



State Recovery Now

a project of America Achieves

State Recovery Now

Planning 101

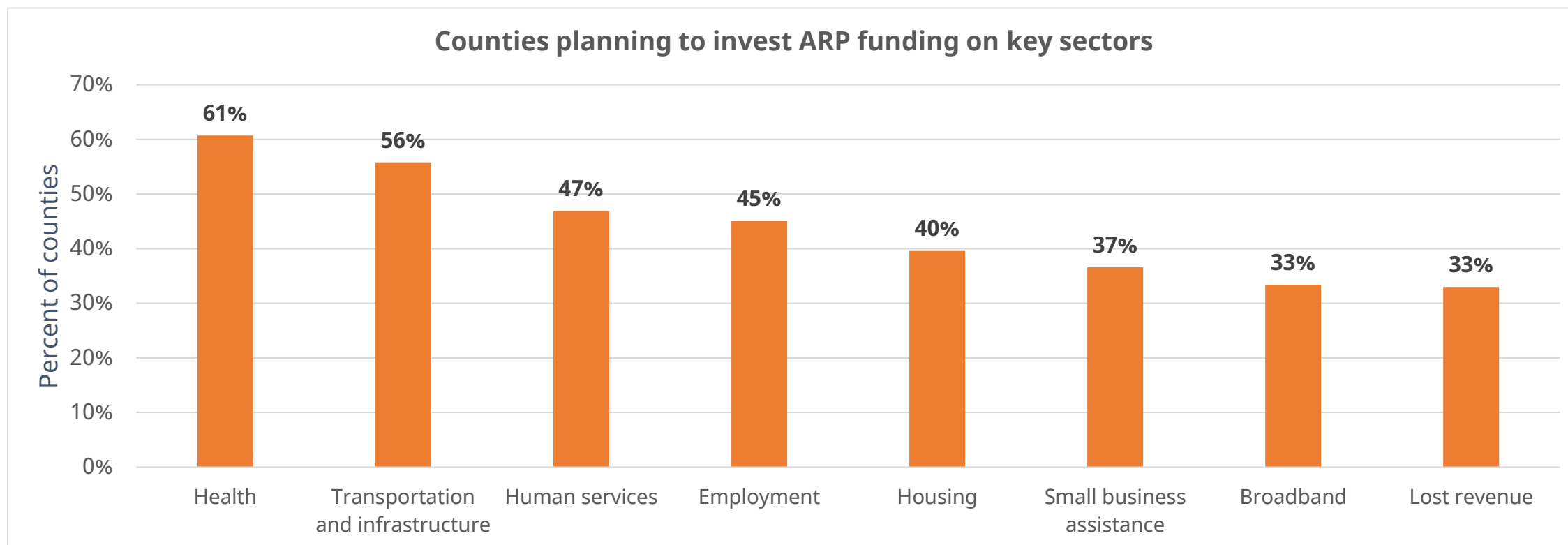
December 2021

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The American Rescue Plan (ARP) is releasing an unprecedented \$350B in funding to local governments that could transform communities – but only if spent effectively

NACO surveyed 178 counties about their anticipated investments
Most counties are planning significant, generational investments that will transform residents' lives



Because of the size of this investment, local governments need to be even more thoughtful than usual about planning and implementation

This guide will take you through each of the below steps and provide resources for your decision-making

1

2

3

4

5

6



Set an aspiration for your investment

Get input on what matters most - internally & externally - and assess ways to embed equity from the outset, focusing on outcomes

Assess how to achieve the desired outcome

Choose broad categories of impact (e.g., housing, broadband, workforce) and allocate funding

Choose strategies

Determine what success would look like, how it would be measured and evaluate evidence-based policy alternatives, based on their potential return on investment and projected impact on outcomes

Consider your capacity

Prepare to operationalize interventions and ensure they will reach intended beneficiaries

Establish routines

Decide how to keep leadership informed and structure supports for driving progress, problem-solving, and decision-making

Sustain momentum

Share stories of impact to build momentum, both internally and for the public

A view of the whole picture has to inform the first steps

This guide is designed for the use of County Leaders, preparing to implement programs in their community, using ARP and other federal funding

Each section of this guide will provide an introduction of the relevant step along with a case study
 Templates for the exercises are available in the appendix of this resource

A. Introduction to this step of the process

Step 1: Aspiration

An aspiration should be translated into one or more meaningful, movable, measurable indicators which will be used to track your progress as you implement

WHAT IS A SUCCESS INDICATOR?

Success Indicator

- A success indicator is a **specific, measurable outcome**
- It moves you closer to your aspiration when you move the number
- It will ultimately tell you when you have achieved the aspiration

CHECKLIST FOR A STRONG SUCCESS INDICATOR

Meaningful

- Will improving this indicator **deliver a real benefit** to the lives of our citizens?

Moveable

- Can we **realistically make progress changing** this indicator with the ARP investment and any existing resources in the time available?

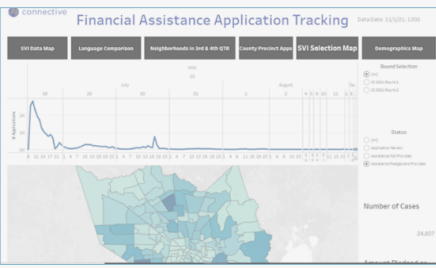
Measurable

- Do we **already have access to data** on this indicator OR are we willing to make an immediate investment to **get that data** within the next 3 months or less?

B. Case Study

Step 1: Aspiration

Case study: Harris County, TX set equity-based targets for each of its programs and is tracking progress towards those outcomes using publicly accessible reports and dashboards



- Harris County, TX set up a **publicly available dashboard** tracking equitable program reach
- Dashboards are available online and the creation and plans for additional dashboards were **shared in an annual report available to the public**

See more on Harris County's plan at <https://budget.harriscountytexas.gov/ARPA.aspx>
 View the county dashboard at <https://public.tableau.com/app/profile/connective/viz/HCRAOutreachDashboard/Main?publish=yes>

C. Exercise Example

You can assess the fit of your aspiration and success indicator by completing a simple justification and rating exercise

What are you trying to achieve? Ensure every resident has the digital connectivity to work or learn

Next, complete this table for your aspiration(s) using a 1-4 scale, 1 being weakest and 4 being strongest

| Success indicator for aspiration | Is it MEANINGFUL? | | Is it MOVEABLE? | | Is it MEASURABLE? | | Total Score |
|--|-------------------|--|-----------------|--|-------------------|---|-------------|
| | Score | Rationale | Score | Rationale | Score | Rationale | |
| Indicator 1: Percent of the population covered by a broadband connection | 3 | <ul style="list-style-type: none"> It will have real benefits for our residents in their education and work It might not capture nuances on if residents' have the technology needed (ie, laptops, phones) | 4 | <ul style="list-style-type: none"> We can use our ARP investments to fund an expansion of the broadband infrastructure and access subsidies for low-income households | 4 | <ul style="list-style-type: none"> Existing FCC data will enable us to track progress on this indicator every six months | 11 |
| Indicator 2: | | | | | | | |

Recommendations on indicators for each of the 6 ARP investment areas are included in the State Recovery Now playbooks

Add any additional indicators you are considering

Use the highest scored indicator

D. Exercise Template

An update note can be used to support a check-in and shared with team members who don't attend to keep frontline and middle management team members on the same page

UPDATE NOTE TEMPLATE

Aspiration: Date:

Strategy: Next update:

| Overall progress: | Key actions since last note: | Next Steps: |
|--|--|--|
| <ul style="list-style-type: none"> Include key highlights on implementation progress which a reader who is not involved in the day to day work could understand Share any relevant data which demonstrates progress towards your aspiration, including your success metric | <ul style="list-style-type: none"> Explain what 2-3 actions you have taken to make progress that are most important for everyone to understand | <ul style="list-style-type: none"> What are the top 2-3 actions you will take next month to keep making progress? |
| | <ul style="list-style-type: none"> What risks or problems are emerging? Where do you need support from others to address these problems? | <ul style="list-style-type: none"> What 1-2 key decisions need to be made, who should be involved, and when does it need to happen? |

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State Recovery Now, a bipartisan initiative, was created to support policymakers at all levels build better, equitable, and more sustainable outcomes

Delivery Associates is a core partner in this effort



The State Recovery Now approach focuses on 3 core objectives to support policymakers across counties and states



Understand the problem and define goals for impact



Adopt evidence-based and innovative policy solutions



Learn by doing through communities of practice

Delivery Associates supports leaders and policymakers to turn ambitious goals into reality and create long-term, sustainable impact for residents

Organizing for Delivery

Bringing delivery insight to solve governments' most critical issues

Driving Delivery

Embedding support to keep focus and overcome implementation challenges



Leveraging technology for Delivery

Applying technology solutions to accelerate and deepen impact at lower cost

Building Delivery capacity

Training the next generation of public sector leaders

We are working with State Recovery Now to offer our Deliverology® approach and expertise in planning and capacity building to policymakers nationwide



Planning

Developing robust, practical plans that drive implementation on the ground



Delivery

Using data, field visits and routines to identify roadblocks, solve implementation problems and keep authorities well-informed on progress



Sustainability

Building capacity through workshops, on-the-ground training and one-to-one coaching to ensure wider, long-lasting benefits for citizens



Collaboration

Bringing peers together through group convenings and individualized connections to share common challenges, ignite problem-solving and inspire action



Together, we want to support you in your efforts to build better outcomes for your residents and promote a sustainable, equitable recovery in your community

Your Questions

How can we Help

What are we trying to accomplish?

Recommendations on metrics to measure outcomes, aligned to expected ARP investment areas and potential impacts on residents

What is the problem we're trying to solve?

Use our [issue maps](#) to identify potential root causes to challenges in your context, backed by data

How will we solve it?

Leverage our [policy playbooks](#) and two-pagers to draw on evidence based, innovative policy interventions you can adapt

How will we learn from this work?

Become part of our community of practice, to help build evidence on what works and what policymakers will need in the future



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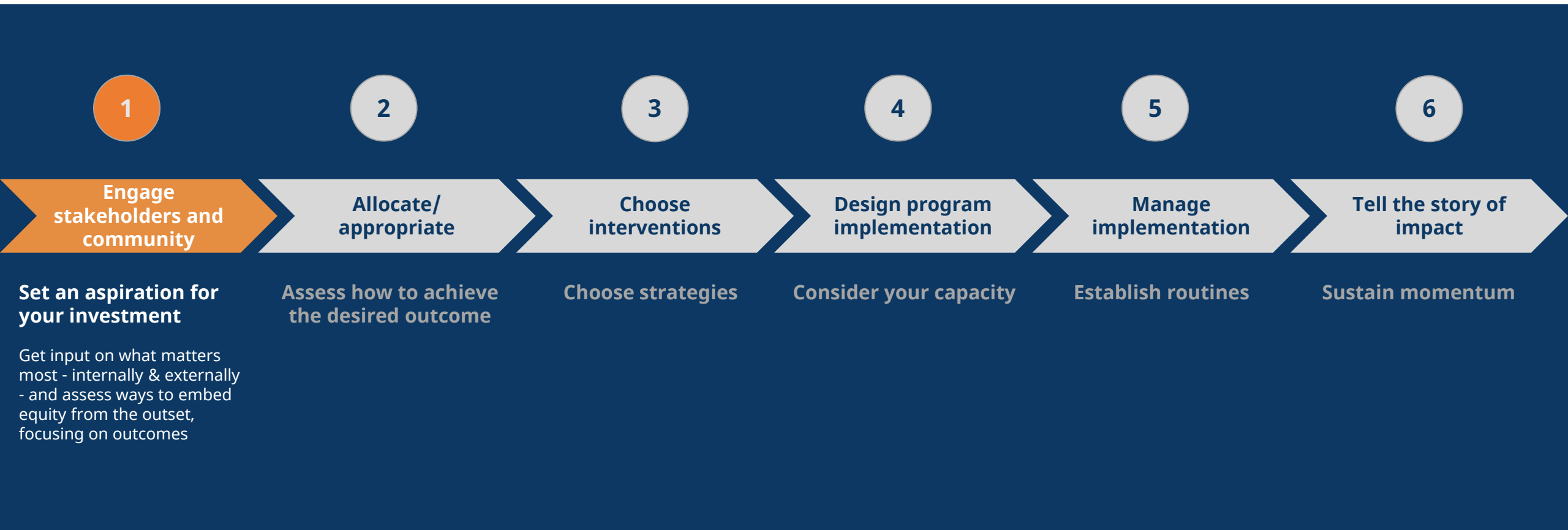


Step 1: Engage the Community to Set an Aspiration

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Your aspiration will define what outcomes you will accomplish and who in the community will benefit from the investment



A good aspiration will provide an overarching ambition and clearly define for you, and for key stakeholders, what you are trying to do...

Illustrative Example

Aspiration: Ensure **every resident** has the digital connectivity to work or learn

How can you define an aspiration that is equitable?

Embedding equity means that you **understand who will benefit** from your investment from the outset and **center them in your design and outcomes**. Engaging and co-creating with **relevant stakeholders**, who will implement and be impacted by it, will help integrate and reflect equity better in your aspiration



County or city officials,
state officials, and other
government stakeholders



**Community-based
organizations,** nonprofits,
and related partners



Residents, through
focus groups, surveys,
and other outreach



...and should be translated into one or more meaningful, movable, measurable indicators which can be used to track and assess ongoing progress

What is a Success Indicator?

- A success indicator is a **specific, measurable outcome**
- It **moves you closer to your aspiration** when you move the number
- It will ultimately **tell you when and whether you have achieved the aspiration**

Checklist for a strong Success Indicator

Meaningful

Will improving this indicator **deliver a real benefit** to the lives of our residents?

Movable

Can we **realistically make progress changing** this indicator with the ARP investment and any existing resources in the time available?

Measurable

Do we **already have access to data** on this indicator OR are we willing to make an immediate investment to **get that data** within the next 3 months or less?



Using these success indicators, you can map out targets and trajectories to track progress towards measurable outcomes and make mid-course corrections

Aspiration

- **Overarching ambition and moral imperative**
- Your answer to the question: **“What am I trying to do?”**

Success indicator

- **Specific, measurable equitable outcomes**
- Measures your progress to your aspiration

Target

- **The desired end result** for the success indicator
- A **specific number**, defined by a point in time

Trajectory

- Best estimate of **what performance will look like over time** until the target is reached



Targets and trajectories should be ambitious but realistic and benchmarked against real data in order to be a useful tool to use to monitor progress

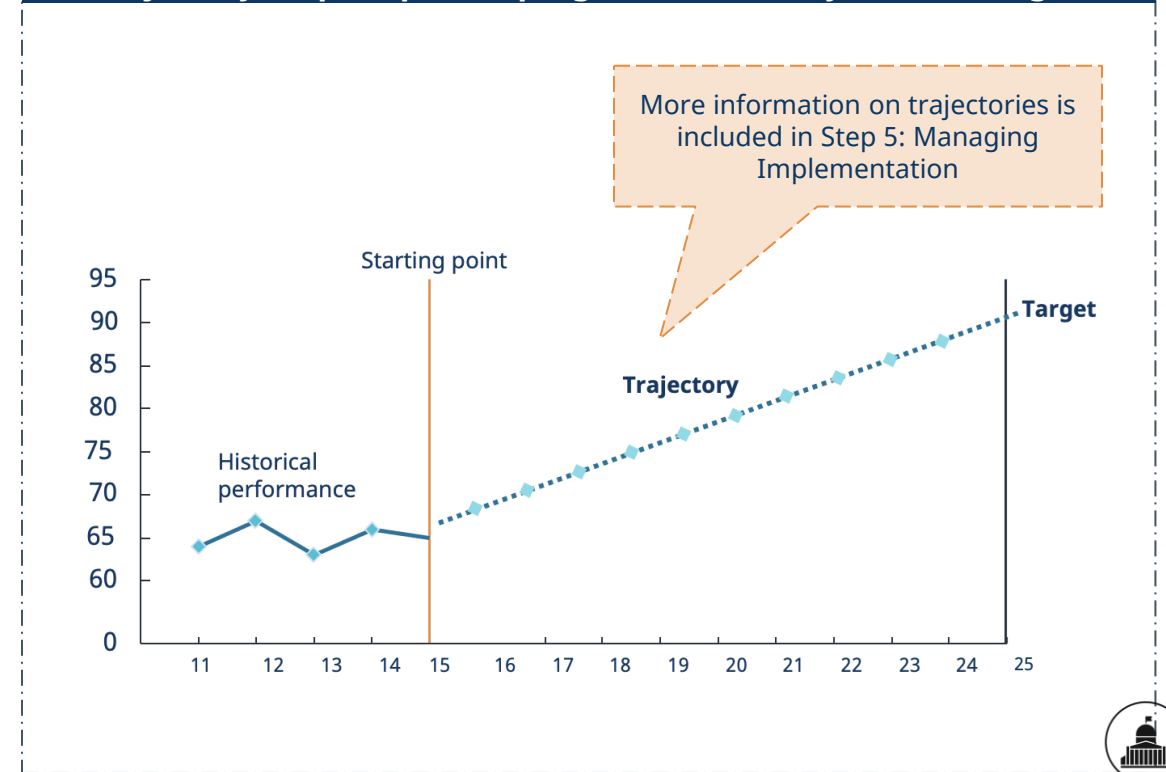
Illustrative Example

Understanding Performance through Benchmarking

| Comparative benchmarking: Percent of the population with access to a broadband connection | |
|---|---|
| Against history | Review annual broadband access coverage for the past ten years |
| Against other similar systems (peers) | Compare against broadband coverage in other states or counties |
| Within your systems (yourself) | Compare broadband coverage by census block or neighborhood within your county |
| Against the world | Review global trends in broadband access, OECD average |

Using the benchmarks to map a Trajectory

The target shows the ultimate number you hope to achieve, while the trajectory maps expected progress on the way to achieving it



As much as possible, across your targets and trajectories, it is important to consider how you can disaggregate your indicator(s) to measure progress equitably

Illustrative Example

Success Indicator: Percent of the population with access to a broadband connection

Disaggregated by

Selecting an aspiration is iterative as you choose a success indicator – the data may inspire you to pick an aspiration that benefits a more specific population



Geography



Income



**Race and ethnic
group**



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Montgomery County, MD: The County set overarching aspirations for its programming by issue area, and set specific outcomes and measurable targets for each investment

The Approach

- Montgomery County set overall, **aspirational** goals for its investments and six priority areas
- The county also set **performance indicators** for the projects funded through ARP investments
- The county also plans to report on and track the progress on investments on its CountyStat website

How you might use it

- An aspiration should be set for your spending as a whole but can also be set for specific priorities and/or specific projects
- Setting clear success indicators and sharing them publicly – particularly when committing to track progress publicly – sets up an accountability system that can fuel momentum

Overall Recovery Vision

To create a more effective and efficient government that will lead the effort to revitalize the diverse communities throughout Montgomery County so that we successfully overcome the impact of COVID19 by strengthening our economy, being inclusive of all communities, and implementing innovative and sustainable solutions.

