Section 5

Performance: Citywide Performance Management and Technical Guidance

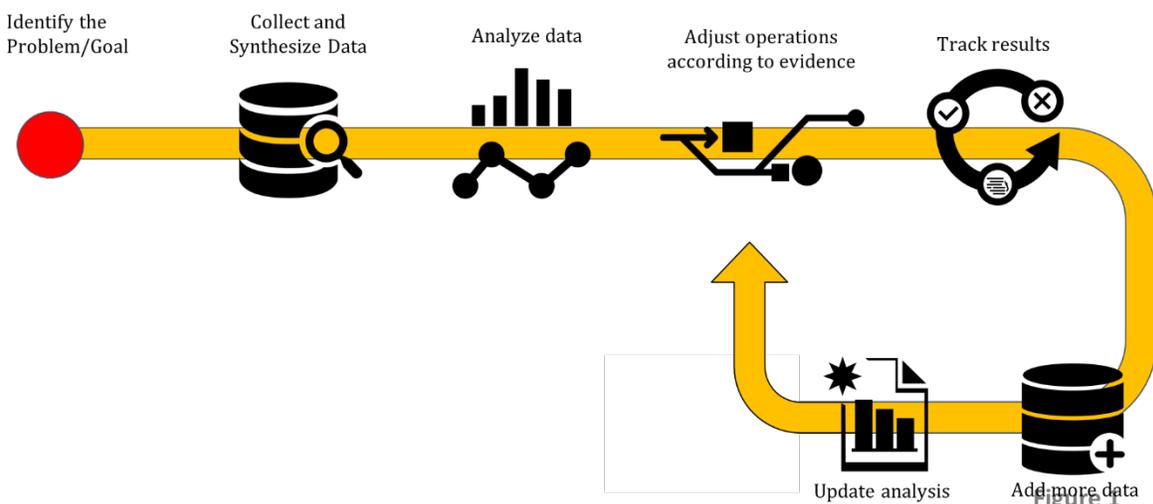# Part 1: Citywide Performance Management

Introduction

The City of Portland has a long history of focusing on performance and results. As far back as the early 1970s, the City made efforts to improve performance. Performance measures were first incorporated into the City's budget documents in 1977. Over the last several years, the City Budget Office has sought to increase Portland's use of performance data both in and out of the budget process. Thanks to improvements in technology, data collection, and the increased attention to performance outcomes, the City has made strides toward governing with data and understanding the impacts of our programs and services. In doing so, Portland is part of a greater movement of forward-thinking governments that are optimizing the power of data to create better results for their communities.

This section of the manual includes both a conceptual introduction to performance management and technical guidance for reporting on performance data in BFM, the City's budget software. For more information on the theory and practice of performance management, benefits and responsibilities in the City of Portland's system, how the City's performance measure types work together, and how to create performance measures, continue reading below.

What is performance management?

Performance management is made up of a broad range of approaches and practices that governments use for managing operations effectively, budgeting wisely, and prioritizing public programs. These strategies help governments determine the level success or failure arising from operational and policy decision-making – and create opportunities to course correct based on that information. While performance management encompasses a range of tools, including tracking and analyzing data, benchmarking against comparable jurisdictions, conducting evaluations, or applying process improvements, the basic process for conducting performance management is illustrated by the infographic labeled Figure 1 below:

Identify the Problem/Goal · Collect and Synthesize Data · Analyze data · Adjust operations according to evidence · Track results · Update analysis · Add more data

Figure 1

- First, a goal is set (or specific problem identified) before relevant data is gathered and analyzed.
- Next, based on insights from the analysis, operations are adjusted to make the best use of resources.
- Again, data is collected, analyzed, and compared to the previous period so that the impact of the adjustment can be described, and tweaks can be made to continually improve.
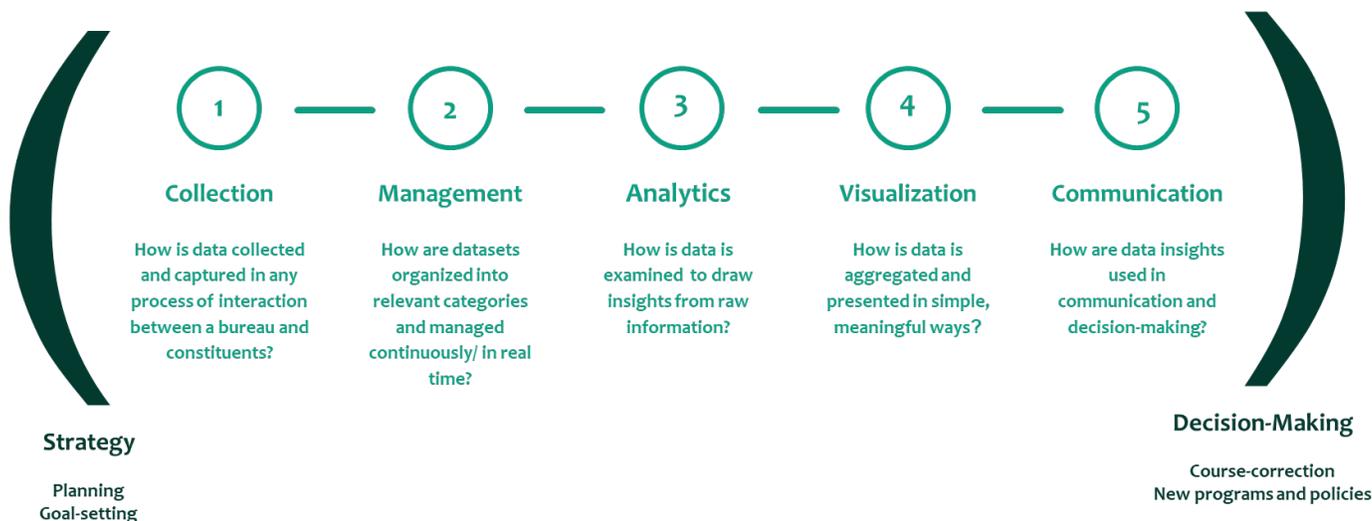

