

# MONICA R. ALLEN, PhD

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Experienced senior management executive leading award-winning teams and successful strategic efforts in organizations to enhance overall organizational effectiveness. Owner of results driven focused efforts that have led to implementation of key new initiatives with tangible outcomes. Leader, team player and collaborator vertically and horizontally across key functional areas. Master's Degree and Ph.D. strengths:

- **Leadership** – Accountable for a corporate and department strategic business planning vision and framework that resulted in a large portion of the County's ~\$1.5 billion budget aligned to three-year strategic priorities.
- **Team Building** – Recruited high-performing strategic planning & evaluation manager and enterprise management analysts to drive the strategic vision of organization that led to winning several nationally recognized awards as well as approximately 50% of divisional staff receiving promotional opportunities within and outside the organization.
- **Innovator** – Directed the development of performance data collection methodology that moved the organization from zero formal reporting to monthly and quarterly reporting of organizational performance, and reporting on strategic business plan activity for 22 departments/business partners.
- **Customer Service** – Enhanced knowledge of internal customers by hosting annual quarterly meetings to discuss strategic initiatives. Partnered with departments to evaluate 20 departments' data collection methodologies and to review 35 surveys used to collect data from external customers. Developed customer experience evaluation framework to be implemented in 2020.

## AREAS OF EXPERTISE

Strategic Business Planning – Organizational Performance Management – Strategic Alliances  
Budgeting – Organizational Design and Development – Survey Design - Research Methodology  
Program Evaluation – Process Improvement – Change Management

## INSIGHT PERFORMANCE MANAGEMENT GROUP, LLC

### Owner, Insight Performance Management Group, LLC

August 2013 – Present

Mecklenburg County, Charlotte, NC

City of Marion, IA (Project)

Summary: Work performed with the City of Marion includes, a comprehensive environmental scan of the residents, community, elected officials, management, employees, demographic/economic data and information; as well as a review of organizational, operational, budget, and performance documents. Additionally, onsite interviews were conducted with all stakeholders. In November, a two-day retreat with the City Council will be held to develop the strategic goals and objectives for a three-year period. Once the infrastructure for a strategic plan is developed, strategies and measures will be developed and where applicable, information will be aligned to the development of the FY21 and FY22 budgets. Post budget adoption, departmental work plans will allow for the execution of the strategic plan at the departmental level. The work plans will include key initiatives, key performance indicators, milestones, etc. The supporting work identified is a communications plan, change management plan and an implementation plan for the City.

Town of Chapel Hill, NC (Project)

Summary: Work performed with the local government included conducting surveys and telephone interviews with the Town of Chapel Hill Council to assess the strategic planning efforts performed prior to

December 2018, developed recommendations for consideration by the Town Manager and senior staff with regards to process improvements and strategic plan design, led a strategic planning session with the Town of Chapel Hill Council to review recommended goals and objectives outlined in the draft strategic plan, and provided strategic direction and consultation to the senior staff leading the strategic organizational initiatives for the Town.

## **PROFESSIONAL EXPERIENCE**

**Director, Strategic Planning & Evaluation, County Manager's Office of Management & Budget**  
November 2011 – Present (Title change from Performance & Evaluation Mgr. in 2014)  
Mecklenburg County, Charlotte, NC

Summary: Serve as the chief strategist for the organization and oversee the strategic business planning, corporate/department performance management and program/service evaluation initiatives for a 5,000-member organization with an annual budget of ~\$1.5 billion. Supervised 15 - 20 people and led several team projects over eight years.

