definitions and examples (pages 15-19).

Best Practices Research: Examples of Property and Real Estate Management performance measures researched at best practices sites:

**State of Arizona**

- “Total annual revenue to permanent fund (millions)” (OP)
- “Percent increase in commercial leasing revenue” (OC)
- “In-house appraisal turnaround time (days from administrator request to receipt by section manager)” (OP)

**City of Austin, Texas**

- “Percent of properties acquired on time and within budget” (OC)  
[Properties acquired within agreed upon time frame and within the amount set out in the Service Agreement]
- “Acquisition cost per parcel” (E)  
[Personnel, contractual and commodity expenses associated with each parcel acquisition]
- “Number of acquisition requests” (I/OP)  
[Number of parcels requested by our customers (other City departments)]
- “Number of parcels acquired” (OP)
- “Number of transactions processed” (OP)  
[The transactions processed include easement releases and street/alley/ROW vacations]
- “Cost per transaction processed” (E)  
[Personnel, contractual and commodity expenses associated with each Leasing, Property and Land Management transaction]
- “Percent of customer satisfaction with CIP inspection services” (OC)  
[City of Austin Project Managers' satisfaction with Construction Inspection Division's infrastructure inspection services provided to them for the fiscal year]
- ”Activity cost per active project inspected” (E)  
[Measures the average cost associated for active projects inspected]
- “Inspection cost as a percent of construction contract costs” (E)  
[Total of Construction Inspection Division personnel costs charged to ongoing Capital Improvement Program construction projects as a % of the construction contract costs completed within that timeframe]
- “Number of active projects inspected” (OP)  
[Number of infrastructure projects under construction inspected each month not in the completion stage]

**Orange County, Florida**

- “Number of lease site selection requests” (OP)  
  
[Although this performance measure deals with lease site selection requests, any meaningful, important division work product could be measured in the same manner!]
- “Percent of leases submitted to user approval within 45 days” (OP)  
  
[Although this performance measure deals with leases and user approval, any meaningful, important division work product could be measured in the same manner!]

**Broward County, Florida**

- “Number of parcels received for acquisition/condemnation” (OP)
- “Average number of parcels negotiated for purchase or lease per agent” (E)

- “Percentage of square footage leased versus owned” (OP ratio)
- “Client satisfaction rating (%)” (OC)
- “Number of workshops (offered) designed to promote professional and technical competence of project managers” (OP)
- “New (type of project) projects managed (>\$200,000)” (OP)
- “Percent of new (type of project) projects (>\$200,000) completed within budget” (OC)
- “Percent of new (type of project) projects (>\$200,000) completed on schedule” (OC)
- “New projects initiated” (OP)
- “Number of projects managed” (OP)
- “Number of projects managed per (type of project) manager”

#### LEVEL 4 EVALUATION – PROPERTY AND REAL ESTATE MANAGEMENT DIVISION

##### Performance Measures

The Level 4 evaluation examined performance measures as they relate to defined business perspectives. This ensures that there is a balanced approach in defining and utilizing performance measures to maintain high performance in several important focus areas.

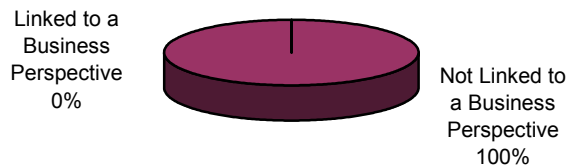
*Performance Component*

<b>Division Performance Measures</b>	<ol style="list-style-type: none"> <li>1. Properties acquired (purchased, dedicated or long term lease)</li> <li>2. Acquisitions avoided through the use of civic sites</li> <li>3. Number of County-funded property acquired at/below appraised value</li> <li>4. Revenues generated from sale/cash out of surplus/civic properties</li> <li>5. Number of properties disposed</li> </ol>
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*Evaluation Criteria*

<b>Business Perspectives</b>	<ol style="list-style-type: none"> <li>1. Customer satisfaction perspective</li> <li>2. Internal process efficiency perspective</li> <li>3. Financial accountability perspective</li> <li>4. Employee growth and learning perspective</li> </ol>
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**Property and Real Estate  
Management Division  
Performance Measures  
Linkage to Business Perspective**



*Recommendation*

- Review any changes to the department’s mission statement, the division’s “Definition of Programs and Services” and the division’s objectives. Incorporate the updates in these areas into developing performance measures from the four business perspectives. The division should strive to have at least one performance measure developed from each of the four business perspectives.

