

PERFORMANCE MEASUREMENT MANUAL FOR FY 2008



MULTNOMAH COUNTY, OREGON
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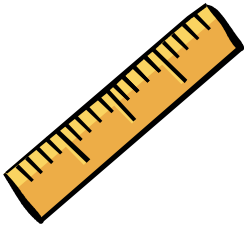
www.co.multnomah.or.us/budget/
www.co.multnomah.or.us/budgeteval/

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Introduction

Introduction



Performance measurement is the process of developing and using meaningful, objective indicators that can be systematically tracked to assess progress made in achieving predetermined goals. Only after the development of meaningful measures and matched with regular review and utilization is an organization able to move to performance management.

The performance measurement process requires ongoing data collection to determine if a program is implementing activities and achieving objectives. It typically measures resources used, activities performed, and results over time. The data are used to identify the difference between what customers and stakeholders expect and what programs deliver.

The development of meaningful performance measures is a critical component of the *Priority-Based Budgeting* process. Departments provide performance indicators as a part of their program offers. These measures are used by program managers. The Outcome Teams review the results to assist with their rankings of program offers. The Board uses the information to aid in their decisions to purchase programs. Purchase decisions are based on how well the program contributes to the priority—the County’s long-term strategies—and what these programs promise to deliver.

Improving the program offer performance measurement system requires a high level of on-going commitment and effort for employees at all levels in the county. Included herein are detailed instructions, examples, templates, exercises, and additional resources to improve upon the performance measurement section of program offers for FY 2008.

A Brief History of Performance Measurement in Multnomah County



The concept of performance measurement is not new to Multnomah County. Its importance has ebbed and flowed for the past 30 years. Below is a brief timeline of key accomplishments in performance measurement in Multnomah County:

In 1973, the Multnomah County Office of Planning, Evaluation, and Program Development created the Program Objectives Productivity System (POPS) producing a catalog which detailed the personnel, financial, and activities for the county’s 134 programs. The system explained activities but did not explain program outcomes or link them to greater strategic goals.

The 1990’s saw substantial growth in using performance measurement in the County with board Resolution 90-45, which developed an implementation plan for county-wide program evaluation. From this point, performance measurement movement grew to include the fundamental strategies of formal program evaluation.

In 1993, Program Performance Budgeting introduced *Key Results* reporting. A requirement in Key Results was for each service program have at least one

Introduction

reportable measure, preferably some form of outcome. The data were published annually in the adopted budget document.

From this effort grew a more comprehensive 1996 quality initiative—termed RESULTS—which matched annual performance measurement (Key Results), formal program evaluation, and continuous process improvement teams.

The initiative linked program performance with the identification of intermediate and long-term targets known as *benchmarks*. While this was the County's first comprehensive data-driven decision making system, the process failed to integrate performance measurement data into the strategic planning and formal budgeting process. This was because the performance measurement process and reporting occurred after the formal budget construction, deliberation, and adoption.

In 2000, the Auditor's Office began its *Service Efforts and Accomplishments (SEA)* reporting effort. This was designed to meet anticipated *Government Accounting Standards Board (GASB)* reporting requirements which provided more complete information about a government's performance beyond the traditional financial statements. The report alternates publishing years between public safety and health and human services, reporting to the public useful data including outcomes on various services that Multnomah County delivers. While useful to illustrate the County's accomplishments and document historical performance, its timeliness of the information is less useful as program management data or during the actual budgeting process.

In 2003, performance measurement added real-time reporting with the introduction of the *Safety Priority Brief*, a monthly real-time report detailing the workloads at various key decision points in the criminal justice system. The report was designed to meet a lack of timely, accurate and on-going workload data delivered in an easy to understand format. This was followed in 2005 with the *Basic Needs Priority Brief*. Currently, a new *Internal Accountability Brief* focused on county-wide organizational health is in pre-release quality assurance stages. However, these reports were never designed to specifically focus on program outcomes.

Priority Based Budgeting—Budget for Results

Priority Based Budgeting—Budget for Results



Each of the previous efforts listed above moved Multnomah County closer to a system of timely, integrated results-based performance measurement within a planning and budgeting process. Lessons from each of these accomplishments were incorporated into the performance measurement system of the *Priority-Based Budgeting* process.

The *Priority-Based Budgeting* process relies heavily on the program offer in determining the relative contribution a program makes in achieving the County's Priorities. The program offer contains a program's description, financial and budget data, staffing, and a variety of performance indicators. The program offers are electronically submitted via the web-tool and posted on-line for review at mid-year. *Outcome Teams* from each priority area will review the program offers, meet with department staff and discuss issues, and provide feedback to the departments, and ultimately rank the programs in their ability to contribute to the priority. This feedback should be incorporated in the revised offer to better clarify and strengthen the program offer.

Following are the policy statements for Multnomah County's six priorities, as established during FY 2005. Complete strategy maps, reports, past program offers and requests for offers, go to:

www.co.multnomah.or.us/priorities/aboutpriorities.shtml

- All Multnomah County residents and their families are able to meet their basic living needs.
- I want to feel safe at home, work, school, and at play.
- I want Multnomah County to have a thriving economy.
- I want to have clean healthy neighborhoods with a vibrant sense of community
- I want my government to be accountable at every level.
- I want all children in Multnomah County to succeed in school.

The Performance Measurement Process

The process does the following:

- Integrates performance reporting during the planning stages of the department's program offer development;
- Requires that all program offers provide a variety of meaningful performance measures;
- Provides meaningful outcome measures that show a link to the marquee indicators;
- Provides performance data at mid-year, allowing for timely course correction and future planning; and
- Includes a formal review process of the performance measures by the respective Outcome Teams, before ranking.

New for this year and included in this revised manual:

New this Year!

- Highlights of the first annual performance measurement development

Priority Based Budgeting—Budget for Results

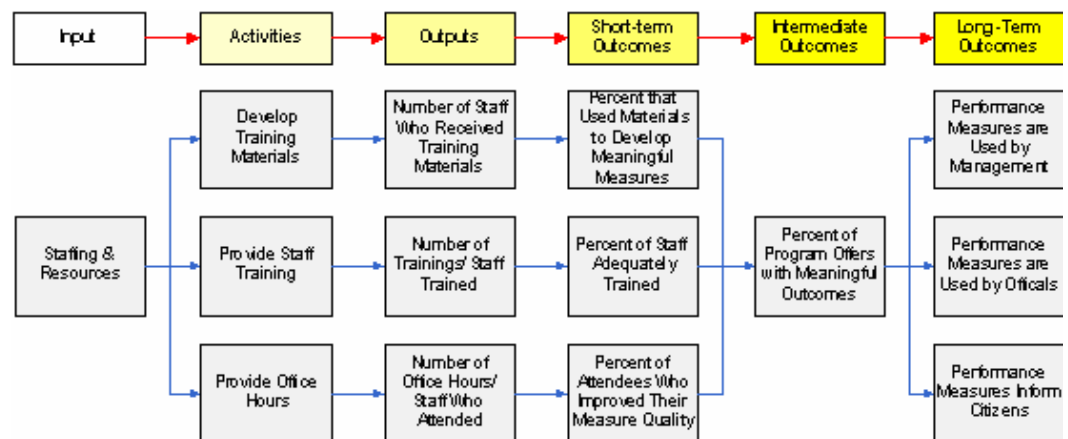
survey;

- The piloting of a new quality assurance process;
- Workshops to develop meaningful outcome measures;
- How to make changes to established performance measures;
- Enhancements to the web-tool's performance measurement section; and
- *MultStat* the introduction of a performance management system for measure utilization.

Survey Results from Last Year



Based on respondents requests identified in the annual Budget Survey, the county invested substantial resources into the development of the current performance measurement system for Priority-Based Budgeting. Assessing this efforts starts with a logic model of performance measurement development. A model begins with the resources (inputs) such as staffing followed by the activities performed. The outputs, such as training manual and templates developed and the number of trainings performed, the number of office hour technical assistance provided, and the number of attendees of both. Outcomes are listed as short, intermediate, and long-term outcomes. A short term outcome might be the number of attendees in training that learned how to develop meaningful outcome measures, or the number of *Office Hour* visits which resulted in the creation of meaningful outcomes. Intermediate outcomes might be the percentage of program offers reporting meaningful outcomes. Ultimately, the long-term, and most meaningful outcome in the development of county-wide performance measurement system, would be the utilization of the performance measures by departments/ agencies and policy-makers to make data-based decisions.



An email survey was sent to key County staff (98) involved in developing the performance measures in the FY2007 budget. There was a 39% response rate. Seventy-seven percent attended a performance measurement training; 40% went to at least one *Office Hour* for technical assistance; 87% said that they developed some or all of their department's performance measures; and 64% said they were members of an Outcome Team.

Priority Based Budgeting—Budget for Results

Overall respondents were satisfied with the level of training and technical assistance (*Office Hours*) that were provided. Most also said that the quality of the performance measures was adequate, and a marked improvement over the first year's efforts. While not assessed for quality, 85% of the 499 adopted program offers had at least one outcome measure listed.

Respondents noted that the quality of the outcome measures—specifically the outcome measures—needed more work and that utilization at various levels was low. Respondents (71%) felt that the highest use was by the *Outcome Teams* in their rankings, followed closely by their use to inform citizens. There was a perception that management and officials actual utilization of the performance measurement data was low.

About half of respondents felt that performance measures had an effect on their department's operations even though they believed their measures were of good quality and that the data were regularly collected. Few felt that the performance measures were used by elected officials in the development of either the executive or adopted budgets.

Continuous Quality Improvement

Recommendations for improving the performance measurement process for this year include:

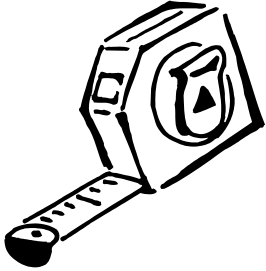
- Providing trainings and office hours including east county trainings;
- Adding outcome measure development workshops;
- Develop quality assurance steps so that accuracy and reliability of data increases; and
- Find ways to integrate the measures in a more on-going fashion, instead of just at the *Priority-Based Budgeting* process so as to increase utilization of data.

Increasing the quality of the measures will lead to greater utilization. Greater utilization, will increase the quality of the measures.

Details can be found in the full report at www.co.multnomh.or.us/budgeteval/

Priority Based Budgeting—Budget for Results

Why Measure Performance?



Performance measures are important for a number of reasons, but overall they relate to accountability, whether it is to the Board, manager, staff or otherwise. Programs are being purchased with the taxpayers' money, and the county has a responsibility to show the value in achieving results. Below are several specific reasons why performance measures are important:

- **Performance measures link to marquee indicators.** Marquee indicators are those high-level community measures specifically selected to reflect movement toward citizen-identified priorities. The County's strategy maps contain 20 measures, roughly three for each priority area. The program offer measures developed by departments should attempt to align with the marquee indicators as directly as possible. For example, one of the marquee indicators for the Safety Priority is "Percentage of adults and juveniles convicted of a crime who commit additional crimes (i.e. recidivism rates)." Measures for an offender job placement program that illustrate outcomes which reduce recidivism would be considered superior to measures that simply show how many offenders got jobs.
- **Performance measures help decision-makers refine strategies and improve results.** The use of performance measurement information helps in developing priority based budgets and in setting overall performance goals for the county government. This is done through the allocation and prioritization of resources and by informing decision makers so they can either confirm or change current policy direction to meet those goals.
- **Performance measures help build community support for County programs.** Citizens are primarily interested in results or outcomes. An implicit aspect of results oriented budget process is "justification" which is where performance measures provide a strong empirical and factual basis for programs and services that clearly deliver strong and measurable results. Without strong performance, especially outcome measures, programs run the risk of more intense public scrutiny and losing support from citizens and communities. Besides, clearly specified performance measures can stimulate the public to take a greater interest in and provide more encouragement for government employees to provide quality services. They also help improve civic discourse and foster trust and public understanding of specific government service.
- **Performance measures help managers deliver expected results.** Having performance measures will increase attention to a program's results. Managers often use performance measure to help identify problem and promising areas and track results over time. Applying performance measures to all programs will also foster greater understanding, responsibility and accountability on the part of program managers since they are the ones who are responsible for attaining the program's performance targets. Without that accountability, the measures will do little to improve performance. On the other hand, measures can be a manager's tool to keep their focus and help achieve their desired results.