1 Collection	2 Management	3 Analytics	4 Visualization	5 Communication
How is data collected and captured in any process of interaction between a bureau and constituents?	How are datasets organized into relevant categories and managed continuously/ in real time?	How is data is examined to draw insights from raw information?	How is data is aggregated and presented in simple, meaningful ways?	How are data insights used in communication and decision-making?

Strategy

Planning
Goal-setting

Decision-Making

Course-correction
New programs and policies

Figure 2

Another illustration of how the different elements of performance management work together is in Figure 2 above. This figure describes how data, goals, and strategy are used in the process of performance management. As the process depicts, effective performance management is inextricably linked with our ability to use data across the organization – this is represented by the five steps of turning data into information for decision making:

1. **Collection**: How is data collected and captured in bureau processes?
2. **Management:** How are datasets organized into relevant categories and consistently maintained?
3. **Analytics:** How is data examined to draw insights from raw information?
4. **Visualization:** How is data aggregated and presented in simple, meaningful ways?
5. **Communication:** How are data insights used in communication and decision-making?

Data is certainly an increasingly critical – though not sufficient – element of using performance management to improve our organizational outcomes. To do performance management well, the City needs to need to be able to collect and manage data for consistency and accuracy, have the skills and capacity to glean insights from the data, and be able to communicate those insights to key audiences.

But the context for all of this data is equally important. As a City, it is critical that we identify and plan for the goals we are trying to achieve on behalf of the community, and that we are

deliberately reflective about whether the policies and programs we've put in place are effective in achieving those goals. We may have the best data analysis in the world, but if we don't know what we're trying to accomplish, and if no one incorporates that analysis into management, budget, or policy decision-making, then it won't change outcomes for the community. The practice of performance management brings these two elements together by creating data pipeline of sorts, moving from data collection all the way to communication of results, with the surrounding context of planning and goal setting on one side and decision-making on the other.

Why should we do performance management?

Why are cities, including Portland, investing the time and resources to incorporate performance data and analytics into operational and policy decision-making?

Performance Improves Results

The first reason is inherent in the description of performance management above – we invest the time to plan, consider the information, and evaluate because these practices improve our organization's results over time. There are many examples in recent years of how bureaus have used performance data to measurably improve results. In some cases, bureaus worked deliberately to streamline and analyze processes, or even applied more advanced analytics techniques, as in the case of the Bureau of Emergency Communication's efforts to reduce wait times for 9-1-1 calls. In other cases, simply enabling different bureaus to compare results seems to have had an impact, as in the case of radically improved timelines for recruitment for the Bureau of Human Resources. In other cases, Council has used performance goals to rally resources toward achieving an important goal, as in the case of increasing the City's production of newly affordable housing units.

Performance helps operationalize the City's core values

On June 17, 2020, Portland City Council passed a resolution establishing six core values for the City of Portland: Anti-Racism, Equity, Transparency, Communication, Collaboration, and Fiscal Responsibility. These values are illustrated in the now-familiar graphic in Figure 3.

City Council has also passed a number of Citywide strategic plans in recent years that set City policy and influence bureau's focus and objectives. These include the Climate
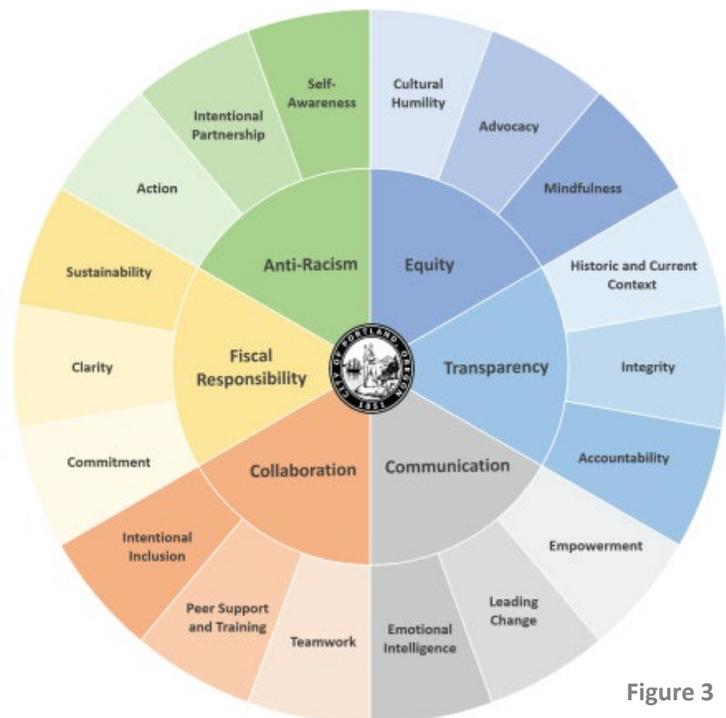

Figure 3

Action Plan, the City's Plan to Achieve Racial Equity, the Comprehensive Plan, and the Portland Plan, the City's 25-year strategic plan that was passed by Council in 2012. The Mayor's Annual Budget Guidance and Adopted Budget also communicate the City's operational and strategic values through Council's investment priorities each year.

