

DEPARTMENT OF  
ADMINISTRATION

Date: 1/30/2008

# Performance Management Roundtable Notes

**The Roundtable was held at the Veterans Department Auditorium to accommodate a larger than expected attendance.**

**There were two primary topics: Aligning KPM reporting with the budget process timetables and an overview of the KPM system automation process currently underway.**

### **KPM Reporting Process Alignment with Agency Budget Timetables**

Gorge Naughton, BAM Division Administrator introduced the Roundtable with an overview of the reporting timetable changes.

KPM's allow agencies to tell their story to the legislature and the public - the impact-benefit agency performance and accomplishments have had on the people of Oregon. They are important as reporting and management tools.

BAM is currently streamlining Budget processes; looking at improving processes and adjusting timelines. In the initial stages of this analysis, both BAM and LFO agreed it was necessary to re-align KPM reporting with the Budget cycle.

KPM's are an increasingly important informational tool for BAM and LFO budget analysts to use in preparing and reviewing agency budgets. In order they be given the necessary consideration, agency KPM reporting will now follow the general Budget process timetables (note included revised process chart).

While this change will present some challenges for agencies with KPM's based on fiscal year data, they will be allowed to initially submit measures with no, or estimated data and then update them as final information becomes available.

### **Revised Process for Requesting Changes in KPMs**

In order to streamline the KPM change request process, agencies can work with their BAM and LFO analysts to make "administrative" changes (changes in data sources, wording, etc.) without the necessity of legislative approval. However, it is very important that such changes are made with BAM/LFO analyst knowledge and agreement. Approved adjustments should be reflected in future Annual Performance Progress Reports with the adjustment documented in the "data source" section of the report.

The review process for proposing more significant changes will be streamlined and again managed cooperatively between the agency, BAM and LFO analysts before submission for legislative approval. If there is a complicated change needed in a current KPM, please request a deletion and submit a **new** KPM request. If you have no changes of a substantive nature, then you may skip the April 30<sup>th</sup> deadline (with analyst approval). As soon as the new Web-based system interface is available, more information and specific directions will be given to agencies.

**KPM's and Policy Option Packages (POP's):** When submitting Policy Option Packages in the budget, agencies will be expected to provide information on how they will measure performance. This will be accomplished by either linking to an existing or proposed KPM or by identifying an internal measure of performance. If agencies are going to spend money, they need to define how the results will be measured and analyzed. If your agency is asking for POP funding be prepared to track and report on associated performance measures whether they are KPMs or internal measures. It is **not** intended that this requirement automatically trigger a request for a **new** KPM; however, if this is what is desired by your agency, please discuss this plan with your analyst first.

### **Budget Timetable Summary**

It is understood there the timeline changes create a more aggressive schedule for agencies to meet. However, other than for fiscal-year measures, we hope this change does not present an undue hardship. Remember, submissions can be updated through the Budget development process. Data “placeholders” may be used in the Agency Request Budget and updated before the Governor’s Budget moves forward.

The three main items that will change are:

- Change request and reporting deadlines have been moved up.
- Review and feedback on KPMs is limited to just requested additions or deletions; and, mechanical changes can be made with LFO/DAS Analyst approval.
- Streamlining the reporting process through replacing paper forms, with an Web-based, electronic information system.

With all of the agency coordinator turnover and systems changes both BAM and LFO acknowledge the need for KPM systems training . During this transition, please contact your

BAM/LFO analysts and the BAM/LFO Performance Management coordinators with any questions or need for assistance.

**KPM Auditing:**

KPM auditing will be discussed in more detail at the next Roundtable meeting. BAM and LFO are working with Pamela Valencia at DAS to develop this process. When the process is developed, we will communicate detail to the agencies.

**Performance Management Reporting System Automation**

The paper-based process has been an enduring frustration to users at all parts of the process. DAS now has the capability of converting the manual system to a Web-based interface which should both simplify and greatly enhance the current system capabilities. The current schedule has the system up and running in time for the upcoming Budget cycle.

At the time these notes are being written, the basic system is constructed, and data entry will start next week. To the degree it is possible DAS will “pre-load” the system with as much agency KPM information as practical, to reduce the conversion workload to the agency.

