The KPI Institute

Celebrating 10 Years of PERFORMANCE

Key Performance Indicators Course

Scorecards Catalogue

Table of Contents

The KPI Institute Template 3

Agriculture

Landcorp Farming 4

Education

Austin Independent School District 5
Colorado Mountain College 5
Fulton County Schools 6
Seattle Public Schools 7
University of Minnesota 8
University of Washington 9
University of Westminster 10

Financial Institutions

Credit Valley 11

Government

Civil Service Commission of Ontario 12
Endumeni Municipality 13
Oregon Government 14
Tennessee Valley Authority 15
United States Office of Personnel Management 16
Victoria Government Procurement 17

Healthcare

Department of Health, Division of Medical Quality Assurance 18
Medicare Australia 19
The South African Medical Research Council 20
UK Healthcare 21

Resources

Eskom 22

Transportation

Wisconsin Department of Transportation 23

Metrics and targets

We have agreed eight key measures against which we and our stakeholders can hold us to account. We are committed to monitoring and reporting on our progress annually.

	Metric	Actual 2013	Target 2018
Customer & Client	RBB, Barclaycard and W&IM: Weighted average ranking of Relationship Net Promoter Score®[a] vs. peer sets	4th	1st
	CIB Client Franchise Rank: Weighted average ranking of wallet share or customer satisfaction with priority clients	4th	Top 3
Colleague	Sustained engagement of colleagues score	74%	87-91%
	% women in senior leadership[b]	21%	26%
Citizenship	CItizenship Plan – initiatives on track or ahead	10/11	Plan Targets
Conduct	Conduct Reputation (YouGov survey)	5.2/10	6.5/10
Company	Return on Equity (Adjusted)	4.5%	> Cost of equity
	Fully Loaded CRD IV CET1 ratio	9.3%	>10.5%

For further information on Balanced Scorecard Methodology and Data Sources please visit barclays.com/balanced scorecard and see the 'Metrics and targets' page

A detailed view of performance against Citizenship Plan targets is available in the Citizenship Report 2013 at barclays.com/citizenshipreport

STRATEGIC GOAL: HIRE *THE* BEST

Performance Measure	FY 2007 Results	FY 2008 Results	FY 2009 Results	FY 2010 Results	FY 2011 Results	FY 2011 Target	Met/ Not Met
Average number of days to hire a Federal employee	n/a	n/a	122 days (baseline)	105 days	*	80 days	*
Percent of agencies with violations of veterans preference laws, rules and regulations	25%	33%	18%	33%	30%	25%	Not Met
Average number of days to complete the fastest 90 percent of initial national security investigations to meet the Intelligence Reform and Terrorism Prevention Act	n/a	n/a	n/a	39	40	40	Met

		All FM								Departments Current Month Score				
	Performance Metric	Current Target	Current Month Score	Metric Status	Fiscal YTD	Previous Four Months Dec	Nov	Oct	Sep	EB	HS	StPW	Central	Energy
ALL FM	Safety Meeting Attendance (bi-monthly)	95+%	-	-		99%	-	99%	-	-	-	-	-	-
	Lost Time Injuries	0	3	Y	-	2	1	2	2	0	1	1	1	0
	Preventive Maintenance - FLS	100%	93%	R	97.3%	96%	95%	100%	99%	86%	98%	98%	33%	94%
	Preventive Maintenance - Non-FLS Critical	90%	64%	R	80.5%	77%	77%	85%	95%	68%	84%	61%	-	39%
	Preventive Maintenance - Non-FLS Non-Critical	85%	76%	Y	86.4%	92%	-	-	-	94%	81%	49%	-	-
	Customer Work Order Response Time	85%	77%	Y	78.7%	77%	76%	78%	85%	74%	80%	77%	72%	50%
	Customer Initiated Work	85%	47%	R	46.4%	49%	42%	43%	55%	49%	51%	49%	28%	36%
	FM Initiated Work	85%	55%	R	55.3%	55%	56%	57%	58%	58%	49%	55%	40%	72%
	Hours Variance	97+%	92%	R	93.4%	93%	93%	94%	95%	96%	96%	94%	81%	85%
	Compass Time Card Accuracy	97%	99%	G	-	99%	99%	99%	99%	99%	99%	99%	99%	100%
	Compass Time Card Approval	97%	91%	R	-	90%	93%	93%	93%	93%	87%	92%	89%	93%
	Budget vs. Actual Expense	> -2%	6%	G	-		6%	6%	9%	4%	4%	-5%	7%	15%
Energy	Campus Energy Report Card	< 95%	97%	Y	-	98%	107%	107%	107%	97%	114%	89%		
	Utility Outages	0	2	R	-	1	0	0	5	-	-	-	-	-
Districts	Custodial Projects Completed On-Time	85+%	92%	G	-	77%	69%	80%	62%	-	56%	99%		
	Custodial Quality Assessment Counts	100%	97%	Y	-	93%	88%	93%	98%	100%	100%	89%		
	Custodial Quality													
Central	Service Center Answer Time	90+%	91%	G	-	92%	95%	90%	93%					
	Elevator Entrapments	N/A	6	N/A	-	5	7	8	4					

The KPI Institute Template

office@kpiinstitute.org
+61 3 9028 2223

Performance Scorecard - Human Resource Department

Select period: July 2011

Trend *: ↗ Increasing; = Constant; ↘ Decreasing

Results: ✓ On or above targets; ☼ Within tolerance limits; ✖ Under target

Perspective / Goal Strategic Objectives / KPIs	smartKPIs.com #	Standard reporting frequency	Previous Period Results	Current Results	Trend *	Target	% Target complete	Results	Comments
Customer - 2 Strategic Objectives / 4 KPIs									
Maintain high levels of internal customer satisfaction									
% HR customer satisfaction with service levels	sK2379	Q	72%	94%	↗	75%	125%	☼	Comments Jul 2011
# Satisfaction of employees with HR services	sK2038	Yr	60	75	↗	70	107%	☼	Comments Jul 2011
Ensure high service delivery standards									
# Employee complaints resolution timeliness	sK1938	M	76	92	↗	50	184%	☼	Comments Jul 2011
% On-time delivery of HR service requests	sk2278	M	56%	79%	↗	60%	132%	☼	Comments Jul 2011
Financial - 3 Strategic Objectives / 5 KPIs									
Provide good value for money to the organisation									
% HR operating expense rate	sK2046	M	27%	37%	↗	30%	123%	✓	Comments Jul 2011
# FTEs per HR department FTE	sK44	M	23	29	↗	30	97%	☼	Comments Jul 2011
Seek efficiencies to minimise cost base									
$ Cost per hire	sK49	M	431.00	418.00	↘	350.00	119%	☼	Comments Jul 2011
$ Cost avoidance savings	sK262	M	543.00	764.00	↗	500.00	153%	☼	Comments Jul 2011
Maintain financial rigour in budget projection and execution									
% HR budget variance	sK479	M	-1%	-3%	↘	2%	-161%	☼	Comments Jul 2011
Internal Processes - 2 Strategic Objectives / 5 KPIs									
Optimize recruitment and retention									
# Open requisitions	sK241	Q	2	6	↗	12	50%	☼	Comments Jul 2011
# Time to fill a vacant position	sK688	M	23	21	↘	15	140%	☼	Comments Jul 2011
% HR performance appraisals completed on time	sK769	M	62%	85%	↗	60%	141%	☼	Comments Jul 2011
Improve HR service delivery capability									
% HR projects on time, on budget and according to specifications	sk2863	M	63%	72%	↗	60%	120%	☼	Comments Jul 2011
% HR processes optimised	sk2284	M	58%	85%	↗	60%	142%	☼	Comments Jul 2011
People, Learning & Growth - 3 Strategic Objectives / 6 KPIs									
Build an environment that fosters creativity and innovation									
# HR employee engagement index	sK1836	Q	73	75	↗	65	115%	☼	Comments Jul 2011
# Ideas for new / improved service from HR employees	sK4657	M	45	11	↘	30	37%	☼	Comments Jul 2011
Develop workforce skills and competences									
# Certifications per HR employee	sK4659	Q	1.37	1.47	↗	2.00	74%	☼	Comments Jul 2011
# Training hours per HR full time equivalent (FTE)	sK7	M	6	18	↗	8	225%	✖	Comments Jul 2011
Maintain high performing motivated employees									
% HR employee satisfaction	sk5912	Q	82%	51%	↘	60%	85%	☼	Comments Jul 2011
% HR employee turnover	sK1	M	6%	13%	↗	5%	255%	☼	Comments Jul 2011