Priority Based Budgeting—Budget for Results

- **What gets measured gets managed; measures motivate!** The old adage that what gets measured get managed is most important in motivating staff. Employees don't want to feel as though their program's performance is sub-standard and will rise to the challenge when presented with accurate performance information that shows opportunities for improvement.

Getting Prepared



As part of the *Priority-Based Budgeting* process, all program offers must include a variety of performance measures. This includes administrative and support program offers, and also those programs referred to as “*pass-through payments*” programs. Many of the services the County purchases are actually provided by another outside agency, but there is still an interest in the results of those purchases.

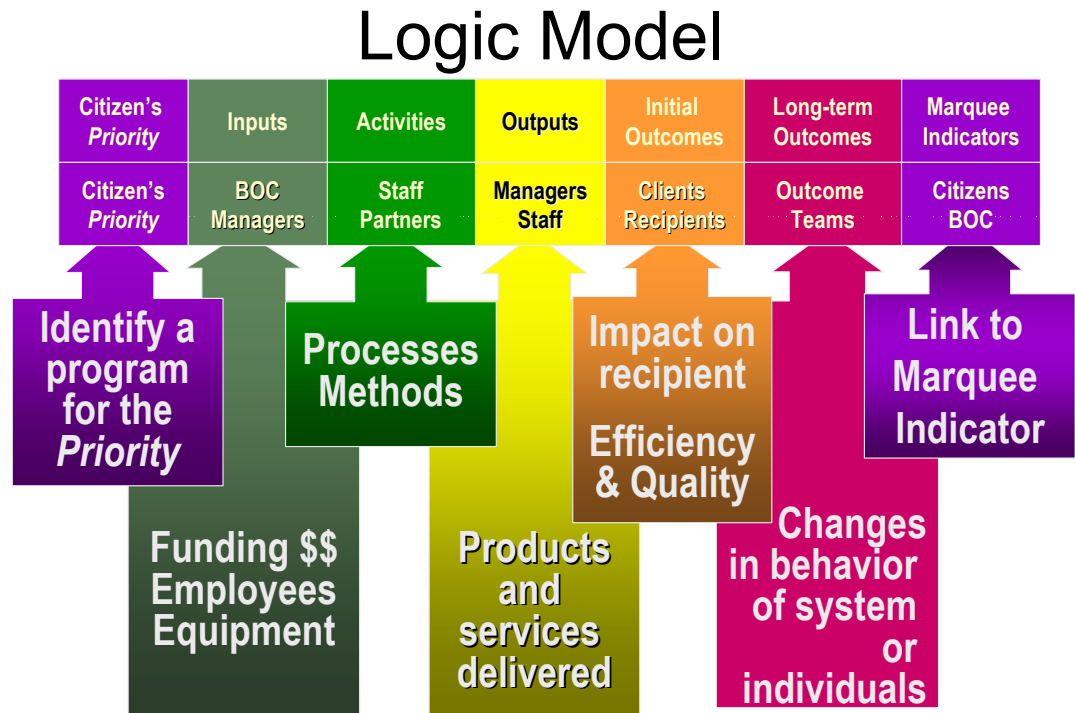
Departments create their own program offers and are responsible for the accuracy of an offer's narrative, financial and performance information. Departments are responsible for defining their programs' performance measures. Considering the wide range of services/programs delivered by the county (e.g., elections, animal control, jails, health clinics, libraries, etc.), the type and number of measures required to be submitted with program offers have been designed to give as much flexibility to the departments as possible, while still retaining the standardization needed for thoughtful review and year-over-year comparison.

To do this, the development of each program offer's performance measures must be coordinated with the program planning and offer submission. A program offer's performance measures will benefit greatly when they are determined in conjunction with the program manager and staff, and the department's analytical staff. The program's manager and staff are important to include in the discussions about performance measures—they are the program experts. Their input and ultimate buy-in ensures that the data will be used. Analytical staff should include the department's experienced finance and budget staff, and any knowledgably research or evaluation staff.

Developing Performance Measures

Developing Program Measures

Developing meaningful performance measures depends on understanding the County's six priorities. Effective meaningful measures report what the program is trying to accomplish; where the resources come from and how they are allocated; the program's main users, recipients, or clients; what activities are being performed; and what output and outcomes are expected. The following diagram shows a general program logic model for developing performance measures.



Adapted from: Mary Campbell's *'Driving Changes and Getting Results'*

Measuring What Matters

It is important to measure what matters, not simply what is convenient. Jim Clemmer, a best selling author on performance management, once said: "Crude measures of the right things are better than precise measures of the wrong things."

Thinking about what matters means considering what matters to whom. Some measures might matter to staff but not necessarily to the program's customers, the Outcome Teams that review and rank program offers, or the Board which ultimately purchases programs. In selecting performance measures, consider the following questions:

- Who are the customers or beneficiaries (internal and external) of your program?
- What are the significant performance measures valued by these customers or beneficiaries (e.g., outcomes, timeliness, effectiveness, quality, satisfaction, etc.)?
- What performance standards would our customers, clients, Outcome

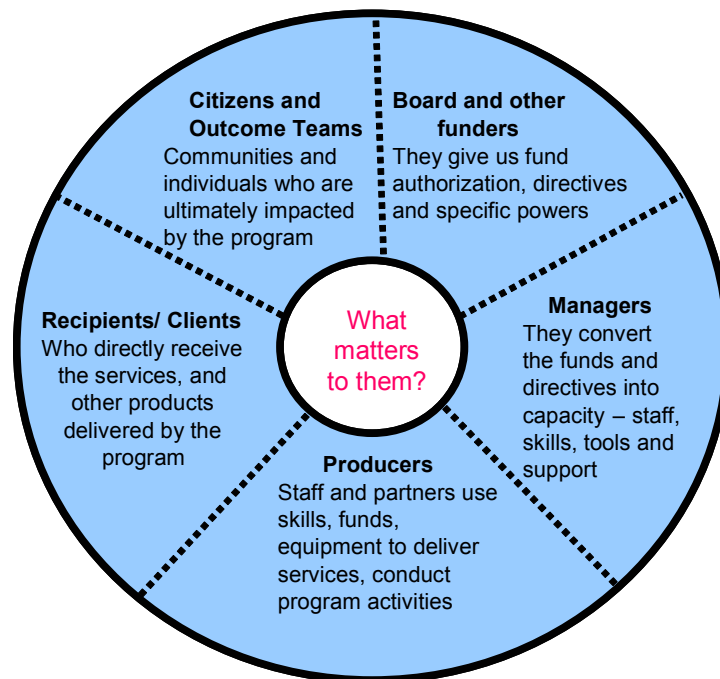
Developing Performance Measures

Team members, Board of Commissioners, department managers, grantors, etc., like to see us achieve on these measures?

- How might management and program staff explain what the program accomplishes in numbers to someone on the street?
- How do you communicate that the program is doing better or worse than before?

The questions are about identifying who expects what results from the program/service offered and bringing their perspectives in the performance measure process.

As illustrated in the following chart, almost every program involves funders, managers and staff, service recipients, and the community in which the program operates. Their perspectives and expectations on performance should be considered when building a program's performance measures. After identifying who matters, it's then possible to focus on what matters to them and create measures that are meaningful. With careful thought there is likely to be agreement on what matters from the various groups' perspectives.



Adapted from: Mary Campbell's 'Driving Changes and Getting Results'

Planning and cooperation are necessary for creating meaningful performance measures because a program's description (its activities and what it's trying to accomplish), budget determination (staff levels and funding needs) and service levels (inputs, outputs and outcomes, etc.) are highly interconnected.

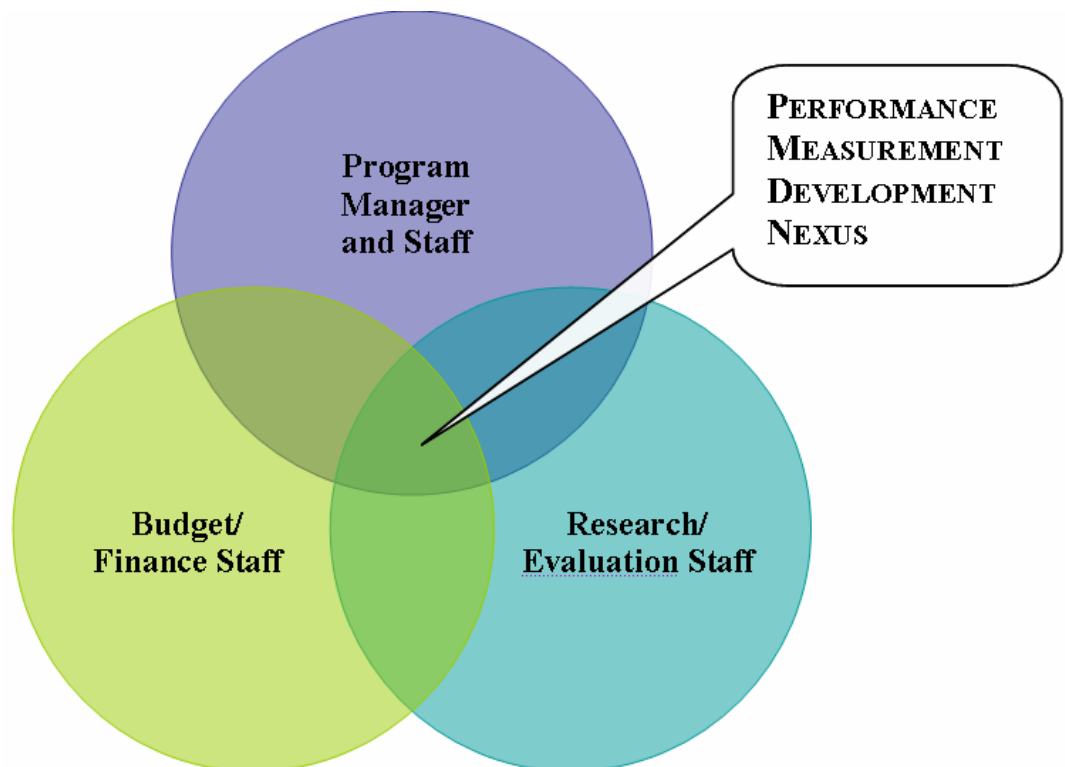
Expertise in each of these lies with various staff resources within the department.

Developing Performance Measures

For example, an innovative/ new program should define the goals; the delivery system and activities (managers and program staff expertise); the requested resources needed to accomplish the activities and results (budget and finance staff expertise); and the evaluation of program success (research and evaluation staff expertise).

An established program might have a reduction in funding (e.g., grant loss), which in turn may reduce the service levels through lower volumes, longer processing times, or decreased customer satisfaction. This may ultimately lead to reengineering of the program. On the other hand, increased wait times or customer dissatisfaction may warrant increased funding needed to continue delivering services at the appropriate level. These interactions affect the variety and type of performance measures selected and their subsequent results.

Remember program offers should describe either a specific service population (elderly, youth, minorities, etc.) or a specific service being delivered (residential treatment, housing, nutrition services, etc.). Single offers that attempt to describe several service populations and various services being delivered are much more difficult to describe their result than if they were more than one offer.



Developing Performance Measures

Which Indicators Can Be Reported?

There are several types of performance indicators available for reporting. These include input, output (workload), outcome (results), efficiency and quality indicators. Each of these draws upon a different aspect of the service that is being delivered. A good performance measurement system should include a variety of meaningful measures.