Performance

As part of the design phase, the project has proposed the following key performance indicators, which will be refined as the project moves into the implementation phase:

- Number of residents served by the Mobile Health Unit
- Number of events organized/attended
- Percent of residents served who connected to additional health and human services in the six months following initial engagement (ex: dental services, food stamps, behavioral health support, child care subsidies, rental assistance, etc.).
- Percent of residents served in (or from) high-need and vulnerable communities as defined by community indicators of social vulnerability (CDC) and healthcare access.

View more on their plan at: <https://montgomerycountymd.gov/covid19/Resources/Files/slfrf/recovery-plan-performance-report-july312021.pdf>



Milwaukee County, WI: To determine its aspiration for its ARP investments, Milwaukee County set up a community engagement strategy to gather input

The Approach

- Milwaukee County designed an **engagement strategy** to promote **equitable input** into its ARPA spending priorities and decision-making process
- Their strategy uses a mix of **passive outreach** (surveys) and **active outreach** (listening townhalls, social media, mailings) to capture resident input

How you might use it

- Consider how you might mix passive and active outreach strategies to engage more diverse groups of residents
- Identify and name what groups of residents you want to reach to ensure diverse and equitable input
- Think about how you can use aspiration setting as a hook to bring residents into your ARP spending implementation long-term

Resident Priority Ranking
Please select the top three areas that Milwaukee County should prioritize to help the community recover from the pandemic.

First Priority *
What should be the first priority for community support programs?

Select or enter value

- Public Health: Mental Health Services
- Public Health: Substance Use Services
- Household Assistance: Food Programs
- Household Assistance: Rent, Mortgage
- Household Assistance: Internet
- Housing Support: Affordable Housing
- Economic Impacts: Unemployment
- Economic Impacts: Job Training, Employment, Employment Support

LISTEN TO the diverse perspectives and ideas of Milwaukee County residents most impacted by COVID-19 to help define what, where, and how ARPA dollars are used.

- ARPA Community-specific Reverse Townhalls
 - African American Community
 - Latinx Communities

INVOLVE Milwaukee County residents and impacted community partners directly in ARPA planning and decision making.

- ARPA Taskforce Meetings
- Community Support Service Area Subject Matter Teams
- COVID-19 Mitigation and Strategic Communications Planning and Outreach
- Milwaukee County Public Health Infrastructure Planning and Development

View more on their plan at: <https://county.milwaukee.gov/EN/Administrative-Services/Performance-Strategy-and-Budget/American-Rescue-Plan-Act>



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Exercise: You can assess the fit of your aspiration and success indicator by completing a simple justification and rating exercise

Illustrative Example

What are you trying to achieve? Ensure every resident has the digital connectivity to work or learn

Exercise: Assess success indicators using a 1-4 scale, 1 being weakest and 4 being strongest

| Success indicator for aspiration | Is it MEANINGFUL? | | Is it MOVEABLE? | | Is it MEASURABLE? | | Total | |
|---|-------------------|--|-----------------|---|-------------------|---|-------|----------------------------------|
| | Score | Rationale | Score | Rationale | Score | Rationale | Score | |
| Indicator 1: Percent of the population with access to a broadband connection Recommendations on indicators for 6 ARP investment areas are included in the State Recovery Now Issue Maps | 3 | <ul style="list-style-type: none"> It will have real benefits for our residents in their education and work It might not capture nuances on if residents' have the technology needed (i.e., laptops, phones) | 2 | <ul style="list-style-type: none"> We can use our ARP investments to fund an expansion of the broadband infrastructure locally But, our state has significant access limitations we can't address as a county | 4 | <ul style="list-style-type: none"> Existing FCC data will enable us to track progress on this indicator every six months | 9 | Use the highest scored indicator |
| Indicator 2: Add any additional indicators you are considering | | | | | | | | |

Access blank Template in the [Appendix](#)



Exercise: To obtain the most value from your success indicator, once you have selected it, use it to set a target for what your aspiration will achieve in the community

Illustrative Example

Aspiration: Ensure every resident has the digital connectivity to work or learn

Success Indicator: Percent of the population covered by a broadband connection

Baseline: 70% of the community (2011 data)

Success Target: 87% of our community by 2025

Use historic data to set a benchmark for where you are today ...

...then determine where you want to go. **Note that you may need to look at similar communities and historic trends to set a realistic target**

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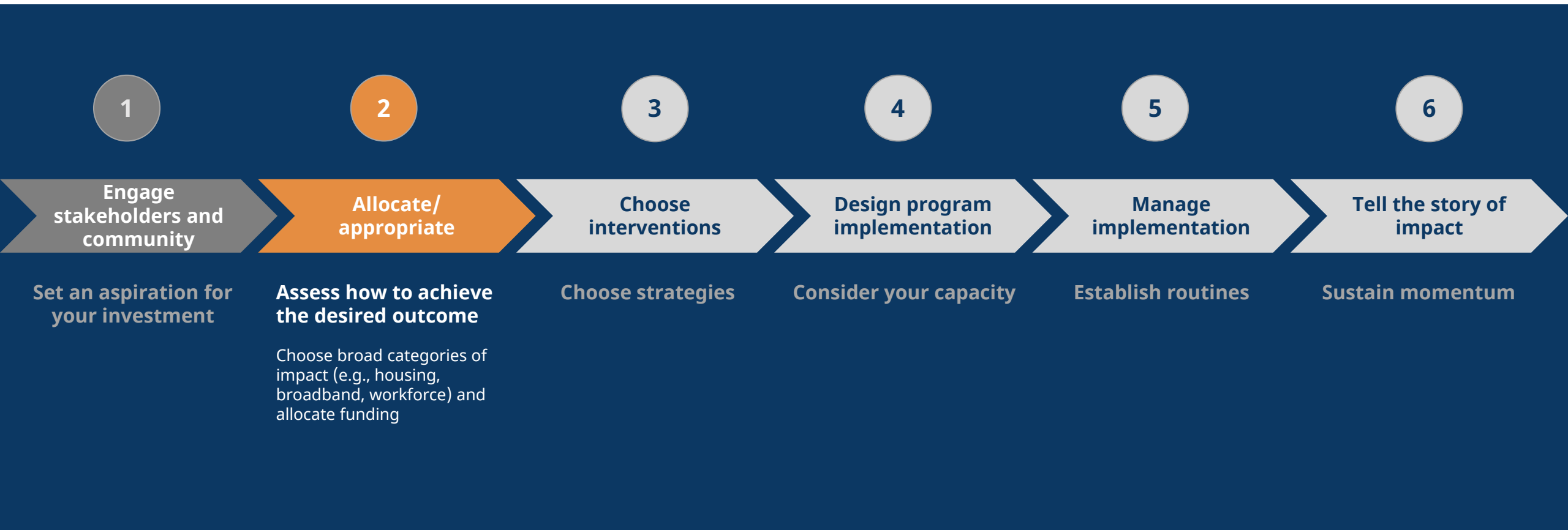
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Step 2: Prepare to Allocate and Appropriate

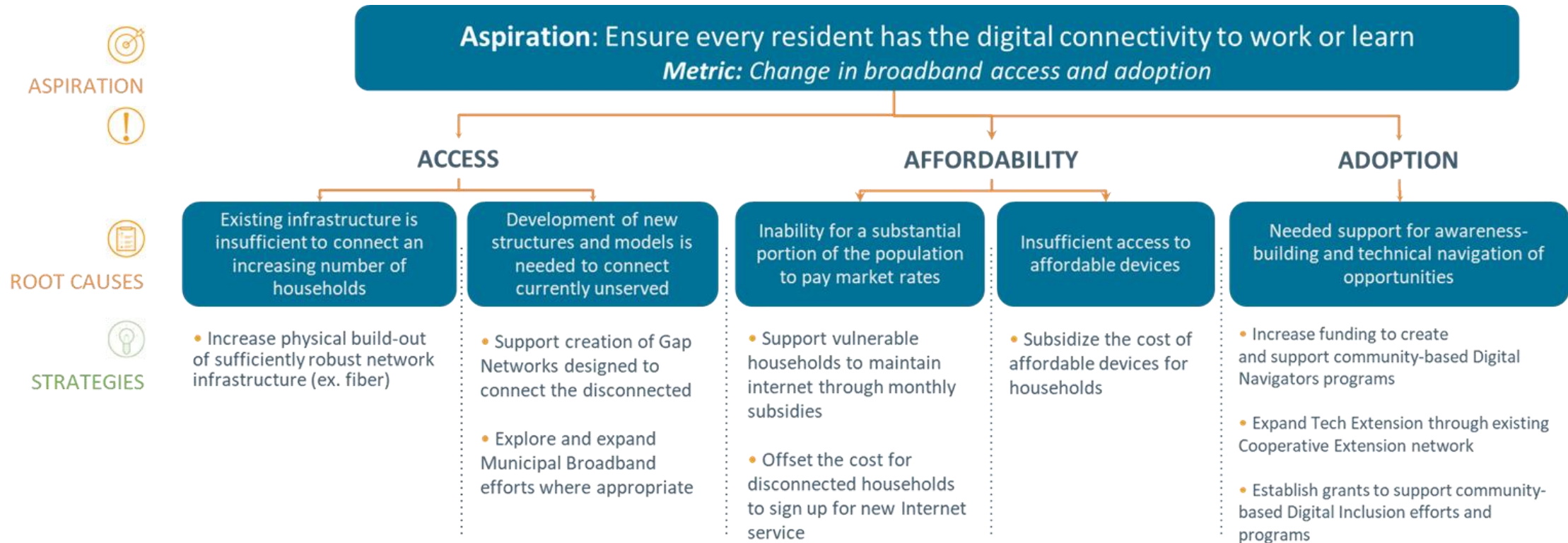
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To determine funding needs and allocation to implement your aspiration, it is critical to understand the root cause of the problem you hope to solve in your community



An issue map is one approach to identify the root causes of a challenge, which can then be used to map potential solutions that you can use the ARP funding to address

Illustrative Example



Step 2: Prepare to Allocate and Appropriate

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Harris County, TX: The County formed a hypothesis of potential solutions across its health, workforce and housing sector priorities, and is now exploring these with the community

The Approach

- Harris County identified a limited set of **three priorities** which it would consider for ARP investments
- It has an **initial hypothesis** of what areas investments could benefit
- Working groups are **studying the solutions** in more depth

How you might use it

- As you move from problems, to strategies, you may want to consider a similar way to integrate community input and review
- The exercise included in this guide may yield different results if produced by a group of different stakeholders representing diverse community perspectives

How will the funds be used?

Commissioners Court has set out three clear priorities: Health, Jobs, and Housing, together with improvements in County operations. Working groups are studying opportunities in each area. Possible options are included below.

Commissioners Court has adopted an Equity Framework to guide project selection, design, implementation, and evaluation. The [Equity Framework](#) calls for investments to be made fairly, taking into account who has been most impacted by the pandemic, with community member engagement throughout all project phases.

Our first Treasury Report describes investments to date.

| Treasury Report | |
|---|---|
| HEALTH | JOBS/EDUCATION |
| <ul style="list-style-type: none"> ▪ Vaccine distribution ▪ Mental health supports/counseling ▪ Activities that address short and long-term health disparities ▪ Food ▪ Health-based responses to behavioral health, social welfare and safety | <ul style="list-style-type: none"> ▪ Workforce development ▪ Employment practices ▪ Small business report ▪ Access to credit ▪ Flexible financial assistance ▪ Digital Access ▪ Education ▪ Childcare |

See more at <https://budget.harriscountytexas.gov/ARPA.aspx/>



Step 2: Prepare to Allocate and Appropriate

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Step One: To build an issue map, first you identify possible problems which may be preventing the aspiration from being realized in your community

Illustrative Example

Aspiration: Ensure every resident has the digital connectivity to work or learn
Metric: Change in broadband access and adoption


ASPIRATION


PROBLEM
HYPOTHESIS

Lack of ACCESS

We do not have the right broadband services or infrastructure to meet resident needs

Lack of AFFORDABILITY

Residents cannot afford the services that are present in the community




Insufficient resident ADOPTION

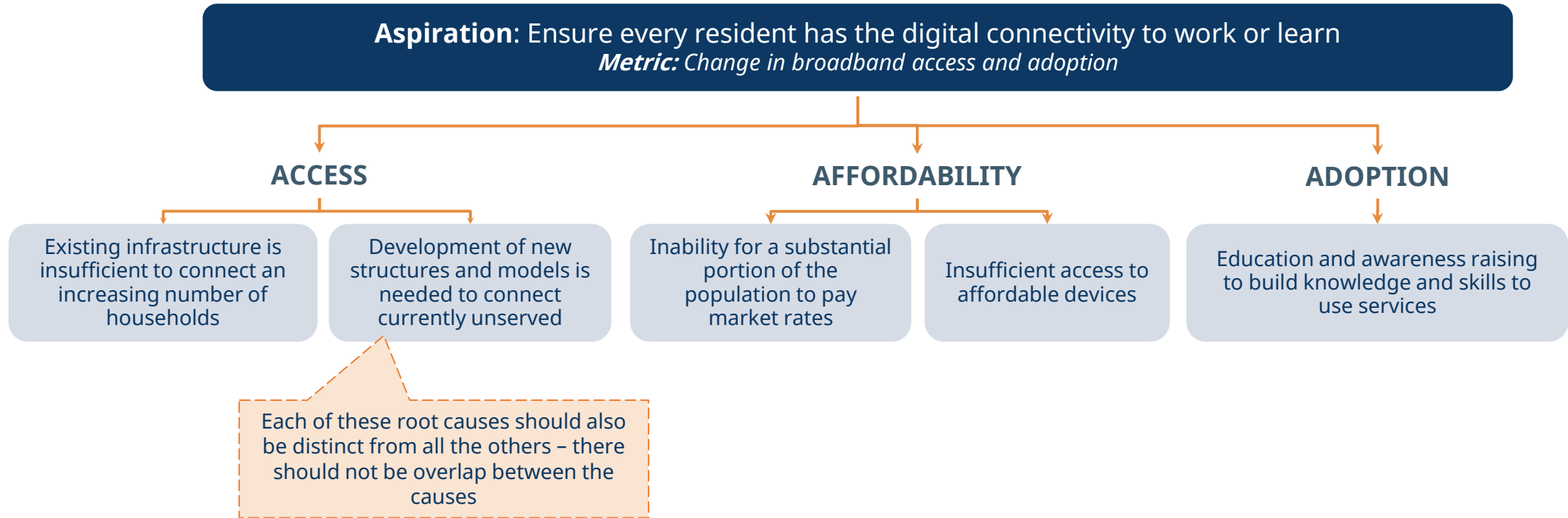
Residents do not want to use the broadband services

Each problem is uniquely distinct from the others and is identified as a potential factor limiting resident's digital connectivity

Step Two: Breakdown each of the main problems further, distinguishing unique reasons for what is driving the problem, naming the root causes of problems

Illustrative Example

-  ASPIRATION
-  PROBLEM HYPOTHESIS
-  ROOT CAUSES



Step Three: Once the root causes have been identified, you identify specific solutions which could address these root causes creating your community's problems

Illustrative Example

Aspiration: Ensure every resident has the digital connectivity to work or learn
Metric: Change in broadband access and adoption