* Trend = current vs. previous month results

Data not available due to measure being inactive

Helicopter view business statistics	Previous month	Current month	Trend	Other comments
Human Resources - Snapshot				20 KPIs tracked in the scorecard with targets
# HR team members	149	150	↗	Min 1 KPIs for each objective
# Employees	1,224	1,223	↘	4 Metrics monitored as statistics
# HR service requests received	1,585	1,596	↗	
$ HR Budget ('000)	999	995	↘	

Source: http://store.kpiinstitute.org/hr-scorecard.html

Landcorp Farming

BALANCED SCORECARD 2013

Customers

OBJECTIVE	MEASURE	2012/13 TARGET	2012/13 ACTUAL	2009-2013 AVERAGE
Produce animals and farm products that are "fit for purpose" when supplied to processors and end markets	Average prime lamb carcass weight (kg)	17.7	17.4	17.5
	The lamb carcass weight was below target due to drought conditions and the emphasis on meeting contracted kill targets with customers.			
	Average prime cattle carcass weight (kg)	254.7	269.9	269.3
	Average cattle carcass weight was a Landcorp record. The dry summer feed situation suited beef finishing efficiency on many farms. This was also supported by robust management on farm.			
	Average prime deer carcass weight (kg)	53.9	53.9	53.9
Quality assurance on animals and farm products	FarmPride® audit ratings – annual average for all farms for assurance on quality to customers.	8.00	8.30	7.7
Landcorp's livestock farms are audited biennially and dairy farms annually under the FarmPride® quality assurance programme. A score of 8 out of 10 is regarded as satisfactory compliance. Landcorp continues to raise its standards.				

Operational

OBJECTIVE	MEASURE	2012/13 TARGET	2012/13 ACTUAL	2009-2013 AVERAGE
Maintain effective farmed area	Total hectares in farm production*	174,536	173,388	175,148
The total includes all land in pasture or crop, and excludes areas of conservation retirement, riparian strips, forest plantations and service areas with buildings. *Excludes Shanghai Pengxin (SPG) farms. The decrease on targeted hectares reflects the more accurate exclusion of non-farmed land.				
Sustainably improve pasture production and utilisation	Stock units per effective hectare at 30 June*	8.5	8.3	8.5
	Stock units per effective hectare at 30 June (Total)	N/A	8.7	8.7
The stocking rate per hectare was close to target. Emphasis was placed on optimising production and returns per animal. * Exclude SPG farms and animals.				
Sustainably increase total stock units	Total closing stock units*	1,487,926	1,447,628	1,518,911
	Total closing stock units (SPG only)	N/A	123,820	123,820
Summer drought conditions in 2012/13 and the resulting destocking contributed to closing stock units being below target. *Exclude SPG farms and animals.				

Source: http://www.landcorp.co.nz/assets/NEW---Our-Business/Financial-and-Statutory-Information/Annual-and-Half-Year-Reports/Landcorp-AR-2013-WEB-29-Oct13.pdf

office@kpiinstitute.org
+61 3 9028 2223

Austin Independent School District

GOAL 1 AND GOAL 2 INDICATORS

EXHIBIT 1: STAAR/EOC/TAKS Passing Rates for Math – at Level II, Phase 1 Standard[1]

STAAR/EOC/[TAKS]	Passing Rates at Level II, Phase 1 Standard								
	STATE			AISD					
Mathematics	2012*	2013†	State Yr to Yr	2012*	2013†	AISD Yr to Yr	2013 Target (15%)	Met Target	Improved or same
All Students	77%	**79%**	2%	78%	**81%**	3%	81%	☑	☑
African American	65%	**68%**	3%	63%	**66%**	3%	69%	☒	☑
Hispanic	73%	**76%**	3%	73%	**76%**	3%	77%	☒	☑
White	86%	**88%**	2%	93%	**94%**	1%	94%	☑	☑
Special Education	55%	**57%**	2%	62%	**64%**	2%	68%	☒	☑
Economically Disadvantaged	69%	**72%**	3%	70%	**73%**	3%	75%	☒	☑
English Language Learners	58%	**62%**	4%	61%	**65%**	4%	67%	☒	☑

STAAR, STAAR Modified, STAAR-Alt, TAKS (Grade 11 only)
Accountability Subset; excludes results for ELL < 4 years in US schools

*2012 includes EOC Grade 9 and Below
†2013 Includes EOC at Grade 10 and below

Evaluation – STAAR/EOC/TAKS Passing Rates for Math

- In 2013, AISD equaled or exceeded State performance for 6 of 7 student groups.
- Gains were achieved by all 7 student groups.
- The largest gains were achieved by the ELL student group (+4 percentage points) while the All Students, African American, Hispanic, and Economically Disadvantaged student groups achieved gains of +3 percentage points.

Source: http://www.austinisd.org/sites/default/files/dept/strategic_plan/docs/strategic_plan_2013_Scorecard_05292014.pdf

Colorado Mountain College

Balanced Scorecard 2012-2013
Colorado Mountain College

Strategic Focus Areas		Key Performance Indicators	Stretch Target	Exceeds Target	Meets Target	Below Target	Take Action	2011-2012 Performance	2012-2013 Performance	
Transformational Experiences	Students	Successful Course Completion (%)	81.5	81	80.5	80	<80	80.30%	80.16%	Final
		Rate of Attempted/Completed Credits (%)	92	91.5	91	90.5	<90.5	86%	87%	Final
		DevEd Student Transition to 100 level Math	50	49	48	47	<47	43%	46%	Final
		DevEd Student Transition to 100 level English	47	46	45	44	<44	51%	41%	Final
	Employees	Professional Development of Full-time Employees (%)	95	94	93	92	<92		in progress	
		Employee Satisfaction (%)	90	85	80	75	<75	73%	75%	Final
		All Turnover (%)	7	7.5	8	8.5	>8.5	8.5%	10.5%	Final
	Communities & Business Partnerships	Community Satisfaction (%)	87	86	85	84	<84	85%	91.8%	Final
		Participation Rate (%)	14	13.5	13	12.5	<12.5	12%	11%	Final
		Business/Educational Partnerships' Satisfaction with CMC (%)	91	90	89	88	<88	89%	80%	Final
		Carbon Neutrality (%)	3.5	3	2.5	2	<2	new	in progress	
Transformational Growth	Enrollment	Total Unduplicated Headcount (k)	24	23	22	21	<21	21.5	20,436	Final
		FTE (100s)	46.5	46	45.5	45	<45	45.2	45.50	Final
		Fall-to-Fall Retention First-time, Full-time, Degree Seeking Students (%)	74	73.5	73	72.5	<72.5	73%	67%	Final
		Fall-to-Fall Retention First-time, Part-time, Degree Seeking Students (%)	55	54.5	54	53.5	<53.5	54%	50%	Final
	Programs	Employer Satisfaction with Graduates (%)						new	85.7%	Final
		General Student Satisfaction (%)	91	90.5	90	89.5	<89.5	90%	89.7%	Final
		Graduate Satisfaction (%)	93	92	91	90	<90	86%	in progress	
		Graduate Employment (%)	76	75	74	73	<73	73%	in progress	
	Financial	General Fund Expenditures as a Percent of Budget (%)	98	99	100	101	>101	70.5%	87.98%	As of June 17, 2013
		General Fund Revenues as a Percent of Budget (%)	102	101	100	99	<99	110.4%	100.55%	As of June 17, 2014
		Tuition Revenue as a Percent of Budget (%)	104	102	100	98	<98	87.9%	91.04%	As of June 17, 2015
		Reserve Balance (%)	28	27	25	24	<23	29%	28.19%	As of June 17, 2016
		Foundation Income ($M)	3	2.8	2.5	2.3	<2.0	2.93	in progress	

Source: http://www.coloradomtn.edu/web/about-cmc/aqip_accreditation/balanced_scorecard