Input Indicators

Input (descriptive). This indicator is designed to report the amount of resources such as financial, personnel, material, or other, that are available or have been used for a specific service or program. Financial and personnel data are the most common input measures. However, since they are already reported in the revenue/expense and FTE detail sections, they should not be repeated in the Program Performance Measurement table. Departments may choose to report other program resources that are managed or consumed. The measure is helpful in illustrating the scope of work, but not the actual activities performed. The data are typically reported as numbers and not percentages.

Examples of Input Indicators

- number of client referrals
- number of fleet vehicles
- number of jail beds
- number of branch hours opened
- number of maintained centerline/ lane miles
- number of helpdesk covered PC terminals
- number of prosecution cases received

Output Indicators

Output (workload). This is the most common type of indicator found in most performance measurement systems and reports the number units produced or services provided by the program. It describes the activities that a program has completed, but not necessarily their results. It is common for programs to have more than one output indicator. The data are typically reported as numbers and not percentages.

Examples of Output Indicators

- number of treatment episodes delivered
- number of vehicle repairs performed
- number of client screenings provided
- number of purchase orders issued
- number of vaccinations given to children
- number of centerline/ lane miles resurfaced

Developing Performance Measures

Outcome Indicators

Outcome (results). This indicator is designed to report the results of the service. It can often be described as a short-term (e.g., successful treatment completion), intermediate term (e.g., success by 3 or 6 months), or long-term outcome (e.g., 1 year or more). There should be a logical connection from outputs to meaningful outcomes, with activities supporting the results in a sequential fashion. Whenever possible the outcome indicator should relate directly to one of the Priority's *Marquee Indicators*. The data can be reported as either numbers, percentages (assuming percentages of the output), or rates (xxx per 1,000).

Examples of Outcome Indicators

- Percent reduction of juvenile recidivism
- Percentage of youth living independently at discharge
- Percentage of clients that reduced drug use at discharge (initial outcome)
- Percentage of clients drug-free at one year after discharge (long-term outcome)
- Reduction in incidents of disease (rates)
- Reduction in repeat calls for service

Note. Reporting "cases closed" (e.g., case management, addiction treatment, cases prosecuted, etc.) is not a meaningful outcome. Simply terminating services/cases does not tell the reader what was accomplished by providing the service. Defining the nature of the service termination is a meaningful outcome.

Efficiency Indicators

Efficiency (productivity). Efficiency measurement is a method for examining how effectively a program is performing the activities it is doing. This is an indicator that measures the cost of resources (e.g., in dollars, FTE, employee hours, time, etc.) per unit of output (e.g., per repair, per case, etc.).

Efficiency can also be qualified as a *productivity measures*. For example, where "vehicles repaired per labor hour" reflects efficiency, and "percentage of vehicles repaired properly" (e.g., not returned for rework within 6 months) reflects outcomes, "unit costs (or labor-hours) per proper vehicle repair" reflects productivity. The costs (or labor-hours) of faulty vehicle repairs as well as the costs of the proper repairs are included in the numerator of such a calculation, but only good repairs are counted in the denominator—thereby encouraging both efficiency and outcome by repair personnel.

Examples of Efficiency Indicators

- Cost per tax-lot appraisal
- Reports generated per analyst FTE
- Average number of days to close a case
- Cost per jail bed day
- Labor-hours per proper vehicle repair

Developing Performance Measures

Quality Indicators

Quality. This measure reflects effectiveness in meeting the expectations of customers and stakeholders. Measures of quality include reliability, accuracy, courtesy, competence, responsiveness, and completeness associated with the product or service. Customer satisfaction reflects the degree to which the customer's expectations of a service are met or exceeded. Lack of quality can also be measured. Such examples include rework, correcting errors, or resolving complaints.

Examples of Quality Indicators

- Percent of reports that are error free
- Percentage accuracy of information entered in a data system
- Percent of customers that rank service as exceeding their expectation (customer satisfaction)
- Percent of clients waitlisted more than a month for treatment

The Templates

After identifying the specific priority the program will be submitted to and considering the audience and what matters to whom, the next steps lie in determining the meaningful performance measures. Effective performance measures clearly identify relevant program resources, activities, outputs and meaningful outcomes. The easiest way to determine these is through program modeling.

A three-part modeling template is available in Appendix C. Part 1 develops the program logic model, Part 2 selects the performance measures and Part 3 details each of the measures. The template should be used to record information that is crucial to understanding how the measures were developed, how they were defined, and how data were collected. This information also helps with quality assurance, data analysis, and program offer evaluation in the next fiscal year.

Additionally, a new independent quality assurance process is being piloted this year. These templates—especially a copy of Part 3 for each measure—will be key components of the independent review process.

Be prepared! Copies of a program offer's templates may be requested by Outcome Teams and may be used as a part of the quality assurance pilot process. Board members may also request copies of these templates. Future web-tools may allow for direct entry of this information, but until then the Budget Office Evaluation staff recommends keeping final copies on file.

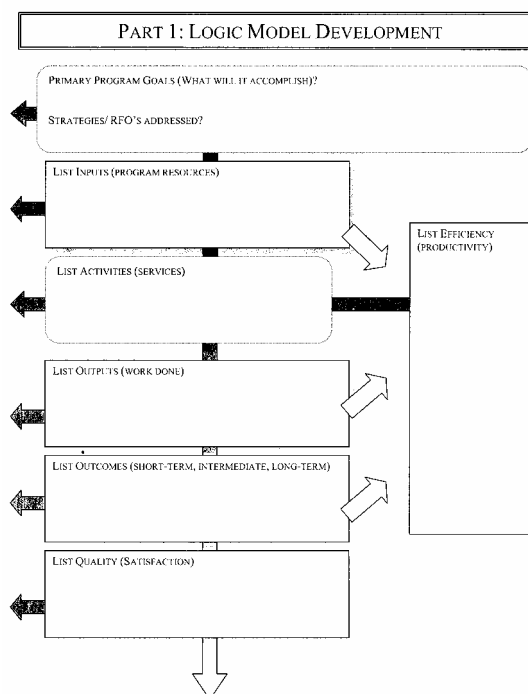
Part 1 is used to determine the basic program logic model and to brainstorm the variety and number of potentially meaningful measures. Think of it as a sandbox in which to play. Each section may generate multiple measures. Some of these measures may already be collected by the department, while others may need to be developed. Here are some questions that should be considered as the template

Developing Performance Measures

is filled out:

1. Think about how a program links to the County's Priority: what's the purpose and goal of the program? Where on the *Priority Map* might it fall? Which part of the *Request for Offers* (RFO) is the program addressing?
2. List the program inputs such as funding, FTE, materials (e.g., PC's, fleet vehicles, buildings, etc.)—these are the resources needed to accomplish the program's goals.
3. Think about how the program works and how the service is delivered; briefly list the activities that lead to a product or service being delivered.
4. Identify program outputs; list what was accomplished (e.g., PC's repaired, fleet vehicles maintained, cases managed, people served).
5. Identify the various outcomes (i.e., results) of the program: both the outcomes expected immediately after the service is delivered (i.e., short-term), the intermediate and the long-term outcomes expected for the clients/ customers who received service.
6. From the inputs, outputs, and outcomes consider efficiency indicators: how much does it cost in staff or dollars? How long it takes (hours or days) to get an output or outcome? Are there any efficiency mandates that need to be addressed?
7. Identify measures of service quality: is customer satisfaction measured? List any quality levels mandated.
8. Are benchmarks or industry standards available when considering measure options?

Part 1: Logic Model

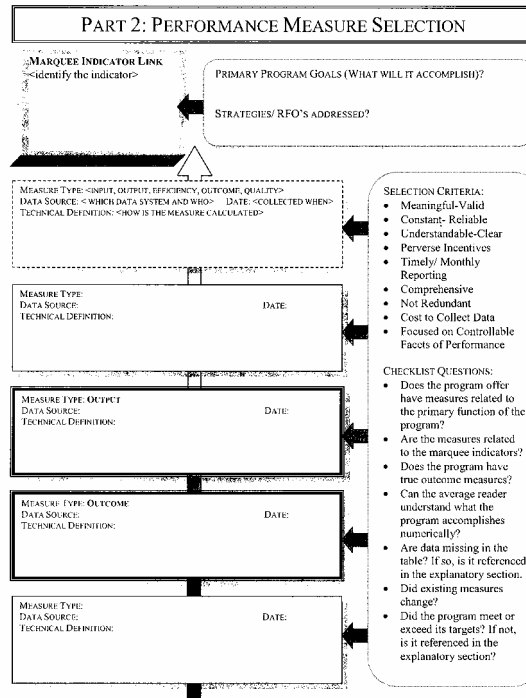


Program offers have space to report four measures in the performance measure table. After completing Part 1, it is likely there will be more measures than

Developing Performance Measures

needed. Some will be less meaningful, some will be expensive to collect or maintain, difficult to understand, or downright wrong given the context. Part 2 of the template—*Performance Measure Selection*—narrows the results of Part 1 by identifying the most meaningful performance measures to report.

Part 2: Measure Selection



Performance Measures Selection Criteria



Part 2 of the template includes a list of selection criteria to apply to each of the measures identified in Part 1. The selection criteria should be used to help narrow down the multiple measures and determine the most meaningful measure to report. A properly developed set of performance measures typically satisfy the following criteria:

- **Meaningful-Valid:** The key to assessing program performance is measuring the right things with the right measure. If a measurement fails to measure what was intended, then this measurement is not valid.
- **Consistent-Reliable:** The data used to generate the measurement must be consistently accurate and reliable. It is important that the collected data actually describe what is being measured. If other departments have similar services, can the same measure be applied universally (e.g., drug treatment services)?
- **Understandable-Clear:** Think about whether or not a measure is simple enough to be understood by people who are interested in the program. Keep it simple, and ask if it would pass the 'Aunt Edna' test.
- **Perverse Incentives:** Might the measure lead to behaviors that reduce quality or outcomes just so the "numbers look good"?

Developing Performance Measures

- **Timely/ Monthly Reporting:** Think about the appropriate time frame for which the data will be reported. The measurements used for developing annual budget must be provided by mid-year. Consider that *MultiStat* may require more frequent reporting, such as monthly.
- **Comprehensive:** Performance measures should capture the most important aspects of a program's goals. When multiple measures exist, it's best to use a variety of measurement types (e.g., input, output, outcomes, efficiency, quality).
- **Not Redundant:** Due to the space limitation in program offers, there is room for only four measures—of which at least one is an output and one an outcome. It is acceptable to have more than one output or outcome measure, but keep in mind that providing variations on the same measure is redundant and a waste of space.
- **Sensitive to Data Collection Costs:** For many programs, the data needed for performance measures are readily available. However, data collection cost should be taken into consideration, especially when creating new measurement. Data sharing across programs, divisions, and departments through data warehouses could dramatically reduce duplicated efforts in data collection. Many measures are already established and should be considered.
- **Focused on Controllable Facets of Performance:** Good measures should focus on the indicators that show program success, individual behavior, or agency performance that can be directly affected by the activities of the program/service.
- **Measures for Management:** These measures are supposed to inform management as well as decision makers. Consider how these data will be regularly collected and report for management purposes.

Once the measures have been selected, they should be clearly defined in the provided measurement boxes. Each box requires several pieces of specific information. Each measure should identify the type of measure (e.g., input, output, outcome, etc.), a clear definition, the source from which the data comes (including the technical contact person), and the date range the data should be extracted. This allows consistency and reduces confusion in data collection.

The measure definition may be more technical than what might be printed in the limited program offer space. For example, the outcome measure definition may read: “the percent of residential drug treatment episodes where the engaged client completed a minimum of 2/3^{rds} of their treatment plan and tested drug-free 30 days prior to termination.” The program offer may state: “the percent of clients drug-free upon treatment completion.”