But how do we use these values, goals, and priorities to guide our work? Performance management is one way that the City can operationalize both *ethical* and *operational* values by building a cycle that translates these values into action. The cycle [1] (Figure 4) looks like this:

Figure 4

• The City establishes ethical values such as those in the wheel above, to communicate the intended direction of the organization.

• Operational and strategic values are set either intentionally, through Citywide and bureau plans, or unintentionally, through informal processes and practices.

• In order to continually improve and make progress toward our goals, the assessment step is critical. Asking the question, "is our work demonstrating our values?" leads back to the City's ethical values as a framework for evaluating our outcomes. If the answer to this question is "no," or "not enough," then we know we need to make changes to how we are doing our work through our management, budget, or policy decisions.

Performance breaks down silos and promotes transparency

Though many bureaus track additional data to inform management decisions on a more detailed level, a shared Citywide reporting system with more public-facing measures is critical to informing budgetary tradeoffs across bureaus and service areas. These public-facing, often summary-level measures reveal what information is even available, and prompts decision-makers to ask better questions. The Citywide system also provides a shared source of information to City Council and other cross-bureau audiences, including bureau equity managers and asset managers. Especially considering Portland's Commission form of government, a comprehensive performance management system is critical to working across organizational silos and serving the community more effectively.

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[1] Adapted from the Drucker Institute.

What's New in Performance Management?

Last year, CBO implemented several key improvements to the Citywide performance system that the performance team will continue to support in FY 2021-22. These changes included the creation of Citywide Measures, providing [performance measure guidance](#) to achieve greater alignment of performance measurement practices across City bureaus, and the monthly convening of the Performance Advisory Committee.

Here's what bureaus can expect from Citywide performance management in FY 2021-22:

- **Setting annual targets for performance measures ("PM Goal" in BFM Form 1800) will be optional for all measure types.** CBO is eliminating the annual requirement as the short-term service level goal may not be relevant for all measures. Bureaus may still input annual targets into BFM, and these targets will be published in budget documents. Please note, strategic targets will still be required for all performance measures and will also be published in budget documents.
- **Measures will no longer be graphed in the Adopted Budget document for FY 2021-22.** This change will eliminate the need for several metadata fields and will shorten the published document. The "graph description" metadata field will now be used exclusively to describe trends for the online Performance Dashboard and should be updated by bureaus each year (see the technical instructions below for more detail). Performance measure tables will continue to be published in budget documents.
- **Introduction of new metadata fields:** Bureaus have access to the following metadata fields for all new and existing active measures.
  - **Disaggregated data flag:** Bureaus should update this field for all new and existing measures in FY 2021-22. Check this flag if the measure is available to the data owner in a more disaggregated form than provided in BFM. Bureaus may indicate whether the data is disaggregated by demographic parameters, geographic parameters, or both.
  - **Notes field:** This optional field provides both bureaus and CBO a place to document additional details about the measure that do not fit elsewhere.
- **BFM Administration Changes:**
  - **(Relatively) new Performance Measure Update Form** to facilitate easier historical data uploads Located in BFM Reporting, bureaus export and use this report for easier historical updates. See page 72 for more details.
  - **New option for bulk uploads of performance measure metadata.** CBO will be offering a "batch upload" option for performance measure metadata in 2021. CBO will provide instructions once that process is made available.
- **Monthly convening of the PAC**. The Performance Advisory Committee (or PAC) is a group of performance champions from bureaus and Council Offices that meets on a monthly basis to share effective practices and advise CBO's performance team on Citywide performance management. Bureau staff interested in joining the Performance Advisory Committee should contact [Angela Butel](#).

Benefits & Responsibilities of Performance Management for Different Roles

Though the City Budget Office is charged with coordinating Citywide performance management, much like the budget process, performance management is a shared responsibility across the City. Bureaus, CBO, Council Offices, and even the Portland community each play an important role in ensuring the City is making progress toward its priorities and delivering better results for the community. Our performance management system also delivers different benefits to the various parts of the organization. Here is an overview of the benefits and responsibilities of performance management in the City of Portland:

Bureaus	
Benefits	Responsibilities
- Communicate value of bureau programs and services - Understand impacts of operational decisions - Provide baseline for tracking improvements - Enable benchmarking to other bureaus and/or jurisdictions	- Develop performance measures that track bureau and program outcomes - Conduct data collection for performance measures - Set targets for performance measures - Report on measure values and metadata as "data owners" (input into BFM) - Regularly review bureau's suite of measures and performance framework to assess alignment with current bureau strategic priorities - Develop Citywide measures
City Budget Office	
Benefits	Responsibilities
- Incorporate performance data into budget monitoring and analysis - Identify innovations to be shared between bureaus and staff - Provide greater transparency into the results of City spending	- Support bureau performance measure development and target setting through training, guidance, and coaching - Incorporate performance results into budget recommendations, reviews, and various reports to support Council decision-making - Approve performance measures - Promote consistency of performance measures - Develop Citywide measures - Provide Citywide reporting of performance measures.

