

Chapter XXXVIII

Implementing ActiveStrategy in Miami–Dade County

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ABSTRACT

ActiveStrategy's performance management application deploys the widely utilized Balanced Scorecard framework in a dashboard platform designed to align strategy and operational outcomes through all organizational levels. For nearly 5 years, Miami-Dade County has been deploying ActiveStrategy within the broader context of its results-oriented budgeting initiatives. While the county has a long history with output-oriented budgeting, this case study suggests that ActiveStrategy's successful implementation requires significant time and effort as well as a change of organizational culture. Moreover, consistent with experience in the private sector, the county's effort may have had relatively unclear expectations for implementation, and the "true cost" of rollout, including the time and labor of county employees, has not been calculated. While this does not diminish the value of implementation, it suggests that return on investment may be primarily intangible—ascertaining if county programs are consistent with the strategic aims of the citizens and elected officials.

INTRODUCTION AND BACKGROUND

This exploratory case study (Yin, 1989) is an intellectual hybrid with two critical threads. It combines a discussion of software implementation with the development of an advanced performance measurement system in Miami-Dade County, Florida. From the author's vantage this is a unique contribution. While a vast amount has been writ-

ten about the implementation of performance measurement in the local sector (e.g., Ammons, 1999; Poister and Streib, 1999) Berman and Wang, 2000; Wang, 2002; Pizzarella, 2004), on the face of it, little has been written about roll-out of performance measurement software in the public sector at any level. Likewise, implementation of Enterprise Resource Planning (ERP) software has been studied at great length in the private sector (e.g., Kaplan and Mercer, 2006; Songini,

2006; Stefanou and Revanoglu, 2006), but little has been written about this phenomenon in the public sector. This exploratory case study is an effort at bridging these literatures in an effort to guide future research and provide practitioners with guidance for practice.

This discussion takes on heightened importance because an increasingly large proportion of local governments are not only engaging in performance measurement (hereinafter, PM); at least 40% deploy PM for performance appraisals, budget allocations, strategic plans, employee compensation decisions, and benchmarking to other jurisdictions. And while no particular PM rubric has been incorporated into Generally Accepted Accounting Principles (GAAP), both the Association of Governmental Accountants and the Governmental Accounting Standards Board are committed to increased utilization and transparency of PM, and some would argue that for better or worse, mandatory PM reporting is in the offing in coming years.¹

This chapter centers on review of the literature, documentary evidence, and interviews with four senior managers in Miami-Dade County, one of the largest local governments in the Southeast United States, deploying a format used in the public budgeting literature (Caiden, 1984; Pitsvada, 1988). Miami Dade County government provides county-wide services (the airport, seaport, and libraries among the most important) as well as traditional local government services (police, fire, parks and recreation) for over 1,000,000 residents who live in its unincorporated areas. The County has 60 agencies (and nearly 30,000 employees with a Strong Mayor as well as a County Manager who still maintains considerable control over hiring and firing decisions.²

Miami-Dade County has a long and distinguished history in the application of outcome-oriented budgeting. It was one of the five counties in the Ford Foundation's 5-5-5 (five cities, five counties, five states) effort of the late Sixties and early Seventies designed to facilitate PPBS

implementation in the local-state sector (Tyler and Willard, 1997). In the late Seventies and early Eighties, then-current County Manager Merrett Stierheim instituted a Productivity Division that served as in-house consultants to operating divisions seeking to improve performance through process redesign and benchmarking, with several alumni from this effort moving to the private sector and Florida Power and Light where they went on to win the Baldrige Award in 1999. In recent years former County Commissioner Jimmy Morales spearheaded the Efficiency and Competition Commissioner (ECC), of which the author was a member. The ECC was responsible for passing ordinances that institutionalized performance measurement in the county's budget process. It also managed several "bid-to-compete" efforts which resulted in significant performance improvement (and employee bonus checks) for the County's Water and Sewer and Jail Cafeteria divisions.

In its latest effort, starting 1999, the County has implemented an integrated strategic planning process that began with citizen input on establishing priority goals and objectives. Goals established through this process are implemented through departmental business plans that are reviewed annually. Budget allocations are tied these business plans and senior county managers compensation is in part tied to their successful implementation. The implementation of ActiveStrategy is integrated with that effort, with the County's acquisition of the program starting in 2004.

ActiveStrategy (hereinafter, AS) is a performance management application sharing the name of its developer (See www.activestrategy.com). The firm is headquartered outside of Philadelphia, Pennsylvania and counts a wide range of Fortune 500 firms (Lockheed Martin, Johnson and Johnson, Merck among them), educational institutions (Cherry Hill School District, Penn State, University of Wisconsin), public sector organizations (in addition to Miami-Dade, Nashville-Davidson, San Francisco, Miami Beach, and the North Atlantic

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