**7**

Finding and Observation	Recommendation
<p>The division representative on the HOP Team was unable to categorize any performance measure as being developed from a business perspective.</p>	<p>Review each current performance measure and determine if the measure is intended to represent a HOP defined business perspective. Update those measures to ensure they can be categorized as belonging to a business perspective.</p> <p>Performance measures that cannot be categorized as belonging to a business perspective are candidates to be updated or eliminated from the published performance program.</p>

*Resources*

HOP Client Workbook: Reference **Section IV. HOP Definitions and Concepts**, the performance measure definitions and examples (pages 20-22).

Best Practices Research: Refer to examples from the Level 3 evaluation, beginning at page 36.

The following examples of performance measures are created from the four business perspectives. Corresponding objectives statements are also displayed. The examples were developed with input from the Charlotte, NC best practices site.

Customer Satisfaction Perspective

- *Objective:* Be rated 'extremely good' or 'good' in overall service delivery by at least 80% of citizens surveyed in the biennial citywide phone survey.
- *Performance Measure:* Citizens responding that over-all service delivery is good or extremely good as reported in the biennial citywide phone survey.

Internal Process Efficiency Perspective

- *Objective:* Use technology to enhance information gathering and analysis by implementing an Information Technology Strategic Plan to facilitate improvements in service delivery, quality, timeliness, employee productivity and overall organizational effectiveness.
- *Performance Measure:* Number of service requests completed per service technician, per day.

Financial Accountability Perspective

- *Objective:* Deliver competitive services by implementing the five year competition plan to include optimization of all 3 Street Maintenance Districts and all of Transportation Operations City-wide.
- *Performance Measure:* Percent of total dollars subjected annually to competition, optimization, benchmark or bid-to-go.

Employee Growth and Learning Perspective

- *Objective:* Increase the capabilities of the inspection staff to respond to increasingly diverse and varied caseloads.
- *Performance Measure:* Percentage of inspector workforce that is cross trained and certified in two or more inspection disciplines.

## PROJECT SUMMARY

The findings, observations and the recommendations contained in this report are developed from two evaluation meetings held with the Facilities Development and Operations Department's participating divisions (Capital Improvements, Property and Real Estate Management, and Facilities Services). The report's findings and recommendations follow the Harnessing Organizational Performance principles of:

- Concise, clear descriptions of mission statements, objectives and performance measures
- A clear linkage or coherence between the mission level topics, objectives and performance indicators
- A balanced representation of all "types" of performance measures (output, efficiency and outcome)
- A balanced focus to performance measurement across the HOP "business perspectives" (customer satisfaction, internal process efficiency, financial accountability and employee growth & learning)

The anticipated organizational benefits of successfully implementing the HOP recommendations are:

- Creating a vital few, meaningful performance measures
- Decreasing the time and energy spent collecting and reporting performance measures that lack meaning
- Focusing the organization on activities and initiatives that achieve the overall departmental mission
- Development of a uniform approach to measuring performance; creating linkages from performance measures to mission statements or objectives statements; utilizing different "types" of performance measures to provide balance across the four defined "business perspectives."