City Council Offices	
Benefits	Responsibilities
• Access performance data from all City bureaus to inform budget and policy decision-making • Communicate organizational priorities by establishing goals, measures and targets • Consult independent analysis of bureau performance and key issues for bureaus both in and out of assigned portfolio	• Work together to set Citywide priorities • As Commissioners-in-Charge, set bureau goals • As Commissioners-in-Charge, approve bureau performance measure targets • Review results of Key Performance Measures of assigned bureaus and Citywide • Alter operations or policy as needed to address performance deficits or sustain positive results
Portland Community	
Benefits	Responsibilities
• Understand more about the results of City spending • Gain insight into questions for City leadership in areas of interest • Access comparable data across City programs and services	• Help establish City vision and goals • Provide feedback on City services and priorities • Provide feedback on bureau measures (through bureau/budget advisory committees) • Hold the City accountable for results

Performance Measure Types across the City

The City has several different types of performance measures that help with operations and communications with a variety of audiences. An illustration of how the measure types relate is illustrated in Figure 5 below.
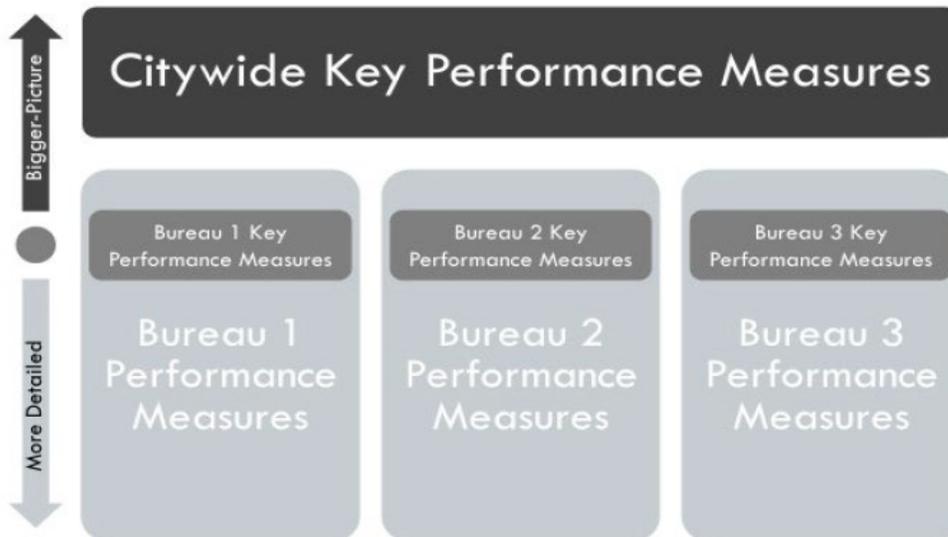
Figure 5

The first category is **Bureau Performance Measures**. These measures indicate progress and impact of programs and services at the bureau level. Bureau measures are sometimes referred to as programmatic measures, or simply "performance measures". These measures get into the specifics of what a program is aiming to accomplish, how those services are delivered, and to whom. These measures are often used by program managers or analysts considering how a budget change could impact the program.

The City's four types of measures provide a range of indicators for understanding the City's various programs and services. Bureaus select a measure type for each measure as a metadata field in BFM. Bureaus are considered *data owners* for those measures that they report on in Form 1800.

- Workload measures describe a quantity of work performed.
- Output measures are things that the bureau "produces". Outputs are activity-oriented, measurable, and usually under managerial control.
- Outcome measures answer the question, "Is anyone better off?" because of the program/service. External forces can limit managerial control. This category may include measures of service quality.
- Efficiency measures are inputs used per unit of output. They tell at what cost (whether time or monetary) the units were produced.

When considering the **suite of measures** to report in the Citywide system, bureaus should consider whether the listed measures provide meaningful information as to whether its programs and services are successful. Each bureau should report on a diverse set of performance measures, to provide a balanced view of program accountability and communication of intended outcomes. This suite of measures should answer the questions, "How much did we do?", "How well did we do it?", "Is anyone better off (and whom)?", and finally, "How do we compare?".

The second category are **Key Performance Measures**, or "KPMs". Each bureau selects several Key Performance Measures from their suite of bureau measures, focusing on the measures that best represent the outcomes of the bureau's core service delivery. KPMs should be clearly

understandable to "lay" audiences and should be results-oriented. Brought together across bureaus, KPMs create a Citywide suite of measures that communicate the City's intended outcomes, provide Council and bureau leadership with information to guide decision-making, and connect City operations to strategic priorities.

At the top are **Citywide Key Performance Measures**. Citywide KPMs were added in FY 2020-21 to fill gaps in reporting on City priorities, especially in areas where the outcomes are a result of collective effort across bureaus. Examples of those areas include: Housing for All, Equitable Community Development, and robust Community Engagement and Representation. Citywide KPMs help to better identify and track City progress in these areas. These measures also help formalize the intended, long-term outcomes the City is seeking for Portland communities, sometimes referred to as "better off" measures in the Results-Based Accountability for Equity framework. Citywide measures are reported with disaggregated data wherever available to help the City better understand the progress we are making to close disparities for communities of color and those living with disabilities.

Key Performance Measures and Citywide measures are what we consider the City's "enterprise" measures. They are often shared with City Council and with the general public, whereas bureau-level measures are often most relevant for bureau and CBO analysts.

