Management Evaluation Executive Summary

PROBLEM

How can the State of Missouri provide a standardized framework and supporting tools, so state agencies can evaluate available resources and program efficiencies?

- Increased spending can perpetuate problems and not address need or root of the problem.
- Inconsistent/unknown evaluation resources throughout state departments.
- Quarterly Pulse Survey (QPS) data (Survey 13, May 2022)revealed only 73% of state team members felt they had the adequate knowledge, skills, and resources needed to provide adequate citizen/customer service.

WHY

To effectively utilize available resources to provide high quality programs and services to team members and Missouri citizens. A look within often reveals a path forward.

- Good stewards of funds
- Minimize budget requests
- Build knowledge, skills, and resources for state team members
- Provide consistency across all state departments

SOLUTION

Adoption and utilization of the SHOME tool. A convenient evaluation mechanism that provides all state departments a consistent avenue to assess available resources.

FIVE FOCUS AREAS:

- General Information
- Program Resources
- Stakeholder Engagement
- Professional Development
- Performance Metrics

NEXT STEPS

- Recommend bi-monthly meeting with department budget leaders and OA Budget and Planning
- OpEx community takes ownership of the SHOME tool and converts to a user friendly web-based tool
- OpEx community and senior leadership share with their departments and becomes a best practice

State Handbook for Management Evaluation (SHOME)

The purpose of this evaluation tool is to assist managers in creating a holistic picture of current or new programs in order to review efficiencies and if necessary, provide a thorough justification for budget New Decision Items (NDIs). This tool is broken down into 5 general sections for standard use across all state departments. It is encouraged to add custom questions to better analyze the department's specific needs. Please respond to the questions with as much detail as possible as it will only benefit the program in the future. Ideally, upon completion of this form, program managers should be able to present to upper management for review and approval. Take particular note of the last item on this form, as it is a critical metric for an NDI narrative. If you have questions, or need assistance, please reach out to your Department Operational Excellence Coordinator.

Section 1. General Information- the details of any program are the foundation for providing staff the knowledge and guiding factors needed to deliver proper customer service.

What factors make the program a priority?

What is the purpose of the program?

What are the current/existing funding sources and amounts? Are there new grant funding opportunities available?

Who are the customers the program serves and who are the additional stakeholders (e.g., participants, agencies, organizations, clients, and partners)?

How does this program fit into the department's mission/vision/values?

What authority does the department have to manage the program?

What are the Federal requirements (if applicable) and are there roadblocks to meeting these requirements?

What are the state requirements and are there issues meeting these requirements?

Are there state or Federal legislative or regulatory barriers that need to be addressed?

What are the impacts if the program does not take place?

Section 2. Program Resources- asking "how much" and "why" should be commonplace when acting as public stewards of taxpayer funds.

Does/will the program use existing equipment (e.g., ITSD-related, personal protective equipment, office furniture) and materials (e.g., sample kits, office supplies, etc.) or will there be/is there a need to procure additional items? Explain and provide details including costs (e.g. one time vs. recurring).

Are existing technological systems performing optimally or are they dated? Are there upgrades needed? Please explain in detail.

Are volunteers used? Why? How are they organized? What is their feedback about program operation? What are the advantages and disadvantages of using volunteers?

Are program processes manual or automated (e.g., SFTP/web-based)? Can there be process improvements (OpEx contacted)?

How many team members support the program? What are their job titles and salary?

Has a staffing analysis been completed? If yes, what were the results of the analysis?

Section 3. Stakeholder Engagement- who the program serves should factor into how the program operates and inform the determination of unmet needs.

What is the engagement plan?

What are the current program marketing efforts?

Is program branding consistent within the department? Is program branding consistent across the network of department partners (e.g., other departments, non-profit organizations, private sector)?

Does the program meet customer interests and needs? If not, what would be required to meet demand?

Section 4. Professional Development- a well-educated and trained team is important for program success along with customer and staff satisfaction.

Are training certifications required? Which ones?

Are staffs' CEU's up-to-date?

What educational resources are being used? (e.g., LinkedIn Learning, in house expertise)

Are there any unmet educational needs?

Are the ERGs available to support the program?

Is there a mentoring program or resource available to help meet program goals?

Section 5. Performance Metrics- when developing performance metrics, it is important to determine the type of measures to be emphasized, such as cost-effectiveness, outputs, efficiency, service, quality, and customer satisfaction (Handbook of Practical Program Evaluation, Kathryn E. Newcomer, Harry P. Hatry, Joseph S. Wholey). LINKS to OP EX

How does the program measure success? Is the program currently successful? If not, what steps are being taken to address the issue.

Has the program utilized any process improvement strategies? (e.g., AGILE, Six Sigma, etc.)

After answering the above questions, the program should be able to fill in the blanks of the following sentence:

Our program can serve ______ (number and type of customers) with our current funding and FTE resources. With ______ (amount of funding and/or number of FTE), this program can increase service to ________ (number and type of customers).