Fulton County Schools

SYSTEM STRATEGIC PLAN: BALANCED SCORECARD

System-wide Goals, Objectives, and Performance Measures

Goals	Objective	Measure Type	Performance Measure	Unit of Measure	Baseline Data 2008-09	Baseline Data 2009-10	Baseline Data 2010-11	Actual 2011-12	Target 2011-12	Target 2012-13	Target 2013-14	Target 2014-15	Target 2015-16	Target 2016-17
STUDENTS MASTER CURRICULUM	Improve Student Achievement in Reading	Status	Criterion-Referenced Tests - Reading	Percentage of students meeting or exceeding expectations										
			Grades 3, 4, and 5											
			All Students		90% (37%)	91% (39%)	92% (47%)	93%(51%)	93%	93%	94%	94%	95%	95%
			Limited English Proficient		81% (11%)	85% (15%)	84% (17%)	85%(24%)	86%	88%	90%	91%	92%	93%
			Students w/Disabilities		68% (14%)	72% (16%)	76% (22%)	77%(23%)	78%	80%	82%	84%	86%	88%
			Economically Disadvantaged		86% (19%)	89% (20%)	88% (27%)	90%(32%)	90%	91%	92%	93%	94%	95%
			Black		83% (19%)	86% (20%)	86% (27%)	87% (32%)	88%	90%	91%	92%	93%	94%
			TAG		100%(82%)	93%(84%)	100%(91%)	100%(91%)	100%	100%	100%	100%	100%	100%
			Grades 6, 7, and 8											
			All Students		94% (39%)	95% (41%)	95% (41%)	97%(49%)	96%	96%	96%	97%	97%	97%
			Limited English Proficient		79% (11%)	84% (9%)	82% (12%)	85%(12%)	84%	86%	88%	90%	91%	94%
			Students w/Disabilities		76% (10%)	73% (11%)	78% (12%)	82%(14%)	80%	82%	84%	86%	88%	90%
			Economically Disadvantaged		93% (19%)	94% (22%)	95% (22%)	96%(26%)	96%	96%	97%	97%	97%	98%
			Black		91% (20%)	91% (22%)	93% (23%)	94%(27%)	94%	95%	95%	96%	96%	97%
			TAG		100% (83%)	100% (86%)	100% (87%)	100%(91%)	100%	100%	100%	100%	100%	100%
			Percentage of Limited English Proficient students that remain at or above grade level through two years of exiting the program in Reading	Percentage of students	93%	97%	96%	87%						
		Value Added	Percentage of all students, system-wide, with a z-score increase on the CRCT-Reading for grades 2, 3, 4, and 5, using the state mean and standard deviation to calculate.	Percentage of students										
			All Students		49.5%	50%	54%	62%	56%	58%	60%	62%	64%	66%
			Limited English Proficient		48.2%	55%	53%	61%	55%	57%	59%	61%	63%	65%
			Students w/Disabilities		52%	50%	51%	50%	53%	55%	57%	59%	61%	63%
			Economically Disadvantaged				51%	64%						
			Black				50%	61%						
			Percentage of all students, system-wide, with a z-score increase on the CRCT-Reading for grades 6, 7, and 8, using the state mean and standard deviation to calculate											
			All Students		49.3%	49%	47%	61%	49%	51%	53%	55%	57%	59%
			Limited English Proficient		56.8%	53%	53%	72%	55%	57%	59%	61%	63%	65%
			Students w/Disabilities		52.4%	50%	43%	58%	45%	55%	57%	59%	61%	63%
			Economically Disadvantaged				48%	62%						
			Black				48%	61%						

Source: http://www.fultonschools.org/en/about/Documents/BSC%20FY13.pdf#search=balanced%20scorecard

Seattle Public Schools

SPS District Scorecard

2011-2012 School Year

	Positive Annual Change	Growth from Baseline	On-Track for 2013
Total of 23 Goals	12*	14*	0**

Academic growth and student outcomes

SPS Strategic plan milestone	Measure	Baseline SPS 07-08	SPS 08-09	SPS 09-10	SPS 10-11	SPS 11-12	State 11-12	SPS 2013 Target	Annual Change	Growth from Baseline	2013 Target Gap
District-wide Goals	Free/Reduced Lunch students proficient on the state reading test	56%	57%	53%	57%	58%	N/A	83%	1%	2%	-25%
	Free/Reduced Lunch students proficient on the state math test	35%	37%	39%	46%	51%	N/A	69%	5%	16%	-19%
	Percent of students with fewer than 10 absences	60%	60%	62%	66%	67%	N/A	80%	1%	7%	-13%
	English Language Learners who met or exceeded typical growth on the state reading test	N/A	48%	42%	49%	46%	N/A	80%	-3%	N/A	-34%
Elementary students on grade level	3rd graders proficient on the state reading test	73%	74%	75%	79%	74%	69%	88%	-5%	1%	-14%
	3rd graders exceeding standard on the state reading test	40%	44%	46%	47%	40%	32%	50%	-7%	0%	-10%
	4th graders proficient on the state math test	56%	60%	62%	65%	67%	59%	80%	2%	11%	-13%
	4th graders exceeding standard on the state math test	35%	42%	32%	38%	38%	29%	50%	0%	3%	-12%
7th graders ready for Algebra in 8th grade	6th graders passing all classes	83%	83%	86%	87%	88%	N/A	90%	1%	5%	-2%
	7th graders proficient on the state math test	53%	56%	64%	66%	67%	59%	80%	1%	14%	-13%
	7th graders exceeding standard on the state math test	29%	35%	33%	34%	39%	28%	50%	5%	10%	-11%
9th graders ready for high school	First-time 9th graders earning sufficient credits	82%	85%	87%	88%	88%	N/A	90%	-1%	6%	-3%
	Repeat 9th graders earning sufficient credits	48%	49%	44%	39%	34%	N/A	75%	-5%	-14%	-41%
9th & 10th graders passing state tests	10th graders proficient on the state reading test	81%	82%	75%	80%	79%	81%	95%	-1%	-2%	-16%
	9th & 10th graders proficient on the state math test ***	N/A	N/A	N/A	59%	65%	62%	82%	6%	N/A	-17%
	10th graders proficient on the state writing test	86%	85%	84%	85%	86%	85%	95%	1%	0%	-10%
	9th & 10th graders proficient on the state science test	N/A	N/A	N/A	N/A	60%	65%	80%	N/A	N/A	-20%
Students ready for college and work	Students graduating in 4 years or fewer	62%	66%	67%	73%	74%	N/A	80%	1%	12%	-6%
	Students graduating in 6 years or fewer	68%	67%	70%	75%	77%	N/A	85%	2%	9%	-8%
	Graduates prepared for a 4-year college	61%	58%	63%	61%	60%	N/A	80%	-1%	-1%	-20%
	Graduates enrolling in higher education within 1 year of graduation	61%	65%	67%	65%	67%	N/A	80%	2%	6%	-13%
	Graduates taking a college-level course during high school (AP or IB)	51%	53%	59%	65%	65%	N/A	80%	0%	14%	-15%
	Of graduates taking a college-level test in high school, percent passing college-level test	67%	64%	65%	65%	64%	N/A	75%	0%	-3%	-11%

*** First-time test takers only

* Requires at least one full percentage point of growth

** On-Track indicates district will reach 2013 target if current rate of annual improvement is sustained

Demographics

Data as of October 1, 2011

(unless noted otherwise)

American Indian	1%
Black	19%
Hispanic	12%
Asian/Pacific-Islander	19%
White	43%
Multiracial	6%
Free/Reduced Lunch (5/12)	43%
English Language Learners (5/12)	10%
Special Education (5/12)	14%
Accelerated Progress Program (APP) or Spectrum	8%

Student Proficiency on State Tests

Subgroup	Reading 2011-12 Average	Reading 1 Yr. Trend	Math 2011-12 Average	Math 1 Yr. Trend**
American Indian	56%	↑ 1%	43%	↑ 1%
Black	50%	↓ -1%	39%	↑ 4%
Hispanic	61%	↑ 3%	52%	↑ 4%
Asian/Pacific-Islander	77%	↑ 1%	78%	↑ 5%
White	88%	↑ 1%	80%	↓ -2%
Multiracial	79%	↓ -1%	72%	↑ 2%
Free/Reduced Lunch	58%	0%	51%	↑ 5%
ELL	28%	↓ -2%	37%	↑ 7%
Special Education	49%	↓ -1%	32%	↓ -1%
APP or Spectrum	98%	0%	98%	0%

2011-12 Annual Measurable Objectives

Did the district meet the AMO target in reading?	Below
Did the district meet the AMO target in math?	On/Above
Percent of schools on/above AMO for reading:	55%
Percent of schools on/above AMO for math:	61%

Source: http://www.seattleschools.org/modules/groups/homepagefiles/cms/1583136/File/Departmental%20Content/strategicplan/districtscorecard/districtscorecard20112012.pdf