## Appendix A

### Best Practices Reference Sites

#### (1) **Franklin County, Ohio**

Contact: Carolyn Bethel, Assist. Director Support Services, (614) 462-3800  
Royce Chessor, Fiscal Manager, (614) 462-3800

Web Address:

[http://www.franklincountyohio.gov/commissioners/budget/apps/agencyOverview\\_final.cfm?03](http://www.franklincountyohio.gov/commissioners/budget/apps/agencyOverview_final.cfm?03) , Scroll down the 2005 Public Facilities Management Final Budget Agency Overview web page and click on the Program of interest: General Services, or Contract Construction, or In-house Construction. Then go to performance program elements (mission/purpose, and primary performance measures)

For example:

[http://www.franklincountyohio.gov/commissioners/budget/apps/programOverview\\_final.cfm?id=03&program=03A509](http://www.franklincountyohio.gov/commissioners/budget/apps/programOverview_final.cfm?id=03&program=03A509),

[http://www.franklincountyohio.gov/budget/apps/agencylist\\_final.asp](http://www.franklincountyohio.gov/budget/apps/agencylist_final.asp)

For Program Overviews:

[www.co.franklin.oh.us/commissioners/pfm/](http://www.co.franklin.oh.us/commissioners/pfm/) , Facilities Department mission statement; Under Related Links (to the right of the page), click on to, [MFR Programs], then Building Services, Construction Management, etc.

[http://www.franklincountyohio.gov/commissioners/pfm/contract\\_construction\\_pgm.cfm?id=03&program=03A509%20%20%20%20](http://www.franklincountyohio.gov/commissioners/pfm/contract_construction_pgm.cfm?id=03&program=03A509%20%20%20%20) , Contract Construction Program mission statement, home web-page.

#### (2) **Fairfax County, Virginia**

Contact: Linda Metcalf, Facilities Management Department Analyst III, (703) 324-3872  
(Assembles and coordinates all department performance measures)

Web Address:

<http://www.co.fairfax.va.us/dmb/pdf/Volume1/00108.pdf> , See Real Estate Services, and Building Services sections [performance measure list is on browser pages 11-14 (page 328-9 of the document)]

<http://www.co.fairfax.va.us/dpwes/construction/cap.htm> , Design & Construction of County Facilities (home page)

(3) **Maricopa County, Arizona**

Contact: James Foley, Deputy Director Facilities Management Department,  
(602) 506-8196

Web Address:

<http://www.maricopa.gov/cio/mfr/viewOnlyDept.asp?DID=72> ,

Find the appropriate program and activity, then click for performance elements examples.

<http://www.maricopa.gov/cio/mfr/changeyear.asp> ,

Under Fiscal Year Selection, click on [Submit Query], then under departments listing, click on [Facilities Management]; “view all programs” or select a specific area such as [Facilities Maintenance]; note that the Protective Services Program – Parking Management, and Security; – are included in this listing. Fleet operation are also listed in Maricopa’s Managing For Results, Strategic Planning documents.

[http://www.maricopa.gov/Budget/Budget\\_Documents/2005-06/Tent2005-06.pdf](http://www.maricopa.gov/Budget/Budget_Documents/2005-06/Tent2005-06.pdf) ,

This is the web link to the tentative budget document; see Capital Improvements section or pages 424-429 (Facilities Department)

<http://www.maricopa.gov/cfdd/default.asp> ,

Home page for Capital Facilities Development Department mission statement

(4) **State of Arizona**

Contact: Richard R. Hubbard, Deputy State Land Commissioner  
Arizona State Land Department  
[rhubbard@land.az.gov](mailto:rhubbard@land.az.gov) (602) 542-4621  
(602) 542-2590 (FAX)

Commercial\* (602) 542-2650

Sales\* (602) 542-3000

\*These were not contacted to serve as performance references.

Web Address:

[www.ospb.state.az.us/documents/fy2006-2007-executive-budget-detail.pdf](http://www.ospb.state.az.us/documents/fy2006-2007-executive-budget-detail.pdf) , State of Arizona, Executive Budget Detail, For Real Estate performance measures - go to Adobe browser page 134 of 413 [document page 118]; for State Land Department mission and performance measures – go to Adobe browser page 209 of 413 [document page 185].

<http://az.gov/webapp/portal/>

Select from the top menu – agency Directory, choose L for Land Department, view mission statement.