Program offers also provide a helpful lens from which to consider the bureau's suite of measures. Every performance measure for which a bureau is a "data owner" should ideally be associated with one of the bureau's program offers. Conversely, each program offer should include at least one performance measure. Some bureaus have a multitude of program offers reflecting the bureau's broad range of services. In these cases, it's important to know that one performance measure can be associated with multiple program offers. Programs may even be associated with performance measures reported on by other bureaus! This flexibility means that bureaus don't need to report on a unique performance measure for every single program offer. Additional guidance for associating performance measures to program offers can be found in Section 4.

To improve consistency and completeness of performance reporting, last year CBO conducted a review of each bureau's suite of measures and issued a Citywide Performance Reporting Guidance Memo. This memo, issued in May 2020, provided guidance on measures tracking racial equity, community engagement, and social equity in contracting. CBO will support continued implementation of these recommendations where relevant in FY 2021-22.

To create a new performance measure, archive an obsolete measure, or change a measure title, enter requests into the Performance Measure Change form and email the form to your CBO analyst.

How to Develop (or Assess Existing) Performance Measures

Developing performance measures, or even assessing the ones you already have, can feel like a challenge when you don't have the right tools. This fall, CBO offered a series of workshops leading up to FY 2021-22 Budget Development to support bureaus in improving their suite of measures. Materials from these sessions are available at the links below.

- **Performance 101**: [PowerPoint slides](#), [video recording of the workshop](#)
- **Performance 201: Measure Development for Program Management:** [PowerPoint slides](#), [logic model exercise handout](#), and [Video recording of the workshop](#)
- **Performance 201: Managing Data for Performance in BFM** will be held on December 10th from 10-11:30 am.
- The full list of **active performance measures for all City bureaus** with historical values and relevant metadata is available [here](#). CBO will update this document on a monthly basis throughout 2021.

Excerpts from these workshops are included below as a "quick start" guide for developing performance measures. Bureaus that would like additional support for establishing performance measures should contact their CBO analyst to schedule a coaching session.

There are several ways that one might approach developing a performance measure:

Copy it

Use a measure you like from a peer jurisdiction or industry group. Scanning the known environment of performance measures used in comparable cities is a great way to save time and avoid reinventing the wheel.

Check out these "indicator catalogs" to get started:
- [Community Indicators Consortium (CIC)](#)
- MSRC (Washington state) [Performance measurement resource page](#)
- Gov Ex [Catalogue of Performance Indicators and Metrics](#)

Map it out

Portland's city services are sometimes unique or are less often measured by other government performance systems. For programs in these areas, staff may want to use frameworks like the ones below to identify indicators of success that are derived from your bureau or program goals. The first framework is quite useful for developing program-specific performance measures. The second framework can help develop or assess a bureau's key performance measures, by connecting the mission/vision/values of the bureau to different measure types.

Framework One: Program-level Performance Measures

To apply the framework below, think about a specific program or service. Once you've identified one or more goals for your program, consider conducting a root cause analysis to ensure that your program is working towards the right goal. Including this step has the benefit of incorporating a major component of Results-Based Accountability for Equity into your measure development process.

Next, identify some of the major activities that are conducted while operating your program. Ask yourself, how do you know if those activities are successful? These "indicators of success" form the basis of what can then become a more formal performance measure, stated in a way that is accessible to the general public.

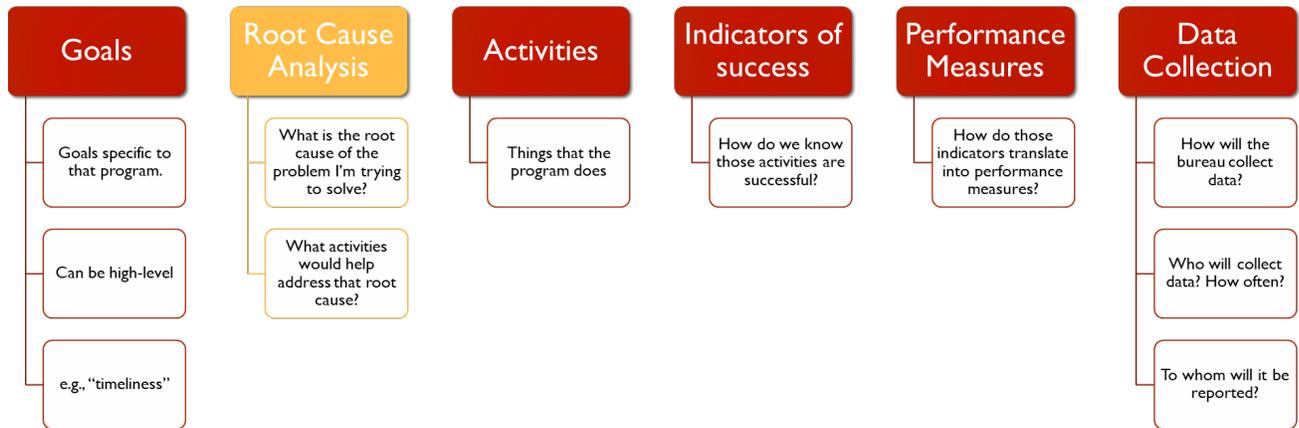| Goals	Root Cause Analysis	Activities	Indicators of success	Performance Measures	Data Collection
Goals specific to that program.	What is the root cause of the problem I'm trying to solve?	Things that the program does	How do we know those activities are successful?	How do those indicators translate into performance measures?	How will the bureau collect data?
Can be high-level	What activities would help address that root cause?				Who will collect data? How often?
e.g., "timeliness"					To whom will it be reported?