### Strategic Business Planning

- Supervised development of the organization's five strategic goal areas (or priorities) used to set the County's FY2017-2019 and FY2020-2022 Corporate Strategic Business Plans; created the organization's strategic business planning framework aligned to the Strategic Business Plans that include measurable goals, objectives, strategies, key performance indicators, annual action items, and annual costs to execute the plans
- Consulted with all County departments and business partners on the development of 3-year strategic business plans; successfully helped departments implement plans for Economic Development, Public Health, Social Services, Park and Recreation, etc.
- Created and implemented annual tactical plans resulting from the department/agency strategic business plans
- Produced the bi-annual Community Pulse reports that included social, demographic, economic and environmental external market factors that affect operations and services. Utilized information in the report to develop organizational budget
- Created a change management plan for staffing moving to a new Community Resource Center
- Partnered with staff to identify enterprise risk management strategies and led the crisis management project team focused on developing a crisis management plan for the enterprise

### Performance Management

- Lead teams on the annual assessment and development of corporate key performance indicators/targets and department/service level key performance indicators/targets
- Effectively assess operational performance that informs decisions on department director performance and executive merit increases
- Review operational performance across the enterprise by synthesizing disparate data - pulled from 22 departments/business partners - on employee satisfaction, customer satisfaction, financial performance, environmental leadership measures, and resignation rates
- Support key non-profit partners on development of strategies to achieve organizational and community outcomes
- Prepare and publish the County's annual performance report highlighting key accomplishments
- Lead the customer satisfaction initiative on equity in service delivery to businesses and residents

## Evaluation

- Redesigned and implemented a program evaluation model used to understand the efficiency and effectiveness of programs and services
- Responsible for managing a team of people to conduct two comprehensive evaluations in 2015 that resulted in changes to both program structure for one department and budget allocation for another
- Lead the County's annual Employee Climate Survey, which has resulted in a greater than 73% response rate for more than five consecutive fiscal years (highest response rate in 2013 at 81%.) Results from the survey have led to improvement in County security practices, employee motivation and satisfaction, and employment development
- Manage the annual Community Survey of a statistically representative sample of more than 1,000 residents in the County. Results from the survey have led to improved communications throughout the County, informed the development of a Park and Recreation Master Plan, the Charlotte-Mecklenburg Library operational strategies and other general customer engagement strategies. Disparity analyses were conducted to determine and respond to demographic differences in perception and attitude scores.

## **Enterprise Management Analyst, Office of Strategic Organizational Improvement**

October 2007 – November 2011

Mecklenburg County, Charlotte, NC

Summary: Worked as senior analyst with accountability for leading teams and projects; served as primary point-of-contact for survey design and administration consultation; and liaised to the organizational development team. Received the unit's Making a Difference Award in 2009 and in 2011 (i.e., award for the analyst with the highest overall performance rating in the division).

## Planning and Evaluation/Organizational Development

- Served as lead analyst on the annual County-wide Employee Climate Survey; primarily responsible for implementing new method in 2009/10, which resulted in a 61% (09) response rate for first-time web-based survey
- Managed a team to analyze corporate and department quantitative and qualitative data; provided strategic recommendations to executives and department directors based on performance drivers
- Worked with the Organizational Development team on strategic planning initiatives; assisted team with understanding complex customer/employee survey data

## Budget

- Single-handedly analyzed revenue and expense budgets; made recommendations for cost savings and/or increases to department and service area budgets based on performance. Portfolio of department budgets ranged from \$2 million (tax funded) to \$63 million (fee funded)
- Provided consultation to budget evaluation team to design scoring criteria for budget measures of performance; created range for overall scoring

## **Management Analyst, Charlotte-Mecklenburg Police Dept. – Research, Planning and Analysis**

December 2006 – October 2007

City of Charlotte, Charlotte, NC

- Worked directly with the Chief of Police on the Sergeant and Deputy Chief promotional processes to include designing 360-degree assessments, surveys, and analysis of rankings
- Conducted best practices research of initiatives and strategies in other jurisdictions

## **Management Analyst II, Dept. of Public Works – Division of Management Services**

July 2003 – December 2006

City of Norfolk, Norfolk, VA

- Coordinated the annual employee survey; developed a method for recording and analyzing data
- Developed process maps of work processes and performed analyses of various work management systems
- Served as project manager to analyze data and include in the performance measurement publication, city encroachment database, disaster preparedness manuals and publicity plan, and 2005 Waste Management Focus Group report.