University of Minnesota

FACILITIES MANAGEMENT
UNIVERSITY OF MINNESOTA
Driven to Discover℠

FACILITIES MANAGEMENT
MONTHLY OPERATIONS SCORECARD



January 2014

		All FM								Departments Current Month Score				
	Performance Metric	Current Target	Current Month Score	Metric Status	Fiscal YTD	Previous Four Months								
						Dec	Nov	Oct	Sep	EB	HS	StPW	Central	Energy
ALL FM	Safety Meeting Attendance (bi-monthly)	95+%	-	-		99%	-	99%	-	-	-	-	-	-
	Lost Time Injuries	0	3	Y	-	2	1	2	2	0	1	1	1	0
	Preventive Maintenance - FLS	100%	93%	R	97.3%	96%	95%	100%	99%	86%	98%	98%	33%	94%
	Preventive Maintenance - Non-FLS Critical	90%	64%	R	80.5%	77%	77%	85%	95%	68%	84%	61%	-	39%
	Preventive Maintenance - Non-FLS Non-Critical	85%	76%	Y	86.4%	92%	-	-	-	94%	81%	49%	-	-
	Customer Work Order Response Time	85%	77%	Y	78.7%	77%	76%	78%	85%	74%	80%	77%	72%	50%
	Customer Initiated Work	85%	47%	R	46.4%	49%	42%	43%	55%	49%	51%	49%	28%	36%
	FM Initiated Work	85%	55%	R	55.3%	55%	56%	57%	58%	58%	49%	55%	40%	72%
	Hours Variance	97+%	92%	R	93.4%	93%	93%	94%	95%	96%	96%	94%	81%	85%
	Compass Time Card Accuracy	97%	99%	G	-	99%	99%	99%	99%	99%	99%	99%	99%	100%
	Compass Time Card Approval	97%	91%	R	-	90%	93%	93%	93%	93%	87%	92%	89%	93%
	Budget vs. Actual Expense	> -2%	6%	G	-		6%	6%	9%	4%	4%	-5%	7%	15%
Energy	Campus Energy Report Card	< 95%	97%	Y	-	98%	107%	107%	107%	97%	114%	89%		
	Utility Outages	0	2	R	-	1	0	0	5	-	-	-	-	-
Districts	Custodial Projects Completed On-Time	85+%	92%	G	-	77%	69%	80%	62%	-	56%	99%		
	Custodial Quality Assessment Counts	100%	97%	Y	-	93%	88%	93%	98%	100%	100%	89%		
	Custodial Quality													
Central	Service Center Answer Time	90+%	91%	G	-	92%	95%	90%	93%					
	Elevator Entrapments	N/A	6	N/A	-	5	7	8	4					

Source: http://www.facm.umn.edu/prod/groups/uservices/@pub/@uservices/@fm/documents/content/uservices_content_471610.pdf

University of Washington

FINANCIAL MANAGEMENT

Process	Measure	Current Output Measure	Target		Gap (Target-Output)
CUSTOMER					
Manage Grants	Twelve month average of number of days to setup a new award (from receipt of award in OSP to notification to PI of budget number)	19 days	12 days	↓	7
Disburse Financial Aid	Percentage of Aid disbursed during the 1st week of a quarter.	83% 2012	85% Goal	↑	-2%
	Percent of students satisfied with SFS services.	81% 2010	90% Goal	↑	-9%
Provide Services	Student Educational Tax Credit Reporting: e1098T Utilization ("Opt In") Rate (page 11)	23%	85%	↑	-62%
INTERNAL BUSINESS PROCESS					
Inc. online Trans.	Process online mailing, printing & copying	51%	45%	↑	No Gap
Manage Fin. Rec.	Percent of total count of inter-departmental billings entered in FAS more than 1 month & 1 day from current month	8%	1%	↓	7%
Productivity	Productivity – Annual % change from previous year, using a 2008 base year (benchmark).	11% FY10	0%	↑	No Gap
Pay People	Number of outstanding I-9's	71	50	↓	21

Process	Measure	Current Output Measure	Target		Gap (Target-Output)
FINANCIAL					
Pay Bills	Percent of online invoices paid within 30 days of receipt in PA	93%	95%	↑	-2%
Pay Bills	Reduction in Small Dollar PAS Transactions which should be going through eCommerce.	3,109	2,500	↓	609
Manage Grants	Total uncollected cash for unbilled invoices & aged receivables (cumulative) – JDE	$49 million	$23 million	↓	$26
Bill & Collect Tuition	Percent of students in default on all long-term loans.	7.3% 2011	10.0%	↓	No Gap
Indirect Cost Rates	Five year average of percent annual change in F&A Indirect Cost	6.0%	5.0%	↑	No Gap
Avoid Postage Cost	Maximize Postage Discounts Through Automation	11.4%	8.5%	↑	No Gap
LEARNING & GROWTH					
Develop Staff	Percent of staff highly satisfied with FM (top 2 ratings on scale)	68% 2009	69% Benchmark	↑	-1%
	Percent of staff who agree that "the FM Diversity Initiative has made a positive impact in FM". (top 2 ratings on scale)	56% 2009	90%	↑	-34%
	Percent of staff who state that "they are developing their skills as a knowledge worker" (top 2 ratings on scale)	73% 2009	90%	↑	-17%
	Active Employee Development Plans (EDPs)	24.2%	75%	↑	-51%

Source: http://f2.washington.edu/fm/sites/default/files/dashboards/fm-dashboard-03.2012.pdf

University of Westminster

HR KPI Reporting Summary Information


Positive current position
Upward trend


Negative current position
Upward trend


Positive current position
Downward trend


Negative current position
Downward trend

KPI	Target	Status	Trend	Benchmark	Action
Staff Turnover					
All turnover	Target for overall staffing bill - 54% of income by 2015		• Average increase of 0.32% from previous quarter. • Continued downward trend for Academic staff since Qtr 3 2011. • Continued upward trend for Professional Support staff since Qtr 3 2011.	None available	• Cross-functional workforce reviews in the Corporate Services Group. All new structures are expected to take effect from 1st August 2012. • Workforce planning strategies being developed. • Key post recruitment carefully managed and increasingly competence-based.
Voluntary turnover	As this turnover is voluntary HR does not anticipate setting a target		• Voluntary turnover average is 5.33%. • Turnover in academic staff is lowest recorded since Quarter 2, 2009, at 2.30%, and remains on a downward trend. • Professional Support staff turnover is at its highest since Quarter 2 in 2009 at 8.66%.	Sector ave 6.2%	The focus for HR workforce planning actions continues to be: • Maintaining manager support • Capability building • Information collection and analysis • Organisation design - focus effort and eliminate 'waste' • Introduction of performance management processes
Sickness/Absence					
Ave working days lost per employee	No target set		Decline in the number of working days lost appears to be stabilising at an average 3.31 days, which remains below the sector average	Sector ave is 6 days	• Managers need to ensure sickness reporting is done so that we can have confidence in the numbers. • Continued monitoring of key groups for patterns and/or trends.

Source: http://www.westminster.ac.uk/action=%22/?a=151725

Barclays

Metrics and targets

We have agreed eight key measures against which we and our stakeholders can hold us to account. We are committed to monitoring and reporting on our progress annually.

	Metric	Actual 2013	Target 2018
Customer & Client	RBB, Barclaycard and W&IM: Weighted average ranking of Relationship Net Promoter Score®[a] vs. peer sets	4th	1st
	CIB Client Franchise Rank: Weighted average ranking of wallet share or customer satisfaction with priority clients	4th	Top 3
Colleague	Sustained engagement of colleagues score	74%	87-91%
	% women in senior leadership[b]	21%	26%
Citizenship	CItizenship Plan – initiatives on track or ahead	10/11	Plan Targets
Conduct	Conduct Reputation (YouGov survey)	5.2/10	6.5/10
Company	Return on Equity (Adjusted)	4.5%	> Cost of equity
	Fully Loaded CRD IV CET1 ratio	9.3%	>10.5%

For further information on Balanced Scorecard Methodology and Data Sources please visit barclays.com/balanced scorecard and see the 'Metrics and targets' page

A detailed view of performance against Citizenship Plan targets is available in the Citizenship Report 2013 at barclays.com/citizenshipreport

Source: http://www.barclays.com/content/dam/barclayspublic/docs/InvestorRelations/AnnualReports/AR2013/2013-barclays-annual-report-final.pdf