 ASPIRATION

 PROBLEM HYPOTHESIS

 ROOT CAUSES

 STRATEGIES

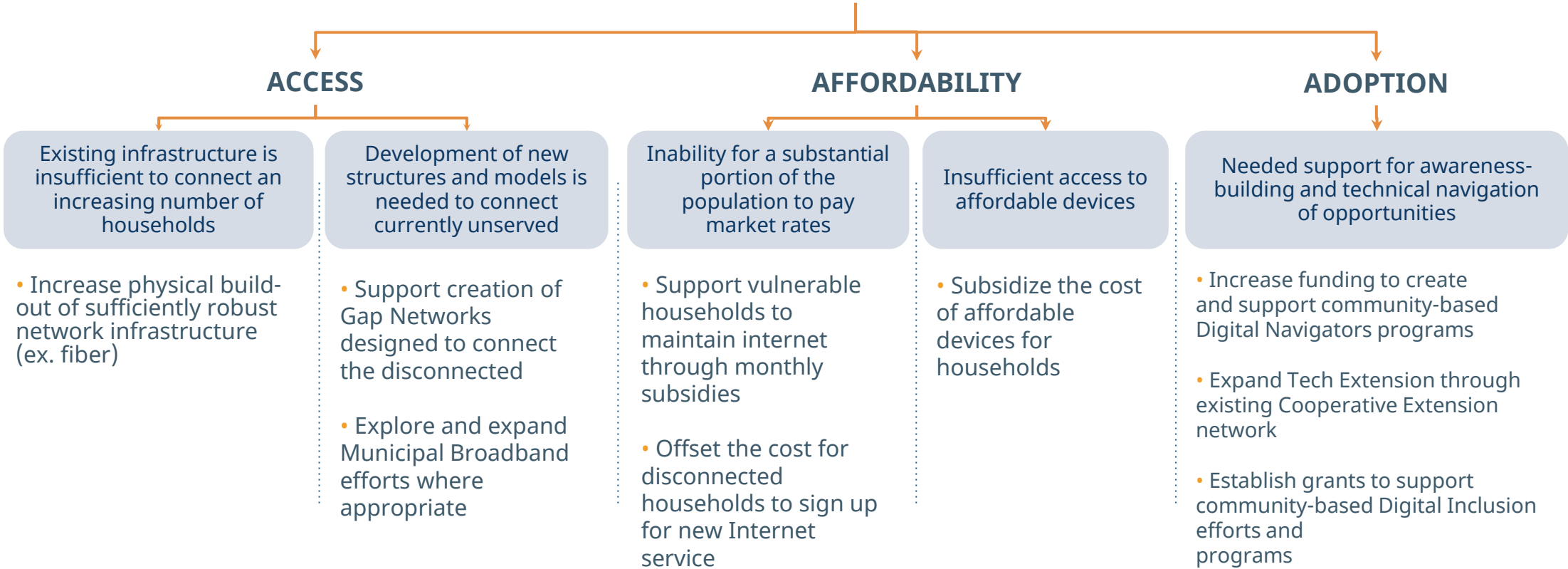


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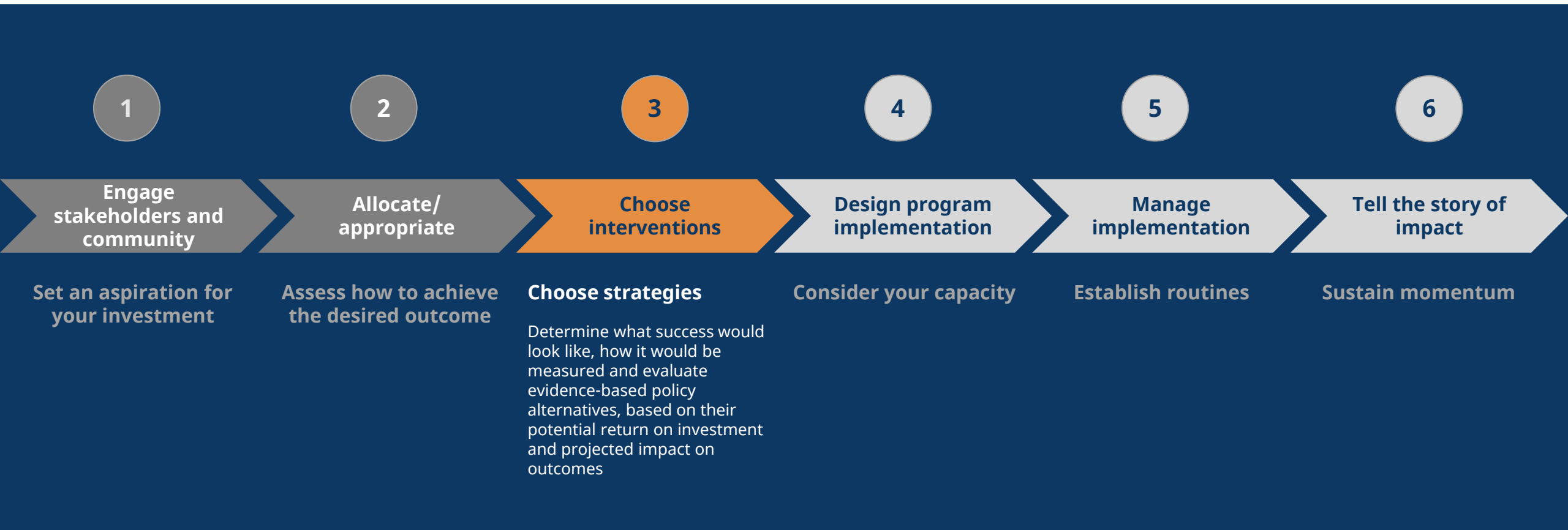


Step 3: Choose interventions

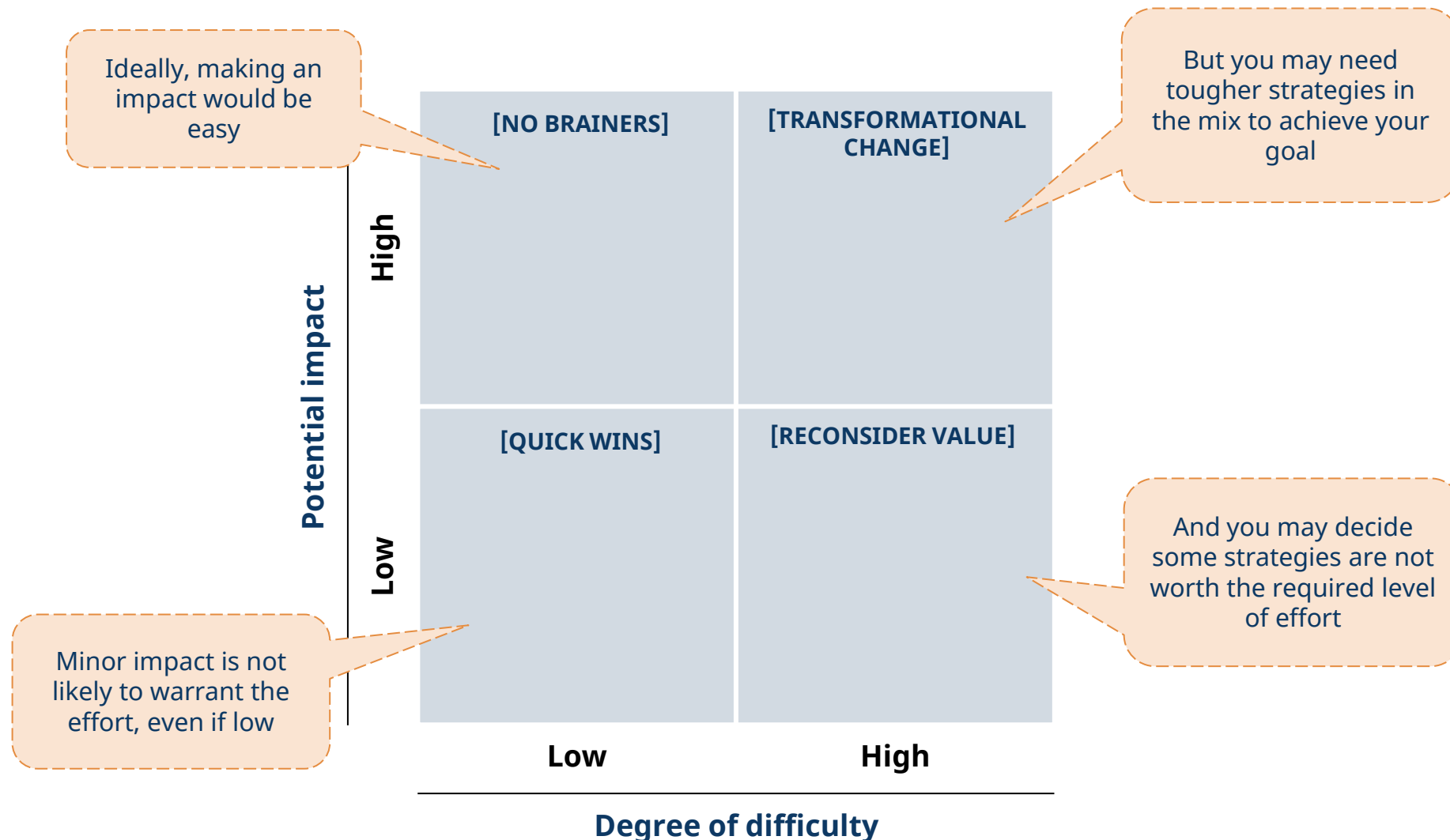
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Identifying all possible strategies to achieve your aspiration is not enough, you need to prioritize which strategies should be pursued and when



Using a prioritization matrix to map proposed strategies, based on potential impact and difficulty, can help identify the effort and impact tradeoffs involved in each strategy



Step 3: Choose interventions

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Pierce County, WA: The County revisited its strategic plan to reassess priorities, identifying priority projects and indicators which made it easier to allocate ARPA funding

The Approach

- Pierce County revisited its strategic plan to affirm a **set of aspirations**, and to set **priority projects** and indicators for success for each area
- Federal funding is then allocated to priority projects which use those indicators to **measure outcomes**
- Additional interim output indicators are also identified

How you might use it

- You may find it useful to have a strategy identification process with county stakeholders that can guide wider county programming
- Setting indicators for success for priorities, and then aligning project specific indicators for success with those priorities, enables you to track progress on specific projects and on overall improvements

A place people are proud to call home.
Our mission: Build strong communities.

- Vibrant Communities**: Safe and just communities, Healthy and happy people, Clean, sustainable environment, Attainable housing.
- Safe and Just Communities**: People have confidence they are safe and will be treated fairly.
- Skilled Workforce**: Expand living-wage job training for underserved communities.
- Attainable Housing**: Everyone has access to a safe and affordable place to live.
- Jobs and Entrepreneurship**: Distribute economic.
- Accountability for Results**: Measurement and public.
- Talented and Diverse Employees**: Our employees are.

| Strategic Objective | Intended Results/Outcome | Community Indicators/Measures |
|----------------------------------|--|--|
| Vibrant Communities | | |
| Safe and Just Communities | People have confidence they are safe and will be treated fairly. | <p><u>Community Indicators:</u></p> <ul style="list-style-type: none"> Violent crime and property crime rates Domestic violence rate Percent of people who feel safe Percent of people who feel respected Number and outcome of community events <p><u>Performance Measures:</u></p> <ul style="list-style-type: none"> Average emergency response time Percent of pretrial participants Percent of Trueblood diversions Average time from initial report to arrest |

B R O A D B A N D

Project: Broadband Improvements
Funding Amount: \$15,000,000
Expenditure Category: 5.17 Broadband: Other projects

Project Overview: Support for partnerships, seed money, and matching money for grants to provide or improve broadband services in underserved areas of Pierce County.

Performance Indicators:

Output Measures

- Speeds/pricing tiers offered
- Technology to be deployed
- Miles of fiber
- Cost per mile
- Cost per passing

See more at <https://www.piercecountywa.gov/7275/American-Rescue-Plan-Act>

El Paso County, CO: The County set priorities and published planned allocations across each priority area, in addition to setting output and outcome indicators for each priority

The Approach

- El Paso County published planned allocations across 9 key budget areas, showing all allocations and how funding will primarily be spent in six top **priorities**
- The County also set output and outcome **indicators** for how it will measure success and measure progress towards its defined success

How you might use it

- Publicly sharing priorities and spending plans can publicly demonstrate how you are operationalizing the priorities
- Setting indicators for priorities overall helps pre-determine what programs will need to achieve
- This will make it easier to prioritize across programs, because the county has already set spending intentions and planned outcomes

| | | |
|--|--------------------|-----|
| Economic Recovery | \$20 Million | 29% |
| Funding in this allocation will grant money to businesses that need it most, get workers back to work through workforce development programs, get tourists back to the Pikes Peak region, and support local chambers of commerce. | | |
| Public Safety | \$17 Million | 24% |
| Funds will go to the County Departments and Offices with direct COVID response expenses. | | |
| Water Infrastructure | \$8 Million | 11% |
| The county will partner with area water and sewer districts to identify and fund high-impact water infrastructure projects with a focus on managing or mitigating pollutants, reduce the energy required to treat water, and reuse water where possible. | | |
| Public Health | \$8 Million | 11% |
| Funds will go to Public Health for the direct response to COVID-19. | | |
| Broadband Infrastructure | \$6 Million | 9% |

PERFORMANCE MEASURES:

Output Measures:

- Number served
- Number served by zip code
- Number of trainings completed
- Number of employees upskilled by their employer

Outcome Measures:

- Improve employment situations for impacted El Paso County residents
- Improve skills needed for the underemployed or unemployed El Paso County residents
- Increase number of skilled workers in El Paso County

See more at https://issuu.com/elpasocounty/docs/2021_arpa_recovery_performance_plan_report?mode=window



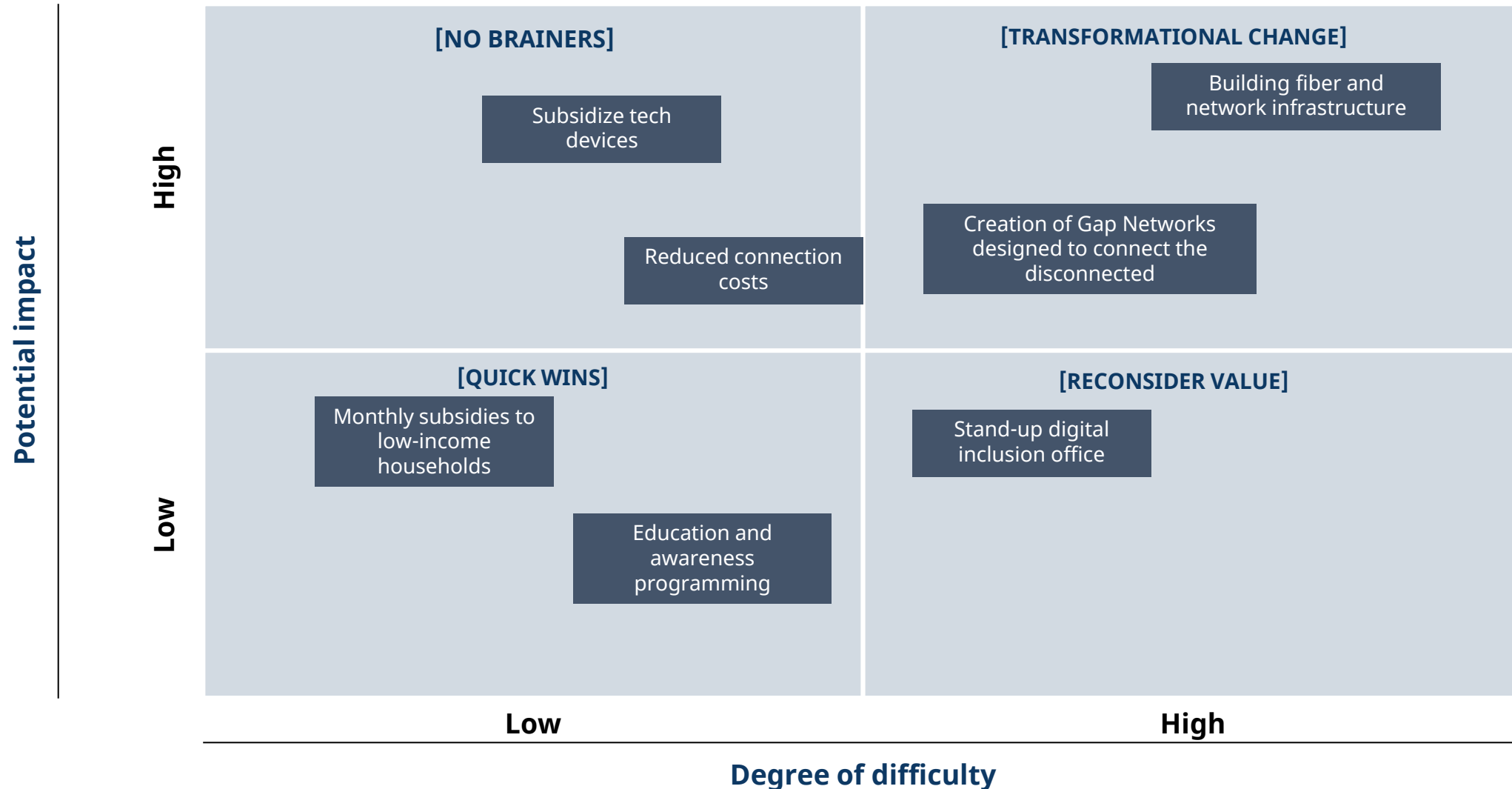
Step 3: Choose interventions

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| C. Exercise example: Strategy prioritization | 44-46 |