## **Management Analyst I, Human Services – Organizational Development and Training**

January 2002 – July 2003

City of Norfolk, Norfolk, VA

- Served as program manager of the Title IV-E Revenue Maximization and single-handedly generated over \$1.5m in additional revenues for the department and City community partners by training program coordinators to organize case records, record expenditures properly, and submit expense reports on preventive services
- Developed measures of effectiveness for department senior staff
- Conducted study of time and billing systems to track social worker activity with caseloads, court attendance, etc.

## **Teaching Experience**

### **Adjunct Faculty, 2014 – Present; Course Coordinator, 2017**

**University of North Carolina – UNC@MPA Online, Chapel Hill, North Carolina**

Courses of instruction:

- Public Financial Management (January 2014 – Present) – Graduate-level
- Organizational Theory (September 2015 – April 2017) – Graduate-level

### **Adjunct Faculty, 2014 – Present**

**Southern New Hampshire University**

Online Courses:

- Human Relations in Administration (Spring 2014 – Present) – Undergraduate
- Organizational Behavior (Spring 2014 – Summer 2014) – Undergraduate

### **Adjunct Faculty, 2010 – 2015**

**Pfeiffer University**

**Charlotte, North Carolina**

Seated and Online Courses:

- Organizational Behavior (January 2010 – May 2014) – Graduate
- Effective Leadership (May 2012 – July 2016) – Graduate
- Organizational Leadership (May 2011 – December 2011) – Graduate
- Organizational Behavior (January 2011 – March 2011) – Undergraduate
- Strategic Human Resource Management (March 2010 – May 2010) – Graduate

**Associate Faculty, 2010 – 2014**  
**Ashford University**  
**Clinton, Iowa**

Online Courses:

- Adult Development (October 2011 – July 2014) – Undergraduate
- Ethics and Moral Reasoning (October 2011 – March 2014) – Undergraduate
- Business – Leading Organizational Change (August 2011 – September 2011) – Graduate
- Business – Contemporary Issues in Organizational Leadership (August 2010 – May 2011) – Graduate
- Management – Management for Organizations (January 2011 – May 2011) – Undergraduate
- Public Administration – Personnel Management (May 2011 – June 2011) – Undergraduate

**Professional Affiliations**

- Association for Strategic Planning (2017 – Present – Member, 2019 – Board of Directors)
- YMCA of Greater Charlotte – Harris Y/Harris Y Express Board of Managers (2015 – Present)
- Women’s Intercultural Exchange – Board Member (2015 – Present)
- Promising Pages – Vice Chair of the Board of Directors (2014 – Present)
- Women + Girls Research Alliance at University of North Carolina at Charlotte – Board Member (2014 – Present)
- Leadership Charlotte Class 35 (2013 – 2014)
- Innovation Institute – McColl Center for Art and Innovation (2012)
- National Forum for Black Public Administrators – Southern Piedmont Chapter 2<sup>nd</sup> Vice President (2008 – 2010) and President (2010 – 2012), Chair – National Emerging Leaders (2012 – 2014), Co-Chair – National Strategic Planning Committee (2017 – Present)
- Society for Industrial Organizational Psychology
- International City/County Manager’s Association
- American Psychological Association
- Alpha Kappa Alpha Sorority, Inc.

**Awards and Honors**

- International City/County Management Association 2020 Recipient of the Certificate of Distinction in Performance Management
- Nominated by Mecklenburg Times as one of the 2018 50 Most Influential Women in Charlotte-Mecklenburg
- International City/County Management Association 2017 Recipient of the Certificate of Distinction in Performance Management
- Association for Strategic Planning 2017 Recipient of the Richard Goodman Award for Strategic Planning
- 2016 Charlotte Chamber of Commerce Young Professional Public Servant Award
- National Association of Counties (NACo) 2016 Achievement Award for Mecklenburg County’s “Department Strategic Business Planning” in the category of County Administration Management
- National Association of Counties (NACo) 2014 Achievement Award for program “Mecklenburg County’s Service Evaluation Framework” in the category of County Administration Management