An additional template (Part 3: Performance Measure Detail) has been created for greater specificity and documentation. This is the single most important part of the templates—it clearly states the measure and defines how it is calculated. This

Developing Performance Measures

protects an organization from both expected and unexpected staffing changes (i.e., expected retirements, promotions, etc.) or organizational structures that often change to better document measures for consistency and to reduced future confusion. **Note: This form has been updated since last year.**

Each measure determined in Part 2 should be detailed in a greater degree in Part 3. Part 3 should include the following information:

- Technical definition that clearly defines the measure,
- The definition as it appears in the program offer—this is a simplified version of the technical definition,
- Why use this measure—what does it provide for,
- Unit of measure the result should be expressed in (e.g., time, numbers, percents, rates, episodes, unique clients, etc.),
- Data source (i.e., where the data come from) and data calculation method (e.g., the specific criteria, filters and formula),
- How current year estimates are calculated including steps, data, etc., and
- Who the data contact person (not necessarily the program contact or program manager) and the date the sheet was filled-out or updated.

The Budget Office urges the retention of all templates by departments and submitting copies to the Budget Office Evaluation staff. Particularly Part 3 for each measure reported. Again, templates may likely be requested by *Outcome Teams* for review and may be used as a part of the quality assurance pilot process.

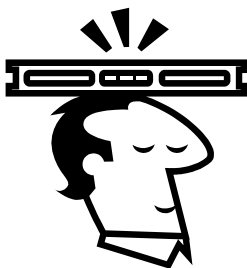
Developing Performance Measures

Part 3: Performance Measure Detail

PART 3: PERFORMANCE MEASURE DETAIL	
AFTER CHOOSING THE PERFORMANCE MEASURES IN PART 2, USE THIS TEMPLATE TO DOCUMENT THE DETAIL BEHIND YOUR PERFORMANCE MEASURE. THIS WILL ALLOW FOR THE RECREATION OF ACCURATE, RELIABLE AND CONSISTENT MEASURES IN THE FUTURE. EVERY MEASURE USED REPORTED IN A PROGRAM OFFER MUST HAVE THIS LEVEL OF DETAIL.	
TECHNICAL DEFINITION:	
DEFINITION AS IT APPEARS IN PROGRAM OFFER:	
WHY USE THIS MEASURE? <WHAT DOES THIS MEASURE PROVIDE?>	
UNIT OF MEASURE: <HOW SHOULD THE RESULT OF MEASUREMENT BE EXPRESSED?> (PERCENTAGE, MINUTES, DOLLARS, CHILDREN SERVED, RATES?)	
DATA SOURCE AND CALCULATION METHOD: <FORMULA OR PROCESS FOR CALCULATING MEASURE>	
CURRENT YEAR ESTIMATES: <HOW ARE CURRENT YEAR ESTIMATES CALCULATED?>	
CONTACT PERSON: <INDIVIDUAL RESPONSIBLE FOR DATA/ EXTENSION>	DATE:

ONE FOR EACH
PERFORMANCE
MEASURE!!!

Tips and Suggestions



Initially, this process may appear overwhelming. Here are several tips and suggestions that can make the process easier, and help you to create a better program offer.

- Don't reinvent the wheel unless it's necessary. There are several places where measures are already being collected (Service Efforts and Accomplishments, Safety Priority Brief, Basic Needs Brief, Progress Board, department annual reports, grant funding reports, etc.)—in many cases these are good starting points for meaningful measures.
- Many programs have several activities that encompass the service. The measure should relate to the primary service or result that the program is attempting to accomplish. For example, a job placement program may measure the number of pre-service screenings, resumes created, or interviews scheduled, but the primary purpose is to place someone in a job and have that person remain employed. The last two measures—outputs and outcomes—are the measures of primary interest.
- It is likely that industry standard measures or comparable jurisdiction measures exist for many programs. If you're stuck, it can be helpful to search the internet for similar programs to determine what measures they use to report performance (also see Appendices B & C).
- There are cases where departments offer similar programs (e.g., drug treatment, call centers, protective services investigations, gang services, etc.). In these cases, the various program offers should attempt to use common measures where appropriate. This will move county reporting toward more standardized outcomes and increase the ease and understanding of performance measures by citizens.

Developing Performance Measures

- Use the best available measures. Crude measures of the right things are better than precise measures of the wrong things. Not all measures may be readily available, especially if the program is innovative/ new.
- Better to have several measures than only the bare minimum. A variety of measures communicates the value of the program. This is especially true when outcome measures or data may not currently be available.
- Select measures that are effectible and meaningful. Measures that are always 100% suggest the bar is too low or the measure has little meaning from a program management perspective. This is also true of programs where failure is not an option. In these cases, proxy measures of what the program does may be better indicators of a program's performance.

Making Changes to Established Measures

Making Changes to Established Measures



Following all the steps in the above sections should allow for the selection of consistent, reliable and meaningful program offers measures so that performance can be evaluated over time. However, even the best efforts to develop meaningful measures may not always result in good measures. Changes to established program performance measures typically occur for one of three reasons: 1) to fix an error in the performance measure definition or reported value, 2) to replace a poor measure with a better one, or 3) to stop reporting an established measure. Minor adjustments (e.g., spelling) that do not effect the measure do not need to be reported. Regardless of the reason, established programs are responsible to report the change and results for consistency, transparency and accountability.

There are several steps that need to be completed when making changes to established performance measures.

1. Identify and document the reason for the change. For example, was the logic model incomplete? Was the performance measure poorly documented last year in Part 3 *Performance Measure Detail*? Were the data impossible to retrieve? Were incorrect calculations of the values entered into the program offer last year? Was this a new better measure than what was existing?
2. Update the logic model so that future changes and mistakes are avoided; clarify definitions, calculations, and other areas that may lead to future mistake. Document these so that next year's efforts have the proper documentation.
3. In the web-tool's section entitled *Performance Measures* enter the program offer's updated measure or changed values into the appropriate space in the table (see *Data Entry and Submittal through Web Tool*).
4. In the web-tool's check the *Measure Changed* box ☒.
5. Report the change
 - a. If the change was a replacement of a poor measure with a better one, the replaced measure and its results must still be reported in the *Significant Program Changes* section (page 2 of the program offer) to allow for consistency, transparency and accountability (for this year only).
 - b. If the change was to correct an error either in the definition clarity or any reported value a brief explanation should be given in the *Significant Program Changes* section (page 2 of the program offer) for this year only.
 - c. If the program offer no longer reports an established measure, its results must still be reported in the *Significant Program Changes* section (page 2 of the program offer) for this year only.

These steps are necessary to ensure consistency, transparency and accountability in the program offer and the measures that are submitted for purchase.

Data Entry & Submittal with Web Tool

Data Entry and Submittal through the Web-Tool



Once the performance measures have been determined and the template has been filled out, the data can be entered into a program offer via the web-tool. The FY 2008 budget web tool will include a Performance Measures section for each program offer. The section standardizes the performance measure data entry into a table. This should make the data entry relatively easy, as well as simplifying future data retrieval. The web-tool has a two part section specifically for performance measures: 1) the quantitative table and 2) the qualitative explanatory section.

The quantitative table has space for four measures reporting the following data: the measure type, the measure definition, and cells for data for each year of performance and its numerical representations (i.e., number or percentage). Two of the measures are pre-determined as an output measure and an outcome measure. To offer the greatest amount of flexibility for the department, there are two additional slots.

The Web-tool Interface

Performance Measures						
Measure Type:	Primary Measure:	% ?	FY 2006 Actual Result	FY 2007 Purchased	FY 2007 Current Estimate	FY 2008 Target
Output	<input type="text"/>	% <input type="checkbox"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Outcome	<input type="text"/>	% <input type="checkbox"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Optional	<input type="text"/>	% <input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Optional	<input type="text"/>	% <input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Performance Measure - Description Measure Changed ☐

Each measure includes cells for data entry. These cells have been relabeled this year to reduce confusion, however, this doesn't change the value of the cell or what it represents. Cells are now labeled. They are ordered in a way to present historical results, most recent targets and performance estimates, and the program offer's target if the program is purchased. The cells allow the reader to easily make a variety of comparisons, including whether the program is meeting its specified targets. In addition, the data will be collected and trended over time.

Data Entry & Submittal with Web Tool

The *FY 2006 Actual Result* (previous labeled *Previous Year Result*) cells reflects the result of the last full fiscal year of service. In some cases this data may not be available and may be left blank (e.g., innovative/ new program, reconstructed program, a new measure, or a revised measure). Nearly every established program should have historical data available for each measure.

The *FY 2007 Purchased* cell (previously labeled *Current Year Purchased*) reflects the target service level for which the program is currently engaged. For example, if in last year's offer the program's target was to serve 250 clients, then the value in the *FY 2007 Purchased* should read 250. If your offer is an existing program, these values should be the same as last year's program offer target (i.e., Next Year Offer). Most measures should include these data, although there will be some cases (e.g., new programs or new measures) where this data may not be available and can be left blank.

The *FY 2007 Current Year Estimate* cell gives an annualized estimate based on the most recent program data. In most cases, programs will have 6 months of current fiscal year data, which should be adjusted for the full year. This adjustment is based upon program staff observations and expertise, and the current year-to-date totals. These assumptions should be documented. This allows for comparison of current performance to the current year target. Additionally, this figure allows departments an opportunity to perform a mid-year review or course correction based on data.

The *FY 2008 Target* cell (previously labeled *Purchase Target*) reflects the service level result the department is proposing for the upcoming fiscal year should the program be purchased. This service level might differ from the previous year's service level, depending on service model or funding changes. For example, if a program's costs increase while revenue remained unchanged, the expected service level may decline unless increases in efficiency are found. Every program offer must include data for this indicator. This field must not be blank.

New! Decimals Places

A change to the web-tool this year allows for the use of a decimal place to report percentage values to one-tenth (i.e., ##.##). To select this option, you must check the percent check-box when entering your data so that it is properly reported.

New! Entering Changes to Established Measures

If real changes (e.g., other than simple spelling errors) were made to existing measures or if previously existing measures are to no longer be reported in the future, the program offer must check the *Measure Changed* box ☒. Program offers that are reconstructed will most likely have changes to their performance measures. Regardless the previous results must still be reported in the *Significant Program Changes* section (page 2 of the program offer) to allow for consistency, transparency and accountability for this year only.

Data Entry & Submittal with Web Tool

Qualitative Explanatory Section

A qualitative explanatory section sits below the table and allows limited space to explain any issues with data anomalies, missing data, clarifications or changes to definitions, or other pertinent data-related issues. For example, if the program's current year estimate is off target by more than 5% of what the program offer was originally supposed to deliver, a brief explanation should follow.

This section is not intended to be used to further define or qualify the performance measures. If the definition in the table is not clear to the reader, consider rewriting the definition.

It may also be beneficial to note whether a formal program evaluation, performance audit, independent assessment, or other quality assurance process has ever occurred for this program, and briefly the results.

Scaled Offers

Special attention should be given to scaled offers. Each scalable offer's performance measures should report only those services that the scaled offer supports if purchased. For example, if the primary offer is for 10 residential beds, then the performance measure must reflect only those 10 beds. If the next scaled offer is for an additional 10 residential beds, then additional performance measures must reflect only those additional 10 beds, not the combined 20 beds.

If the scalable offer merely increases capacity like in the example above, the performance measure definitions should be the same as the base offer (e.g., drug treatment days, successful drug treatment completion rates, etc.). In cases where capacity is increased, especially in cases where a reduced caseload is part of the result, efficiency measures should be considered.

If the scalable offer adds a new service or features (e.g., 10 post-treatment alcohol and drug-free supported housing slots) the measures can differ for the base offer.