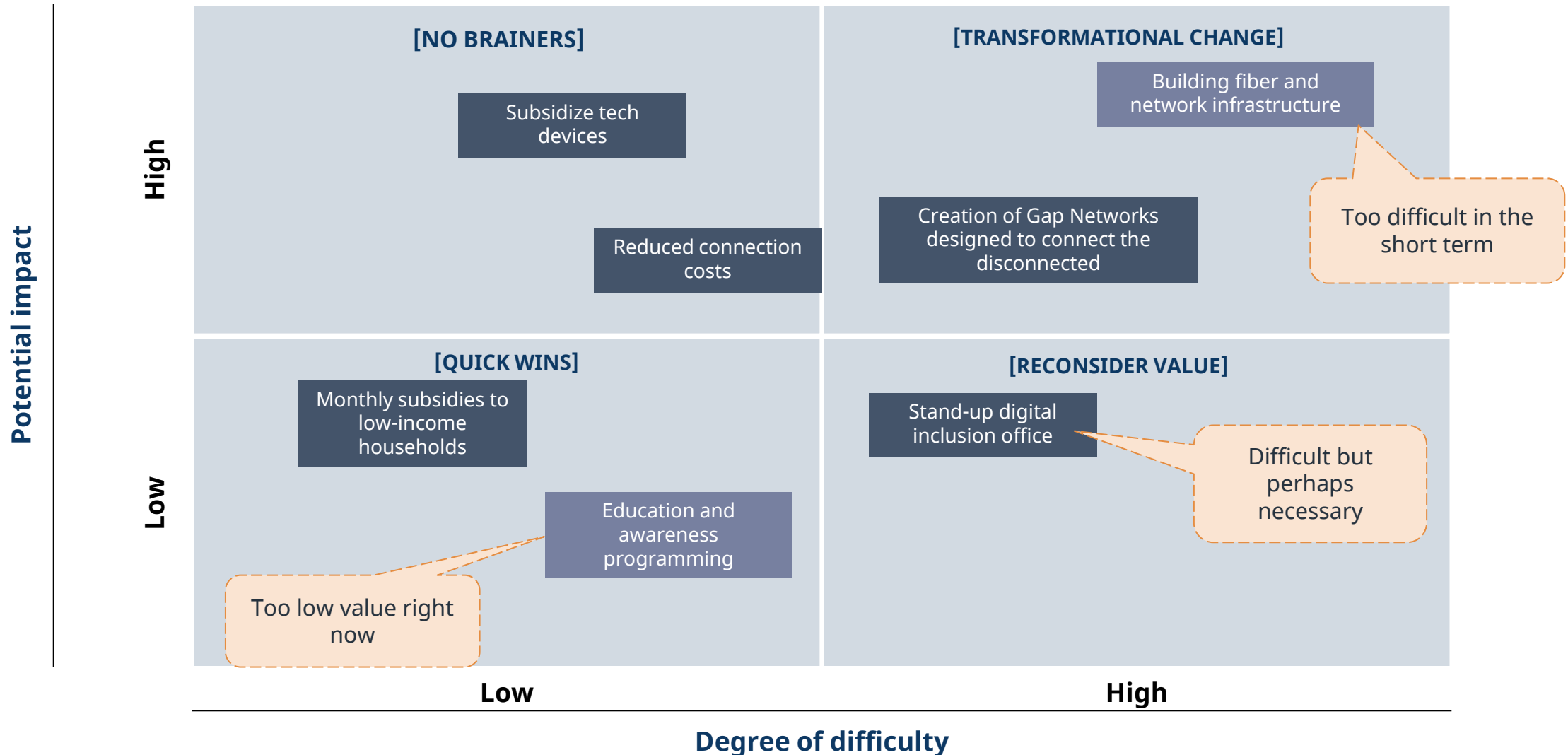
Step One: Begin by mapping the strategies that you identified in the issue map onto the matrix, trying to ensure that strategies are distributed across the map

Illustrative Example



Step Two: Decide the mix of strategies required to pursue your aspiration, keeping in mind your current capacity and the timelines to implement

Illustrative Example



Step Three: Finally, sequence those priorities by deciding what you will do first; ensure you're thinking both short term and long term.

Illustrative Example

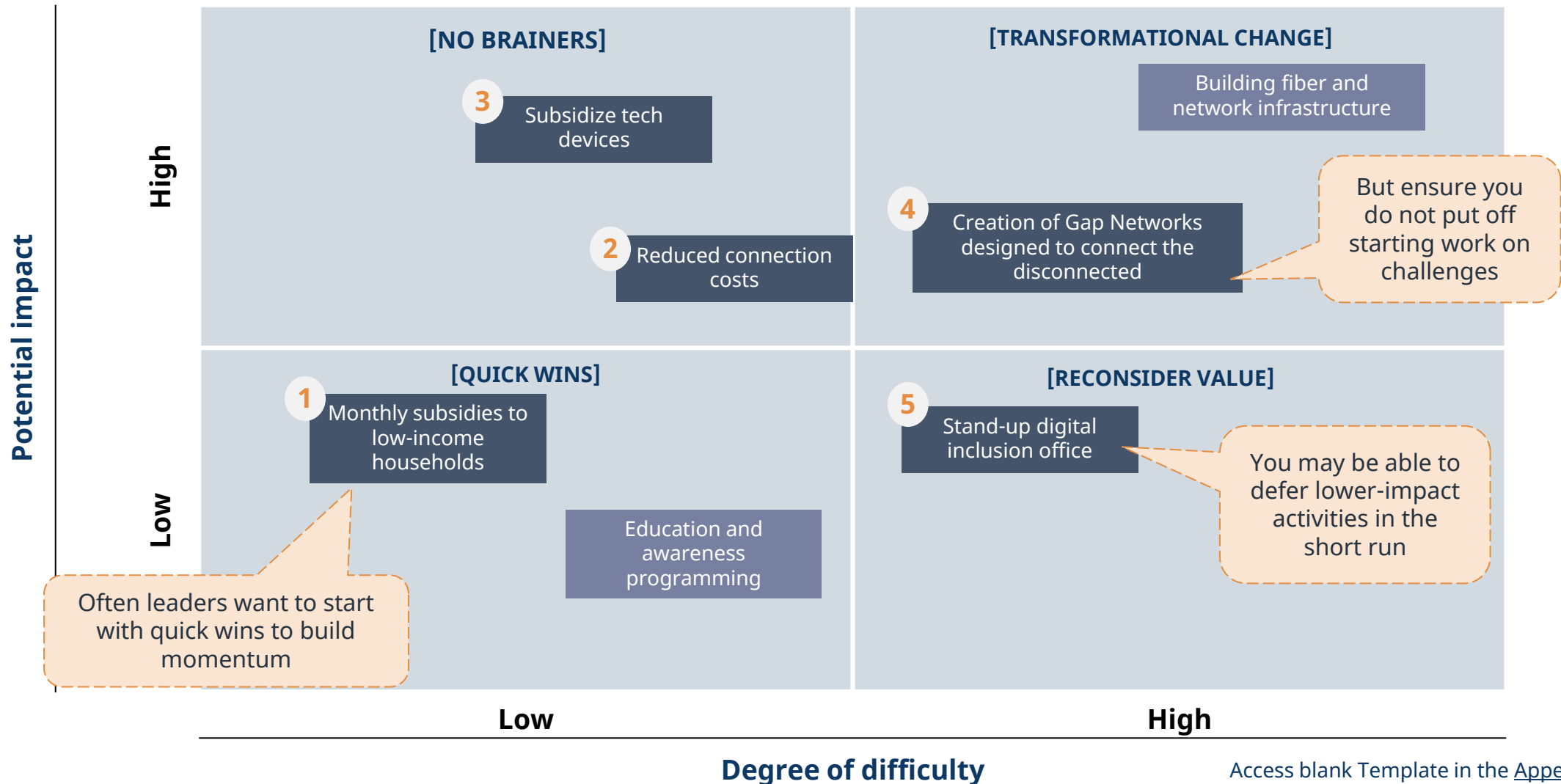


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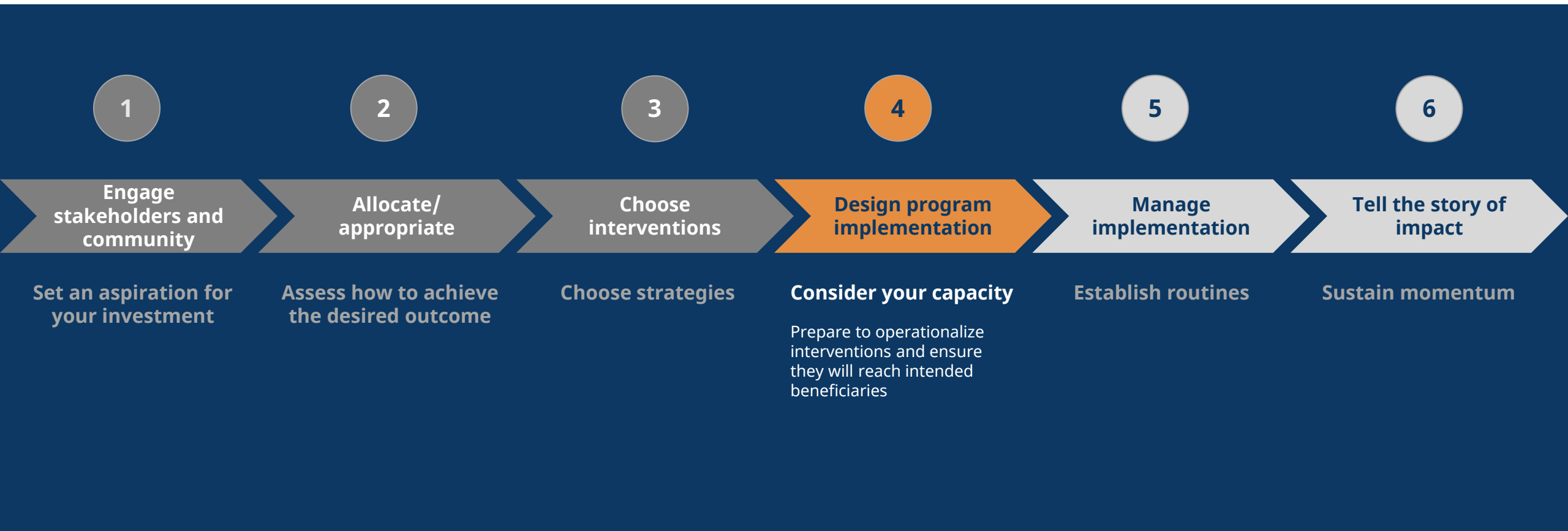
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Step 4. Design Program Implementation

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| C. Exercise example: Mapping the Delivery chain | 58-63 |

Once you have prioritized the strategies you will implement, you can further define your strategy and assess overall capacity of existing systems to deliver



Drawing a delivery chain is critical to planning, by mapping out stakeholders you can see how the strategy will be implemented in the field

What is a Delivery Chain?



A **delivery chain** is the map of the **actors (people or organizations) involved in delivering a policy, and the relationships between them**, through which a given strategy is implemented



A delivery chain answers two major questions: From the senior leader to the front-line, **who is involved in making sure a plan becomes a reality?** And **how will they work together** to make it happen?



Delivery chains can be useful in planning for service delivery, problem-solving challenges, and identifying risks and feedback loops

Planning

- Tell the story about **who is responsible** for implementation at each stage
- Ensure you are considering and **building relationships** with the most influential actors
- Help you **identify risks** to implementation and plan to mitigate them

Diagnosing Problems

- Provide a 'complete set' of **places to investigate** as delivery problems arise – the source will exist somewhere along the delivery chain
- Identify other **relationships near the problem** in the chain that can support – helping you problem-solve quickly

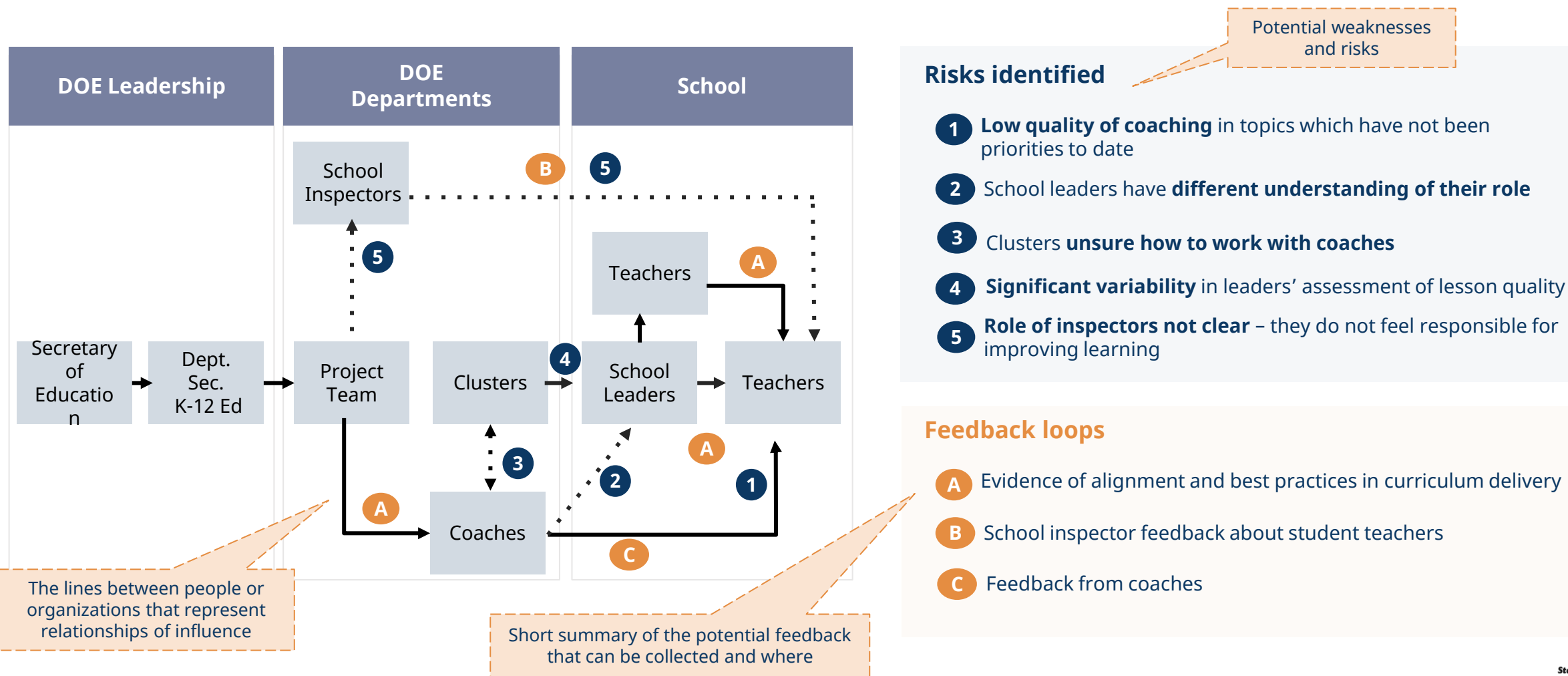
Collecting Feedback

- Identify stakeholders you should engage to **seek feedback** and understand how implementation is working
- Identify areas for **field work** to investigate problems as they arise



The delivery chain is represented in a visual map that identifies how each stakeholder involved in implementing a policy connects to one another

Illustrative Example: Education Delivery Chain



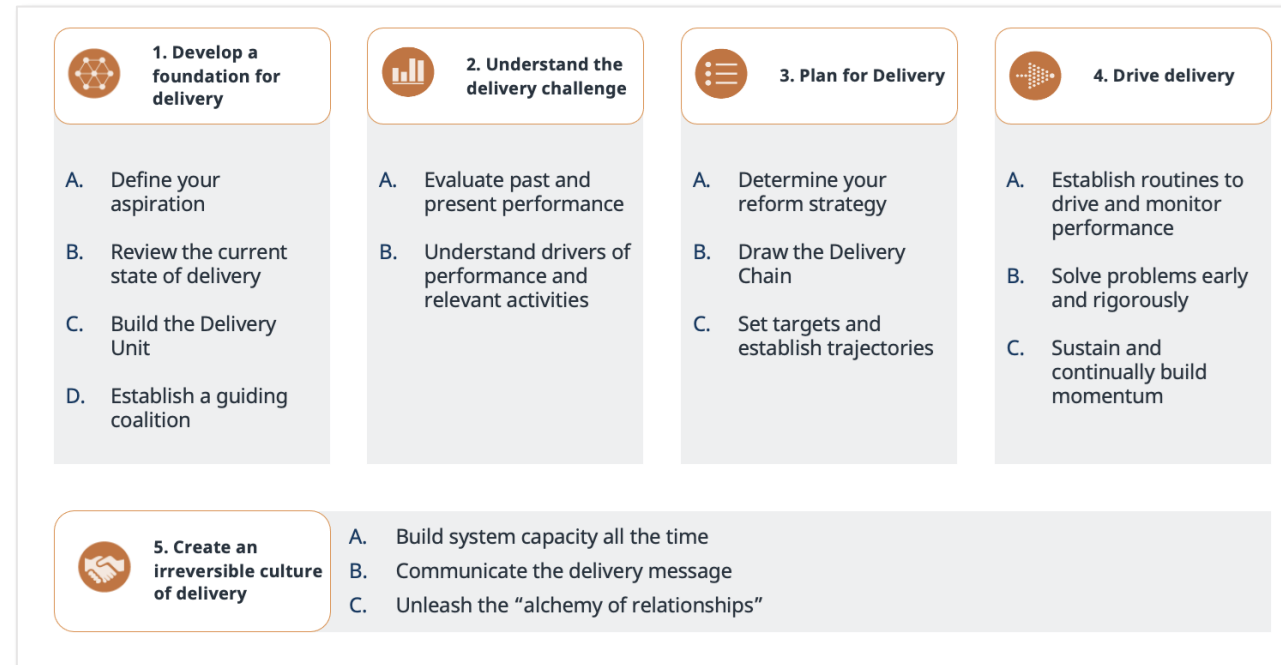
In addition to the delivery chain, it is important to assess system wide capacity to deliver on commitments; this is possible through a rapid self assessment or a 'capacity review'