## **Presentations**

- Allen, M.R., Chapparo, M., & Ellis, D. (October, 2020) Strategic Planning, Budgeting and Performance Management: A Trifecta for Success in Local Government. Presented at the National Forum for Black Public Administrators 2020 Forum (online).
- Allen, M.R. (February, 2018) Women, Management and Mentorship. Presented to Enterprise Holdings.
- Allen, M.R. (July, 2015) Mecklenburg County's Strategic Approach to Performance Management. National Association of Counties, Charlotte, North Carolina.
- Allen, M.R. (September, 2013) The Mecklenburg County, NC Approach to Performance Management: Past, Present and Future. The Southeastern Conference of Public Administration, Charlotte, North Carolina.
- Allen, M.R. (November, 2012) Developing Meaningful Performance Measures for Results. Performance Management and Strategic Management conference (sponsored by the Balanced Scorecard Institute), New Orleans, Louisiana.
- Allen, M.R. (June, 2012) New Tools in Financial Management of Performance. The Government Finance Officers Association conference, Chicago, Illinois.
- Allen, M.R. (April, 2010) The Public Administrators' Guide to Understanding Human Capital during Times of Uncertainty and Change. The National Forum for Black Public Administrators annual conference, Greensboro, North Carolina.
- Allen, M. R. (October-December, 2009) Conducted the Balanced Scorecard Basics Workshops for The National Forum for Black Public Administrators (3 sessions), Charlotte, North Carolina.
- Allen, M. R. (April, 2008). PB Views software. The National Forum for Black Public Administrators annual conference, Little Rock, Arkansas.
- Allen, M. R. et al. (May, 2005). Constituent communication. Minority Political Leadership Institute Virginia Legislative Black Caucus, Richmond, Virginia.
- Allen, M. R. (February, 2004). An Evaluation of the 7 Habits of Highly Effective People Training Program in a Virginia Local Government. National Forum for Black Public Administrators Winter training session, Washington, D.C.
- Allen, M. R., & Nezlek, J. B. (April, 2001). Social support as a moderator of relationships between self-esteem and daily events. Eastern Psychological Association Meeting, Washington, DC.

## **Features/Publications**

- Allen, Monica (July, 2016). A planning evolution: How Mecklenburg County got on the road to strategic business planning. International City/County Management Association
- Nezlek, J. B., Sorrentino, R. M., Yasunaga, S., Otsubo, Y., Allen, M., Kouhara, S., & Shuper, P. (2008). Cross-cultural differences in reactions to daily events as indicators of cross-cultural differences in selfconstruction and affect. *Journal of Cross Cultural Psychology*, 39, 685-702.
- Nezlek, J. B., & Allen, M. R. (2006). Social support as a moderator of day-to-day relationships between daily negative events and daily psychological well-being. *European Journal of Personality*, 20, 53-68.

## **Skills and Qualifications**

- Customer Relationship Management (CRM)
- PowerBI
- Green Belt Six Sigma Certified (2009)
- Experienced in Microsoft Office Suite
- SPSS (Statistical Software Package)
- PeopleSoft
- Hierarchical Linear Modeling (HLM)
- PB Views (Performance Measurement System)
- Advantage Financial Management System
- Tableau
- Qualtrics

## **Education**

Ph.D., Organization and Management – General Business, Capella University, Minneapolis, MN, 2009  
Concentrations: Psychology, Organizational Change Dissertation: *The Effect of Organizational Change by Type and Frequency on Employee Psychological Contracts*

M.A., Psychology, College of William and Mary, Williamsburg, VA, 2001 Concentrations: Psychology (Social), Cultural Differences, and Daily Life Events Thesis: *Examining the Effect of Social Support as a Moderator of Daily Events and Daily Psychological Adjustment*

B.A, Psychology, Hampton University, Hampton, VA, 1999 Dean's List 1995-1999 Beta Kappa Chi National Honor Society Psi Chi National Honor Society