

# ENVISIO EXAMPLE REPORTING FRAMEWORK

## Integrating Strategy Execution into Management Processes & Reporting

Envisio provides comprehensive reporting capabilities flexible enough to meet the reporting needs of all constituencies; managers, executive teams, elected officials and the public. The following are examples of the reports Envisio customers can create and tailor to meet their unique requirements.

REPORT	CADENCE	RECIPIENTS
<b>Council Reports</b>		
<b>Council Strategic Plan Progress Summary</b> Summarize all activity supporting the strategic plan, by department and by strategic goal. <a href="#">Example Report</a>	Monthly	Council
<b>Council Strategic Goal Report</b> A deep dive into all actions and metrics supporting a single strategic goal e.g. Economic Vitality. <a href="#">Example Report</a>	Monthly	Council
<b>Economic Development Project Summary Report for Council</b> The current status of all Economic Development projects supporting the strategic plan. <a href="#">Example Report</a>	Quarterly	Council
<b>Executive Team Reports</b>		
<b>Action Plan Progress Update - Actions by Parent Strategy</b> Executive team review of all strategies and their actions. All action statuses included. <a href="#">Example Report</a>	Monthly	Executive Team
<b>Action Plan Progress Update - Actions by Department</b> Understand workload and performance by reviewing how many actions each department currently has in progress and the status for each action. <a href="#">Example Report</a>	Monthly	Executive Team
<b>Disruptions Report - Disrupted Actions by Department</b> An early warning system. Review all actions that have been reported as at risk. <a href="#">Example Report</a>	Weekly	Executive Team
<b>Completed Strategic Actions</b> Share regularly with staff, council and the community, all actions that have been completed in the previous month, quarter or calendar year (you choose). <a href="#">Example Report</a>	Monthly	Executive Team
<b>Actions Coming Due in the Next 60 Days by Department</b> Avoid surprises by reviewing all actions scheduled to be completed in the next 60 days and ensure they are on track. <a href="#">Example Report</a>	Monthly	Executive Team
<b>Actions Scheduled to Start in the Next 90 Days</b> Ensure managers are prepared and resources are allocated toward items planned to start in the next 30, 60 or 90 days. <a href="#">Example Report</a>	Quarterly	Executive Team

REPORT	CADENCE	RECIPIENTS
<b>Department Reports</b>		
<b>Police Department Scorecard Report</b> Select measures from internal dashboards to report out as a department scorecard. <a href="#">Example Report</a>	Monthly	Council, City Manager, Department
<b>Parks &amp; Recreation Strategies, Actions &amp; Measures</b> An example department-specific report, including all strategies, actions and measures the department is responsible for. <a href="#">Example Report</a>	Monthly	Department Director
<b>My Department's At Risk Items</b> All strategic actions experiencing disruption, including reasons (updates), progress and the last update date. <a href="#">Example Report</a>	Monthly / Weekly	Department Director
<b>Individual User Reports</b>		
<b>Actions I Own &amp; Contribute To</b> For Envisio users to see everything they own and contribute to. <a href="#">Example Report</a>	Weekly / Biweekly	Individual Users
<b>My Overdue Actions</b> For individual managers to be notified of their overdue actions. <a href="#">Example Report</a>	Weekly	Individual Users
<b>My Items Requiring an Update in the Current Reporting Period</b> For individuals to be notified of their actions that have not been updated in the current reporting period. <a href="#">Example Report</a>	Monthly, 7 days before report due date	Individual Users
<b>Special Reports</b>		
<b>Citizen Satisfaction Survey Report</b> Visualize and report on citizen satisfaction (or other survey results). <a href="#">Example Report</a>	Annual	Public
<b>Actions Pending Updates in the Current Reporting Period</b> All actions that have not been updated in the current reporting period. <a href="#">Example Report</a>	7 & 3 days before report due date.	All Envisio Users
<b>Actions Pending a Status Update</b> All actions that have started according to the planned start date but are yet to be updated in Envisio. <a href="#">Example Report</a>	Monthly	Individual / All Envisio Users
<b>Capital Improvement Plan Project &amp; Budget Status</b> Track and report on the progress of all capital improvement plan projects including the actual spend, budgeted spend and variance for each project, and overall for the department. <a href="#">Example Report</a>	Monthly	Council, Executive Team, Department Directors

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