Credit Valley

BALANCED SCORECARD

CORPORATE SCORECARD FOR FISCAL YEARS 2009-10 AND 2010-11		
Quality	**2009-10**	**2010-11**
Number of Critical Safety Events	91	117
Rate of Hospital Acquired CDAD	0.3	0.3
Rate of Hospital Acquired MRSA	0.3	0.3
Rate of Hospital Acquired VRE	0	0
Rate of Surgical Site Infection Prevention (SSI)	98.59	98.27
Rate of Ventilator Associated Pneumonias (VAP)	3.2	2.1
Rate of Central Line Blood Stream Infections (CLBSI)	0.7	0
Rate of Hand Hygiene Compliance (Before Patient Contact)	59.25	68
Rate of Hand Hygiene Compliance (After Patient Contact)	76	79.25
Hospital Standardized Mortality Ratio (HSMR)	85.31	80.44
Rate of Readmission (%)	2.44	2.4
Rate of Pressure Ulcer Prevalence in Acute Care	22	22
Overall Quality of Care (%) - Inpatient (Med/Surg)	92.25	89.89
Overall Quality of Care (%) - Emergency Department	80.73	82.99
Sustainability	**2009-10**	**2010-11**
Total Margin (%)	-0.38	3.02
Current Ratio	0.88	1.20
Working Capital	-5,033,360	11,170,785
Non-Ministry of Health Funding (%)	10.47	10.72
Full Time Nurses (%)	79.58	78.65
Employee Sick Hours (%)	3.66	3.89
Salaries and Benefits (%)	61.27	59.44
Vacancy Rate (%)	4.94	5.7
Turnover Rate (%)	7.1	7.7
Lost Days Severity Rate (%)	19.55	38.11
Lost Time Frequency Rate (%)	1.22	1.78
Rate of Employee Engagement (%)	66.6	65.93

CORPORATE SCORECARD FOR FISCAL YEARS 2009-10 AND 2010-11		
Access	**2009-10**	**2010-11**
Acute Inpatient Separations	23,463	22,870
Average LOS for Acute Cases	4.87	4.87
Days Over/Under ELOS (%)	-3.31	-3.69
Average Acute RIW	1.01	1.03
Average Outpatient RIW	0.06	0.06
Acute ALC Days (%)	9.5	11.43
Short Stay Admissions (%)	29.99	29.78
Total ER Visits	83,748	87,010
ER - Admissions via ER (%)	11.59	11.67
ER - Percent of admitted patients treated within 8 hours (%)	32.18	35.17
ER - Percent of non-admitted high acuity patients treated within 8 hours (%)	90.08	95.67
ER - Percent of non-admitted low acuity patients treated within 4 hours (%)	93.88	94.72
ER - Percent of ER admits with total LOS less than or equal to 25 hours (%)	N/A	66.92
ER - 90th Percentile Total ER LOS for Admitted Cases (hours)	58.94	55.74
ER - 90th Percentile Time to Physician Initial Assessment (hours)	N/A	3.18
90th Percentile Wait Time - Cancer Surgery (Days)	64	59
90th Percentile Wait Time - CT (Days)	13	17
90th Percentile Wait Time - MRI (Days)	101	68
Total Ambulatory Care Visits	382,547	346,270
Total Day Surgery Visits	21,431	20,744
Complex Continuing Care Inpatient Days	13,658	11,671
Inpatient Rehabilitation Days	14,026	14,260
Mental Health Patient Days	6,410	6,556
Occupancy (%)	91.97	90.56

Source: http://www.cvh.on.ca/agm/2011/pdf/CVH-Annual-Report-2010-2011.pdf

Civil Service Comission of Ontario

OPS Enterprise HR Scorecard

MGS Vision
Modern Government

Key Result (RbP): Make the OPS the "Place to Work"

MGS Strategic Outcome: Dynamic and Innovative People Delivering Quality Public Service

Key Measures:	FY04/05	FY05/06	FY06/07
Overall employee engagement score			
Level of employee satisfaction with senior leadership practices			
Level of employee perception of OPS as an innovative workplace			
Level of employee willingness to recommend OPS as the place to work			
% citizens satisfied with OPS service delivery (62% in 2003)			

	Priority	Strategy	Performance Measures	FY04/05	FY05/06	FY06/07
Commitment to Quality Public Service *Pride in the OPS* **Engaging and Flexible Work Environment** *Shared Values & High Performance*	**Engaging Employees**	Ideas, Innovation and Recognition	- Level of employees satisfied with recognition received for work well done - Level of employee perception of OPS as an innovative workplace - % of OPS ideas adopted and implemented - % of employee participation in the employee survey			
		Performance Management	-% of employees who have had a performance appraisal in last 12 months			
		Organizational Health & Wellness	- Average number of days of short-term sick leave usage per employee			
Capable and Innovative Workforce *Right people. Right role. Right time.*	**Attracting Talent**	Recruitment	- % decrease in time to hire			
		Youth and New Professionals	- % of respondents who evaluate their experience of YNPS corporately-run programs (ie. SEP, OIP, AYWEP, Learn and Work, OQEP) as "good" to "excellent." - % of respondents of YNPS corporately-run programs (ie. SEP, OIP, AYWEP, Learn and Work, OQEP) who wou			
		Total Compensation	- % salaries surveyed within +/- 10% of relevant market			
Learning Organization *Robust Learning Culture* **Dynamic Leadership** *Maximized Leadership Effectiveness*	**Building Capacity**	Leader-Manager Competencies	- % talent management Phase 1 target group assessed against the four leader-manager competencies and with learning and development plans in place - % learning and development courses that are aligned with at least one leader-manager competency			
		Learning and Development	- % respondents rating the quality of corporate learning programs as "good" to "excellent" (4 out of 5 or higher) - # of corporate course offerings provincially and by region - # of participants who attended courses and programs			
		Integrated Talent Management	- % target-group employees in the "move now" category placed within six months - % target-group employees in the "move in future" placed within one year			
		Employee Relations	- % decrease in union policy grievances - # days lost to strike or lock-out			

Source: http://www.mgs.gov.on.ca/stdprodconsume/groups/content/@mgs/@aboutmin/documents/resourcelist/stdprod_093469.pdf

Endumeni Municipality

office@kpiinstitute.org
+61 3 9028 2223

ORGANISATIONAL SCORECARD PMS REPORTING FORMAT FOR THE PERIOD 01 JUL 2013 TO 30 JUN 2014

FINANCIAL SERVICES DEPARTMENTAL SCORECARD PMS REPORTING FORMAT FOR THE PERIOD 01 JUL 2013 TO 30 JUN 2014

KPA	OBJECTIVE	KPI'S	SOURCE	FREQUENCY	EXPLANATION OF RATIOS /KPI	BASELINE	ANNUAL TARGET 2013/14	TARGET FOR THE FIRST 6 MONTHS	ACTUAL FOR FIRST 6 MONTHS	TARGET FOR THE SECOND 6 MONTHS	ACTUAL FOR THE SECOND 6 MONTHS	ACTUAL FOR YEAR	VARIANCE	REASONS FOR PERFORMANCE STATUS	RECOMMENDED CORRECTIVE ACTION	RESP OFFICIAL
Budget process	To meet the MFMA budget process requirements	Compilation and adoption of an annual budget process plan by August 2013 in accordance with Section 21 of the MFMA	MFMA	six months	None	2012/13 IDP and Budget process plan adopted by Council	2013/14 IDP and Budget process plan to be adopted by Council	2013/14 IDP and Budget process plan to be adopted by Council						100% Compliance	0%	CFO
Creditors	To pay creditors within 30 days from date of statement	Creditors days ratio performed quarterly not to exceed 30 days	Creditors Payment System	monthly	This ratio indicates the time taken to pay creditors. Major increases will indicate liquidity problems.	30 days	30 days	30 days		30 days				100% Compliance	0%	Manager Expenditure
Financial viability	To monitor the financial viability of the Endumeni Municipality	**Outstanding Service Debtors** to Revenue as defined in the Municipal Planning and Performance Management Regulations (2001) (A=B/C)	Financial System	Annually	None	46%	44%	22%		22%				100% Compliance	0%	CFO
		Cost Coverage as defined in the Municipal Planning and Performance Management Regulations (2001) (A=(B+C)/D)	Financial System	Annually	None	5:1	6:1	3. 5%		3. 5%				100% Compliance	0%	CFO
		Debt Coverage as defined in the Municipal Planning and Performance Management Regulations (2001) (A=(B-C)/D)	Financial System	Annually	None	16:1	17:1	8.55%		8.55%				100% Compliance	0%	CFO
Financial statements	To meet the MFMA requirements re financial statements	Meeting the deadlines for the completion and submission via Office of the MM of financial statements to the Auditor-General	MFMA	Annually	None	2011/12 Financial statements submitted to the Auditor General via the Office of the Municipal Manger	2012/13 Financial statements to be submitted to the Auditor General via the Office of the Municipal Manger	2012/13 Financial statements to be submitted to the Auditor General via the Office of the Municipal Manger						100% Compliance	0%	CFO