A typical capacity review will give you two outcomes:

- A **shared (and often improved) understanding** about system capacity amongst leaders and stakeholders
- **Actionable recommendations** to improve system capacity and drive delivery

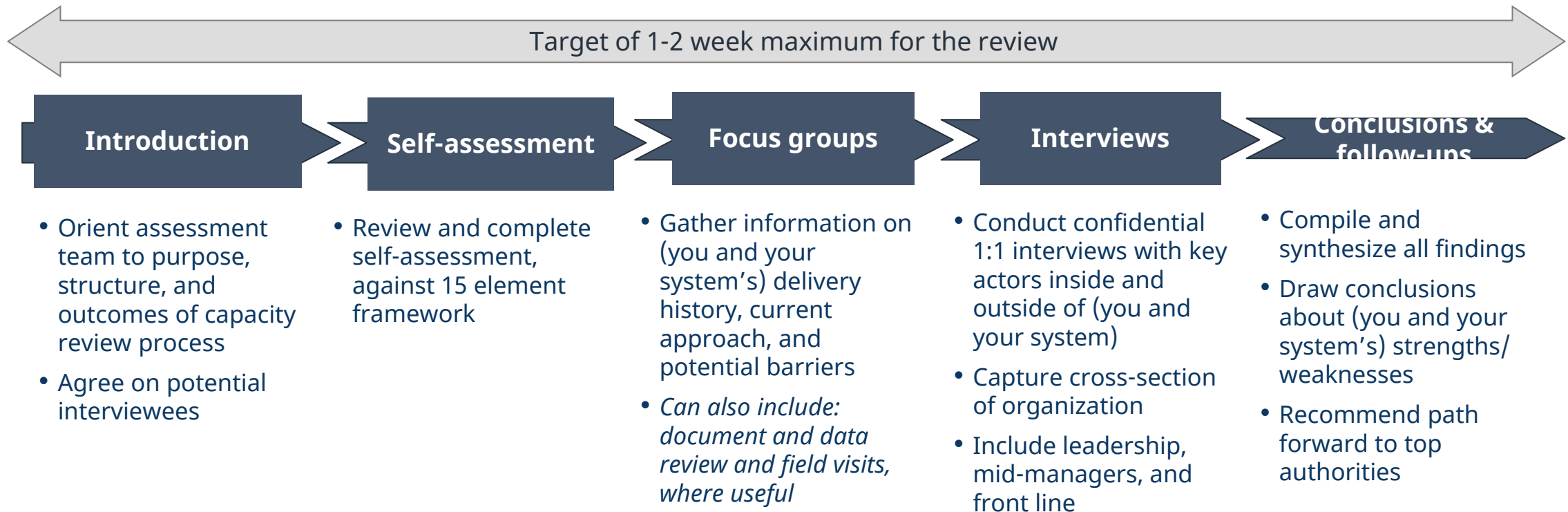
The Capacity Review tool interrogates the systems capacity against the 15 core elements in the Delivery Framework ®

The capacity review does not replace the delivery chain – it is a separate tool to understand a specific system/stakeholder/teams capacity to deliver



A summary rubric for each element can be found in Appendix B

A capacity review typically takes 1-3 days and can include additional internal and external input from focus groups and interviews



You must adjust the length and depth of this process, depending on (a) how much insight you already have and (b) how complicated the delivery chain is for the goal set

Step 4. Design Program Implementation

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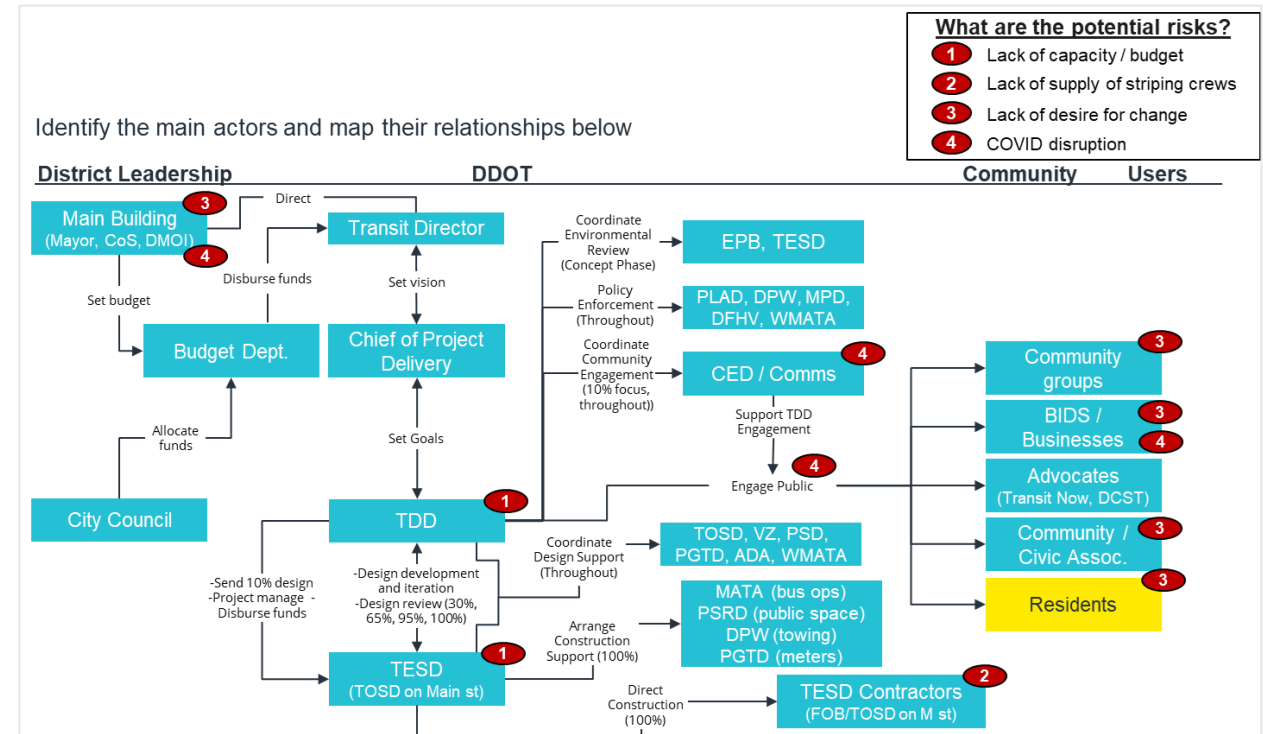
A US city's Department of Transportation used a delivery chain to review and improve on a pilot to build access to car free lanes for buses and bikes

The Approach

- The delivery chain helped **demonstrate where additional capacity was needed** to make this priority pilot successful
- It helped the city determine it needed to **invest more**
- The team running the pilot has now quadrupled in size and received a significant budget increase to expand

How you might use it

- You can use a delivery chain before you launch a program, or at an inflection point when there's an opportunity to improve on the program
- Like the city, you may find the delivery chain a useful tool to bring to system leaders to help them quickly understand how the program is operationalized



Step 4. Design Program Implementation

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Step One: To identify a delivery chain, begin by identifying the ultimate beneficiaries of the strategy

Illustrative Example: Subsidize tech devices for low-income residents

Center

Middle

Frontline

Identify the number of residents the policy aims to cover or reach

Low-income residents (2000)

Senior low-income residents (500)

Equity tip: If you have populations of residents who will be served by different government frontline workers, you may need to identify more than one group of residents



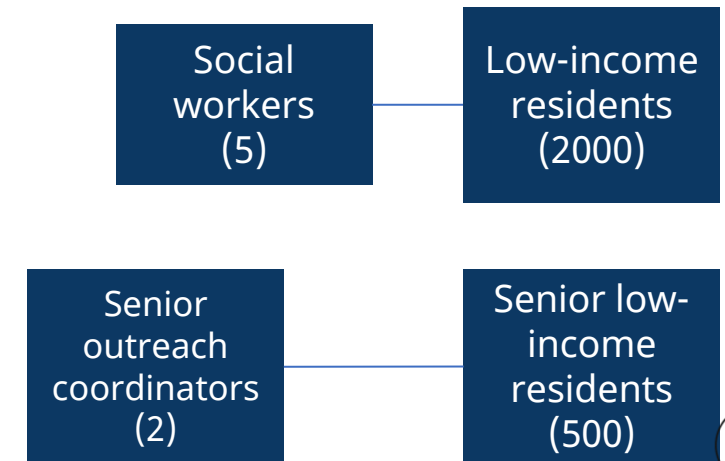
Step Two: Identify the frontline workers who will engage with the resident to deliver this strategy

Illustrative Example: Subsidize tech devices for low-income residents

Center

Middle

Frontline



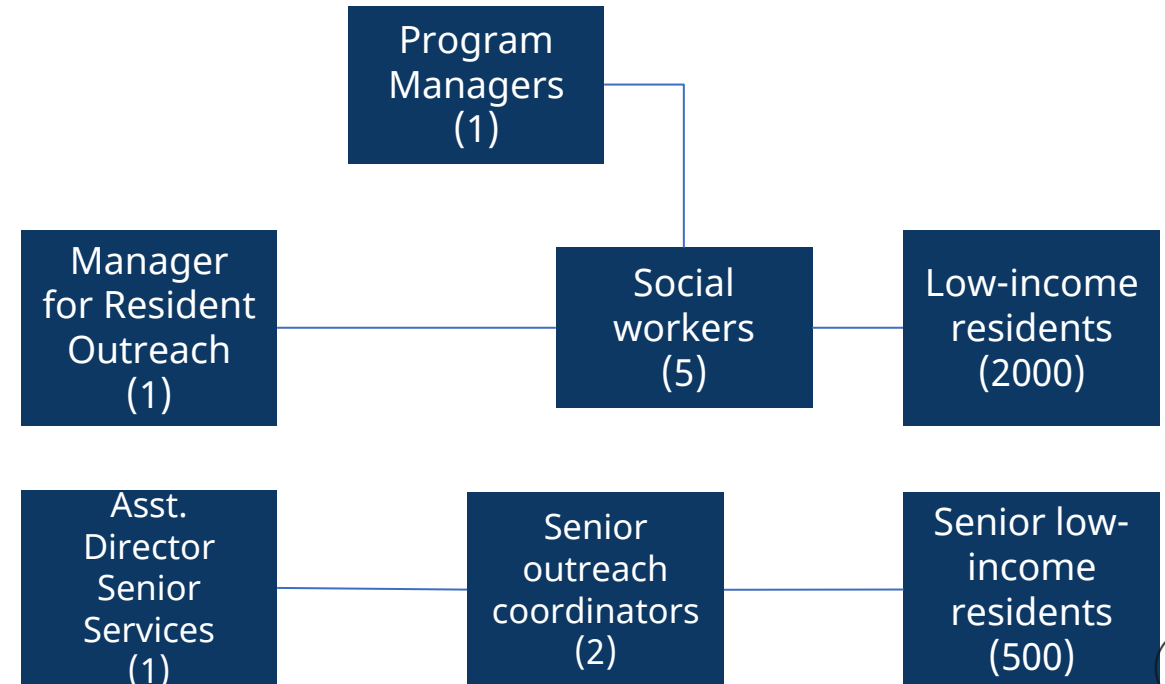
Step Three: Continue working backwards to identify who will influence those frontline workers to deliver

Illustrative Example: Subsidize tech devices for low-income residents

Center

Middle

Frontline



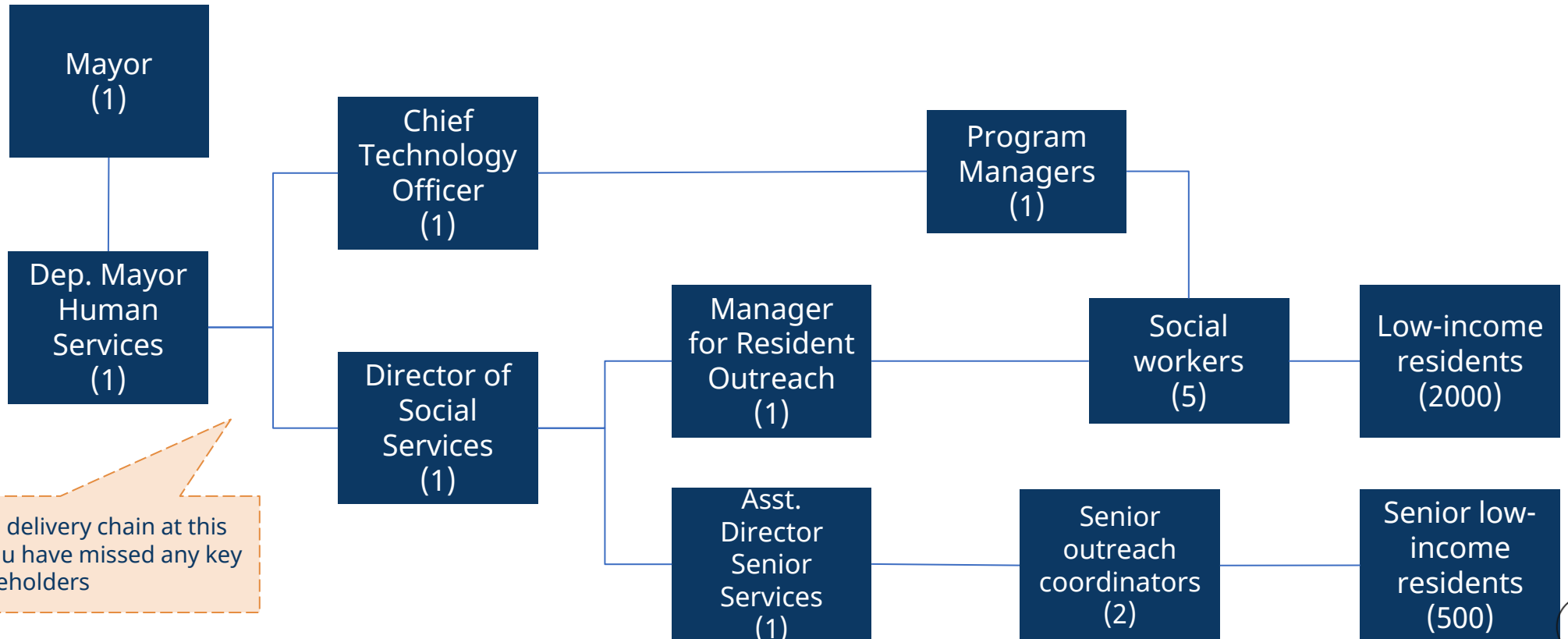
Step Four: Finally, add the most senior decision-makers and leaders who will have oversight over the entire strategy