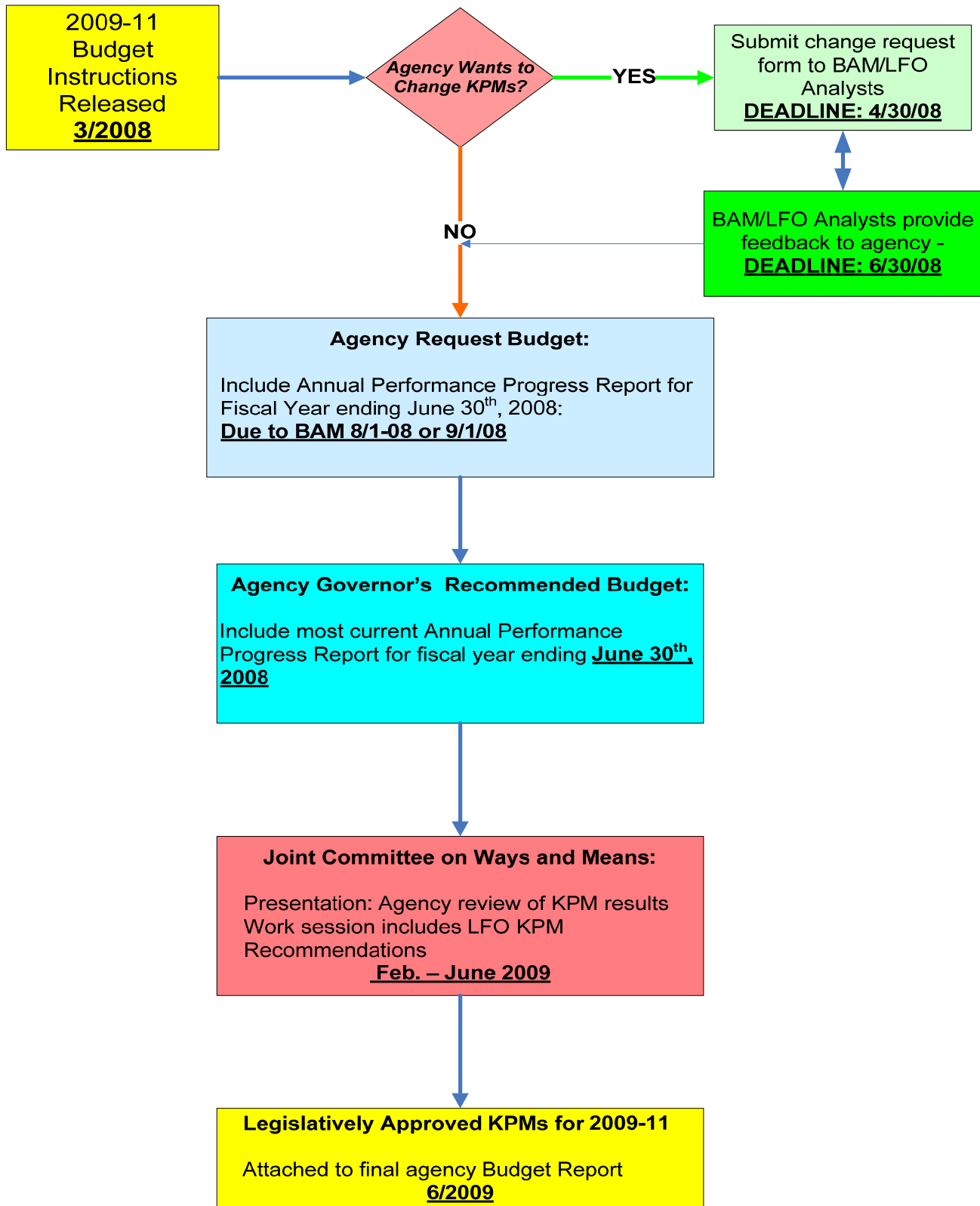
A BAM Performance Management Webpage is under development. Once this is completed, it will serve as host for the system. Agency coordinators will link to the Performance Management reporting system from the webpage. In addition to the ease of use of an electronic interface, the system will allow for data searches and charting functions. The goal is to have basic functionality in time for the upcoming budget cycle. We will be sending out updates and screen captures so you will be able to see functionality features. If you have questions or comments please contact [Rick Gardner](#).

**Summary**

We recognize this is a significant amount of change in a very short period of time, but we also believe these changes will ultimately produce significant improvements, impact and ease of use in the system. While the pace of these changes does not allow for greater involvement, we want to invite agencies to contact either Rick Gardner or Dawn Farr at any time with suggestions and concerns.

Respectfully Submitted: Rick Gardner, BAM Performance Management Coordinator

Dawn Farr, LFO Performance Measurement Coordinator



2009-11 Budget Development Timetable