Source: http://www.endumeni.gov.za/Uploads/655131ce-f4fc-40b0-b925-810477e834f6/Departmental%20Scorecard.xls

Oregon Government

One-Page Status Overview of ODOT External Performance Measures

ODOT

	Status	Measure	Definition	Actual	Target	Progress	
Goals	✓	Traffic Fatalities	Traffic fatalities per 100 million Vehicle Miles Traveled	0.99	0.96	⇧	Yes
	★	Traffic Injuries	Traffic injuries per 100 million Vehicle Miles Traveled	1.05	0.70	✗	No
Safety	!	Impaired Driving	Percent of traffic fatalities that involved alcohol	37%	35%	▲	No
Engineering, educating and enforcing a safe transportation system	✓	Safety Belts	Percent of all vehicle occupants using safety belts	97%	95%	⇧	Yes
	✓	Large Truck Crashes	Number of large truck (commercial motor vehicle) at fault crashes	0.33	0.37	⇧	Yes
	✓	Rail Crossing Incidents	Number of highway-railroad at-grade incidents	10	14	⇧	Yes
	✓	Derailment Incidents	Number of train derailments caused by human error, track, or equipment	16	42	⇧	Yes
	✓	Travelers Feel Safe	Percent of public satisfied with transportation safety	83%	74%	⇧	Yes
	✓	Employee Safety	Employee Disabling (time loss) Claims Rate per 100 ODOT Employees	1.72	1.70	⇧	Yes, new measure
Mobility							
Keeping people and the economy moving	✓	Travel Delay	Hours of travel delay per capita per year in urban areas	20	26	⇧	Steady
	!	Incident Response	Roadway Clearance: Percent of lane blocking crashes cleared within 90 minutes	75%	80%	▲	New measure
	✓	Special Transit Rides	Average number of special public transit rides per each elderly and disabled Oregonian annually	8	7	⇧	Yes
	✓	Rail Ridership	Number of rail service passengers	204,480	205,574	⇧	Yes
	✓	Intercity Bus Service	Percent of Oregon communities of 2,500+ with intercity bus or rail passenger service	91%	95%	⇧	Yes
	✓	Commuting to Work	Percent of Oregonians who commute alone to work during peak hours	30%	30%	⇧	Steady
Preservation							
Preserving and maintaining infrastructure	✓	Pavement Condition	Percent of pavement miles rated "fair" or better out of total miles on ODOT highway system	86%	78%	⇧	Yes
	✓	Bridge Condition	Percent of State highway bridges that are not distressed	77%	78%	⇧	Yes
Sustainability							
Sustaining the environment and communities	✓	Fish Passage	Number of priority culverts that need work to improve fish passage	190	191	⇧	Yes
	✓	Bike Lanes and Sidewa	Percent of urban state highways with bike lanes and sidewalks	42%	42%	⇧	Yes
Stewardship							
Maximizing value from transportation investments	★	Construction Jobs	Number of jobs sustained as a result of annual construction expenditures	11,700	14,200	✗	No
	✓	Contracting Timeliness	Percent of projects going to construction phase within 90 days of target date	89%	80%	⇧	Yes
	★	Completion Timeliness	Percent of projects with construction phase completed within 90 days of original date	64%	80%	✗	No
	✓	Projects On Budget	Percent of original construction authorization spent	97%	99%	⇧	Yes
	✓	Certified Businesses	% of ODOT contract dollars awarded to Disadvantaged Business Enterprise (DBE) businesses	10%	12%	⇧	Yes
	✓	Customer Service	Percent of ODOT customers who are satisfied with Services	91%	90%	⇧	Yes
	✓	Office Wait Times	Field Office Wait Time (minutes)	9.8	15	⇧	Yes
	✓	Phone Wait Times	Phone Queue Time (seconds)	29.5	45	⇧	Yes
	✓	Title Wait Times	Title Transaction turn around time (days)	17.8	21	⇧	Yes

Status and Color Formatting: Green (check mark) is within 5% of target, Yellow (!) is within 15% of target and Red (star) is beyond 15% of target.

Print

Source: http://www.oregon.gov/ODOT/CS/PERFORMANCE/docs/2012overview.swf

Tennessee Valley Authority

office@kpiinstitute.org
+61 3 9028 2223

Winning Performance

TVA BALANCED SCORECARD FOR APRIL 2008

	Weight	Status	Actual YTD	Plan YTD	Year-End Forecast	GOALS Threshold	GOALS Target	GOALS Stretch
CUSTOMER								
Delivered Cost of Power Excluding FCA Costs ($/MWh sales)		■	35.00	34.48	35.08	33.91	33.64	33.37
Fuel Cost Adjustment Costs ($/MWh sales)		■	20.72	18.69	21.89	19.48	19.10	18.71
Economic Development (actual/plan)		●	137	100	115	100	115	120
Participation in Energy Efficiency & Peak Shaving Initiatives (percent)		●	97	96	96	96	97	99
Customer Satisfaction Survey (percent satisfied)		●	86	86	84	82	86	89
Connection Point Interruptions (interruptions/connection point)	30%	●	0.31	0.33	0.90	0.90	0.85	0.80
PEOPLE								
Cultural Health Index		●	64.9	64.3	64.3	64.3	66.3	68.3
Safe Workplace (injuries/hours worked)		●	1.08	1.50	1.50	1.50	1.34	1.17
FINANCIAL								
Debt-like Obligations/Asset Value (percent)		●	72.1	72.4	70.5	72.3	72.2	72.1
Earnings/Asset Value (percent)		●	5.8	5.8	10.6	10.4	10.5	10.6
Non-Fuel O&M ($/MWh sales)	40%	■	14.19	14.13	13.85	13.45	13.20	12.95
ASSETS/OPERATIONS								
Key Environmental Metrics (index)		◆	116	118	100	100	120	140
Megawatt Demand Reduction (MW/reduced)		●	20.7	18.8	63.9	63.9	65.2	66.5
Equivalent Availability Factor (percent)	30%	■	85.7	86.3	88.6	89.0	89.5	90.0

Notes:

Participation in Energy Efficiency & Peak Shaving Initiatives, Customer Satisfation Survey, Cultural Health Index and Key Environmental Metrics is not reported monthly.

This scorecard has been posted on the Winning Performance section of TVA's internal Web site.

Status:

- ● = YTD at or better than plan; forecast at or better than threshold
- ▲ = YTD at or better than plan; forecast worse than threshold
- ◆ = YTD worse than plan; forecast at or better than threshold
- ■ = YTD worse than plan; forecast worse than threshold

Source: http://www.tva.com/insidetva/jun08/winning_perf.htm

United States Office of Personnel Management

Summary Performance Tables by Strategic Goal

STRATEGIC GOAL: HIRE *THE* BEST

Performance Measure	FY 2007 Results	FY 2008 Results	FY 2009 Results	FY 2010 Results	FY 2011 Results	FY 2011 Target	Met/ Not Met
Average number of days to hire a Federal employee	n/a	n/a	122 days (baseline)	105 days	*	80 days	*
Percent of agencies with violations of veterans preference laws, rules and regulations	25%	33%	18%	33%	30%	25%	Not Met
Average number of days to complete the fastest 90 percent of initial national security investigations to meet the Intelligence Reform and Terrorism Prevention Act	n/a	n/a	n/a	39	40	40	Met
Investigations determined to be deficient due to errors in investigation processing**	0.12%	0.10%	0.08%	0.16%	0.15%	<1%	Met
Percent of customers satisfied with quality and service of FIS products, policies and guidance	n/a	n/a	n/a	98%	*	96%	*
Percent of employees in the Federal Government with targeted disabilities	n/a	n/a	n/a	.95%	*	1.2%	*

*The FY 2011 results are undetermined. Thus, they will be reported in the FY 2012 APR.