Illustrative Example: Subsidize tech devices for low-income residents

Center

Middle

Frontline



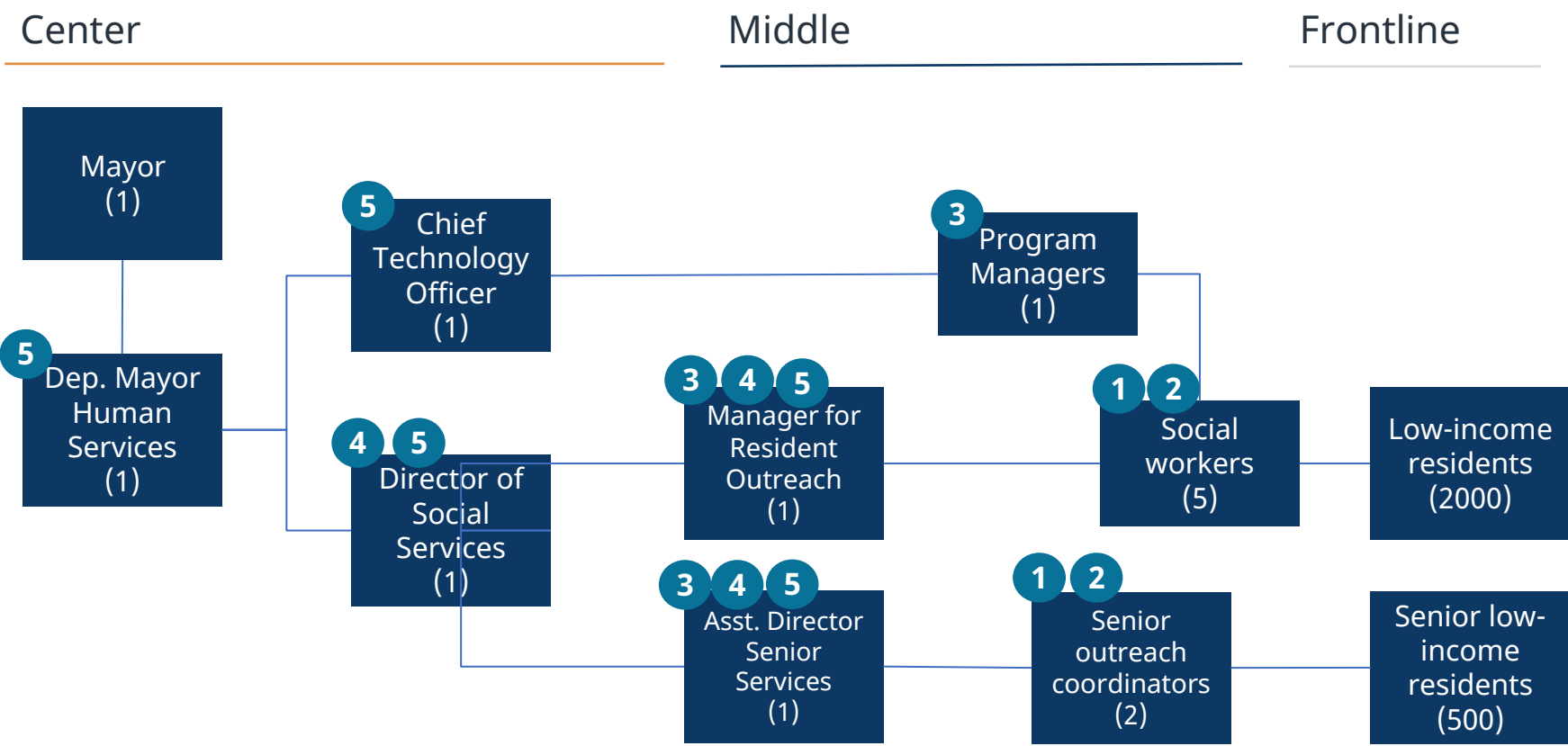
Review the entire delivery chain at this point to check if you have missed any key stakeholders



Step Five: When the delivery chain is complete, identify any key roles the stakeholders must play for the strategy to be successfully implemented

Illustrative Example: Subsidize tech devices for low-income residents

- 1 Increased frequency of outreach and engagement with residents
- 2 Real-time data collection on resident needs
- 3 Strong accountability and performance targets
- 4 Hiring to staff outreach activities and fill any frontline worker turnover
- 5 Communication to drive cross-departmental collaboration



Step Six: Finally, identify potential weaknesses that may need to be managed during implementation as well as feedback loops

Illustrative Example: Subsidize tech devices for low-income residents

- 1 Social workers already overstretched and have limited capacity
- 2 CTO role just filled - needs time to onboard to step into role
- 3 Weak communications between tech and social service divisions presently
- 4 Senior services potentially running parallel programming

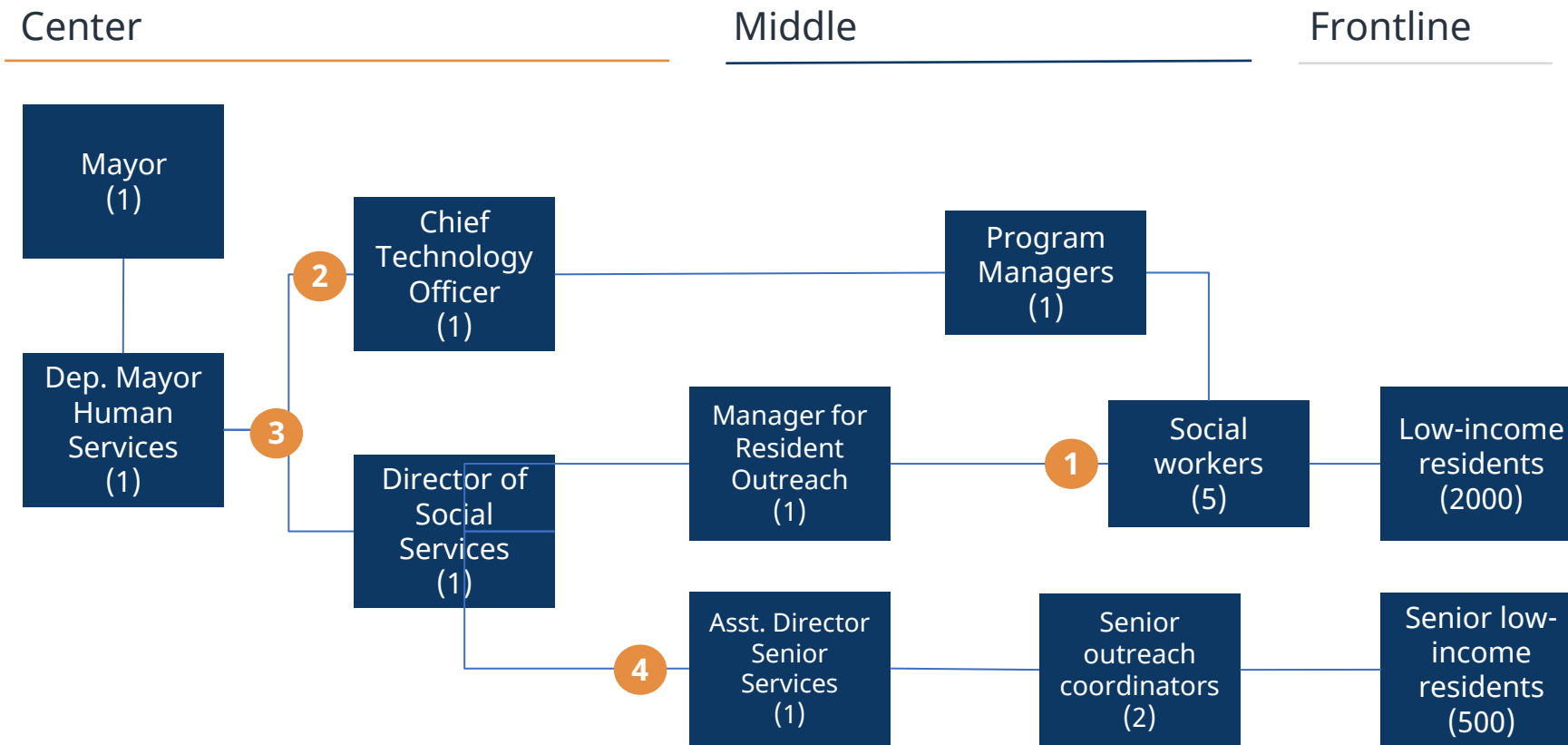


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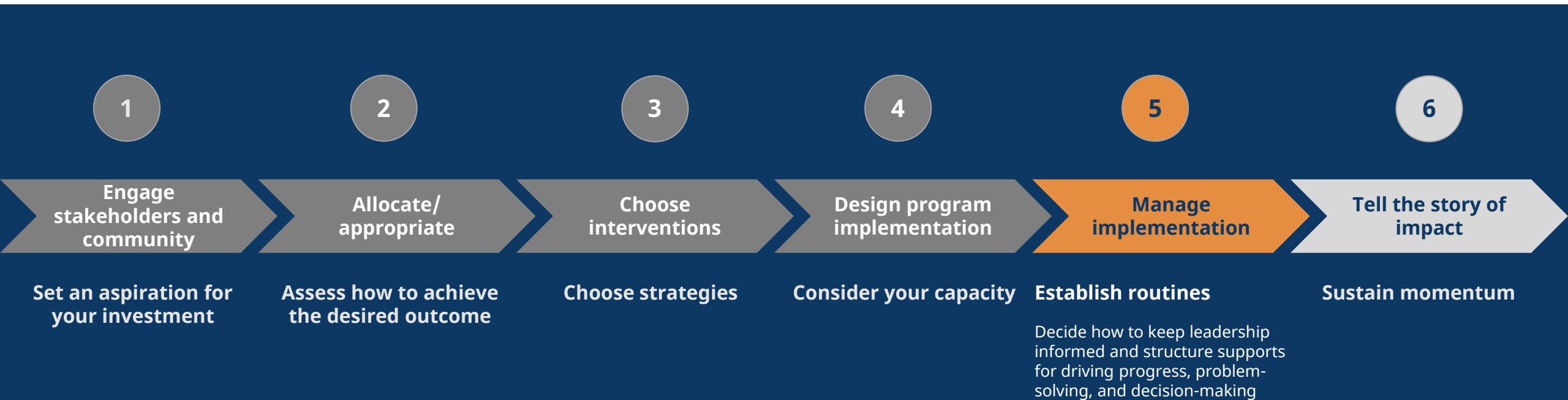


Step 5. Manage implementation

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Once your reform strategy has been mapped you can start implementation; here it is to set up routines to drive progress, problem-solve, and make key decisions



Routines are the engines of delivery which build momentum and keep implementation on track

What are routines?

Routines are:

- **Regularly-scheduled checkpoints** to assess if delivery is on track
- **Engines that drives delivery forward**; without routines, delivery will stall or eventually fall off the agenda
- **Sources of structure and discipline** that create a culture of 'government by performance' where leaders expect to be held accountable

What purpose do routines serve?

They are regular opportunities to:

- **Monitor performance** toward the aspiration
- **Celebrate successes** and learn from what is working
- **Identify and surface issues** that are inhibiting progress, analyze data to **pinpoint causes**, and discuss and **decide how to overcome challenges**

There are four types of routines that are typically used to engage stakeholders during implementation



Check-ins with the working team

Objective: Problem-solve, exchange updates, and agree next steps

Who uses it: The team members responsible for day-to-day implementation

How often: Typically weekly or biweekly



Update notes or reports

Objective: Summarize implementation to date and what's coming next

Who uses it: Day to day team, potentially senior leaders and other stakeholders

How often: Weekly to monthly



Performance dashboards

Objective: Track progress over time using data to show path to aspiration, inform decision-making

Who uses it: All stakeholders

How often: Monthly to bimonthly



Stocktakes with system leaders







Objective: Accountability review with all team members, problem solve major challenges, affirm commitment to aspiration

Who attends: System leader, such as a mayor or county commissioner

How often: Quarterly or semi-annually



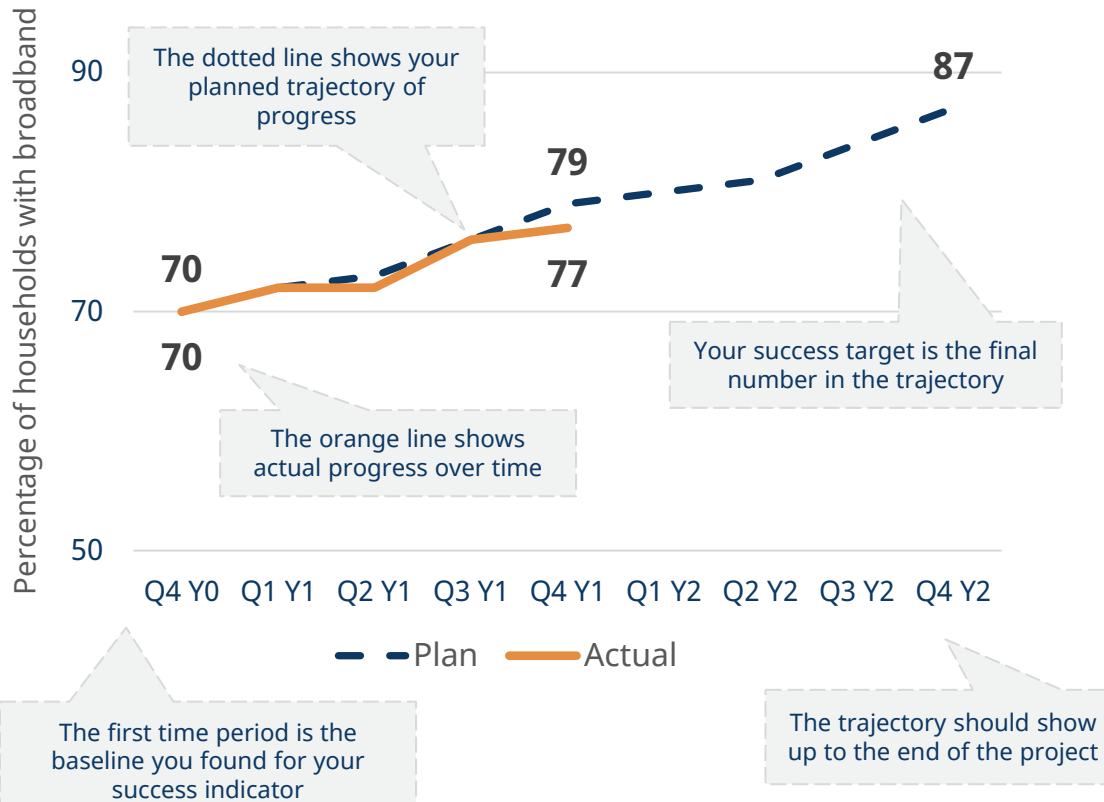
Performance dashboards can be routines on their own while also informing other routines to drive evidence-based decision making; a strong dashboard has a few core characteristics

-  **Frequency of Data Collection** → At any point in time, is it possible to see recent data on performance?
-  **Granularity** → Can the system show performance at a detailed level (e.g. household, daily service charges)?
-  **Reliability** → Does the data give a true picture of on-the-ground realities?
-  **Leadership Understanding** → Do system leaders understand what data shows and what it means for residents?
-  **Effectiveness Of Utilization** → Is the data routinely used to improve policy planning and implementation?
-  **Transparency** → Do constituents have access to data and can they use it to improve performance?

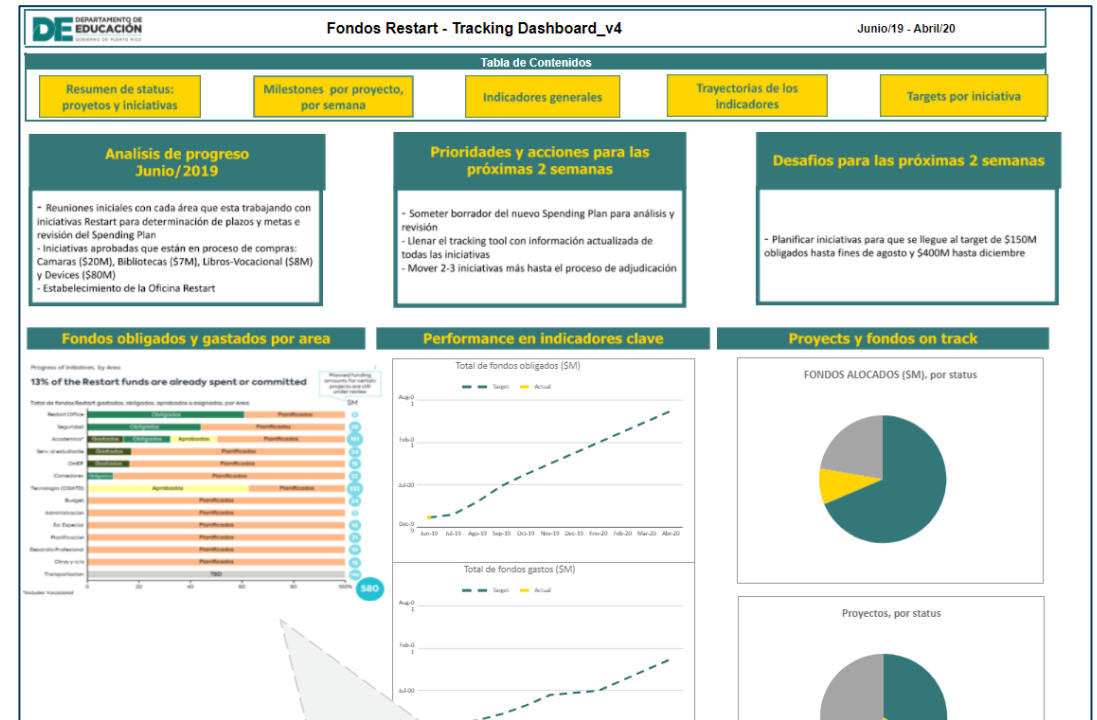
The simplest form of a performance dashboard tracks progress towards your success indicator, while more detailed ones can track multiple programs, indicators and spending

Illustrative Examples

Dashboard 1: County progress to closing the digital divide



Dashboard 2: Education Dashboard in Google



Data includes funds which have been allocated and spent and performance on success indicators

Last, an effective routine with the system leader can be a driver of accountability. A stocktake will typically review all strategies aligning to your aspiration at a strategic level

A good and effective stocktake will answer four key questions clearly, simply and rigorously

- **Where are we now?** What has the progress been since the last routine? Does the data show we are making equitable progress?
- **What are the challenges?** Why do we think delivery challenges are happening? Are there areas where data isn't moving as expected?
- **What will we do to address challenges?** What actions have been taken to address challenges? How have they worked? What support is needed?
- **What comes next?** What are the precise next steps for each stakeholder to take before the next routine?