Entering the Performance Measures in the Web-tool

Below are the steps to fill out the web-tool:

1. Login to the web-tool and select the appropriate program offer.
2. To enter a new measure simply select the measurement type with the drop down box.
3. Enter the performance measure definition. This should be a simple and clear definition—technical language, acronyms and jargon should be avoided, but include them on Part 3 of the template. Symbols like \$, %, or # are perfectly acceptable.
 - a. If the measure is the same as last year, simply copy and paste the definition.
4. Enter the data into each cell (*FY 2006 Actual Result*, the *FY 2007 Purchased* amount, the *FY 2007 Current Estimate*, and the *FY 2008 Target*).
 - a. Existing programs should take the last year's purchase Target

Data Entry & Submittal with Web Tool

value and shift that value into the *FY 2007 Purchased* cell.

5. Select the percentage check-box ☒ if the data in the cells should be reported as percentages. You may also report values with a single decimal place.
6. Repeat the steps for the additional measures.
7. If any existing measures are changed or dropped, select the *Measure Changed* box ☒.
8. Enter any clarifying information into qualitative explanatory section.

Checklist Questions



The cycle of performance measurement development is not over after the initial web tool submission. In response to their *Requests for Offers* (RFOs), the Outcome Teams will review the submitted program offer in detail, including their measures. Outcome Teams are an excellent source of feedback and assistance in helping departments develop better offers. Team members will have the opportunity to ask for clarification of the measures and may request copies of the templates used in selecting the measure. Among other methods, Outcome Teams will review each program's performance measures using following checklist of questions.

1. Does the program offer have measures related to the primary function of the program?
2. Are the measures related to the marquee indicators?
3. Does the program have true meaningful outcome measures?
4. Have established measures changed or been removed? If so, are the current results reported in the explanatory section, and have the significant changes box been selected?
5. Can the average reader understand what the program accomplishes numerically?
6. Are data missing in the table? If so, are reasons noted in the explanatory section?
7. Did the program meet or exceed its targets? If not, are reasons noted in the explanatory section?

MultStat: Performance Management & Reporting

MultStat: Performance Management & Reporting

It is one thing to simply collect and report data, it's another thing altogether to utilize that data to make decisions. This is the difference between performance measurement and *performance management*. Historically, Multnomah County, like many other jurisdictions, has fallen short of having an integrated process that utilizes the collected data in a pro-active way county-wide.

As was noted in the results from the survey, there is a strong perception that while data are collected and reported, it is not regularly used to manage programs or make operational changes. Additionally, there was little perception that decision makers at the highest level are utilizing this data as well. Respondents suggested finding ways to integrate the measures in an on-going fashion, instead of just at during budget development.

In response to this the new administration has shown great interest in the development of an on-going reporting system based on, and fully integrated with, the *Priority-Based Budgeting* process. Performance management is the natural evolution of the budgeting process—ongoing assessment of the results that were purchased, termed *MultStat*.

Basic Process Principles

The goals of the *MultStat* process are to increase accountability, expedite problem solving, to ultimately improve the performance of government agencies and their service outcomes. *MultStat* is a structured continuous management process for ongoing review of government agencies' performance indicators measuring utilization of available resources and delivery of services to the public, with a specific focus upon immediate results. The process is based on the four basic process principles of *Compstat/ Citistat* models:

1. Provide timely, accurate and relevant data,
2. Analyze data and develop effective solutions that respond to emerging issues,
3. Deploy resources quickly to address issues, and
4. Relentless follow-up and assessment.

The process for performance management is currently in development stages within the Budget Office, however piloting is expected to begin by the Fall of 2007. When reviewing, adjusting or developing measures for the program offers this year, program managers should keep in mind that these measures will be reported and reviewed by the new administration on a regular and on-going basis.

Additional information will be provided as *MultStat* development continues. Stay tuned!

The Challenges of Measuring Performance

Performance Measures Challenges



Some limits exist to what types of information performance measures can actually capture. Typically these are limits one sees in cases where direct measurement is difficult or costly. Often however, measurement difficulties are due to unclear program results. Clarifying the program results will go a long way towards developing meaningful measures. Below are several common responses when applying performance measures.

- **You can't measure what I do.** Areas previously thought to be “unmeasurable” such as prevention, education programs and even international relations have been shown to be measurable if someone is motivated and creative enough to pursue an innovative approach. Since so many jurisdictions have initiated performance measurement systems in recent years more information than ever exists for staff to reference (see Appendices for additional resources). In some cases even information may be limited to proxy measures or successive milestone measurement rather than traditional outcomes.

In some cases, the outcome of a program may not be realized for many years. In some cases, this can be addressed by identifying meaningful output-oriented milestones that will lead to achieving the long-term outcome goal. To address this issue, a program should define the specific initial and intermediate outcomes to accomplish the long-term outcome goal. These steps are likely to be output-oriented, prerequisite accomplishments on the path toward the outcome goal. It is important that these steps are meaningful to the program, measurable, and linked to the outcome goal.

- **The measures aren't fair because I don't have total control over the outcome or the impact.** It is the rare program that has total control over the outcome, but if programs can't demonstrate any impact on the result, then why should the program be funded?

Often programs from various departments all contribute to achieving the same goal. The contribution of any one program may be relatively small or large. One approach to this situation is to develop broad, yet measurable, outcomes shared by a collection of programs, while also having program-specific performance goals.

- **It will invite unfair comparisons.** Comparison is going to happen whether programs invite it or not. But the program offer doesn't stand only on it's performance results. Clearly articulating the program's target audience and services can help temper attempts at apples-to-oranges comparisons. Consider working with other programs of similar design to use the same measures.

Additionally, taking the initiative in selecting comparable organizations can help your program by proactively comparing performance, determining how well you are doing, and seeking ideas on how you can improve your performance.

The Challenges of Measuring Performance

- **Performance data will be used against the program.** Demonstrating transparency and accountability, even when the news is not so good, inspires trust, gives the program performance data street credibility, and shows that the department's understand their programs and the difficulty of providing social services. If programs are open about the need to improve, most people will give a program the benefit of the doubt as long as programs demonstrate improvement plans. Cynical manipulation of measures, for example selecting overly easy targets or ignoring relevant data, will likewise cause the Outcome Teams and other reviews to question motives and credibility and will lead to mistrust.
- **Priority-based budgeting is just a passing fad.** The co-chairs of the Design Team, including the new incoming administration, have stated their desire to continue with *Priority-Based Budgeting*. Pressure to demonstrate program results, accountability and improvement is only expected to increase.
- **We don't have the data/we can't get the data.** Considering the investment the County has made in information technology, it is hard to believe that performance data are not available. Every manager of a program should be intimately familiar with their programs measures and performance. If a program is important enough to fund, staff should be able to find some way to collect data on its effectiveness. It can be as simple as a desktop spreadsheet using information collected from a hard-copy log. What is important is that critical indicators of success are identified and measured consistently and conscientiously.
- **We don't have the staff resources to collect the data.** The reality is that administrative positions will not likely be added for performance measurement. Program managers should realize however that dedicating a small percent of their time to collecting data on thoughtful measures, and using the data to manage for results, will generally save more time than would be spent correcting problems down the road. Every manager of a program should be intimately familiar with their programs measures and performance.
- **How do I measure prevention.** Programs with a deterrence or prevention focus can be difficult to measure for a variety of reasons. Most importantly, deterrence measurement requires consideration of what would happen in the absence of the program. Also, it is often difficult to isolate the impact of the individual program on behavior that may be affected by multiple other factors. If performance measures reflect a continuum from lower-level outputs to higher-level outcome measures related to the overall goal, it is important for deterrence programs to choose measures that are far enough along the continuum that they tie to the Priority and Marquee Indicators as well as to the program's activity. This will help ensure that the measures are both meaningful and genuinely affected by the program.
- **Programs where failure is not an option.** For programs where failure to

The Challenges of Measuring Performance

prevent a negative outcome would be catastrophic such as programs to prevent terrorism or a pandemic disease outbreak, traditional outcome measurement might lead to an “all-or-nothing” goal. As long as the negative outcome is prevented, the program might be considered successful, regardless of the costs incurred in prevention or any close calls experienced. In these cases, proxy measures can be used to determine how well the deterrence process is functioning. These proxy measures should be closely tied to the outcome, and the program should be able to demonstrate how the proxies tie to the eventual outcome. Because of the risk, multiple proxy measures should be used. Failure in any one of the safeguards would be indicative of the risk of an overall failure.

● **Isn't this just Key Results?** *Priority-Based Budgeting* is a completely different way to budget. The process is focused on timely and accurate data in program offers which are reviewed and ranked by Outcome Teams. Interviews with multiple county staff and reviews of independent analyses of performance measurement in Multnomah County determined several reasons why Key Results fell into disuse. The current system and process have been specifically designed avoid these pitfalls.

1. The Key Results data were never integrated in the strategic planning and budget process; data came after the fact, too late for department planning and budgeting.
2. Trainings and continuous education did not continue after the initial investment into Key Results.
3. There were no administrative champions for Key Results.
4. Key Results typically consisted of a single measure which did not provide enough information to effectively describe a program's performance.
5. Key Results definitions were not clear enough or relevant enough to staff or the public.
6. Management, staff and the Board didn't always see the value of Key Results.
7. There was no leverage with the Key Results Measures; if the measure was bad, or if the data were missing it had no impact upon whether the program was funded.
8. Outcome measures were stressed but most Key Results were output measures.
9. Management and staff didn't develop or use measures that were useful program performance indicators.
10. There were few quality assurance steps integrated into the development or reporting of Key Results.

Quality, Training & Resources

Quality, Training & Resources



The Budget Office Evaluation staff are available to provide performance measurement training, assistance in measure development, and as a source of historical measurement and best practice knowledge. Some departments do not have formal evaluation units or specialized staff. In these cases, the Budget Office Evaluation staff will provide additional measurement development assistance. Regardless, every program offer must provide performance data.

The Budget Office Evaluation staff will provide several levels of training. First, general performance measurement training will occur in an integrated Budget Office training around the county. Second, focused performance measurement training will occur for the county's research and evaluation staff and other interested parties around the county. Finally, the Budget Office will provide "Office Hours" technical assistance sessions located around the county.

A separate technical web-tool training covers inputting performance data into the web-tool. Additionally, Budget Office Evaluation staff will be available so that department staff can receive individualized attention via phone, email, or in person.

Training Calendar

Due to popular demand, *Program Offer & Performance Measure Trainings* will be held across the county in both morning and afternoon sessions. The training calendar below is accurate as of this printing. For the most up-to-date calendar, see the Budget Office website.

Program Offer & Performance Measure Trainings

Thursday, December 21st, 9:00-Noon

Multnomah Building, 501 SE Hawthorne Blvd.

4th Floor Library Conference Room

9:00-10:00a.m. Program Offer Writing

10:00-11:00a.m. Performance Measure Trainings—What's new this year

11:00-Noon Performance Measure Training: refresher & questions

Thursday, January 4th, 1:00-4:00p.m.

Lincoln Building, 421 SW Oak St.

Columbia & Willamette Rooms

1:00-2:00p.m. Program Offer Writing

2:00-3:00p.m. Performance Measure Trainings—What's new this year

3:00-4:00p.m. Performance Measure Training: refresher & questions

Monday, January 8th, 9:00-Noon

Multnomah County East Building, 600 NE 8th St, Gresham.

Sharron Kelley A Conference Room

9:00-10:00a.m. Program Offer Writing

10:00-11:00a.m. Performance Measure Trainings—What's new this year

11:00-Noon Performance Measure Training: refresher & questions

Quality, Training & Resources

Space is limited for these first training sessions, but don't despair if you can't make these dates—there will be many more opportunities! Please contact Rodd Gibbs at x83883 or rodney.b.gibbs@co.multnomah.or.us to reserve your spot!

New! Outcome Measure Workshops

Due to the great success of the Budget Office “*Office Hours*” and to respond to requests for improved outcome measures, the Budget Office Evaluation staff will be hosting meaningful outcome measure workshops. These workshops will focus specifically on developing and improving meaningful outcome measures. The schedule has not yet been determined at this printing. You can find where and when these workshops will be held in the Budget Office training calendar.