Figure 6

Framework 2: Big Picture Logic Model

This framework helps connect the mission/vision/values of the bureau to different measure types. Use this framework to assess or identify bureau key performance measures.
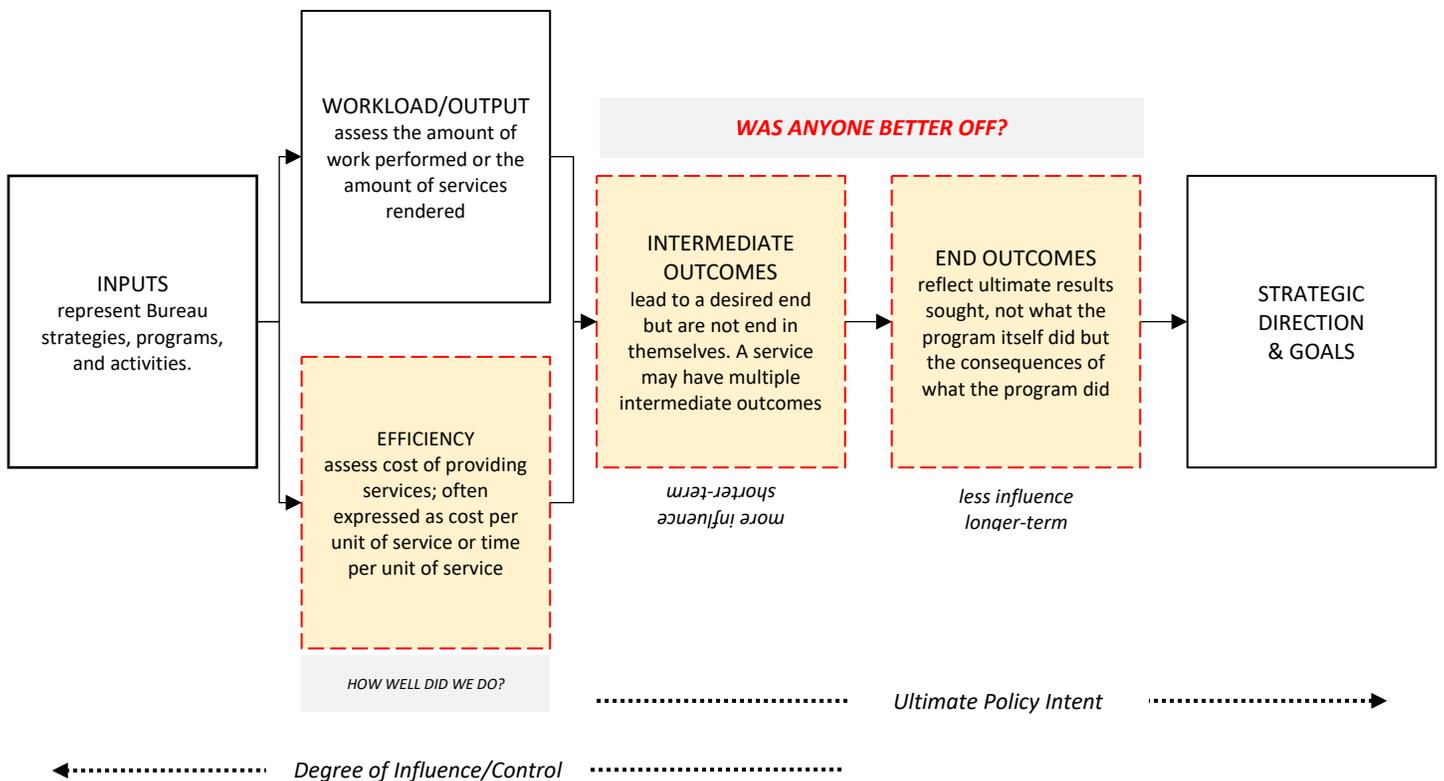

Figure 7

Setting Annual and Strategic Targets

Annual and strategic targets communicate the results that the City expects to achieve for the community in the coming year and over the long term. Bureaus are responsible for setting annual and strategic targets for their performance measures for which they are the "data owners."

Setting annual targets for performance measures in FY 2021-22 will be optional for all measure types. CBO is eliminating this requirement as the annual service level goal is not relevant for all measures. Bureaus may still input annual targets in BFM, and these targets will be published in budget documents. For bureaus that do not set an annual target, the value will be published as "N/A." Strategic targets will still be required for all performance measures and will also be published in budget documents.

As a final step for the requested budget submission, performance measure targets should be reviewed with bureau leadership and the Commissioner-in-Charge, who approves the targets as part of the bureau's requested budget submission. This is to ensure that stated targets reflect the bureau's intended level of service.

Later in the budget process, bureaus may wish to adjust annual targets to reflect the inclusion of decision packages. Please see the Technical Instructions section below for detailed guidance on how to set annual and strategic targets throughout the budget process.

Performance Measure Metadata

Metadata is the "data about the data," and this information is a critical component of City performance measure reporting. Performance measure metadata improves validity of performance data by identifying specific points of contact and offering information about the data including reliability and collection methodology. Metadata also communicates key information about the measure that is not related by the measure title alone. Finally, performance measure metadata promotes the use of performance data both among City bureaus and by external community-based and academic organizations.