[http://www.land.state.az.us/support/mission\\_goals.htm](http://www.land.state.az.us/support/mission_goals.htm) for State Land Development mission and objectives

(5) **Orange County, Florida**

Contact: George Hart, Manager of Real Estate Management Division  
(407) 836-7081

Tony Aguerrevere, Mgr. of Orange County Capital Projects  
(407) 836-0040

Purchasing and Contracts Office, (407) 836-5635 (Did not contact)  
Capital Projects Office, (407) 836-0050, (Did not contact)

Web Address:

<http://www.orangecountyfl.net/cms/GOVERN/budget/budget2005.htm> , Go to and left-click: [Section 4 - Administrative Services](#) , then go to Performance Based Measures on web browser page 7 of 16 [page 4-7] → for Construction (Capital Projects) and Real Estate performance measures.

<http://www.orangecountyfl.net/cms/DEPT/as/capitalprojects/default.htm> , Capital Projects mission statement, home web-page

[www.orangecountyfl.net/cms/DEPT/as/real/default.htm](http://www.orangecountyfl.net/cms/DEPT/as/real/default.htm) ,  
Real Estate Management web-page

[www.orangecountyfl.net/cms/DEPT/as/purcon/default.htm](http://www.orangecountyfl.net/cms/DEPT/as/purcon/default.htm) ,  
Purchasing & Contracts web-page, includes strategic long-term plan

[www.orangecountyfl.net](http://www.orangecountyfl.net) , select: [Proposed Biennial Budget, Fiscal Year 2005-06 and 2006-07](#) , (Reference → Section 11 Public Works --> Performance based measures)

(6) **Charlotte/Mecklenburg County, North Carolina**

Contact: Mark P. Hahn, AIA, Director of Real Estate Services Department  
Mecklenburg County; (704) 336-5483 (voice);  
(704) 619-4863 (cell)

Gina Shell, County Engineering and Property Management Business  
Manager, (704) 336-4648

Nancy Brunner, City Real Estate Services (704) 336-8828  
(704) 432-0270 Main Office

Web Address:

<http://www.co.mecklenburg.nc.us/Departments/Real+Estate+Services/Home.htm>

<http://www.co.mecklenburg.nc.us/Departments/Budget+-+City/+Performance+Reports/Performance+Measures.htm#business%20plans>  
Scroll down to: [Engineering & Property Management FY2004-FY2005 SOP](#)

(7) **San Francisco County/City, California**

Contact: Steve Legnitto, Director of Property Division (415) 554-9850  
Email: [Steve.Legnitto@sfgov.org](mailto:Steve.Legnitto@sfgov.org) ; (Did not confirm as a contact person)

Web Address:

[http://www.sfgov.org/site/realestate\\_index.asp](http://www.sfgov.org/site/realestate_index.asp) , There is a “Map of city owned property” link on this web page, also on this web page is the “Real Property Book.”

(8) **City of Austin, Texas**

Contact: Lauraine Rizer, Manager of Real Estate, (512) 974-7078  
Main Office (512) 974-7836

Web Address:

<http://www.ci.austin.tx.us/budget/eperf/index.cfm?fuseaction=home.Activity&DEPT=600&PROGRAM=2CPD&ACTIVITY=2RPA>

Go to Performance Measures – Public Works – Capital Projects Delivery Program (Real Property Acquisitions, CIP Inspections activity)

-Go to Project Management

- Go to Leasing and Property Management Program

<http://www.ci.austin.tx.us/budget/eperf/index.cfm>

Select Public Works at the Performance Measures by Department “select a department” window.

(9) **Broward County, Florida**

Contact: Gary Smith, Director of the Office of Project Management and  
Construction Phone: (954) 357-8456  
Dale Wilson, Assistant Real Estate Officer - Phone: (954) 357-6826

Web Address:

<http://www.broward.org/budget/fy05mr2qtr/welcome.htm> go to: Ch VIII, Real Property and Construction Management

<http://www.broward.org/budget/yr2005/rop/pw/03projectmgmtconstr.pdf> , Public Works Construction & Project Management Budget Book

<http://www.broward.org/budget/yr2005/rop/pw/02pwadmin.pdf>  
Budget Book in Public Works: go to Real Property section