

County of Santa Barbara

CLIENT SUCCESS: RPM.NET

SNAPSHOT



ORGANIZATION

The County of Santa Barbara California is located on the Pacific coast in Southern California. The Santa Barbara County Government is the governing body for the County's 433,000 residents.

CHALLENGE

Replace a packaged performance management system that was complex and difficult to use with a customized application tailored to the County's needs.

STRATEGY

Develop a new performance management system called RPM. Net that automates the process of entering, managing and tracking key performance indicators (KPIs) in the Budget Book.

SOLUTION

RPM.Net features live integration with the central accounting system, user-configurable settings for formatting Budget Book output, role-based security, comprehensive search capabilities, and easy drill-down into metrics by status, category, division, and staff.

RESULTS

The Budget Office can more easily compare performance from department to department and it is easier for employees to enter and report on recurring performance measures.

When the County of Santa Barbara needed a new performance management system that could provide a simple, intuitive interface for entering and reporting on Key Performance Indicators (KPIs), County decision makers turned to the software development firm that had proven itself through several previous engagements: Visus LLC.

"Visus prides itself on understanding its clients' business requirements," says Sally Nagy, Chief Information Officer for the County of Santa Barbara. "KPIs can be very complex and specific to each organization and industry. From previous experience with Visus, we knew they would take the time to understand what we needed and then translate those needs into a user friendly application."

The County of Santa Barbara is located on the Pacific coast in Southern California. The Santa Barbara County Government is the governing body for the County's 432,981 residents and employs 3,875 people.

Like many government organizations, Santa Barbara County populates its Budget Book with KPIs that reveal each department's performance against designated metrics. For example, County-wide KPIs include workforce lost time rate, employee performance evaluations, rate of workers compensation incident claims, and many more. On top of that, each department has its own specific KPIs. For example, the Public Health Department tracks medical malpractice claims filed, the number of people receiving cancer screenings, and so forth. The Treasury department monitors liquidity requirements, transient occupancy rate, and others.

"Visus developed a system that is easier to use and more germane to the procedures we have in place. Visus has a great team who we enjoy working with very much."

- Sally Nagy, CIO, County of Santa Barbara

Years ago the County had a homegrown performance management system to help managers track these KPIs and load data into its Budget Book. When the County outgrew this system, it purchased a packaged performance management system from a software application vendor.

That's when the problems began. According to Nagy, the packaged performance management system was designed to be driven from a strategic plan. However, since the County didn't implement performance measures in this way, the complexity of this system made it difficult to use. "We wanted to make it easier for users to enter and retrieve data," she says.

A Custom Solution

Led by Budget Director Jason Stilwell, who works in the County CEO's office, Santa Barbara County envisioned a new performance management system that would permit managers to enter data into the Budget Book more quickly and accurately. Stilwell wanted to be sure that his team could easily oversee these tasks, so the system had to

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have a user-friendly interface as well.

“We wanted to go back to something that was much simpler,” explains Gail Johnson, Senior IT Project Manager at the County. “Our objective was to ease the burden of entering KPIs into the system and give users the ability to see what would go in the Budget Book before it was prepared.”

Johnson broke down the project into three phases with extremely tight deadlines. Visus assigned its leading developers and analysts to the project. The team began by conducting several meetings with IT leaders and personnel in the County Budget Office.

“Visus focused heavily on knowledge-transfer and conducted a series of meetings to develop the specifications,” Stilwell reports. “They spent lots of time up-front gathering information, interviewing users and putting together a clear specification.”

“Visus replaced a cumbersome, difficult-to-use system with a custom system that makes it easier for employees to enter and report on recurring performance measures. To top it off, they turned it around in an expedient manner. We would absolutely recommend Visus for this type of work to other organizations.”

– Gail Johnson, Senior IT Project Manager, County of Santa Barbara

Once developers fully understood the requirements, Visus built the new Performance Management system using Microsoft .NET and Microsoft SQL Server software on a Microsoft Windows 2008 Server platform. To maximize output options, they integrated the system with Cognos BI, a third party business intelligence and reporting system.

The custom performance management system automates the KPI workflow by walking users through a series of data entry tasks. It features live integration with the central accounting system for all cost centers, user configurable settings for formatting Budget Book output, and role-based security via integration with Microsoft Active Directory. Comprehensive search capabilities make it easy to find and track individual KPIs, and an online summary page lets authorized users drill-down into metrics by status, category, division, and staff.

Stilwell and others in the CEO’s office continue to oversee all budget items. He says the simplified screen design enables a much better user experience compared to the County’s previous performance management systems. It also enables the Budget Office to more easily compare performance from department to department. Formerly department managers had to create a new KPI for each program, which was time consuming. Visus devised an innovative solution by creating a KPI library that all of the departments can share. This setup permits departments to use existing KPIs with the CEO’s approval.

In Production Mode

The custom performance management system has been in production for several months as the County develops its budget for the upcoming fiscal year. Previously when people added new entries to the Budget Book they couldn’t see how the information would be formatted, which sometimes led to errors. To resolve this issue, Visus developed a Preview function that lets people see how data will be entered and formatted in the Budget Book.

Visus also created a bulk data entry screen that allows people to add or edit multiple rows of data at once. Users can attach comments to particular metrics to speed up the workflow and improve staff communication. The old system had a comments section but it was not tied to a specific metric, which meant the receiving user had to determine which metric was being discussed. This limitation prevented a batch of metrics from moving forward even if there was only one metric that was rejected for review.

“It used to be hard to get data out of the packaged system and into the Budget Book,” notes Johnson. “A lot of massaging was needed that required technical experts. Visus formatted the data so that it is prepared correctly for integration into the Budget Book publication process that is done by the Auditor Controller.

“We have had a successful working relationship with Visus,” concludes Johnson. “The staff is always professional and are technically competent. We wanted to work with a vendor we were confident could deliver a product to meet complex requirements under tight deadlines. We have had a really good track record of working with Visus.”

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