All City performance measures are published on CBO's online bureau performance dashboard. Some contextual metadata is published alongside measure values, in order to provide a more transparent accounting of City program and service results. Bureaus should review their metadata for accuracy and complete any necessary updates prior to requested budget submission. BFM users can go to BFM Reporting > Performance Management and run the "Performance Metadata Key *Custom" report for a comprehensive listing of all performance measures, field definitions, and directions for updating metadata. This information is also provided in the Performance Technical Guidance below.

Part 2: Performance Technical Guidance

Performance Measure Values Entry

Bureaus should provide performance measure values for active measures for which they are the "data owners." These measures will primarily be those in which the measure ID includes the bureau's 2-character code. In BFM, this data entry is completed in the Performance Measure form (form 1800) under the Performance Management tab. Bureaus are responsible for ensuring the accuracy of reported performance measure data.

- Under Performance Mngmt >Performance Measure Form,
- Select Bureau> "Detail">Pencil icon (to the right of the "Justification" column). This opens up columns available for entry.

Use Form 1800 in BFM to enter performance measure values for:

1. **FY 2021-22 PM Goal:** This value is the bureau's annual target for the measure. The value represents what the bureau expects to achieve for that particular measure in the coming year, based on known resources contributing to the measure. <u>Setting annual targets for performance measures in FY 2021-22 is optional for all measure types</u>. Bureaus may still input annual targets in BFM, and these targets will be published in budget documents.

   Bureaus setting an annual target should enter a single value for each performance measure; this value may be updated in the proposed and approved stages of the budget process as needed Note the guidelines for the three budget stages below.
   a. **Requested Budget:**
      i. With the submission of the requested budget, this value should reflect what the bureau expects to accomplish, without factoring in the effects (negative or positive) of requested decision packages – those impacts should be described in the decision package narrative. Annual targets may be influenced by a benchmark or industry standard but should also be a value that the bureau reasonably expects to achieve with existing resources. Significant impacts to performance should also be noted in decision package narrative, and as applicable in the program offer narratives.
      ii. If the bureau does not wish to set an annual target for the measure, enter the code '999999' into this field to publish as "N/A" in budget documents.
   b. **Proposed Budget:** Measure target should be updated to reflect the estimated impact on the performance measure of any decision packages included in the Mayor's Proposed Budget. These effects may be positive or negative and should include the impact from all decision packages combined.

c. **Approved Budget:** Measure target should be updated reflect the estimated impact on the performance measure of any decision packages included in the Approved Budget.

2. **Strategic Target:** <u>Strategic targets are required for all performance measures</u>. Strategic targets are expected to be relatively stable year to year, but bureau staff are welcome to update this value as needed. To update, use form 1800 and enter a single number in the same numeric form (decimal, percentage, etc.) as measure value. The strategic target represents the bureau's long-term level of service goal for the measure, as informed by City administrative code, City or bureau strategic plan, or other policy document.

3. **Performance Measure Actuals Reporting:** Bureaus may report their performance measure actuals for the current year (FY 2020-21) on either an annual, quarterly, or monthly basis in BFM throughout the year. Reporting measure data on a more frequent basis ensures availability of the most recent results. See the table below for instructions on how to report on each measure, based on desired frequency:

Identified Frequency	CY Reporting	Reporting process
Transactionally	Monthly	Enter a monthly value for the measure in **FY 2020-21 PM AP01**, **FY 2020-21 PM AP02**, **FY 2020-21 PM AP03**, **FY 2020-21 PM AP04**, **FY 2020-21 PM AP05**, **FY 2020-21 PM AP06**, etc.
Monthly	Monthly	
Quarterly	Quarterly	Enter data for Q1 in **FY 2020-21 PM AP03**
		Enter data for Q2 in **FY 2020-21 PM AP06**
		Enter data for Q3 in **FY 2020-21 PM AP09**
		Enter data for Q4 in **FY 2020-21 PM AP12**
Annually	Annually	Enter data for FY 2020-21 actual in **FY 2020-21 AP12**
	Not Available	If data on the measure is not available by the time annual reporting is due (mid-September 2021), enter the code '999999' into this field to publish as "N/A" in budget documents.

4. **Justification**: Bureaus are required to provide a brief explanation in this field for each key performance measure when reporting annual actuals as part of the Fall BMP. This information provides an opportunity for bureau data owners to communicate about measure results to CBO, as well as other bureaus associating the measure with their programs.

5. **Historical Data:** The following columns are locked in BFM as the data was due at an earlier stage or prior budget process.
   - FY 2019-20 Performance Actuals (PY1_Actual)
   - FY 2020-21 Performance Target

To update these or other historical measure data, bureau staff should use the "PM Update template" report in BFM Reporting>Performance Management folder. The report is exported to Excel to populate with new data, then emailed to your CBO Analyst. Detailed instructions are included in the report.

Performance Measure Metadata – Data Entry

Bureaus are responsible for entering performance measure metadata for active measures that appear on the bureau's Form 1800 (see above). These are the measures for which the bureau is reporting values data.

Bureaus should review their metadata for accuracy and complete any necessary updates prior to requested budget submission. In BFM reporting, users can go to Performance Management and run the Performance Metadata Key for a comprehensive report that will display all performance measures as well as directions for updating metadata.

Please note! CBO will be offering a "batch upload" option for performance measure metadata in 2021. CBO will provide instructions once that process is made available.

