

Priority-Based Budgeting Performance Measurement: What's New for FY 2008

A techie & manager training of performance
measures changes for FY 2008
December 2006

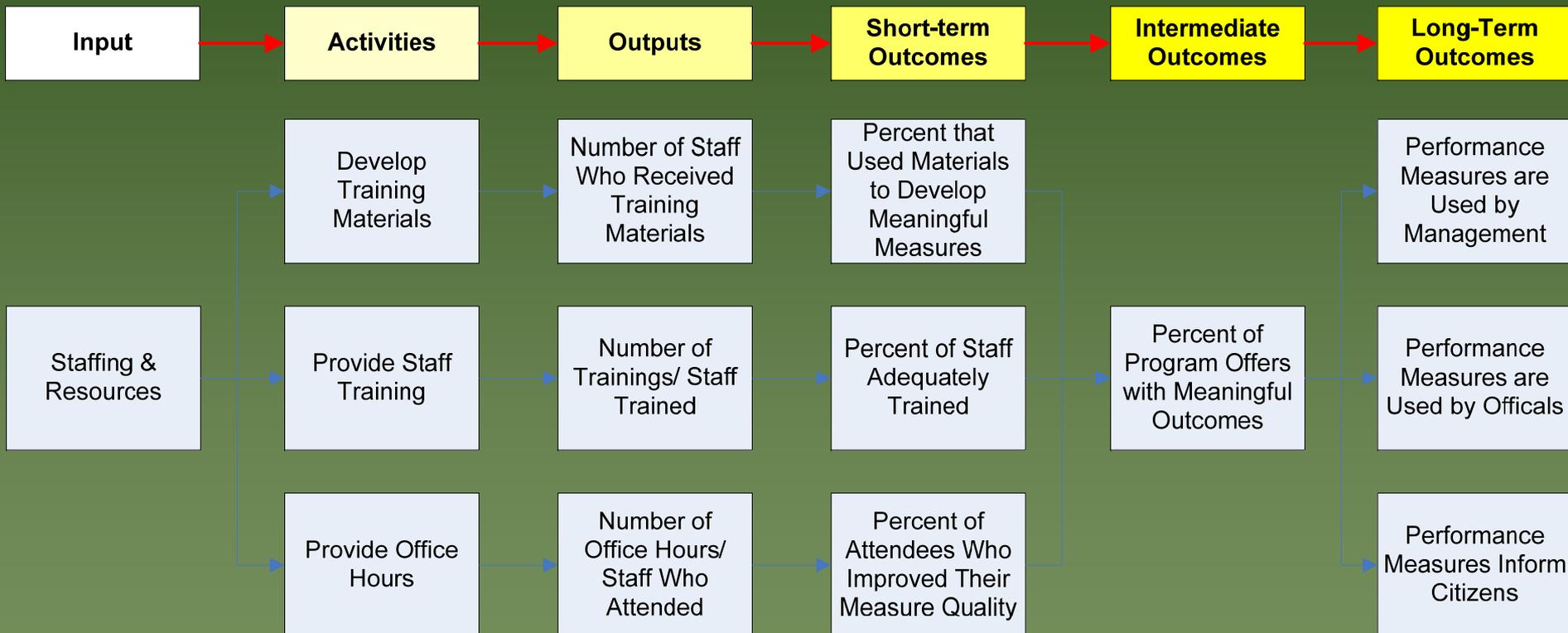
Presented by Matt Nice, Budget Office Evaluation

What this training covers

- ◆ Highlights from last year's efforts
 - Performance measurement development model
- ◆ Five new things for this year's performance measures
- ◆ Additional Resources
 - Technical Assistance
 - Training Calendar
- ◆ Training Evaluation

Highlights from last year

Performance Measurement Development Logic Model



Highlights from last year

- ◆ Email survey to key County staff (98); 39% response rate;
 - 77% attended a PM training;
 - 40% attended *Office Hours* technical assistance;
- ◆ 87% said that they developed their Dept's PMs
- ◆ PMs greatly improved over previous year;
- ◆ 85% of the 499 adopted program offers had at least one outcome measure; 1550+ measures
- ◆ 71% said *Outcome Teams* used the PMs most;
- ◆ Low utilization by management and policy makers;
- ◆ Outcome measures need further improvement

- ◆ This year need to increase PM utilization and the quality of outcome measures.