**This measure has been reworded. Last year's APR read "Percent of investigative case returns."

Source: http://www.opm.gov/about-us/budget-performance/performance/2011-annual-report.pdf

Victoria Government Procurement

office@kpiinstitute.org
+61 3 9028 2223

NOTE: THIS IS AN INTERACTIVE TOOL FOR USE

Department of **Treasury and Finance**

KPI and Supplier performance scorecard

Supplier Name		Contract reference		Month		Year	

Area	Key Performance Indicator (KPI)	Performance Target	Measurement	Purpose	Acceptable Score	Score This month	Variance from Acceptable Score	Trend
Quality	Fit for Purpose	Goods or services can be consumed with no rework x% of time	Count of goods/services received that are subject to rework	Rework adds cost to the business by consuming time and effort			0	↑
	Compliant to Specification	Goods or services are provided to contracted specifications x% of time	Count of goods/services that are rejected as unsuitable for consumption	Rejection of goods/services adds cost to the business and may delay delivery of projects			0	↔
Delivery	In full	x% of goods or services are provided in correct volume/quantity	Count of orders that are received incomplete	Incomplete orders may add time and cost to delivery of projects			0	↓
	On time	x% of Goods or services are provided on date/time required	Count of orders that are received later than expected or required delivery time	Late delivery of orders or other deliverables may add time and cost to delivery of projects			0	
	Secure/no Damage	Less than x% of goods/services are defective on receipt by	Count of orders that are received defective and unable to be used	Defective goods and/or services orders may add time and cost to delivery of projects			0	
Cost	To Contract	All goods/services are invoiced at contracted rate or less	Count of rejected invoices as a consequence of incorrect pricing				0	
	To industry benchmark	Price paid is at industry/market benchmark +/- 2%	Periodic industry benchmark of all unit pricing	Vic Government expects to deliver best value to its customers. Overpricing will lead to increased costs passed to customers			0	
Customer Service	The list of areas and KPIs within the "Supplier Scorecard" tab of this tool can be changed to match the agency's requirements	Supplier attends to urgent orders x% of time	Count of urgent orders attended to within customer expectations	Essential services delivery is subject to external forces that force responsive behaviour from suppliers.			0	
	Issue resolution	x% of operational issues are resolved within X hours of notification	Count of issues unresolved within turn time	Unresolved issues add stress to the relationship and could add both cost and time to delivery			0	
Innovation	Strategically Aligned	Senior Management engagement demonstrates understanding of business and alignment of supply to business needs	Count of relevant initiatives presented	Continuous improvement and innovation adds value to the relationship and has potential to reduce costs			0	
	Creative solutions	Supplier presents innovative and creative supply chain solutions to increase performance across one or more KPI areas	Count of relevant initiatives presented	Continuous improvement and innovation adds value to the relationship and has potential to reduce costs			0	
Risk	Risk is known	Open the "Supplier Scorecard" tab and input the standard data at the top of the sheet relating to the supplier, contract, month that the review is happening and year	Presentation of risk management plan	Risk adds complexity to service delivery and potentially adds to both political sensitivity and public health issues			0	
	Risk is managed	Supplier actively manages and reports to Vic govt that known risks are mitigated	Presentation of information demonstrating active mitigation of known risks	Risk adds complexity to service delivery and potentially adds to both political sensitivity and public health issues			0	
Social/ Environmental Responsibility	Alignment to Vic Govt CSR	Supplier knows Vic Govt CSR policy and public position	Presentation of CSR plan that aligns to Government policy position	Unmanaged CSR adds to the public and political risk profile for Vic Government and potentially adds cost			0	
	Management of CSR Agenda	Supplier actively manages and reports to Vic Govt that own CSR policy is managed and effective	Presentation of action plan demonstrating clear management of CSR responsibilities	Unmanaged CSR adds to the public and political risk profile for Vic Government and potentially adds cost			0	
				Overall				↔

Source: http://www.procurement.vic.gov.au/CA2575BA0001417C/WebObj/KPIandSupplierPerformanceScorecardTool(Appendix6)/$File/KPI%20and%20Supplier%20Performance%20Scorecard%20Tool%20(Appendix%206).XLS

Department of Health, Division of Medical Quality Assurance

Department of Health
Division of Medical Quality Assurance
2011-2012 Operational Balanced Scorecard

Perspective	Objective	Strategy	Measure	Data					
				Actual Performance		Targets			
				Baseline	2011-12	2012-13	2013-14	2014-15	2015-16
DOH/MQA Goal: Public Health, Wellness, Prevention, and Protection									
1.0 Internal	1.1 License expeditiously all healthcare professionals who meet statutorily mandated minimum standards of competency	1.1.1 Provide an efficient licensure process that meets statutory requirements	Average number of days to issue an initial license	69↓	73	70	65	60	55
			Average number of days to renew a license online	10	5	4	3	2	1
	1.2 Enforce healthcare standards through timely discipline, education, and remediation of healthcare professionals found in violation of the law	1.2.1 Provide an efficient enforcement process that meets statutory requirements	Average number of days from legal sufficiency to final order for non-priority cases	503	503	475	450	425	400
		1.2.2 Reduce the length of time to issue emergency actions from the date of the event to the date the order is issued	Percent of emergency actions issued in 30 days or less	41%	41%	50%	60%	70%	75%
2.0 Customer	2.1 Inform stakeholders and consumers to enable them to make health care decisions and promote accessible health care	2.1.1 Ensure customers are informed of, have confidence in, and value MQA services	Percent of public record requests completed within 5 days from receipt of request	53%	53%	75%	80%	85%	95%
			Percent of external customers satisfied with services provided by MQA	93%	96.8%	97%	98%	99%	99%

Source: http://www.floridahealth.gov/licensing-and-regulation/reports-and-publications/_documents/2011-2012-op-bal-scorecard.pdf

Medicare Australia

office@kpiinstitute.org
+61 3 9028 2223

Table 2—Balanced scorecard

	Actual 2007–08	Actual 2008–09	Target 2009–10	Actual 2009–10
Finance				
Revenue	$691.0m	$713.9m	N/A	$762.3m
Operating expense	$697.3m	$722.3m	N/A	$724.2m
Net result	($6.3m)	($8.4m)	N/A	$38.1m
Service (public and government)				
Community satisfaction	89%	93%	≥90%	96%
Medical practitioner satisfaction	86%	74%	≥70%	85%
Practice manager satisfaction	89%	87%	≥85%	91%
Pharmacist satisfaction	91%	86%	≥90%	92%
Telephone response time	93%	85.8%	≥90% in 30 seconds	87.6%
Medicare claim processing accuracy	97.8%	98.1%	≥98.0%	97.9%
Medicare average appropriated expense per billable service	-	-	$1.32	$1.26
PBS claim processing accuracy	98.3%	98.3%	≥98%	98.4%
PBS average appropriated expense per billable service	-	-	$0.74	$0.73
Briefs meet satisfactory standard or above	N/A	98%	95%	100%
Ministerial replies to correspondence are submitted within agreed timeframes	N/A	N/A	95%	96%
Prompt payment of software vendor incentive	N/A	N/A	≥90%	90%
Internal business processes				
ICT service availability	99.9%	99.81%	≥99.90%	99.98%
ICT service performance	99.7%	99.46%	≥99.90%	99.89%
Growth and development				
Online claiming take-up—Medicare bulk bill	67.4%	83.6%	≥90%	91.25%
Online claiming take-up—Medicare patient claim	12.6%	14%	≥25%	25.39%
Online claiming for PBS take-up—number and percentage of participating pharmacies	4962 95%[1]	5099 97.03%	98%	5198 96.22%
Residential Entry Record (RER) Admission Form online	N/A	N/A	≥49%	44.4%
Residential Classification (ACFI) online	N/A	N/A	≥80%	80.6%
Residential Care Claim online	N/A	N/A	≥49%	30.5%
Community Care Claim online	N/A	N/A	≥8%	7.4%
Aged Care Client Record (ACCR) ACAT's online	N/A	N/A	≥70%	37.6%
People				
Overall staff satisfaction	70%	56%[2]	N/A	65%^
Unscheduled absenteeism rate	13.2%	13.55%	13.4%	14.36%
Social and environmental				
Energy usage—office—tenant light and power per person	6944MJ	6467MJ	≤ 10 000MJ	6596MJ^^

1 It was incorrectly reported in the balanced scorecard section of the 2007–08 Annual Report that the percentage of participating pharmacies was 99%. The correct figure was 95%.

2 For the 2009 Staff Survey a different engagement methodology calculation was used. The reported result was 11% higher than the Australian Public Sector average.

^ This figure should not be compared to previous years' figures, as the survey methodologies differed again this year. Different questions were asked and different calculations were used to produce the engagement measures.

^^ To be independently verified in October 2010.

Source: http://www.humanservices.gov.au/spw/corporate/publications-and-resources/annual-report/resources/0910/medicare-australia-annual-report-0910-full-report.pdf

The South African Medical Research Council

Strategic objectives, performance indicators, planned targets and actual achievements

STRATEGIC OBJECTIVE	ANNEXURE E INDICATOR DESCRIPTIONS	NO.	PROGRAMME PERFORMANCE INDICATOR	PERFORMANCE: 2011/12	ANNUAL TARGET PER INDICATOR	2012/13 APP TARGET	REPORTING FREQUENCY	TOTAL PERFORMANCE TO DATE AGAINST ANNUAL TARGET	VARIANCE (EXPLANATION WHY TARGETS WERE NOT MET OR EXCEEDED BEYOND 10% OF THE TARGET)
Health research is undertaken	Number of peer-reviewed journal articles published during the year to create new, quality knowledge through research with expert endorsement from specialists in the field	1,1	Number of peer-reviewed journal articles published during the year	518	**328**	**430**	Quarterly	**491**	The targets set for this indicator were based on unit performance in previous years. Corrective action: These targets have now been reviewed and increased in the 2013/14 Annual Performance Plan. Further action will be to review all submissions from units in order to compare the individual performance against the projected performance in the unit APP document.
		1,2	Number of technical reports published by intra and extramural units	41	**76**		Quarterly	**31**	This indicator and target was set prior to the re-focusing of the MRC on journal articles. Note that the decrease in technical reports is accompanied by an increase in articles. Corrective action: These targets are being reviewed and will be decreased in the 2013/14 Annual Performance Plan.
		1,3	Number of book/book chapters published within the intra and extramural research units	Books and book chapters included in 1.1	**26**		Annually	**30**	The target set for this indicator was set based on reported performance as submitted by units in their respective APP documents. Corrective action: These targets will be reviewed and increased in the 2013/14 Annual Performance Plan. Further action will be to review all submissions from units in order to compare the reported performance against the projected performance in the unit APP document.
National health research facilities are managed	Number of MRC research facilities managed in the year to ensure that the facilities are risk-free and as per national operating standards according to applicable policies	2,1	Number of risk assessments completed	Not included in 2011/12	**2**	**4**	Annually	**2**	
		2,2	Number of cost-benefit analysis initiatives done over the year.		**1**		Annually	**1**	
		2,3	EMC approved minimum acceptable standards per building		**1**		Annually	**1**	

Source: http://www.mrc.ac.za/annualreport/annualreport2012-13.pdf

UK Healthcare

office@kpiinstitute.org
+61 3 9028 2223

UKHealthCare

Building a World-Class IT Function

IT Balanced Scorecard
March 2014

	March	Target	World Class	12 Months	Initiatives
Quality/Safety					
EMR Availability	99.987%	99.000%	99.999%	99.436%	• Proactive Monitoring • Performance Improvements • Information Technology Rounding
Measured as the availability of SCM where the synthetic transactions "SCM Login Time" and "SCM Emergency Care Launch Time" both taking less than 180 seconds to complete. Red(0-98.0) Yellow(98.1-98.9) Green(99.0+)					
Process Improvements (LEAD)	57.1%	70.0%	100.0%	57.1%	• UK HealthCare 8 Step Lean Training Program
Measured by the LEAD team members who have completed the 8 step LEAN training program and/or have LEAN certification. Target is for calendar year 2014. Red(0-24) Yellow(24-69) Green(70+)					
Process Improvements (IT)	20.1%	25.0%	100.0%	20.1%	• UK HealthCare 8 Step Lean Training Program
Measured by the IT team members who have completed the 8 step LEAN training program and/or have LEAN certification. Target is for calendar year 2014. Red(0-9) Yellow(10-24) Green(25+)					
Service Excellence					
Service Experience	4.76	4.85	4.95	4.76	• Call Monitoring • First Contact Resolution • Service Recovery
Measured using metrics from industry benchmark organization HDI and includes aspects of courtesy, timeliness, knowledge and quality of the entire service experience. Red(0-4.64) Yellow(4.65-4.84) Green(4.85+)					
Talent Retention	99.6%	99.0%	99.5%	99.3%	• Mentoring Program • Succession Program • Scottsdale Institute, HIMSS, The Advisory Board
Measured as the ratio of voluntary separations to average number of employees during the period. Red(0-97.9) Yellow(98.0-98.9) Green(99.0+)					
Efficiency					
Priority Incident Resolution	94.4%	95.0%	99.9%	95.8%	•Daily Operations Call •Weekly SLA Review
Measured as the percentage of incidents (severity levels 1 & 2) resolved within service level agreement targets. Red(0-91.9) Yellow(92.0-94.9) Green(95+)					

Source: http://ukhealthcare.uky.edu/uploadedFiles/about/For_staff/IT/balance_scorecard.pdf

Eskom

Performance against shareholder compact

Eskom

Key performance areas	Key performance indicator	Unit	Target March 2013	Target achieved *	Actual March 2013	Actual March 2012	Actual March 2011
Keeping the lights on	Management of national supply / demand constraint	Load shedding (Yes/No)	No	●	No	No	No
	DSM energy efficiency	GWh	1 827	●	2 244	1 422	1 339
	Internal energy efficiency	GWh	20.0	●	28.9	45.0	26.2
Improving operations	UCLF	%	6.00	●	12.12[1]	7.97	6.14
	SAIDI	Hours	47.00	●	41.89	45.75	52.61
	System Minutes <1	Minutes	3.40	●	3.52	4.73	2.63
Delivering capital expansion	Generation capacity installed and commissioned	MW	260	●	261	535	315
	Transmission lines installed	Km	900	●	787	631	443
	Transmission capacity installed and commissioned	MVA	3 545	●	3 580	2 525	5 940
Reducing Eskom's environmental footprint	Relative particulate emissions	kg/MWh	0.30	●	0.35	0.31	0.33
	Water usage per kWh sent out	L/kWh	1.32	●	1.42	1.34	1.35

1. The 12.12% cumulative UCLF consists of energy losses of 7.54% (excluding losses due to the Duvha Unit 4 outage, emission control and short-term outages) plus energy losses of 1.17% for the Duvha Unit 4 outage and energy losses of 3.41% due to decisions by management for emission control and short-term outages

Eskom | Powering your world

* **Key:** ● 2012/13 performance exceeded the target for the year
● 2012/13 performance did not meet the target for the year

8

Source: http://overendstudio.co.za/online_reports/eskom_ar2013/pdf/presentation.pdf

Wisconsin Department of Transporation

office@kpiinstitute.org
+61 3 9028 2223



Wisconsin Department of Transportation
MAPSS Performance Scorecard

✓ Goal has been met | ↑ Performance is trending in a favorable direction | ↔ Trend is holding | ↓ Performance is trending in an unfavorable direction

Performance measure	How we measure it	Current report period	Goal	Goal met	Trend	Comments
Mobility: Delivering transportation choices that result in efficient trips and no unexpected delays.						
Delay (hours of vehicle delay) Seasonal quarter Winter 2014	Number of hours spent in interstate traffic below posted speed	1,828,154 hrs.	Reduced hours of delay		↓	This is a new measure to identify delay on the interstate system. WisDOT will deploy traffic management strategies and evaluate the impact of changes (a lower number is better).
Reliability (planning time index) Seasonal quarter Winter 2014	Index based on extreme travel time in a period	1.20	More on-time arrival		↓	This is a new measure to identify delay on the interstate system. WisDOT will deploy traffic management strategies and evaluate the impact of changes (a lower value is better).
Transit availability Calendar year 2013	Percent of population served by transit	54.0	75.0		↔	Economic factors affecting this measure include rate of inflation in relation to funding.
Bicycle accommodation Calendar year 2013	Percent of state highway miles with safe bicycle accommodation	67.2	100 percent, except where prohibited		↓	State highway traffic volumes increased which resulted in a net loss of safe bicycle accommodations.
Incident response Calendar year 2013	Average time to clear full closures on the interstate	4 hrs. 22 min.	Decrease response time by 5 percent compared to the prior year		↓	Severe weather events with multi-car incidents are the largest factor impacting this measure. The department continues to partner with first responders and public safety officials to identify ways to improve.
Winter response State fiscal year 2013	Percentage to bare-wet within a specific time period after a storm	70 for 18-hour roads; 75 for 24-hour roads	70.0 within specified time	✓	↓	18-hour roadways are typically maintained from 4 a.m. to 10 p.m. when conditions warrant. 24-hour roadways are maintained 24 hours a day when conditions warrant.

Source: http://www.dot.wisconsin.gov/about/performance/goalmobility.htm





The KPI Institute

Celebrating 10 Years of PERFORMANCE

Life.lab Building
198 Harbour Esplanade, Suite 606
Melbourne Docklands, VIC 3008, Australia
T:+61 3 9028 2223 M:+61 42 456 8088
E: office@kpiinstitute.org
W: www.kpiinstitute.org