A stocktake should focus on providing an assessment of delivery for each priority to guide deeper problem solving

Illustrative Example

| | | | |
|--|----------------------------|--|---|
| Aspiration: Ensure every resident has the digital connectivity to work or learn | | | <ul style="list-style-type: none"> On track Nearly on track Slightly Off track |
| Success metric: Percentage of households with broadband coverage | | | |
| Baseline: 70% (2011) | Target: 87% by 2025 | Latest: 77% (Nearly on track) | |
| Strategy | Status | Justification | |
| Subsidies for tech devices for low-income households | Nearly on track | Uptake has been lower than expected, limited demand slowing progress | Additional materials you or the system leader may want to review at a stocktake could include complementary data, key decision for input, potential risks and mitigation as well as actions planned till the next routine |
| Launch the digital inclusion office | Slightly | Severe hiring delays for dept. head | |
| Stand-up new Gap Network | On track | Provider contracted, implementation to begin next month | |

Step 5. Manage implementation

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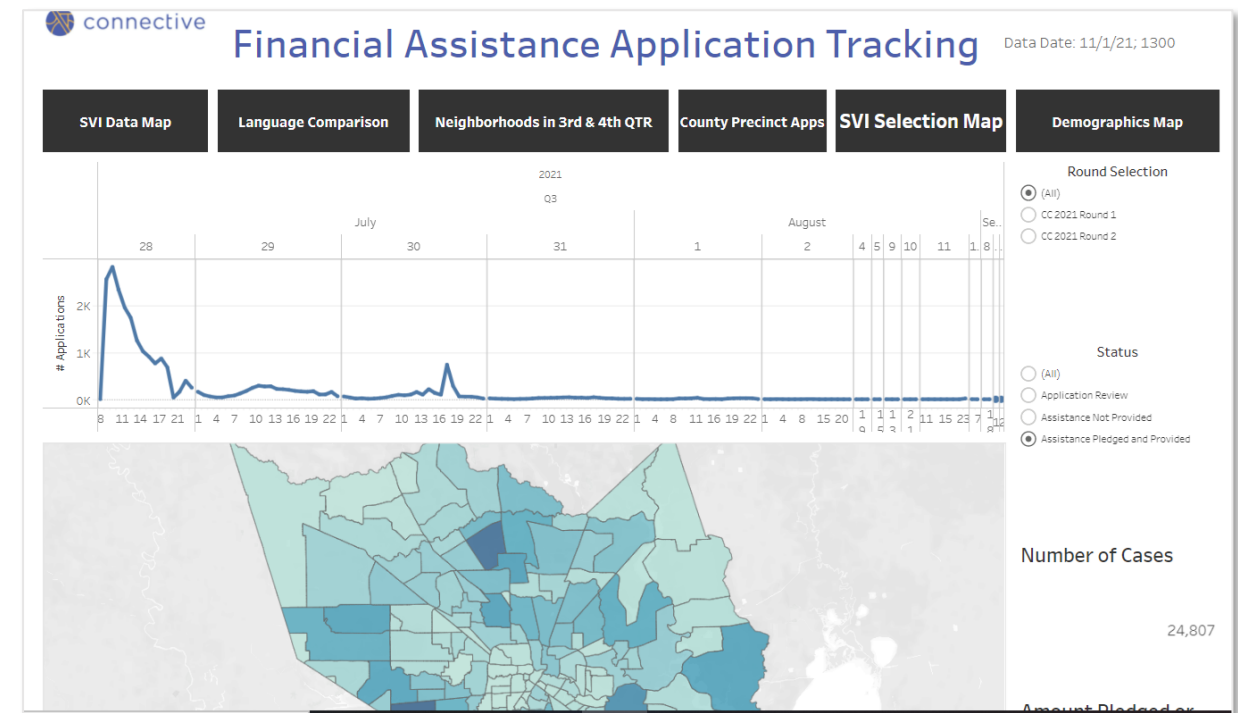
Harris County, TX: The County set equity-based targets for each of its programs and is tracking progress towards those outcomes in public dashboards

The Approach

- Harris County, TX set up a publicly available dashboard tracking **equitable program reach** that uses data to **inform implementation** and to support **transparency**
- Dashboards are available online and the creation and plans for additional dashboards were shared in an annual report available to the public

How you might use it

- If you set up a similar tool for internal use, making some of the data available to the public is a simple way to increase transparency
- If you are interested in promoting equitable outcomes, ensure the data can be disaggregated, such as by geography or resident's primary language, such as in the dashboard at right



Read more on Harris County's plan at <https://budget.harriscountytexas.gov/ARPA.aspx>

View the county dashboard at <https://public.tableau.com/app/profile/connective/viz/HCRAOutreachDashboard/Main?publish=yes>

Step 5. Manage implementation

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When setting up a routine, consider what type of routine you will use, who will be involved, and what information will be shared

Illustrative Examples

| Question | Routine Plan |
|---|---|
| What type of routine will be used? | One hour stock-take meeting |
| Who is receiving information? | County Commissioners |
| Who is being held accountable? | Project management team |
| What other stakeholders will be involved? | CFO, Deputy Commissioner for Programs |
| How frequent will the routine be? | Quarterly |
| What data would be appropriate to review? | <ul style="list-style-type: none"> • Implementation progress against timeline • Quarterly financial report • Progress to success target |
| What will the outcome of the routine be? | <ul style="list-style-type: none"> • Commissioners up to date on progress • Joint understanding of what success looks like for next quarter • Agreed next steps to resolve any identified problems |

Access blank Template in the [Appendix](#)

Access update note Template in the [Appendix](#)



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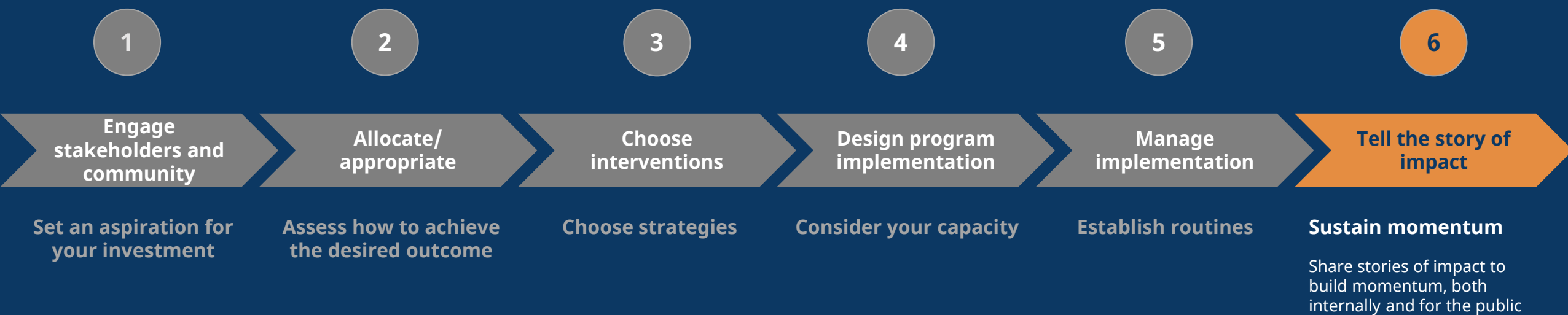
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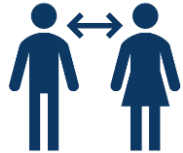
Step 6. Storytelling to sustain momentum

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As your implementation progresses, it is important to share stories of impact to self-reflect, celebrate successes, and sustain buy-in and momentum



Strong storytelling requires early and proactive planning, thinking about who your audience is, the materials you will use and the messages you will share



Audience

- Each different type of audience needs to be **engaged in different ways** and remain interested
- **Residents** like to hear directly from the people **engaged in implementation**
- Certain stakeholders care more about **costs**, others about **outputs**



Assets

- Are fundamental to **telling your story**
- Assets should be **catered to the audience** you are looking to reach

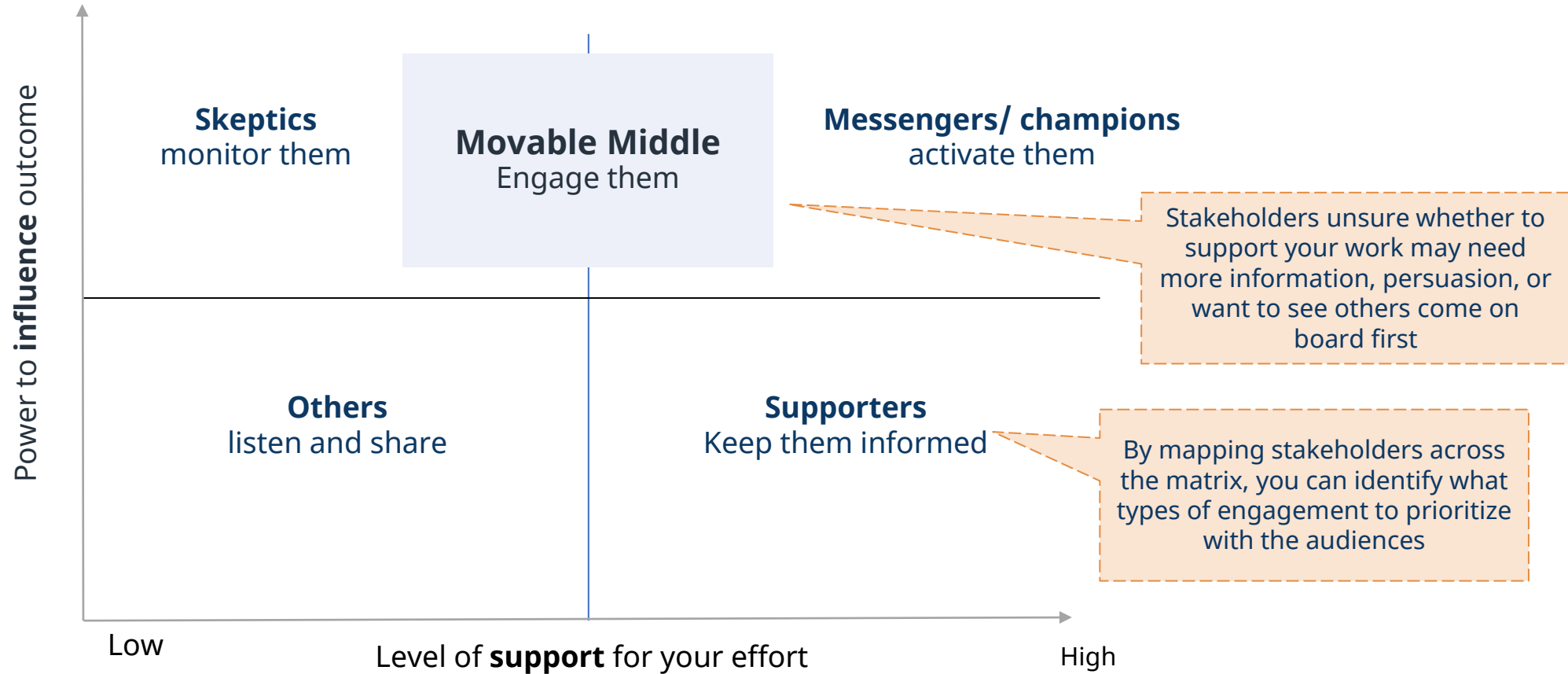


Authenticity

- Needs to be **true and honest**
- Real people, **real data**



To engage an audience, it is helpful to first understand your stakeholders' point of view and potential objectives for engagement



What you share with stakeholders are your assets, including photos, video and data – these will need to be built over time in a continuous process

Collect materials that support the project **before** you know exactly where the story might go. These storytelling components gathered over a period will help **show evolution** and **impact**



Photos

- Before and after
- Photograph through stages
- Groundbreaking/building
- Interactions with users
- Brainstorming sessions
- Visuals that show the problem
- Testing and pilots



Video

- Time lapse to show change over time
- Interviews with users, mayors, and others involved
- Interactions with users/residents engaging with project
- Bringing the challenge to life



Data

- Scope of the problem
- Number of people helped or projected to be helped
- Timeline, impact or dollars saved because of project

Most importantly, the message you share is what builds authenticity and is possible when your story aligns with what matters to your audience

5 key questions for storytelling authenticity

1. Why should the audience **care**? How will it help their lives?
2. How can you **prove** what you're saying **is true**?
3. **Who** is helped by this?
4. How does this make a **difference** to people? The community?
5. How is this different than what has come before? Or **how is this new**?

An additional gut check is to ask- **if I told this story to the average resident** I met in my community, would they care or understand?

Step 6. Storytelling to sustain momentum

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Erie County, PA: The County published required reports with data to its website, and utilized the press to reach more residents with info on the ARP

The Approach

- Erie County published its plan to its local government website, held a press conference and has had video and print media reporting on its ARP plan
- Additional articles on the ARP were then picked up in local media, including ongoing discussions of preferences by community stakeholders on spending

How you might use it

- Building in opportunities to get your leadership in front of the county audience and reaching out to press proactively will enable you to start building awareness of the ARP and your plan for the county
- You can use the press to improve outreach to stakeholders or recruitment of stakeholders to improve the equity of your planning and implementation



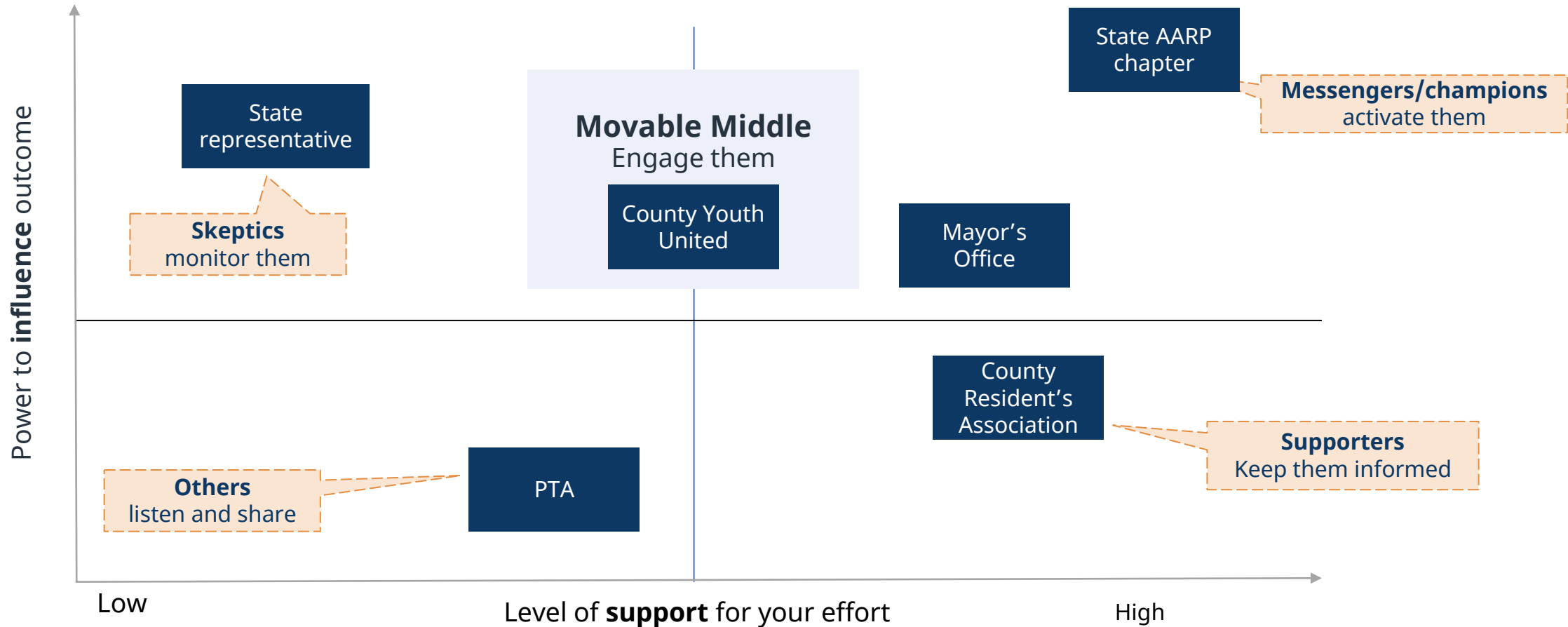
Read more about Erie's plan at: <https://eriecountypa.gov/open-government/american-rescue-plan-act/>

Step 6. Storytelling to sustain momentum

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A stakeholder map helps you identify your key stakeholders, their relationship to your program, and how you should plan to influence them through your engagements

Illustrative Example



After you map your stakeholders, consider what messaging and storytelling assets will help you reach them

Illustrative Example

| Stakeholder | Type | Objective | Approach & Assets |
|--------------------------------------|----------------|--|---|
| County Youth United | Target | <ul style="list-style-type: none"> Share aspiration and progress to date with them Invite them to join quarterly working group Have them share program info w/their constituency & join engagement events | <ul style="list-style-type: none"> Bring resident stories of impact and resident needs assessments |
| State AARP Chapter | Champion | <ul style="list-style-type: none"> Have them share program info w/their constituency & join engagement events | <ul style="list-style-type: none"> Presentation on digital divide for local seniors |
| Mayor's Office | Champion | <ul style="list-style-type: none"> Have them share program info w/residents Accelerate program impact in the city | <ul style="list-style-type: none"> Share performance dashboard on digital divide |
| County Resident's Association | Fan Club | <ul style="list-style-type: none"> Have them share program info w/residents | <ul style="list-style-type: none"> Ask them to share quarterly newsletter |
| State representative | Opponent | <ul style="list-style-type: none"> Demonstrate their constituents want this initiative | <ul style="list-style-type: none"> Have AARP or Youth groups deliver resident stories/needs or digital divide presentation to the Representative |
| PTA | Not a priority | <ul style="list-style-type: none"> NA | <ul style="list-style-type: none"> NA |