Remember you must bring your program offer templates to these workshops!

New! Quality Assurance



Quality assurance is an important aspect of a strong performance measurement system. It gives the reader confidence that the performance measures can accurately reflect what the program offer is to achieve. Internal quality assurance is key to creating and reporting meaningful measures, and the steps listed above will help assure that the highest quality data are reported in program offers.

With over 600 program submissions, few programs receive performance audits, internal or external program evaluations, or other formal independent reviews. In an effort to supplement this effort and increase the quality of the program offers, the *Design Team* has reviewed and approved the addition of a quality assurance review pilot process.

Auditor to Conduct Pilot Audits of Measures

To accomplish this, the Multnomah County Auditor's Office has agreed to conduct an independent pilot project which audits selected performance measures to determine the feasibility of continued work in this area. The audits will review the quality of performance measures and test the validity, reliability, and accuracy of data used in those measures. The Auditor's Office will develop a rating system for measures and the criteria against which measures will be audited for quality.

Any preliminary concerns that arise prior to the completion of the audit will be noted in an interim letter to management so that departments may make immediate improvements. A final report summarizing audit results will be issued to the Board of County Commissioners, departments responsible for submitting the audited program offers, and the public.

What Will They Look For?

The specific criteria and rating system are still under development at the time of this manual's publication. However, there are aspects of the performance measures that we know will be reviewed as part of the auditors' assessment. In preparation for a potential audit, department staff should review the general steps outlined below and be prepared to answer questions and show related documentation.

Quality, Training & Resources

1. Auditors will document the data collection, calculation, and reporting process. This step may include identification of the following:
 - a. Process for data entry, storage, extraction, analysis, and periodicity.
 - b. Staff and data sources at each point of collection.
 - c. Process and responsibility for calculating and reporting the measure.
2. Auditors will assess the reliability and validity of the performance measures and data. This may include the assessing the following:
 - a. Definition of the performance measure submitted to the Budget Office
 - b. Consistency of calculation methodology with measure definition
 - c. Adequacy of sampling or other techniques, if used
 - d. Accuracy of database queries and calculation formulae
 - e. Consistency of data collection and data entry at each collection point
 - f. Effect of any known limitations about the measure data
3. Auditors will assess the strength of controls over performance measures. This may include a review of the following:
 - a. Procedures to ensure that data collection is timely and accurate
 - b. System of data storage and any content controls
 - c. Other controls, such as training of staff, review of calculations, checking on accuracy of extraction, etc.

Note: this is a preliminary list of audit steps. Additional audit techniques may be employed to recreate the reported performance measure, test data for accuracy, review prior measurement efforts, and analyze outliers or unexpected trends.

Special Thanks

This revised manual was developed based on a multitude of performance measurement source information. The information was adapted specifically for the Multnomah County's *Priority-Based Budgeting* process. Budget Office Evaluation staff would be remiss if we did not specifically acknowledge the following sources: *We can't measure what we do: Measuring what matters in the public sector* by Mary Campbell; *Fairfax County manages for results* by Fairfax County Performance Measurement Team; *Performance Measurement Challenges and Strategies* by the White House Office of Management and Budget; and *Not a Tool Kit* by the Institute of Governance Ottawa Canada. Other sources that were used are listed in the Appendices.

Additional thanks are extended to the many past and present county employees that offered for feedback and input into this initiative and manual.

Charlene Rhyne, Multnomah County Department of Community Justice;

Sandy Johnson, Multnomah County Health Department;

Ralph Holcomb, Multnomah County Department of County Human Services;

Sharon Owen, Multnomah County Sheriff's Office;

Wendy Lin-Kelly, U.S. Bureau of Justice Statistics;

Jim Carlson, Multnomah County Sheriff's Office;

Scott Marcy, Multnomah County District Attorney's Office;

Suzanne Flynn, Multnomah County Auditor's Office;

Quality, Training & Resources

LaVonne Griffin-Valade, Multnomah County Auditor's Office; and
Sarah Landis, Multnomah County Auditor's Office.

APPENDIX A: Glossary

Accuracy: the degree of conformity with a standard value (the "truth"). Accuracy relates to the quality of a result, and is distinguished from precision, which relates to the quality of the operation by which the result is obtained. The smaller the difference between the measurement and the standard value the greater the accuracy.

Baseline Data: Initial collection of data to establish a basis for future comparison, evaluation and target setting.

Benchmark: A standard or point of reference used in measuring and/or judging quality or value.

Best Practice: Superior performance with an activity, regardless of industry, leadership, management, or operational approaches; methods that lead to exceptional performance. Synonyms include best-known-methods (BKM) or evidence-based practices.

Compstat/ Citistat (aka STATS): A management and accountability tool that follows four basic process principles: 1) provide timely, accurate and relevant data; 2) analyze data and develop effective solutions that respond to emerging issues; 3) deploy resources quickly to address issues; and 4) relentless follow-up and assessment.

Continuous Improvement: on-going, incremental and measurable steps taken to enhance service delivery by improving efficiency and/or effectiveness.

Course Correction (Corrective Action): Action taken to rectify conditions adverse to quality and, where necessary, to preclude repetition.

Customer: The person or group that established the requirements of a process and receives or uses the outputs of that process, or the person or entity directly served by the organization.

Customer satisfaction: Reflects the degree to which a recipient's experience with a desired service meets or exceeds their expectation. For purposes of priority-based budgeting, customer satisfaction measures should be primarily considered quality measures.

Data: Information or a set of facts presented in descriptive form.

Data Collection System: A broadly defined term indicating that a set of equipment, log books, data sheets, and personnel used to record and store the information required to generate the performance measurement of a process.

Design Team: A review body that includes representatives from each elected officials' office, the Budget Office, and department representation that recommend internal and external budget decision-making process steps, and a communication plan for the Board.

APPENDIX A: Glossary

Efficiency: A process characteristic indicating the degree to which the process produces the required output at minimum cost.

Efficiency measure: An output or outcome relative to a unit of time, money or other input.

Factor: Also called a causal factor is an important contributor to a result; provides one cause-effect link to a result within a results map.

Feedback Loop: A systematic series of steps for maintaining conformance to quality goals by feeding back performance data for evaluation and corrective action. This is the basic mechanism for quality control.

Frequency: One of the components of a performance measurement that indicates how often the measurement is made.

GASB: Governmental Accounting Standards Board (GASB) establishes and improves standards of state and local governmental accounting and external financial reporting.

Goal: Broad statement describing desired outcomes, but more specific than an agency's mission; they support the mission and identify specific strategies or opportunities for an agency to accomplish in order to achieve its mission.

High-level outcome: A measurable indicator of societal well-being—marquee indicators are a select number of high-level outcomes. Agencies and departments can define additional high-level outcomes pertinent to their organizational mission.

Indicator (measure/ metric): A quantifiable unit that provides information regarding the volume, financial performance, service quality, or results of a service which allows an observer to know whether performance is in line, ahead of, or behind expectations.

Initial outcome: A measure of desired result that represents a contribution to achieving a high-level outcome target examined shortly after service delivery.

Input: A measure of financial and non-financial (e.g., time, staff, etc.) resources. For the purposes of performance measures, staff and dollars should not be reported as inputs (these are covered elsewhere in the program offer).

Intermediate outcome: A measure of a desired result that represents a contribution to achieving a high-level outcome target.

Key Results: A single specific performance measures for each program from the 1996 RESULTS initiative.

Logic Model: A process presenting the relationship between inputs, activities, outputs and outcomes to describes the sequence of events for bringing about change.

APPENDIX A: Glossary

Meaningful Measures: Performance indicators that directly, accurately and reliably assess a program's attributes, which can be readily understood.

Marquee Indicator: One of a select group high-level community or social indicators related to a specific Priority area.

Mission: A short, comprehensive description of why an organization exists. It succinctly identifies what an organization does (or should do), and for who it does it.

Outcome: A measure of a desired result. In many cases, outcomes measure the result or impact of an output or set of outputs, and can be examined initially after service delivery or at longer intervals.

Outcome Teams: A group of various experts that staff one of the six county priority areas who are responsible for developing requests for offers, requesting program offers, reviewing their content, and ranking how much contribution each offer has in its intended results. The goal of this work is to create better program offers from which the Board will purchase.

Output: A measure of amount or frequency of products or services delivered.

Performance Management: The use of performance measurement information to help set performance goals; allocate and prioritize resources; inform managers to either confirm or change current policy or program direction to meet those goals; and report on the success of meeting those goals.

Performance Measurement: A process of assessing progress towards achieving predetermined goals, including information on the efficiency with which resources are transformed into goods and services (outputs); the quality of those outputs, i.e. how well they are delivered to customers and the extent to which customers are satisfied (service quality); and the qualitative results of a program activity compared to its intended purpose (outcome).

Plan, Do, Measure Cycle: A continuous process of steps for maintaining conformance to planning goals by feeding back performance data for evaluation and corrective action after activities have occurred.

Priority (budget priority): Represent six categories of citizen directed county government services, that include Basic Living Needs, Safety, Accountability, Education, Thriving Economy, and Vibrant Communities.

Priority Briefs: Monthly performance summaries that report workload data for the Safety and Basic Needs Priority areas.

Process: Any activity or group of activities that takes an input, adds value to it, and provides an output to a customer. The logical organization of people, resources, and procedures into work activities designed to produce a specified end result (work product).

APPENDIX A: Glossary

Productivity: A measure of the value added by the outcome/ result divided by the value of the labor and capital consumed.

Program Modeling: Systematic process to identify a service's resources, activities and service population, output, and results. See *Logic Model*.

Quality: The degree to which a product or service meets the customer requirements and expectations. Customer satisfaction is a specific measure of quality.

Quality Assurance: A process for the systematic monitoring and evaluation of the various aspects of data, measures, or results to ensure that standards are being met.

Reengineering: A process of rethinking and redesigning work processes to achieve noticeable improvements in service delivery responsive to customer needs and/ or achieve significant reductions in cost.

Request for Offers: A process where Outcome Teams ask departments to submit program offers which are designed to respond to specific strategies outlined by the Outcome Team.

Results Map: Different from a strategy map, the results map shows only the results to be achieved and the main factors that influence those results.

Service Efforts and Accomplishments: A performance measure reporting mechanism for state and local governments that provides both financial and non-financial performance data necessary for assessing accountability and in making informed decisions.

Strategy: A set of actions chosen by an organization to achieve a result. A strategy is based on an understanding of (or assumptions about) the cause – effect connection between specific actions and specific results

Strategy Maps (Priority Maps): A visual representation of the pathway to the result. Using words or images, it helps viewers understand the cause-effect connection between actions or factors and the result.

Strategic Planning: A continuous and systematic process whereby an organization makes decisions about its future, develops the necessary procedures and operations to achieve that future, and determines how success is to be measured.

SWOT Analysis: Strength, weakness, opportunity, and threat analysis. An organization's self-assessment of its strengths and weaknesses (internal factors) as well as opportunities and threats (external factors).

Target: A program offer's state level of output and result.

APPENDIX A: Glossary


Template: A document tool with a preset format used as a starting point for the development of the program logic-model and performance measurement selection.

Verification (validation): The determination than an improvement action has been implemented as designed.

Vision: A description of what and where an organization wants to be in the future.

Web-tool: An internet-based program offer input template for use with the Multnomah County Priority-Based Budgeting Process.

APPENDIX B: Additional Resources

The following lists additional resources, many of which were used in the development of this manual. This symbol  denotes material in the Budget Office Evaluation library available for check-out. Recommended source materials are denoted with this symbol ✓.


Accountability for performance: measurement and monitoring in local government / edited by David N. Ammons. -- Washington, D.C.: ICMA, 1995.

Applying performance measurement: a multimedia training program [computer file] / International City/County Management Association (ICMA). -- Washington, D.C.: ICMA, 1998.

Benchmarking: a method for achieving superior performance in law enforcement services / William G. Gay. -- Washington, D.C.: National League of Cities, 1996.