In BFM, metadata entry is completed in Performance Measures – Dimension under the Performance Mgmt. tab. Navigate to the available fields by clicking through:

- Performance Mngmt>Performance Measures>Dimension

Select "Edit" button to navigate to the tabs and metadata fields below. Attributes tab

- **Name:** This is a "short name" used to refer to the measure in the system when a longer title is infeasible. It is not the name used for publishing purposes.
- **Measure Title:** This is the published title of the performance measure.
- **Graph Title:** Previously used for measures graphed in the budget document. This field will no longer be used.
- **Graph Description:** Include a brief explanation (1-2 sentences) of performance outcomes achieved in relation to fiscal year and strategic targets. Provide estimated reason for trends as available. This field is published on the City bureau performance dashboard for all measures.
- **Active?:** This denotes whether this is an active measure. If a measure is marked as inactive, it will not show up in BFM reporting or in Form 1800 to add measure values.
- **Disaggregated Data (NEW!):** Check this flag if the measure is available to the data owner in a more disaggregated form. Bureaus may indicate whether this detail is demographic, geographic, or both.

Groups Tab

- **Publish Measure:** Use the dropdown menu to select 'YES' to publish or 'NO' to not publish the measure in the budget document.
- **Graph Measure:** Use the dropdown menu to select 'NO,' as CBO is discontinuing inclusion of graphs in the Adopted budget document.

- **Desired Direction:** Indicates the desired trend for this measure. See drop down selection.
- **Reliability:** Refers to the expected accuracy and reliability of the performance data. Dropdown menu.
  - *High accuracy* – data gathered via reliable process designed to validate or verify the information;
  - *Medium accuracy* – somewhat dependable process designed to validate or verify the information;
  - *Low accuracy* – data gathered without a dependable process to validate or verify the information. This designation can also be used to indicate that bureau does not have a reliable method of data quality assurance.
- **Division:** Division is required for all OMF measures for tables to publish properly.
- **Citywide Measure:** Optional field, may be selected to indicate that the measure is repetitive of multi-bureau efforts or population-level results.
- **Datatype:** Select a code from the dropdown menu to indicate how data values should be formatted in reporting.
- **KPM:** Check the box if the measure is a Key Performance Measure (KPM). KPMs are indicators of bureau core service delivery that create a layer of Citywide indicators and guide Council decision-making.
- **Frequency:** Frequency of collection for the bureau, or how often the data is available to bureau users. Options include transactionally, weekly, monthly, quarterly, or intermittently. *Frequency may vary from when data is reported to CBO in BFM; please select the option that indicates how frequently the data is collected, not how frequently it is reported to CBO.*
- **Measure Type:** Performance measure types include workload, output, outcome, and efficiency. Select an option from the drop-down menu that best fits the indicator. Measure definitions are as follows:
  - **Workload measures** describe a quantity of work performed.
  - **Output measures** specify quantity or number of units produced. Outputs are activity-oriented, measurable, and typically controllable.
  - **Outcome measures** are often-qualitative consequences associated with a program or service. External forces sometimes limit managerial control of the measure. Outcome measures express "why" City services or programs exist and can include measures of service quality.
  - **Efficiency measures** are inputs used per unit of output. They tell us "at what cost"—financial or in terms of other resources like time--were these inputs, outputs, and outcomes reached.
- **Aggregation**: Aggregation is required to be selected when creating a new measure. "1" indicates that the measure can be summed across all accounting periods. It is used for measures that are expressed as a number. "2" indicates the average of the data across the accounting periods should be taken. It is used for measures that are expressed as percentages or ratios.

Description Tab

- **Unit of Measure:** To help when measures are graphed on the Citywide Performance dashboard, enter a unit of measurement to be displayed on the Y-axis of the graph.
- **Formula:** Mathematical equation used to calculate the measure. For example, to calculate BPS on-time trash collection during scheduled hours, divide the number of times it was collected on time by the total number of times trash was collected.
- **Target Year:** Indicates the year that the bureau expects to achieve the strategic target (enter 4-digit year, e.g. 2049). To communicate achievement of the strategic target in a particular fiscal year, enter the end of that year (e.g., FY 2021-22 would be entered as 2022). Do not enter a month or date value.
- **Strategic Plan:** Cite the City administrative code, City or bureau strategic plan, other policy document, or state/regional code or strategic plan referenced in the creation of the strategic target.
- **Collection Methodology:** Use this field to describe how data is collected for the performance measure. Include (1) data collection mechanisms (describe ways the data will be collected: survey forms, printed reports, contractor performance reports, etc.); (2) data sources (manual logs, check sheets, computer databases, surveys, spreadsheets, etc.); data collection time frame (i.e. reporting time lag); data storage location.
- **Program Mgr:** Name and email address of the person overseeing the program reflected by the measure. Reported as "Bureau data source program manager" on the bureau performance dashboard.
- **Program Mgr Email:** Email address of the City employee overseeing the bureau program or operations reflected by the measure.
- **Data Contact:** First and last name of the City employee responsible for collecting, gathering, and reporting the data for this specific measure.
- **Data Contact Email:** Email address of the City employee responsible for collecting, gathering, and reporting the data for this specific measure.
- **URL:** Relevant URL, "for more info" to direct reader to program webpages, press releases, how to get involved/citizen engagement, annual report, budget, or simply the bureau home page.
- **Notes (NEW!):** This field provides both bureaus and CBO a place to document additional details about the measure that do not fit elsewhere.