PERFORMANCE MEASURES

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SUMMARY

This procedure establishes standards for the use of performance measures by County departments. Clear, reliable and aligned performance measures will promote management accountability, foster decision-making based on fact, and help ensure that Miami-Dade County can track the achievement of the goals and objectives in the Countywide Strategic Plan.

BACKGROUND

[Article CXVIII.5 of the Miami-Dade County Code](#) establishes requirements related to strategic planning, business planning, and monitoring and reporting of performance measures in County government. This legislation, also known as the Governing for Results ordinance, requires that the County:

- Establish specific and measurable performance indicators, with corresponding performance targets, for each priority outcome in the Strategic Plan.
- Gather performance information relative to performance indicators and targets established in departmental business plans.
- Submit departmental performance information on a regular basis to the mayor or his or her designee.
- Annually share with the public the County's performance report, comprised of performance data relative to goals and priority outcomes established in the County's strategic plan.

PROCEDURE

County departments are required to track performance measures in the County's online Strategic Management System (SMS). Measures must clearly align to a department or Strategic Plan objective and are displayed on department scorecards using a Balanced Scorecard approach, which is comprised of four perspectives: Customer, Financial, Internal, and Learning and Growth. On a quarterly basis, department scorecards are printed and posted on the Office of Management and Budget web site, where they are visible to the public. Additionally, selected measures are included in the County's budget books.

In developing and maintaining their scorecards, County Departments are required to adhere to the following performance measure standards:

Measure Component	Standards

Measure Name	• Must precisely describe what is being measured
	• Measure names should be concise and understandable to a layperson
	• Avoid industry terminology and uncommon acronyms
	• In most cases, measure names should start with "Number of" or "Percent of"
	  o Ensure that the usage of "percentage of" is precise. Percentages should be phrased as *"Percentage of [denominator] that are [numerator]."* For example, a measure that reflects the calculation [number of on-time taxis] / [total number of taxis] should be written as follows:
	    ▪ Incorrect: *Percentage of on-time taxis*
	    ▪ Correct: *Percentage of taxis that are on-time*
	  o When a number is expressed in units like hundreds, thousands, millions, or billions, the number itself should reflect that scale.
	    ▪ For example: if a measure is named *Sales revenue (in thousands)*, and the actual value of sales in a period is $10,000, then the value should be displayed as $10 since $10 x 1,000 = $10,000

Description	• Expand on measure name • Fully explain in plain terms what is being measured • Include formula being used, the source of the data, measure assumptions, and if relevant, what is NOT included in the measure • If the formula, data source, assumptions or exclusions change, include an explanation of the change and when the change occurred • Include the methodology of setting the target
Ownership	• Identify as the Measure Owner the person who is responsible and accountable for the measure's performance • Add a second owner if necessary in SMS for data entry • Department should have procedures in place to ensure coverage when measure owners are unavailable and continuity when measure owners vacate the position • Department's scorecard administrator should not be listed as the owner unless he/she is the person accountable for the measure
Good Direction and Accumulation	• Outcome and efficiency measures should include a good direction (up or down) • Measures that are designed to perform within a range (neither too high nor too low) should be accordingly defined as "To Center" • Fiscal Year to Date accumulators should be set logically
Performance History and Frequency	• Enter sufficient performance history to discern data trends • Data should be collected frequently enough to allow for analysis and timely corrective action

Measure Component	Standards
Data Validity	• Data should come from systems that have a consistent and reliable method for collecting information • Data collection procedures must be established, and an ongoing review / quality control process should be in place for all measures, especially in cases where data comes from manually entered logs or Excel tracking sheets • Departments should have procedures regarding the retention of back-up source data • Departments should ensure that data matches data included in the County's Budget Books, where applicable
Target	• Key outcome and efficiency measures, and all measures included in the County's Budget Books, must have performance targets consistent with the department's business plan • Targets should be set at least one fiscal year into the future • Customer requirements, best practices and/or comparative performance levels should be considered in setting the target
Contributing (Child) Measures	• Use contributing (child) measures when necessary to facilitate root cause analysis of the primary (parent) measure's performance • Not all contributing (child) measures need to have a *mathematical* relationship to the primary (parent) measure; they can be added to provide additional information about the primary (parent) measure
Variance Reports	• Create procedures to complete a variance report when triggered by the Strategic Management System • Variance reports must include a reason for underperformance and a summary of planned corrective action, where necessary

Measure Component	Standards

Alignment to County Budget Books and other public reports (if applicable)	• Ensure that the measure information, including the measure name and actual data, matches information in the County's Budget Books and other information that is disseminated to internal and external customers
	• For measures included in the Budget Book:
	  o If the methodology of a measure in the Budget Book changes from one budget year to the next, include a note of explanation in the Budget Book describing the change and when the change occurred
	  o Ensure one of the four measure types is selected in SMS:
	    ▪ Outcome - focuses on program results, effectiveness and service quality, assessing the impact of department activities on its customers
	    ▪ Efficiency - compares the amount of work performed to the quantity of resources consumed or the time required in doing it
	    ▪ Output - indicates how much work was performed or how many units of service were provided
	    ▪ Input - tracks resources used by a department (e.g. funding, staff, equipment, etc.) or demand for department services
	  o Actuals and targets required for the Budget Book must be up to date
	  o Do not include extraneous information in the measure name. The name should appear exactly as it will be printed in the Budget Book

County departments with questions regarding these standards or requiring help with performance measurement generally may contact the Office of Management and Budget for Assistance.

CONTACT(S):
Department/Division
Office of Management and Budget/ Administration and Consulting Services