Benchmarking: achieving superior performance in fire and emergency services / William G. Gay; International City/County Management Association (ICMA). February 1993. -- Washington, D.C.: ICMA, 1993.


The benchmarking book / Michael J. Spendolini. -- New York: AMACOM, American Management Association 1992.; xiv., 207 p.: ill. An introduction to the process of benchmarking including the 5 steps of benchmarking.


Benchmarking basics: Looking for a better way / James G. Patterson. Crisp Publications, 1996. 

Benchmarking for best practices in the public sector: achieving performance breakthroughs in federal, state, and local agencies / Patricia Keehley, Stevin Medlin, Sue MacBride, Laura Longmire. First edition. -- San Francisco, Calif.: Jossey-Bass, 1997.

Best practice benchmarking: an international perspective / Sylvia Codling. -- Houston, Tex.: Gulf Publishing Company, 1996.


Beyond data: current uses of comparative performance measurement in local government / Lydia Bjornlund. -- Washington, D.C.: International City/County Management Association, 1999.


Brief review of performance measurement best practices / by Jim Carlson. Evaluation/Research Unit. Multnomah County, Or. 2000. 

City of Portland service efforts and accomplishments: 2003-04. Fourteenth Annual Report on City Government Performance / Office of the City Auditor, Portland, Oregon -- Portland, Oregon: City of Portland, Office of City Auditor, Dec 2004. ✓ 


Comparative performance measurement / by Elaine Morley, Scott P. Bryant, Harry P. Hatry. -- Washington, D.C.: Urban Institute Press, 2001.


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Comparative performance measurement: FY 2000 data report/ ICMA Center for Performance Measurement. Washington D.C. Sept. 2001. 

Comparative performance measurement: FY 2003 data report/ ICMA Center for Performance Measurement. Washington D.C. Dec. 2004. 

An elected official's guide to performance measurement / by Salomon A. Guajardo and Rosemary McDonnell. -- Chicago: Government Finance Officers Association 2000.

Fairfax County manages for results: A guide to advanced performance measurement/ by Performance Measurement Team of the Department of Management and Budget. Fairfax County, Va. 2005. ✓ 

Government service efforts and accomplishments performance reports: A guide to understanding / Paul Epstein, James Fountain, Wilson Campbell, Terry Patton, Kimberly Keaton. July 2005. Governmental Accounting Standards Board. Norwalk, Ct. 

How Federal Programs Use Outcome Information: Opportunities for Federal Managers/ by Hatry, Harry P., Elaine Morley, Shelli B. Rossman and Joseph S. Wholey. Washington, D.C.: IBM Center for the Business of Government, 2003.

How effective are your community services? Procedures for measuring their quality / Harry P. Hatry, Louis H. Blair, Donald M. Fisk, John M. Greiner, John R. Hall, Jr., and Philip S. Schaenman. 2nd ed. -- Washington, D.C.: Urban Institute; ICMA, 1992.

Implementing performance measurement in government: illustrations and resources / Joni L. Leithe. -- Chicago: Government Finance Officers Association, 1997

Making Use of Outcome Information for Improving Services: Recommendations for Nonprofit Organizations/ by Elaine Morley, Harry P. Hatry and Jake Cowan. Washington, D.C.: The Urban Institute, 2002.

A manual for performance measurement Fairfax County (measures up 8th Ed.)/ by the Performance Measurement Team of the Department of Management and Budget. Fairfax County, Va. 2005. ✓ 

Municipal Benchmarks: Assessing Local Performance and Establishing Community Standards/ by David N Ammons. Thousand Oaks, California: Sage Publications, 1996. ✓ 

Means...ends...indicators: Performance measurement in the public sector. Policy Brief #3. Institute on Governance. Ottawa, Ontario, Canada. April 1999.

Measuring city agency responsiveness: the citizen-surrogate method / by Robert D. Herman and Nicholas C. Peroff; International City Management Association (ICMA). -- Washington, D.C.: ICMA, May 1981.

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Measuring up: Governing's guide to performance measurement for geniuses (and other public managers) / Jonathan Walters. -- Washington, D.C.: Governing Books, 1998. 

Meeting the Challenges of Performance-Oriented Government/ by Kathryn Newcomer, Edward T. Jennings, Jr., Cheryle Broom and Allen Lomax. Washington, D.C.: American Society for Public Administration, 2002.

Monitoring the quality of local government services / Harry P. Hatry, John M. Greiner, Maria Swanson -- Washington, D.C.: ICMA, Feb 1987.


Multnomah County catalog of county programs: Program objectives productivity system by the Office of Planning, Evaluation and Program Development,. Multnomah County, Oregon. December 1973. 


Municipal benchmarks: assessing local performance and establishing community standards / David N. Ammons. 2nd ed. -- Thousand Oaks, Calif.: Sage Publications, 2001.

Not a tool kit: Practitioner's guide to measuring the performance of public programs. Schacter, M. Institute on Governance. Ottawa, Ontario, Canada. 2002. ✓ 

Oregon benchmarks: standards for measuring statewide progress and institutional performance: report to the 1995 Legislature / Oregon Progress Board. Economic Development Department. -- Salem, Oregon: Oregon Progress Board, Annual, 1995.

Overcoming the Challenges in Managing for Results/ by Joseph S. Wholey, Washington, D.C.: IBM Center for the Business of Government, 2004.

The Performance-Based Management Handbook (Vol. I-VI) / by Will Artley, DJ Ellison, Bill Kennedy. United States Department of Energy. Washington D.C.: 2001. 

Performance budgeting in municipal governments / by Janet M. Kelly and William C. Rivenbark. Last accessed 11/07/05
<http://web.pdx.edu/~stipakb/download/PerfMeasures/PerfBudgetingInMunicGovt.doc> 

Performance measurement: a guide for local elected officials / The Urban Institute in cooperation with The National League of Cities and National Association of Counties -- Washington, D.C.: The Urban Institute Press, 1980.


Performance measurement: a tool for managing county governments / by Jim Culotta. -- Washington, D.C.: NACO, 1999.

Performance measurement: a tool for policymakers / James R. Griesemer; National League of Cities -- Washington, D.C.: NLC, May-June 1994.

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Performance Measurement Challenges and Strategies. Office of Management and Budget. Washington D.C., 2003. <http://www.whitehouse.gov/omb/part/index.html> Last Retrieved 11/03/2005.

Performance measurement: concepts and techniques / American Society for Public Administration's Center for Accountability and Performance. 2nd ed. -- Washington, D.C.: American Society for Public Administration, 1999.


Performance measurement: getting results / Harry P. Hatry. -- Washington, D.C.: Urban Institute, 1999. 

Performance measurement: the key to accelerating organizational improvement / Price Waterhouse. -- Arlington, Virg.: Price Waterhouse, 1993.


Performance measurement: the link to effective government / by Patricia Tigue and James Greene, Jr.; Government Finance Officers Association [GFOA] -- [Washington, D.C.]: GFOA, Apr 1994.

Performance measurement for accountability and service improvement / Christine Ulrich; International City/County Management Association (ICMA) Management Information Service. September 1997. -- Washington, D.C.: ICMA, 1997.

Performance measurement in law enforcement [MIS Report] / Bill Thomas and Callie Stivers; International City/County Management Association -- Washington, D.C.: ICMA, Mar 1995.

Portland-Multnomah County benchmarks: standards for measuring community progress and government performance / Portland-Multnomah County Progress Board. January 1994. -- Portland, Or.: Portland-Multnomah County Progress Board, 1994. 

A practical guide for measuring program efficiency and effectiveness in local government / by Mark Glover, Director, The Innovation Groups -- Tampa, Florida: Innovation Groups, 1994.

The price of government: Getting the results we need in an age of permanent fiscal crisis/ by David Osborne and Peter Hutchinson. Basic Books. New York, NY., 2004. ✓ 

Productivity improvements in public works [MIS Report] / Richard G. Bills. -- Washington, D.C.: ICMA, June 1990.

Productivity in human services: measurement, improvement, and management / United States. Department of Health, Education and Welfare. -- Washington, D.C.: USDHEW, Project Share, December 1980.


Program and performance monitoring / prepared by Cambridge Systematics, Inc. -- Olympia, Wash.: State of Washington Legislative Transportation Committee, 1993.

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Program effectiveness study: final report, April 1991 / Washington (State). Office of Financial Management. Washington State Commission for Efficiency and Accountability in Government. -- [Olympia, Washington]: [State of Washington], April 1991.

Program performance measurement resource guide / prepared by The Innovation Groups Inc. -- Tampa, Fla.: Innovation Groups, Nov 1990.

Public and Private Agencies Need to Manage for Results, Not Just Measure Them/ by Harry Hatry. Washington, D.C.: The Urban Institute. Last accessed August 31, 2004.
<http://www.urban.org/url.cfm?ID=900731>

Reinventing government: how the entrepreneurial spirit is transforming the public sector / by David Osborne and Ted Gaebler 2nd printing -- Reading, Mass.: Addison-Wesley Pub. Co., Inc., 1992. 

Reporting Performance Information: Suggested Criteria for Effective Communication/ by James Fountain, James, Wilson Campbell, Terry Patton, Paul Epstein, Mandi Cohn, Mark Abrahams and Jonathan Walters. Governmental Accounting Standards Board: Norwalk, Connecticut, 2003.

A report on the 1997 citywide resident survey City of Seattle: ratings of the quality of life in Seattle and satisfaction with city services / City of Seattle Office of Management and Planning. October 1997. -- Seattle, Wash.: City of Seattle, 1996.

Results-driven management implementing performance-based measures in community corrections / Harry N. Boone and Betsy Fulton. -- Lexington, Ky.: American Probation and Parole Association, 1995.

Service efforts and accomplishments reporting: an overview / Harry P. Hatry et al.; Governmental Accounting Standards Board -- Norwalk, Conn.: Govt. Accounting Standards Board, 1990.


Standards for effective local government: a workbook for performance assessment / Southwestern Pennsylvania Commission. - [Pittsburgh, Pa.]: The Commission, 2000.


Strategies for implementing performance measurement [MIS Report] / Charles K. Bens -- Washington, D.C.: ICMA, Nov 1989.

Strengthening oversight through performance measurement / [Presented for the Association of Washington Cities] by Len Wood. -- Palos Verdes, Calif.: Len Wood & Associates, 1998.

Sustaining performance measurement / by Suzanne Flynn. Multnomah County Auditor's Office. Sept. 2004 <http://www.nalga.org/qrtly/art04s1.htm> Last accessed 11/07/05. 

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The use of performance measures in city and county budgets / by Patricia Tigue and Dennis Strachota. -- Chicago, Ill.: GFOA, 1994. ✓ 

We can't measure what we do: Measuring what matters in the public sector / by Mary Campbell. From Driving Changes and Getting Results—Bellevue, Wa.: Washington Governor's Office, 2005. ✓ 

Who will bell the cat? A fable for our time: a guide to performance measurement in government / Price Waterhouse. -- Arlington, Virg.: Price Waterhouse, 1993.

