

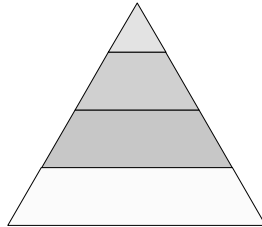
Performance Measurement and Reporting Overview

Rick Gardner
Performance Management Coordinator
Department of Administrative Services
Budget and Management Division
(503) 378-3117

Performance Measurement & Reporting

■ Multiple levels of Performance Data

- Oregon Benchmarks
- Key Performance Measures (KPM's)
- Agency Operational Measures



Oregon Shines Oregon Benchmarks

■ Strategic Planning and Performance Reporting

- Oregon Shines - Highest level of the statewide strategic plan
- Oregon Benchmarks – societal-level measures for identified strategic outcomes
- The strategic plan is updated about every ten years, while the benchmarks are updated annually.



Oregon Shines Oregon Benchmarks

- Oregon Shines and the Oregon Benchmarks are not specific to state government, but look at the broad progress of Oregon society
- First iteration of Oregon Shines was adopted in 1989 in response to Oregon's efforts to reshape the state economy
- The Oregon Benchmarks were adopted as a way of measuring progress toward the strategic plan



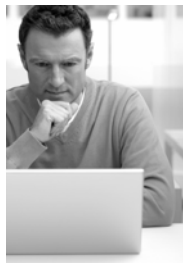
Key Performance Measures (KPM's)

- Agency – System Level Performance and Program Outcomes
- Budget development process - Reported to the Governor and approved by the Legislature
- Barometer of the outcomes achieved by agency programs
- KPM's are aligned with the agency strategic plans and reflect the outcomes that impact Oregon citizens
- Reported annually by state agencies and linked to Oregon Benchmarks where possible



Agency Operational Measures

- Output and process performance data used by agency to manage programs
- Not officially reported to external groups
- Data specific to each agency and depends on the type of processes used



**Boards and Commission
Self-Assessment KPM
"Best Practices" Criteria (% Yes/No)**

1. Executive Director's performance expectations are current.
2. Executive Director receives annual performance feedback.
3. The agency's mission and high-level goals are current and applicable.
4. The board reviews the *Annual Performance Progress Report (APPR)*.
5. The board is appropriately involved in review of agency's key communications.

**Boards and Commission
Self-Assessment KPM
"Best Practices" Criteria (Yes/No)**

6. The board is appropriately involved in policy-making activities.
7. The agency's policy option packages are aligned with their mission and goals.
8. The board reviews all proposed budgets (likely occurs every other year).
9. The board periodically reviews key financial information and audit findings.
10. The board is appropriately accounting for resources.
11. The agency adheres to accounting rules and other relevant financial controls.

**Boards and Commission
Self-Assessment KPM
"Best Practices" Criteria (Yes/No)**

12. Board members act in accordance with their roles as public representatives.
13. The board coordinates with others where responsibilities and interests overlap.
14. The board members identify and attend appropriate training sessions.
15. The board reviews its management practices to ensure best practices are utilized.
16. Others

Self-Assessment - Overview

- **Executive Director (#1-2):** Selection, expectations and feedback.
- **Strategic Management (#3-4):** Understand statutory mission, review agency strategic plan, and review Annual Performance Progress Report (RPM's).
- **Strategic Policy Development (#5-6):** Define role in policy-making, review policy option packages, ensure appropriate policy communication occurs with major stakeholders.
- **Fiscal Oversight (#7-11):** Review budgets, review key financial information, ensure compliance with resource accounting and reporting rules and standards.
- **Board Management (#12-15):** Respect role as agency representative, manage board processes and ensure appropriate training is provided.

Summary – The Big “4”

1. **What are we trying to accomplish?**
2. **To reach those accomplishments, do we have a plan that will get us there?**
3. **As we implement that plan, how are we measuring our progress?**
4. **Are there things we can do to improve performance?**