What you've asked for this year

- ◆ Continuation of performance measurement trainings; add locations and times;
- ◆ Continuation of *Office Hours*; add locations and times;
- ◆ Provide more training focused on meaningful outcomes;
- ◆ Incorporate performance measurement into the organizational language and culture; and
- ◆ Integrate performance measures in a consistent and on-going management process, and not just as an annual budget event.

Five new things for this year

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

Enhancements to the web-tool

- ◆ Changes to clarify data cell labels
 - *FY 2006 Actual Result* (previously *Previous Year Actual* result)
 - *FY 2007 Purchased* (previously *Current Year Purchased* target)
 - *FY 2007 Current Year Estimate* (same)
 - *FY 2008 Target* (previously *New Year Offer*)
- ◆ Percents option now includes a decimal place (tenth place)
- ◆ *Measure Changed* box for any material change in the definition or values

Enhancements to the web-tool

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"/>
<input type="text" value="Optional"/>	<input type="text"/>	% <input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="Optional"/>	<input type="text"/>	% <input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Performance Measure - Description

Measure Changed

Changing established measures

- ◆ Corrections (fix errors in measure or values) v. Changes (improve measures or stop reporting established measures)
- ◆ Identify & document reason for change (internal)
 - Update the Part 3 template (note this template has been revised for FY2008)
 - Every measure must have a Part 3 template
- ◆ Correction or change in web-tool (any change)
 - Check the *Measure Changed* box
 - Note corrections in the qualitative explanatory section (below the table)
 - Report old measures in the *Significant Program Changes* section on the back of the program offer

Changing established measures

- ◆ Changes: Continue to report established or dropped measures (one year only)
 - For consistency, transparency and accountability
 - Report history, purchase, & current year estimate values
 - Must report the established/ dropped measure and their values in the *Significant Program Changes* section

Explanation of Revenues

County General Fund - Current Service Level

Fed/State Fund- Based on projected balances of multi-year grants, and on estimates of renewals from grantors.

Significant Program Changes

Last year this program was: #21009, Homeless Families

The current County General Fund costs in this program offer as been increased by 3.5% of contracted services to reflect the inflation factor related to maintaining services at current service level. The amount of COLA included in this program offer is \$7,827 and will be passed through to the community based providers in their FY07 contract.

Quality assurance pilot process

- ◆ As quality is improved, utilization will increase
- ◆ Auditor's Office will perform audits of the performance measure— a pilot this year
- ◆ Among other things the audits will examine:
 - Measure documentation (e.g., templates)
 - Reliability & validity of reported values
 - Strength of controls over measures
- ◆ Management letters identify issues
- ◆ Final report expected in March 2007
- ◆ Contact Sarah Landis, MCAO x85663

MultiStat performance management

- ◆ Regular utilization will increase measure quality
- ◆ Performance management is the next evolution in *Priority-Based Budgeting*
- ◆ The process is based on the four basic process principles of *Compstat/ Citistat* models:
 - Provide timely, accurate and relevant data,
 - Analyze data and develop effective solutions that respond to emerging issues,
 - Deploy resources quickly to address issues, and
 - Relentless follow-up and assessment.
- ◆ Program performance measures will need to be collected and reported regularly to the administration (likely monthly reporting)
- ◆ Prepare now—Piloting to begin late Summer 2007

Outcome measure workshops

- ◆ *MultStat* & quality assurance piloting = need for better outcome measures
- ◆ Workshops to focus specifically on developing and improving meaningful outcome measures
- ◆ Guaranteed to improve the quality of your outcomes measures
- ◆ Remember you must bring your program offer templates to these workshops
 - Template Part 3 has been revised for FY 2008
- ◆ Watch the Budget Office training calendar for times and locations

Additional resources

- ◆ The revised manual (on-line) has all the details
- ◆ Other trainings available (see calendar)
 - budget rodeos
 - building/ writing good program offers,
 - performance measurement refresher,
 - performance measurement what's new, and
 - web-tool trainings
- ◆ Outcome Measure Development Workshops
 - bring your templates
- ◆ *Office Hours* for technical assistance

- ◆ All at multiple times, days, and locations!

Other

- ◆ Budget Office Evaluation staff

 - Matt Nice x83364

 - Liang Wu x22336

 - Sarah Durant x26745

- ◆ Online resources at BOE:

 - www.co.multnomah.or.us/budgeteval

- ◆ Additional Questions

- ◆ Evaluations Please!