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Exercise: Define your aspiration and success indicator

What are you trying to achieve? *[Add aspiration here]*

Next, complete this table for your aspiration(s) using a 1-4 scale, 1 being weakest and 4 being strongest

| Success indicator for aspiration | Is it MEANINGFUL? | | Is it MOVEABLE? | | Is it MEASURABLE? | | Total |
|----------------------------------|-------------------|-----------|-----------------|-----------|-------------------|-----------|-------|
| | Score | Rationale | Score | Rationale | Score | Rationale | Score |
| Indicator 1: | | | | | | | |
| Indicator 2: | | | | | | | |

Equity tip: Review your rationale with county stakeholders who may have different perspectives on how to score each indicator

Exercise: Set your targets

Aspiration: *[Add aspiration here]*

Success Indicator: *[Add success indicator(s) here]*





Baseline: *[Add baseline information here]*

Success Target: *[Add targets here]*

Equity tip: Discuss your proposed success target with stakeholders to get their feedback on if it is the right level of ambition



Exercise: Assess the issues in your community

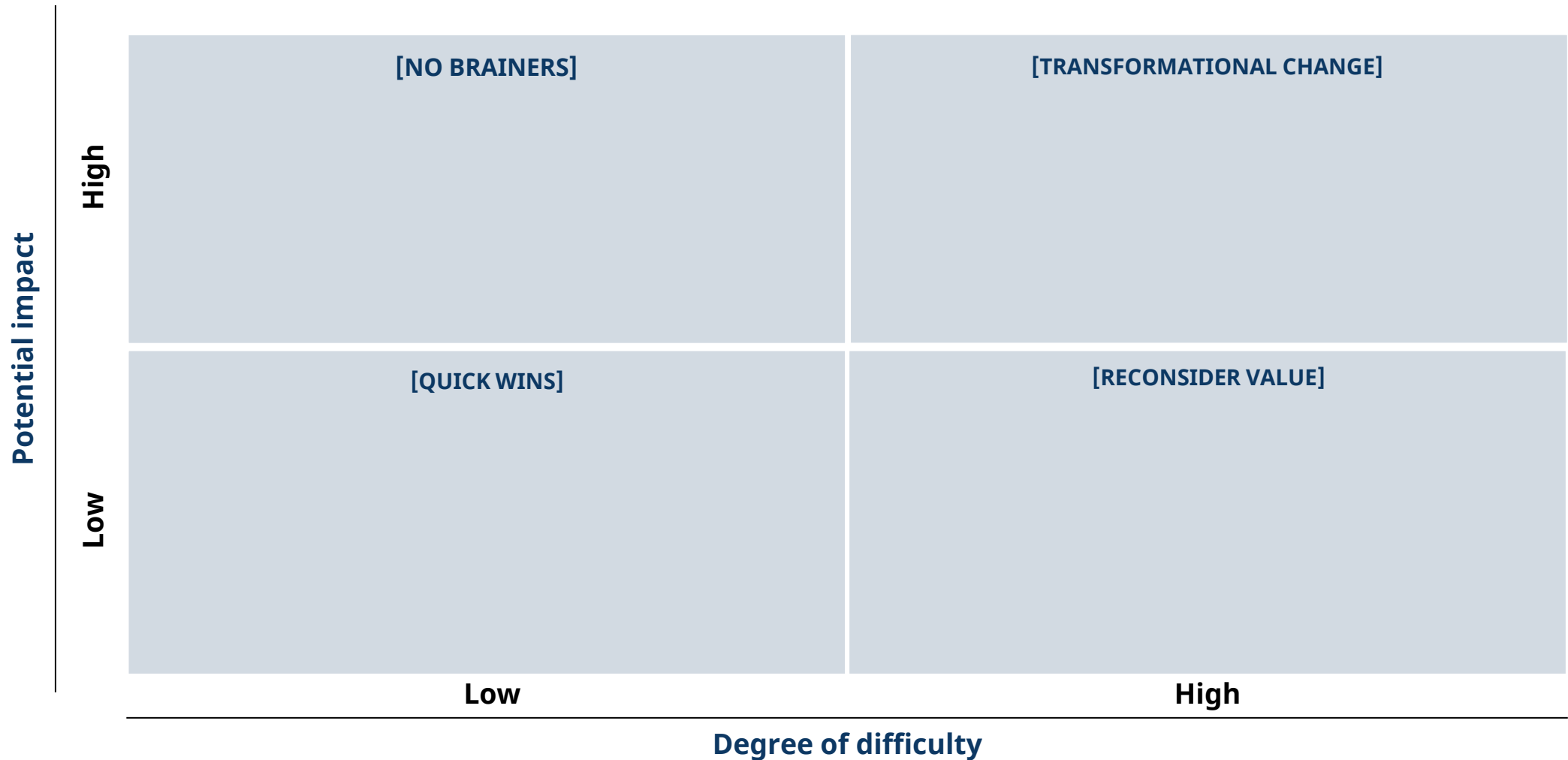
| | | | | |
|---|--|---------------------------------|--|---------------------------------|
|  <p>ASPIRATION</p> | <p>Aspiration: <i>List aspiration here...</i></p> | | | |
| | <p>Success indicator and/or target:</p> | | <p>If you set a success indicator, include it here</p> | |
|  <p>PROBLEM HYPOTHESIS</p> | <p>Problem #1</p> | | <p>Problem #2</p> | |
| | <p>List problem...</p> | | <p>Problem #X</p> | |
|  <p>ROOT CAUSES</p> | <p>Root Cause 1a</p> | <p>Root Cause 1b</p> | <p>Root case 2a</p> | <p>Root case Xa</p> |
| | <p>List root causes</p> | | | |
|  <p>STRATEGIES</p> | <p>Strategies for 1a</p> | <p>Strategies for 1b</p> | <p>Strategies for 2a</p> | <p>Strategies for Xa</p> |
| | <ul style="list-style-type: none"> List strategies to each root cause | | | |

List as many problems, root causes, and strategies as is appropriate for your issue map

If you set a success indicator, include it here

Equity tip: Conduct this mapping exercise with other county stakeholders to capture different perspectives on root causes

Exercise: Map, prioritize and then sequence your strategies



Equity tip: It's helpful to draw this activity on chart paper. You can hold a workshop with other community stakeholders to plot strategies. This activity can be repeated more than once to capture different perspectives.



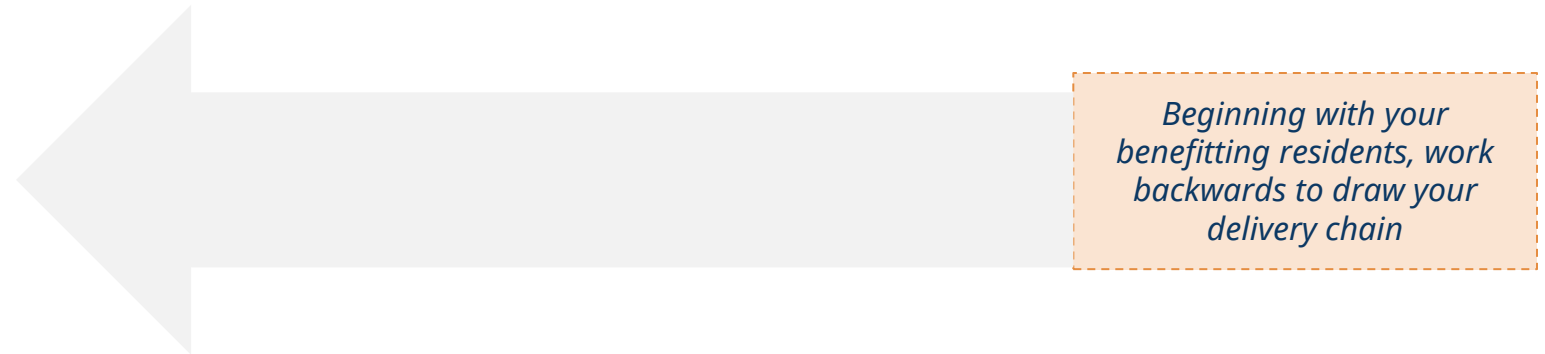
Exercise: Draw your own delivery chain, then identify key roles stakeholders must play and potential risks within the chain

Strategy Name: _____

Center

Middle

Frontline



Exercise: Plan a routine for your implementation

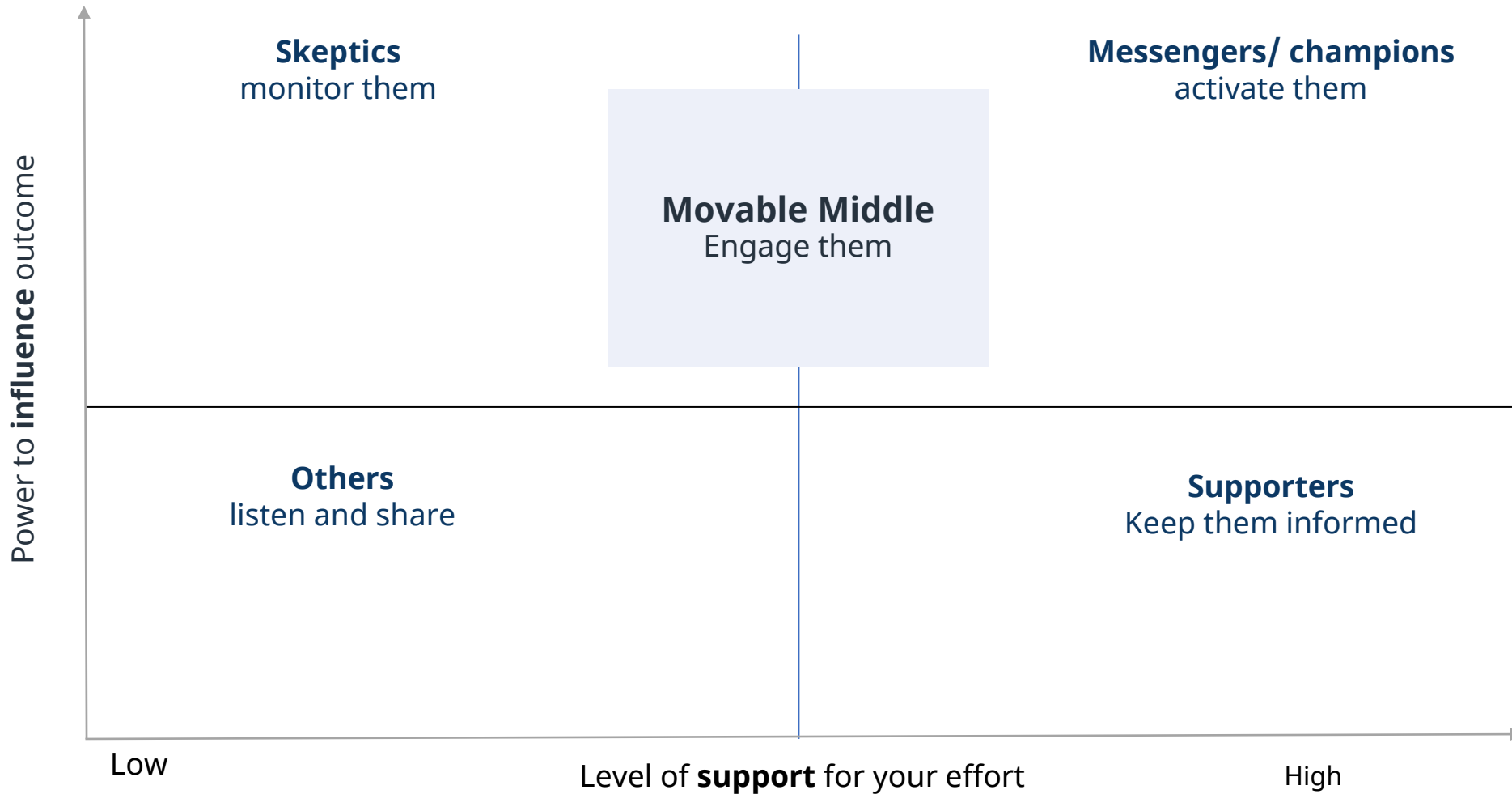
| Question | Routine Plan |
|---|--------------|
| What type of routine will be used? | |
| Who is receiving information? | |
| Who is being held accountable? | |
| What other stakeholders will be involved? | |
| How frequent will the routine be? | |
| What data would be appropriate to review? | |
| What will the outcome of the routine be? | |

Exercise: Write an Update Note for Leadership

| | | | |
|--|--|---|--|
| Aspiration: | <i>List your aspiration and success metric</i> | Date: | |
| Strategy: | <i>List what strategy you are working on to achieve this aspiration</i> | Next update: | |
| Overall progress: | Key actions since last note: | Next Steps: | |
| <ul style="list-style-type: none"> • <i>Include key highlights on implementation progress which a reader who is not involved in the day-to-day work could understand</i> • <i>Share any relevant data which demonstrates progress towards your aspiration, including your success metric</i> | <ul style="list-style-type: none"> • <i>Explain what 2-3 actions you have taken to make progress that are most important for everyone to understand</i> | <ul style="list-style-type: none"> • <i>What are the top 2-3 actions you will take next month to keep making progress?</i> | |
| | Risks and opportunities: | Decisions required: | |
| | <ul style="list-style-type: none"> • <i>What risks or problems are emerging?</i> • <i>Where do you need support from others to address these problems?</i> | <ul style="list-style-type: none"> • <i>What 1-2 key decisions need to be made, who should be involved, and when does it need to happen?</i> | |



Exercise: Map your stakeholders



Exercise: Plan for how to reach your stakeholders

| Stakeholder | Type | Objective | Approach & Assets |
|---|------|-----------|-------------------|
| <p data-bbox="300 901 945 1046">Copy your stakeholders over once you have completed a Stakeholder Map</p> | | | |




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- What is State Recovery Now?
- Step 1 – Engage the Community to set an Aspiration
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- Step 6 – Storytelling to sustain Momentum
- Appendix A: Exercise Templates
- **Appendix B: Capacity Review Rubric**

To conduct a capacity review assessment, convene leadership and other relevant stakeholders to discuss and score each quality of the fifteen-element framework



As stakeholders rate each element, they should consider guiding questions for each element

| Delivery Element | Guiding Questions |
|---|--|
| <p>1. Develop a Foundation for Delivery</p>  | <p>A. Define your aspiration Does the system have a clearly articulated and shared aspiration?</p> <p>B. Review the current state of delivery Does the system regularly and deliberately reflect on its existing capacity to drive progress against the aspiration?</p> <p>C. Build the Delivery Unit Is there a person or team dedicated to driving implementation and monitoring progress?</p> <p>D. Establish a guiding coalition Has the system leader identified and leveraged a group of 7-10 key people outside the system office who are influential in driving progress against the aspiration?</p> |
| <p>2. Understand the Delivery Challenge</p>  | <p>A. Evaluate past and present performance Does the system regularly and consistently use data to evaluate performance?</p> <p>B. Understand drivers of performance and relevant activities Do system leaders understand the impact of their work and what works in improving outcomes?</p> |
| <p>3. Plan for Delivery</p>  | <p>A. Determine your reform strategy Has the system identified and defined a set of strategies that will maximize the collective impact on the aspiration?</p> <p>B. Draw the delivery chain Do system leaders understand the chain through which implementation must occur?</p> <p>C. Set targets and establish trajectories Have the aspiration and associated goals been translated into concrete end targets and trajectories?</p> |

As stakeholders rate each element, they should consider guiding questions for each element

| Delivery Element | Guiding Questions |
|--|--|
| <p data-bbox="104 425 389 462">4. Drive Delivery</p>  | <p data-bbox="624 386 1505 418">A. Establish routines to drive and monitor performance Are there regular, results-driven conversations that allow for shared review of and action on performance?</p> <p data-bbox="624 486 1238 518">B. Solve problems early and rigorously Are there mechanisms to ensure problems are identified, raised early, and solved in order of priority?</p> <p data-bbox="624 586 1322 618">C. Sustain and continually build momentum Does the system maintain its focus through challenges and distractions?</p> |
| <p data-bbox="104 735 522 809">5. Create an irreversible Delivery Culture</p>  | <p data-bbox="624 696 1202 728">A. Build system capacity all the time Is building implementation capacity a priority for system leaders and an ongoing endeavor?</p> <p data-bbox="624 796 1233 828">B. Communicate the delivery message Does the system regularly communicate about the aspiration and the strategies to achieve it?</p> <p data-bbox="624 896 1289 928">C. Unleash the “alchemy of relationships” Are relationships that are central to successful implementation deliberately identified, cultivated, and maintained?</p> |





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Thank You!

For more information reach out to [Senator Bill Ferguson](#) or [Anum Bashir](#)
[State Recovery Now](#)