APPENDIX C: Online Resources

(Online resources adapted from Mark Abrahams of the Abrahams Group)

Resources

Alfred P. Sloan Foundation, Performance Assessment of Municipal Governments Program http://www.sloan.org/programs/stndrd_performance.shtml

GFOA Recommended Practice on Performance Management: Using Performance Measurement for Decision Making (2002) - Updated Performance Measures (1994) <http://www.gfoa.org/services/rp/budget/budget-performance-management.pdf>

GFOA Recommended Practice on Measuring the Costs of Government Services <http://www.gfoa.org/services/rp/documents/MeasuringtheCostofGovernmentService.pdf>

GFOA Best Practices in Public Budgeting <http://www.gfoa.org/services/nacslb>

ICMA Center for Performance Management <http://www.icma.org/main/topic.asp?tpid=18&hsid=1&t=0>

Portland Multnomah Progress Board <http://www.portlandonline.com/auditor/?c=27347>

Cities

City of Albuquerque Progress Report <http://www.cabq.gov/progress/index.html>

City of Ankeny, IA, Service Efforts and Accomplishments Report <http://www.ci.ankeny.ia.us>

City of Austin, Scorecard <http://www.ci.austin.tx.us/budget/>

City of Baltimore, MD. <http://www.ci.baltimore.md.us/news/citistat/reports.html>

City of Bellevue, WA <http://www.cityofbellevue.org/pdf/Finance/2005%20Annual%20Performance%20Report.pdf>

City of Charlotte's Citizen's Annual Report <http://www.charmeck.org/Departments/City+Manager/Annual+Report/Home.htm>

City of Des Moines, Performance Measurement System <http://www.ci.des-moines.ia.us/performance.htm>

City of Kansas City (MO), City Auditors Report <http://www.kcmo.org/auditor/annualreports/06annualreport.pdf>

City of Lynnwood WA, Accountability Report <http://www.ci.lynnwood.wa.us/Docs/2004AnnualPerformanceReport.pdf>

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City of Palo Alto CA, Service Efforts and Accomplishments Report

<http://www.city.palo-alto.ca.us/auditor/ServiceEffortsandAccomplishments.html>

City of Philadelphia, Mayor's Report on City Services

<http://www.phila.gov/mayor/pdfs/csrreport2001.pdf>

City of Phoenix, City Manager's Executive Report

<http://www.ci.phoenix.az.us/MGRREPT/index.html>

City of Portland (OR), Service Efforts and Accomplishments Report

<http://www.portlandonline.com/shared/cfm/image.cfm?id=33651>

City of San Diego, Service Efforts and Accomplishments Report

<http://www.sannet.gov/city-manager/pdf/seaapril02.pdf>

City of San Jose, City Service Area Performance Report

<http://www.sanjoseca.gov/quest/Full%20Year-End%20CSA%20PM%20Report.pdf>

City of Seattle, Performance Perspectives

http://www.cityofseattle.net/audit/report_files/pp_96-5.pdf

City of Winston Salem, Citizen Efficiency Review Committee Reports

<http://www.ci.winston-salem.nc.us/ooe/frpt.htm>

Counties

Clark County, 2003 Annual Performance Report

http://www.co.clark.nv.us/Public_communications/Performance_Report_2003/index_2003.htm

King County, WA Department of Natural Resources and Parks:

<http://dnr.metrokc.gov/dnrp/performance/index.htm>

Maricopa County AZ, Performance Report

http://www.maricopa.gov/Internal_audit/pdf/Reports/2004/67%20SEA%20Citizens%20Report%20internet%20report.pdf

Prince William County (VA) Service Efforts and Accomplishments Report

<http://www.pwcgov.org/default.aspx?topic=040024000110002183>

County of San Mateo, CA, Indicators for a Sustainable San Mateo County

<http://www.sustainablesanmateo.org/>

States

Arizona, Managing for Results <http://www.ospb.state.az.us/handbook.htm>

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Florida Government Accountability Report <http://www.oppaga.state.fl.us/government/>

Illinois Public Accountability Reporting
<http://www.ioc.state.il.us/Office/PAP/reports.cfm>

Illinois, Performance Audits <http://www.state.il.us/auditor/special.htm>

Iowa, Managing for Results <http://www.resultsiowa.org/>

Maine Marks http://www.mainemarks.org/indicators/indi_main.htm

Minnesota Milestones <http://www.lmic.state.mn.us/datanetweb/chi.html> and
<http://www.mnplan.state.mn.us/pdf/2002/MilestonesMeasuresthatMatter.pdf>

New Mexico Department of Transportation, Strategic Plan and Performance Report
<http://www.nmshtd.state.nm.us/upload/contents/445/StrategicPlan2004.pdf>

Oklahoma Health Care Authority, Strategic Plan and Performance Report
http://www.okhca.org/reports/PDFlib/strategic_plan_2006.pdf

Oregon Benchmarks <http://egov.oregon.gov/DAS/OPB/obm.shtm>

Oregon Commission on Children and Families, Outcomes and Accountability
<http://www.oregon.gov/OCCF/Mission/Outcomes/miout.shtml>

Oregon Department of Human Services, Annual Performance Report
http://egov.oregon.gov/DHS/publications/pm_reports/2004/2004_report.pdf

Rhode Island, Performance Measures <http://www.budget.state.ri.us/measures.htm>

Texas School Performance Review
<http://www.window.state.tx.us/tspr/>

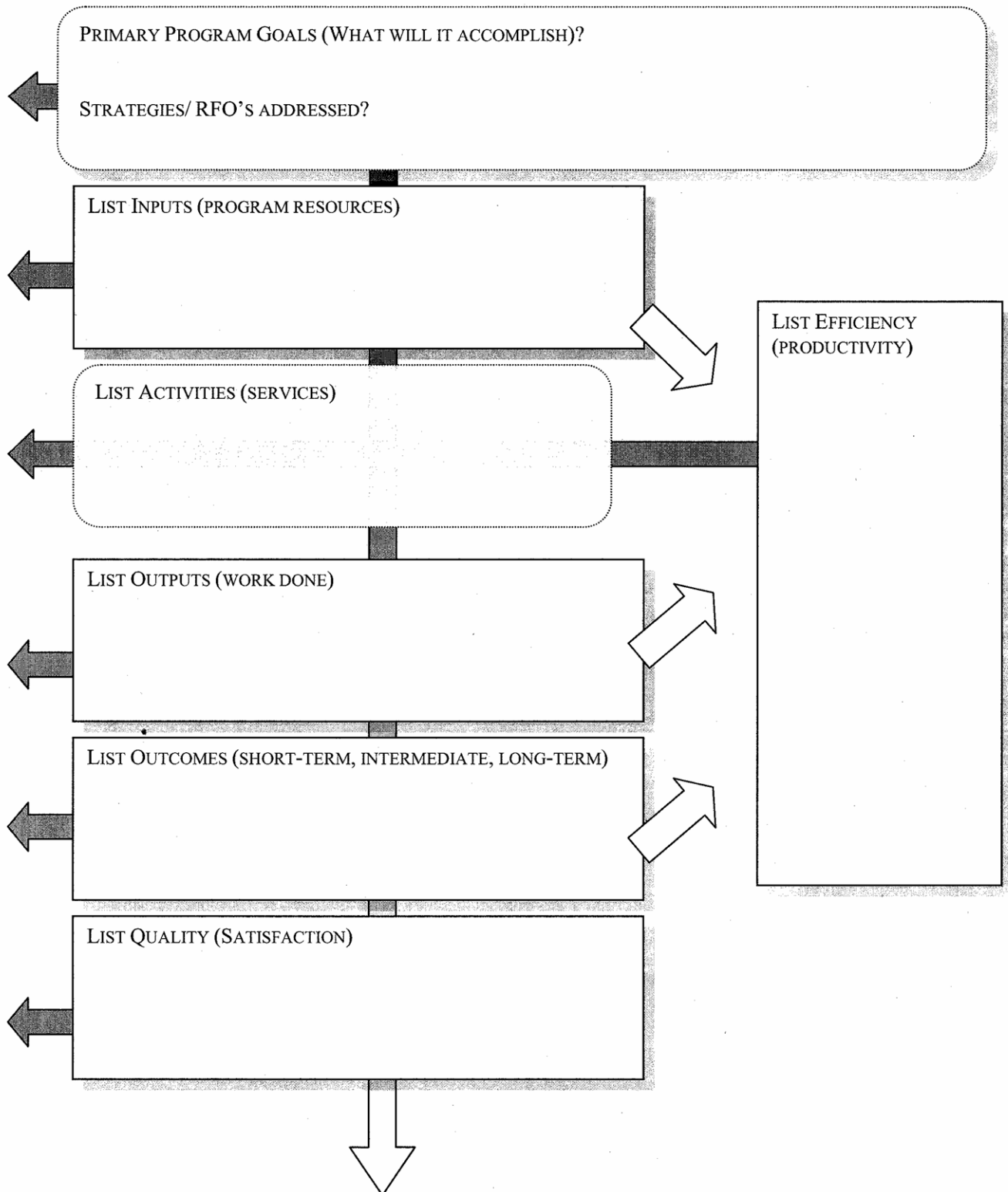
Utah, Summary of Goals and Key Performance Measures
<http://governor.utah.gov/PLANNING/UtahTomorrow/StrategicPlan2000.htm>

Virginia Review of Performance Measures
http://www.apa.state.va.us/data/download/reports/audit_local/PerfMeas02.pdf

Washington Department of Transportation, Measures, Markers, and Mileposts
<http://www.wsdot.wa.gov/accountability/graynotebook.pdf>

APPENDIX D: Templates

PART 1: LOGIC MODEL DEVELOPMENT



APPENDIX D: Templates

PART 2: PERFORMANCE MEASURE SELECTION	
MARQUEE INDICATOR LINK <identify the indicator>	PRIMARY PROGRAM GOALS (WHAT WILL IT ACCOMPLISH?) STRATEGIES/ RFO'S ADDRESSED?
MEASURE TYPE: <INPUT, OUTPUT, EFFICIENCY, OUTCOME, QUALITY> DATA SOURCE: < WHICH DATA SYSTEM AND WHO> DATE: <COLLECTED WHEN> TECHNICAL DEFINITION: <HOW IS THE MEASURE CALCULATED>	SELECTION CRITERIA: <ul style="list-style-type: none">• Meaningful-Valid• Constant- Reliable• Understandable-Clear• Perverse Incentives• Timely/ Monthly Reporting• Comprehensive• Not Redundant• Cost to Collect Data• Focused on Controllable Facets of Performance CHECKLIST QUESTIONS: <ul style="list-style-type: none">• Does the program offer have measures related to the primary function of the program?• Are the measures related to the marquee indicators?• Does the program have true outcome measures?• Can the average reader understand what the program accomplishes numerically?• Are data missing in the table? If so, is it referenced in the explanatory section.• Did existing measures change?• Did the program meet or exceed its targets? If not, is it referenced in the explanatory section?
MEASURE TYPE: DATA SOURCE: TECHNICAL DEFINITION:	
MEASURE TYPE: OUTPUT DATA SOURCE: TECHNICAL DEFINITION:	
MEASURE TYPE: OUTCOME DATA SOURCE: TECHNICAL DEFINITION:	
MEASURE TYPE: DATA SOURCE: TECHNICAL DEFINITION:	

APPENDIX D: Templates

PART 3: PERFORMANCE MEASURE DETAIL

AFTER CHOOSING THE PERFORMANCE MEASURES IN PART 2, USE THIS TEMPLATE TO DOCUMENT THE DETAIL BEHIND YOUR PERFORMANCE MEASURE. THIS WILL ALLOW FOR THE RECREATION OF ACCURATE, RELIABLE AND CONSISTENT MEASURES IN THE FUTURE. EVERY MEASURE USED REPORTED IN A PROGRAM OFFER MUST HAVE THIS LEVEL OF DETAIL.

TECHNICAL DEFINITION:

DEFINITION AS IT APPEARS IN PROGRAM OFFER:

WHY USE THIS MEASURE? <WHAT DOES THIS MEASURE PROVIDE?>

UNIT OF MEASURE: <HOW SHOULD THE RESULT OF MEASUREMENT BE EXPRESSED?> (PERCENTAGE, MINUTES, DOLLARS, CHILDREN SERVED, RATES?)

DATA SOURCE AND CALCULATION METHOD: <FORMULA OR PROCESS FOR CALCULATING MEASURE>

**ONE FOR EACH
PERFORMANCE
MEASURE!!!**

CURRENT YEAR ESTIMATES: <HOW ARE CURRENT YEAR ESTIMATES CALCULATED?>

CONTACT PERSON: <INDIVIDUAL RESPONSIBLE FOR DATA/ EXTENTION>

DATE: