

Enterprise Key Performance Indicators (eKPI)

User Manual

*An automated online system for tracking Key Performance Indicators and other
Performance Measures for Palm Beach County*



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Overview

In 2017, ISS introduced a new business intelligence application – eKPI for capturing and reporting departmental performance measures. With the creation of the Strategic Planning & Performance Management Division in the Office of Financial Management and Budget, this KPI-focused platform was updated to create the County’s Performance Measures Reporting process, which started in 2019. With collaboration between ISS and Strategic Planning & Performance Management, eKPI has become truly robust and provides departments the ability to create and track internal KPIs deemed important by management, including program workload, relevant operating statistics, cost data, and grant reporting requirements.

eKPI is a vast improvement over the existing SharePoint-based worksheets designed to simplify and, in some cases, automate the processes for collecting and reporting the underlying data for departmental performance measures.

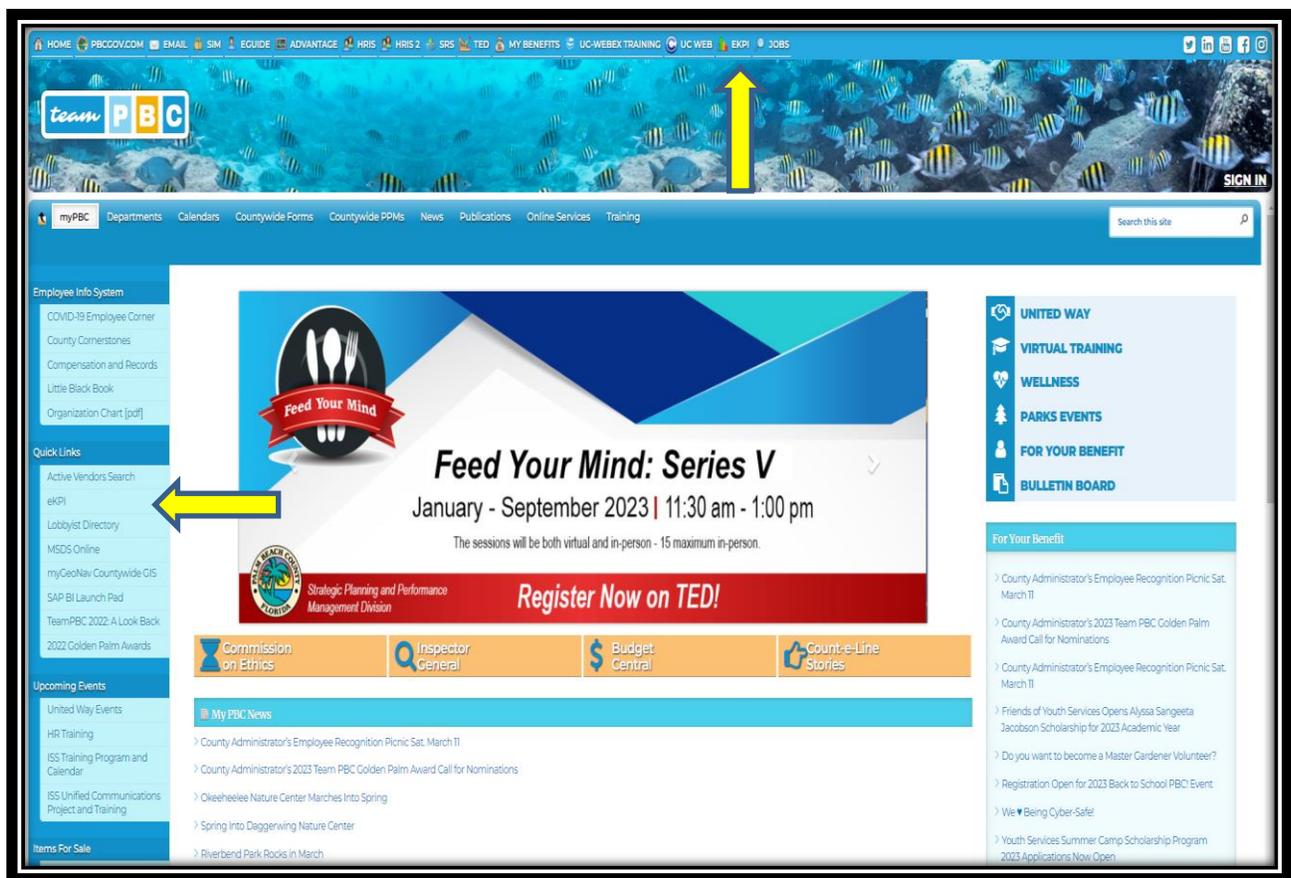
The system can interface with other departmental systems and databases to automatically extract data for display in an eKPI, and also provides a very intuitive data entry screen for manually entering information. Also included in the application is a host of standard and customizable KPI Reports to improve performance reporting.

Additionally, the eKPI application provides a window into the department’s performance through simplified data visualizations such as graphs and dashboards. These customizable dashboards offer intuitive drill-downs providing instant access to understandable metrics that are intuitive, informative, and actionable.

Locating the eKPI Application Online

The eKPI application may be found in the County's main intranet page: pbcportal.pbcgov.org. There is an eKPI tab at the top of the page, as well as on the column titled "Quick Links" on the left of the page. The username and password for eKPI is the same as the SIM information used to log into County computers. However, access to the application for data entry must be granted by ISS via a request from the Senior Strategic Planning & Performance Analyst in OFMB.

Detailed information about the County's overall Strategic Plan, Mission, Vision and six Strategic Priorities may be found in the Strategic Planning and Performance Management Division's intranet page: <https://pbcportal.pbcgov.org/ofmb/SPPM/default.aspx>.



Strategic Planning and Performance Management is in the Governmental Center, located at:
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Login

1. Click on <http://pbc/ekpi>
2. Login with HRIS/SIM user id password



Performance Indicator Screen

Provides listing of all KPIs included in the OFMB Performance Measurement Book. Provides departments the ability to create and track internal performance measures deemed important by management, including program workload, relevant operating statistics, cost data, and grant reporting requirements.

1. Click on KPIs on the menu, the following screen appears

Objective	Performance Type	Division Program	SP	Monthly	Quarterly	Yearly	KPI	MR	BB	Action
Assure all budget transfers and amendments are processed in compliance with...	Number of budget transfers and amendments	Budget Division				Y				
Assure receipt of GFOA'S Distinguished Budget Presentation Award to indepen...	Receipt of GFOA'S Budget Presentation Award (Not Proficient-0, Proficient-1, Outstanding-2)	Budget Division				Y				
Receive Truth in Millage (TRIM) Certification as required by Florida Statut...	State Approval of TRIM material (Options are Approved-1 or Not Approved-0)	Budget Division				Y				
Review and/or provide fiscal comments/recommendations to County Administrat...	Percentage of agenda items submitted to OFMB past due date	Budget Division		Y						
Review and/or provide fiscal comments/recommendations to County Administrat...	Number of agenda items received and reviewed	Budget Division		Y						
Review and/or provide fiscal comments/recommendations to County Administrat...	Percentage of agenda items reviewed without corrective action required	Budget Division		Y						
To ensure we are budgeting a reasonable amount for our major revenues, incl...	Percentage of Major Revenues Collected vs. Budget	Budget Division				Y				
Ensure that all items reviewed and approved by CDC comply with PPMs, Board ...	Contract Review Committee items reviewed and processed.	Contract Division		Y						
Ensure that all items reviewed and approved by CDC comply with PPMs, Board ...	Contract-related items reviewed and processed.	Contract Division		Y						
Ensure that all items reviewed and approved by CDC comply with PPMs, Board ...	Percentage of contract related items to Contracts Div. requiring rework.	Contract Division		Y						
Ensure that all items reviewed and approved by CRC comply with PPMs, Board ...	Percentage of Contract Review Committee items requiring rework.	Contract Division		Y						
Provide workshops to County Staff based on contracting and records procedur...	Satisfaction of County staff pertaining to Contracting and Records Workshops.	Contract Division				Y				
Provide workshops to County staff based on contracting and records procedur...	Conduct Contracting and Records Workshops to County staff.	Contract Division				Y				
Review records destruction requests submitted by departments and submit fin...	Percentage of records destruction requests from other departments requiring rework.	Contract Division		Y						
Review records destr...	Records destruction request reviewed & processed.	Contract Division		Y						

2. Click on **“Add New”** button at the bottom of the Performance Indicators screen, and the **“Add New Performance Indicator”** Screen appears (see next page).

- Click on the “**Department Info**” button at the bottom of the Performance Indicators screen and be directed to a Budget Book Form Search screen to provide access to the forms to be completed for the Budget Book.

Update Performance Type

Department: Office of Financial Management & Budget

Division Program: Budget Division

Objective: Receive Truth in Millage (TRIM) Certification as required by Florida Statutes

Description: State Approval of TRIM material (Options are Approved-1 or Not Approved-0)

Metric Calculation: Options are Approved-1 or Not Approved-0

Strategic Priority: CENTRALIZED/SUPPORTING DEPARTMENT

Fiscal Year: 2022 Unit of Measure: Rating Measurement Type: Outcome

Reported Monthly:

Reported Quarterly:

Reported Yearly:

KPI:

Budget Book KPI:

Management Report KPI:

For this metric choose whether you want to show it monthly, quarterly or yearly for the Management Report. Please Select: * Yearly

RAG:

2022 Min: Monthly Minimum: 1

2022 Target: Monthly Target: 1

2022 Stretch Goal: Monthly Goal: 1 I

Monthly Quarterly Yearly

Preferred Trend: Up

- The Minimum/Maximum has not been met
- The metric is at or below the Minimum/Maximum but not at the Target
- The Target has been met or exceeded
- The Goal has been exceeded

Update Close

- Enter all the required fields marked with an asterisk (*).
- Choose the **Strategic Priority**(ies) associated with the KPI, from the list (can be multiple), if any: **Economic Development, Housing/Homelessness, Environmental Protection, Infrastructure, Public Safety, Substance Use and Bahvior Disorders.**

Metric Calculation: Options are Approved-1 or Not Approved-0

Strategic Priority:

Fiscal Year: ECONOMIC DEVELOPMENT

Reported Monthly: HOUSING/HOMELESSNESS

Reported Quarterly: ENVIRONMENTAL PROTECTION

Reported Yearly: INFRASTRUCTURE

KPI: PUBLIC SAFETY

Budget Book KPI:

Management Report KPI: For this metric choose whether you want to show it monthly Yearly

- Centralized/Supporting Departments** (Administration, Equal Opportunity, ISS, Legislative Affairs, Public Affairs, Purchasing) automatically have “Centralized/Supporting Department” generated in the Strategic Priority section but can choose more options as appropriate per KPI.

- Choose how you want to report your KPI (Monthly, Quarterly, and/or Yearly).

7. A department and/or division may create as many KPI's as wanted, but not all KPI's will be reported to Management Team, in Budget Book, or for Performance October.
8. Mark the KPI "Yes" if you want the new performance indicator to be identified as a "top" KPI, or "**Key KPI**". **These should be the KPI's that best showcase a department's success or need for improvement (no limit on how many Key KPI's) created, but a maximum of 10 KPIs are allowed for reporting to the Management Team Meeting in May and the Budget Book Report.**
 - a. For the "**Print Management Report**" you **must** select one of the frequency options from the drop-down list box (Monthly, Quarterly, or Yearly).
 - b. For the "**Print Only Key KPI(s) Report**" (**Scorecard**), enter the RAG values for min/max, target, and goal. Enter a monthly, quarterly, and(or) yearly RAG when reporting for those time intervals.

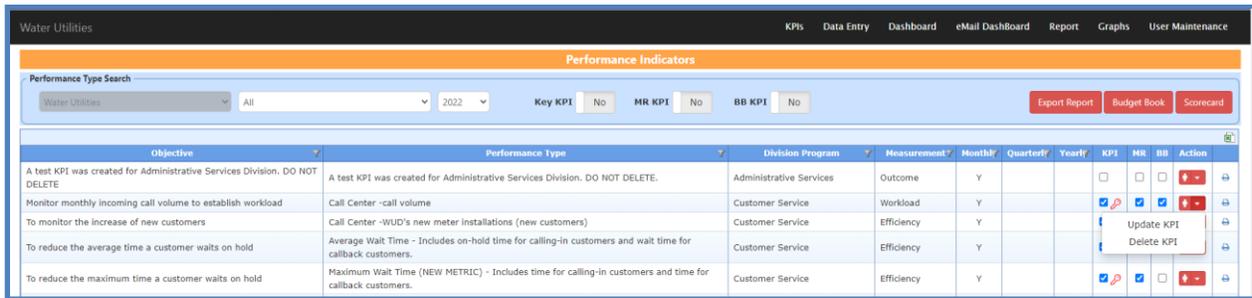
9. **In order to choose Budget Book KPI or Management Report KPI, KPI must be chosen as Key KPI first.**
10. If you uncheck Key KPI, it will uncheck Budget Book and Management Report KPI as well.
11. Mark the Budget Book KPI "Yes" if you want the new performance indicator included in the "**Budget Book.**"
12. Choose the Preferred Trend (Down, Up)

** RAG numbers should go from smallest to largest if trend is going up, and from largest to smallest if trend is going down.

13. Click on the "**Save**" button to save the data. Click on the "**Close**" button to close the pop-up window.

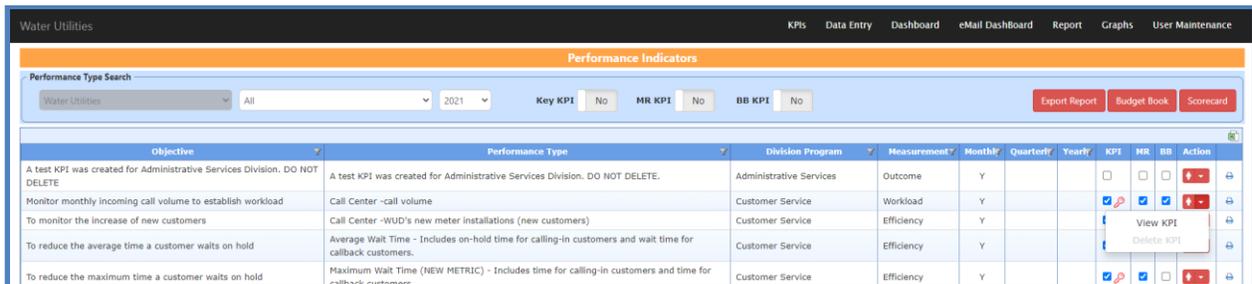
Update / Delete

- To update/delete the Performance Indicator, click on the dropdown icon under “Action”  the following screen appears. Click the action you wish to perform.



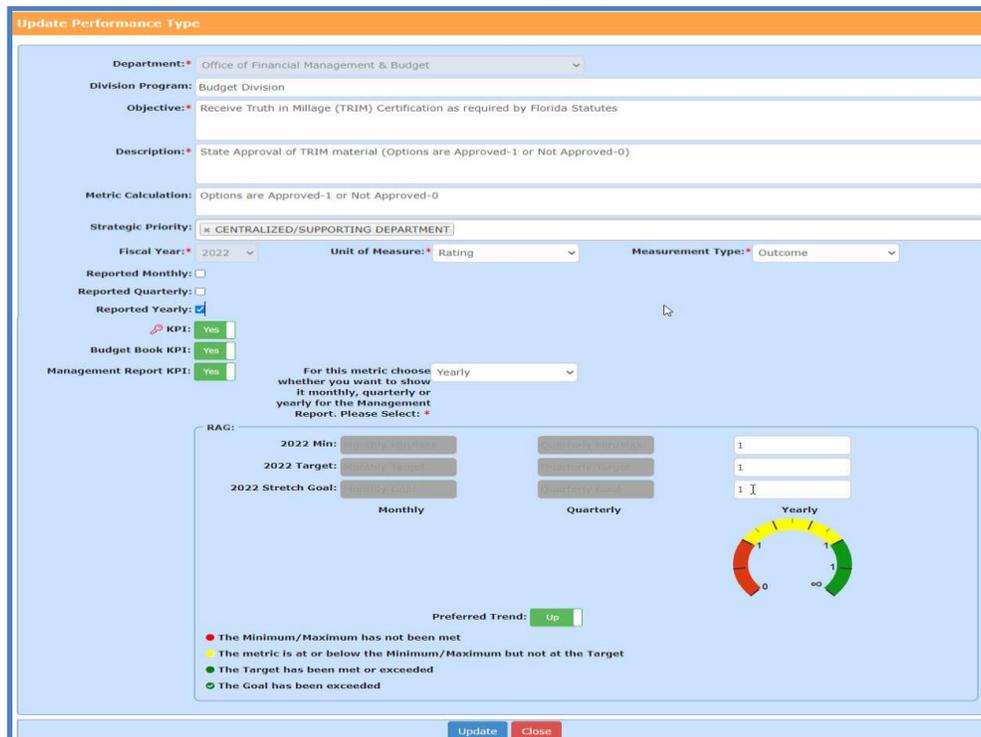
Objective	Performance Type	Division Program	Measurement	Monthly	Quarterly	Yearly	KPI	MR	BB	Action
A test KPI was created for Administrative Services Division. DO NOT DELETE	A test KPI was created for Administrative Services Division. DO NOT DELETE.	Administrative Services	Outcome	Y			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Monitor monthly incoming call volume to establish workload	Call Center -call volume	Customer Service	Workload	Y			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
To monitor the increase of new customers	Call Center -WUD's new meter installations (new customers)	Customer Service	Efficiency	Y			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
To reduce the average time a customer waits on hold	Average Wait Time - Includes on-hold time for calling-in customers and wait time for callback customers.	Customer Service	Efficiency	Y			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
To reduce the maximum time a customer waits on hold	Maximum Wait Time (NEW METRIC) - Includes time for calling-in customers and time for callback customers.	Customer Service	Efficiency	Y			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Note: You can update/delete KPI only for current Fiscal Year. For other years, you can only view KPI



Objective	Performance Type	Division Program	Measurement	Monthly	Quarterly	Yearly	KPI	MR	BB	Action
A test KPI was created for Administrative Services Division. DO NOT DELETE	A test KPI was created for Administrative Services Division. DO NOT DELETE.	Administrative Services	Outcome	Y			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Monitor monthly incoming call volume to establish workload	Call Center -call volume	Customer Service	Workload	Y			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
To monitor the increase of new customers	Call Center -WUD's new meter installations (new customers)	Customer Service	Efficiency	Y			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
To reduce the average time a customer waits on hold	Average Wait Time - Includes on-hold time for calling-in customers and wait time for callback customers.	Customer Service	Efficiency	Y			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
To reduce the maximum time a customer waits on hold	Maximum Wait Time (NEW METRIC) - Includes time for calling-in customers and time for callback customers.	Customer Service	Efficiency	Y			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

- Click on “Update KPI” and make the changes you want to the KPI.



Update Performance Type

Department: Office of Financial Management & Budget

Division Program: Budget Division

Objective: Receive Truth in Millage (TRIM) Certification as required by Florida Statutes

Description: State Approval of TRIM material (Options are Approved-1 or Not Approved-0)

Metric Calculation: Options are Approved-1 or Not Approved-0

Strategic Priority: CENTRALIZED/SUPPORTING DEPARTMENT

Fiscal Year: 2022 Unit of Measure: Rating Measurement Type: Outcome

Reported Monthly: Reported Quarterly: Reported Yearly:

KPI: Budget Book KPI: Management Report KPI:

For this metric choose whether you want to show it monthly, quarterly or yearly for the Management Report. Please Select: Yearly

RAG:

2022 Min: [input] 2022 Target: [input] 2022 Stretch Goal: [input]

Monthly Quarterly Yearly

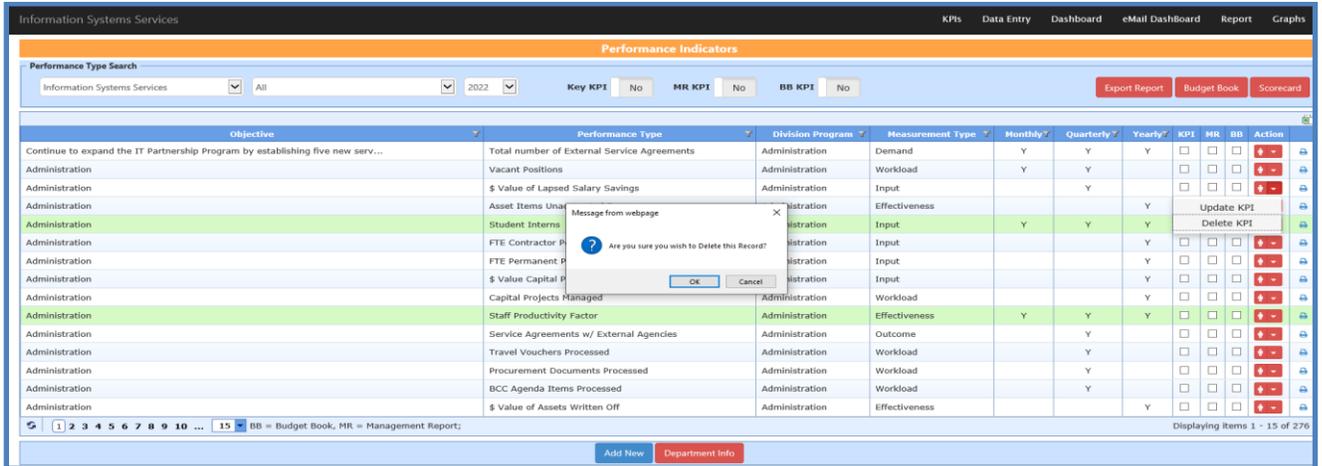
Preferred Trend: Up

- The Minimum/Maximum has not been met
- The metric is at or below the Minimum/Maximum but not at the Target
- The Target has been met or exceeded
- The Goal has been exceeded

Update Close

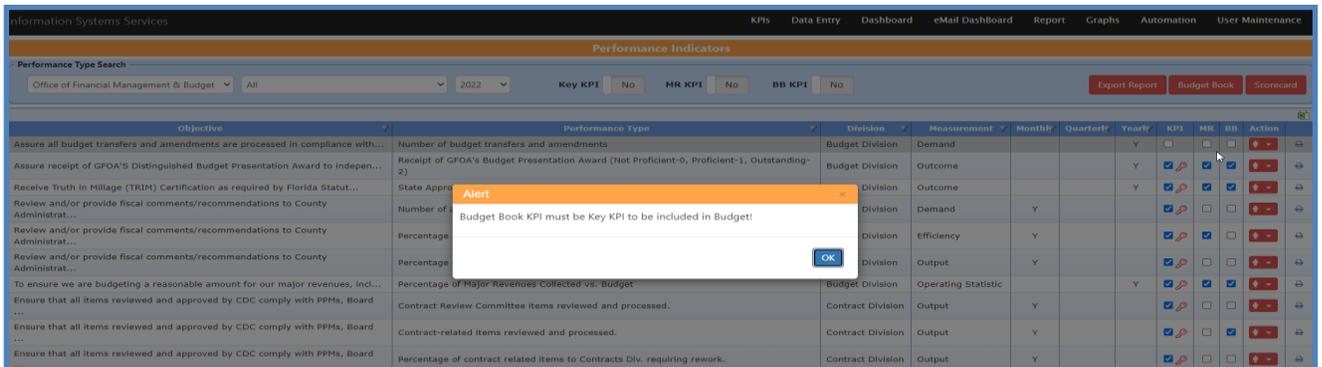
- Click on “Update” to Update and Save the KPI.
- Click on “Scorecard” to view/print a report of this KPI only.
- Click on “Close” to close the popup screen.

- Click on **“Delete KPI,”** and a message is displayed to confirm that you want to delete this performance indicator.

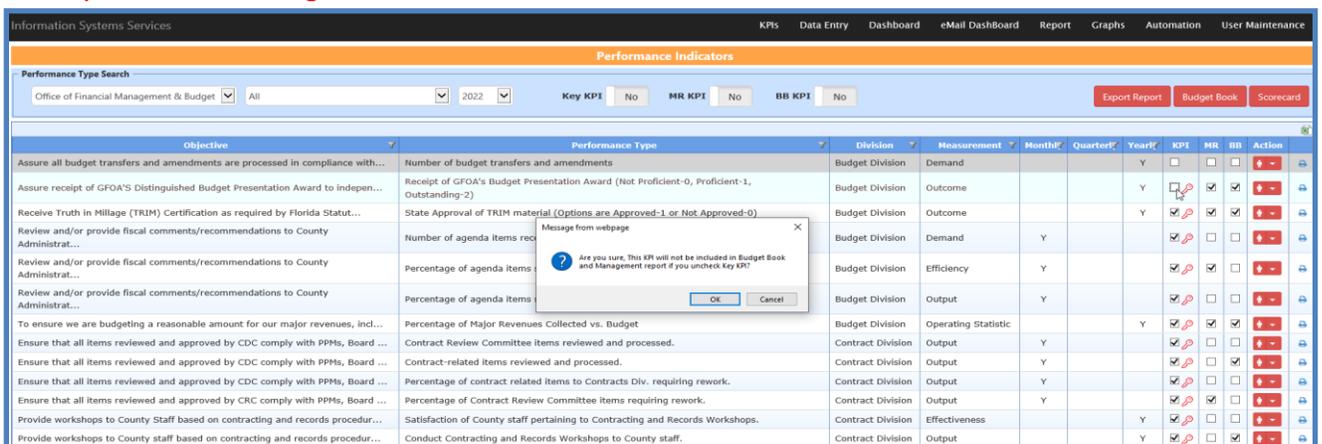


- Click **OK**, and a **“Record deleted”** message will appear.
- Click **Cancel** to stop the performance indicator from being deleted.

Note: In order to choose Budget Book KPI or Management Report KPI, KPI must be chosen as Key KPI. A message will pop up when you try to select Budget book KPI without selecting Key KPI.



Note: If you uncheck Key KPI, it will also uncheck Budget Book and Management report KPI and show you below message:



Reporting Options:

Export Report Button

1. Click on the “Export Report”  button or the Excel  icon to export the data on the screen into an Excel report.

KPI_SEQ	DESCRIPTION	DIVISION	ACTUAL	ESTIMATE	PROJECTE	MONTHLY	QUARTERLY	YEARLY	AUTOMATOCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	Q1	Q2	Q3	Q4
8244	Total num Finance at		46	59	64	N	Y	N																
8111	Work Ordri Platform \$N/A		N/A	N/A	Y	Y	Y	Y		100	106	87	130	107	94	133	114	118	118			293	331	365
8118	Past Due F Platform \$N/A		N/A	N/A	Y	Y	Y	Y		24	18	21	26	16	19	23	11	18	12			63	61	52
8119	Mean Tim Platform \$N/A		N/A	N/A	Y	Y	Y	Y		47.31	41.62	64.9	39.71	38.31	54.26	31.43	61.59	96.76	26.61			52.59	43.83	61.81
8120	Past Due V Platform \$N/A		N/A	N/A	Y	Y	Y	Y		18	22	13	24	17	24	24	27	26	8			53	65	77
8124	Hours Cha Platform \$N/A		N/A	N/A	Y	Y	Y	Y		2468.75	2174	1939	2344.38	2298	2575.75	2649	2467.75	2378	2007			6581.75	7218.13	7494.75
8129	Capital Pri Customer N/A		N/A	N/A	Y	Y	Y	N		1												1	0	
8131	FTE Contri Customer N/A		N/A	N/A	Y	Y	N	N		0												0	0	
8133	Pages Prir Customer N/A		N/A	N/A	Y	Y	N	N		23544	31633	210361	50786									265538	50786	
8134	Student Ir Customer N/A		N/A	N/A	Y	Y	Y	Y		2	2	2	2	2	2	2	2	2	2			2	2	2
8136	Customer Customer N/A		N/A	N/A	Y	Y	Y	Y		100	100	100	100	100	94.11	100	96.82	98.21	92.1			100	94.29	98.3
8137	Help Desk Customer N/A		N/A	N/A	Y	Y	N	N		1025	952	854	918	697	804	895	825	829				2831	2419	860
8138	Average C Customer N/A		N/A	N/A	Y	Y	N	N		4.07.23.36.5.14.06.19.2.06.00.15													7.07	
8141	Maximum Customer N/A		N/A	N/A	Y	Y	N	N		18.53	26.48	26.49	19.3	14.07	15.34	19.48	2.08	27.46				71.5	48.71	49.02
8143	Network f Customer N/A		N/A	N/A	Y	Y	N	N		692	731	753	697	701	699	706	658	658				2176	2097	2022
8144	Staff Prod Customer N/A		N/A	N/A	Y	Y	Y	Y		83.31	78.49	77.56	87.81	86.91	84.46	86.1	84.76	79.31	46.93			79.91	86.35	83.41
8145	Tickets As Customer N/A		N/A	N/A	Y	Y	Y	Y		518	497	406	491	430	502	514	510	457	435			1421	1423	1481
8146	Total Prob Customer N/A		N/A	N/A	Y	Y	Y	Y		518	517	396	501	413	517	503	505	467	435			1431	1431	1475
8147	Work Ordri Customer N/A		N/A	N/A	Y	Y	Y	Y		117	102	97	108	100	109	116	144	145	114			316	316	404
8148	Work Ordri Customer N/A		N/A	N/A	Y	Y	Y	Y		105	101	87	113	92	115	110	147	127	105			293	320	384
8150	Past Due F Customer N/A		N/A	N/A	Y	Y	Y	Y		40	37	24	39	19	22	18	21	26	38			101	80	65
8151	Mean Tim Customer N/A		N/A	N/A	Y	Y	Y	Y		29.85	23.94	35.71	28.46	36.37	32.66	33.23	39.75	37.33	26.77			29.46	32.33	36.74
8152	Past Due V Customer N/A		N/A	N/A	Y	Y	Y	Y		23	18	28	21	25	22	20	24	30	14			69	72	74
8153	Problem T Customer N/A		N/A	N/A	Y	Y	Y	Y		301	292	243	300	254	322	288	287	314	264			836	876	889
8154	Problem T Customer N/A		N/A	N/A	Y	Y	Y	Y		212	199	157	184	170	170	213	216	133	165			568	524	562
8155	Problem T Customer N/A		N/A	N/A	Y	Y	Y	Y		179	191	125	185	176	139	134	133	101	119			495	500	368
8156	Help Desk Customer N/A		N/A	N/A	Y	Y	Y	N		1144	1066	1066	1004	768	865	972	952	953				3276	2637	2877
8234	% Comple Applicatic		10%	30%	60%	Y	Y	N		31	33	34	35	37	39	41	43	44	45			33	37	42
8235	% Comple Applicatic		40%	75%	100%	Y	Y	N		76	79	81	86	90	95	100						77.5	88	100
8236	Customer Customer		85%	90%	98%	N	Y	N																
8237	% Comple Platform \$		0%	10%	100%	Y	Y	N																
8238	Decrease Customer N/A		8%	10%	N	Y	Y	N																
8239	Digital Coi Customer N/A		Top-10	Top-10	N	N	Y	N																
8241	% Comple Network \$		0%	50%	Y	Y	Y	N																
8242	Total Rev Finance at \$455,627		\$508,294	\$610,600	N	Y	Y	N																
8243	% Comple Applicatic		25%	50%	100%	Y	Y	N		60.4	61.8	63.2	64.6	66	67	68	70	71.6	73			61.8	65.3	69

Scorecard Button

1. Click on the “Scorecard”  button to display and print the Scorecard Report for performance indicators displayed. You will have the option to Cancel, or Select the Division Program and one of All Performance Indicators, Management Report, Key Performance Indicators, or Budget Book KPIs as shown below:

Information Systems Services - Performance Report

Depending on the number of KPIs for your department, this report may take a longer time to generate:

Division Program

See an example of a Performance Report (Scorecard) at the end of this guide.

Note: The Print Management Report will only print reports for 10 Key KPI’s identified, along with only ONE frequency chosen (Monthly, Quarterly or Yearly).

Budget Book Button

1. Click on the **“Budget Book”**  button to display and print the Budget Book Report for the Budget-Book-only Performance Indicators displayed. You will be able to Cancel, Print the Objectives/Performance Measures or Print Budget Book management report as shown below:

Information Systems Services - Budget Book Report

Please select the report

Cancel
Ok, Print Objectives/Performance Measures
Ok, Print BB Mgt Report

Office of Financial Management & Budget		Palm Beach County, FL			
PERFORMANCE MEASUREMENTS		Actual FY 2021	Actual FY 2022	Target FY 2023	Target FY 2024
Conduct Contracting and Records Workshops to County staff. ¹		3	7	5	5
Contract-related items reviewed and processed. ²		996	1,154		
Debt per capita (overall) ³		435	390	529	529
Dollars collected by external efforts ⁴		526,769.24	162,365.86	770,000	770,000
Non Ad-Valorem Revenue Bond Debt Service coverage ⁵		5.78	5.79	5.22	5.22
Number of performance management/strategic planning trainings, courses or department presentations ⁶		208	196	84	84
Percentage of Major Revenues Collected vs. Budget ⁷		103.8	113.83	96	96
Percentage of inventoriable assets confirmed		98.68	na	99	99
Receipt of GFOA's Budget Presentation Award (Not Proficient-0, Proficient-1, Outstanding-2)		1	1	1	1
Records Destruction request reviewed & processed. ⁸		73	57		
State Approval of TRIM material (Options are Approved-1 or Not Approved-0)		1	1	1	1

Comments

- In FY20, due to the Covid-19 pandemic, workshops were put on hold. One class was provided in FY20 to one department due to new staff coming onboard. FY21 continued to be negatively impacted by the pandemic. Typically there are 4-6 trainings held per year (between March and September).
- Min/Max, Target, and Goal are not in department's control and are dependent upon other departments' needs. Monthly/Yearly figures are tracked for informational purposes only.
- Improvement in these ratios is the result of continued growth in population coupled with a decrease in the amount of debt outstanding.
- External efforts/sources of collections refer to a third party collection agency such as Penn Credit. In FY20, the Covid-19 pandemic had significant impacts on the ability to collect funds. FY21 and FY22 targets were adjusted to account for Covid-19 recovery efforts, although actuals for FY21 show a continued impact from the pandemic.
- This metric continues to exceed targets and improvement trends in these ratios is the result of continued growth in population coupled with a decrease in the amount of debt outstanding.
- Performance Management and Strategic Planning took advantage of various virtual platforms to hold various presentations, workshops and trainings throughout many departments in the County. Several departments asked for assistance with creating cross-divisional teams, updating core values, and providing guidance on creating meaningful KRIs. Feed Your Mind also returned from a Covid-induced hiatus in September 2021. In preparation for the end-of-year presentation to the BCC, the cross-departmental teams increased number of meetings and this division was able to attend them virtually or in-person. Targets for FY22 and FY23 have not increased due to meetings and workshops returning to in-person settings, and 2-person staffing capacity to hold such events.
- Due to Covid-19 the FY21 Budget was lowered and revenues recovered more quickly than anticipated to be more inline with FY19 figures.
- Min/Max, Target, and Goal are not in department's control and are dependent upon other departments' needs. Monthly/Yearly figures are tracked for informational purposes only.

[Print](#)

Office of Financial Management & Budget		Palm Beach County, FL			
DEPARTMENT SUMMARY					
MISSION STATEMENT To manage, monitor, and maintain financial resources to achieve outstanding results.					
Budget Division The Budget Division prepares and administers the County's annual budget in accordance with Florida Statutes and policies of the Board of County Commissioners (BCC), and fulfills an oversight role on behalf of County Administration and the BCC. The division also provides general guidance and assistance to County departments, members of the public, media representatives, and other government agencies. Primary services include preparing the County's annual operating and capital budgets; analyzing and processing changes to the adopted budget; planning for future operating and capital requirements; reporting financial trends and issues; major project status, and departmental performance measurement data; reviewing and commenting on the fiscal impact of Board agenda items; and providing financial expertise, assistance, and information to the Board, Administration, departments, citizens, and media representatives.					
Contract Development & Control Division The Contract Development & Control (CDC) Division serves as the clearing house for coordinating all formal contracts and related documents to ensure compliance with BCC policies, as well as, State Records Management requirements. To carry out its mandate, the Division facilitates the initiation, completion, and approval process of contract related items through the review of contracts, agenda items, Request for Proposals (RFP), bid documents and Change Orders, Work Orders, Consultant Service Authorizations, surety bonds, and letters of credit. A database is maintained for tracking, updating, and monitoring all ad valorem contracts and related items approved by the BCC. Reports are provided in relation to change activity for approved contracts. The Division is represented or serves as chair for many countywide committees. Services include records management compliance for the Board as required by Florida Statutes.					
Financial Management Division The Financial Management Division includes Debt Management, Fixed Assets Management (FAMO), the Impact Fee Program, and the Revenue Collection Program. Primary services include debt management and planning for future financing needs; recording acquisitions and disposal of County owned property; conducting periodic inventories and reconciliations of fixed assets; managing the surplus asset disposal program and the Thrift Store; ensuring the accurate calculation of impact fees; reviewing impact fee refund requests and conducting impact fee compliance reviews of municipalities, providing financial analysis support for Department of Housing and Economic Sustainability (DHES) Housing and Urban Development (HUD) loan program and selected Purchasing RFPs; maximizing the collection of monies due to the County; and developing related countywide financial policies and procedures.					
Strategic Planning and Performance Management Division The Strategic Planning and Performance Management Division supervises all activities related to the long-term strategic plan and assists the BCC, Management Team, department directors, and staff with the development of long-term goals, objectives, strategies, and actions. The division assists the administrative team with the development, adoption, and implementation of initiatives supporting countywide strategic planning, continuous improvement efforts, process improvement, and performance management. The division leads the performance management processes which include program evaluation and other analytical activities designed to assess the efficiency of County services in achieving the County's long-term goals and objectives. The division also reports departmental performance measurement data in the County's annual budget book.					
Office of Financial Management & Budget		Palm Beach County, FL			
PERFORMANCE MEASUREMENTS		Actual FY 2021	Actual FY 2022	Target FY 2023	Target FY 2024
Conduct Contracting and Records Workshops to County staff. ¹		3	7	5	5
Contract Review Committee items reviewed and processed.		273	271		
Contract-related items reviewed and processed. ²		996	1,154		
Debt per capita (overall) ³		435	390	529	529
Dollars collected by external efforts ⁴		526,769.24	162,365.86	770,000	770,000
Dollars collected by internal efforts		824,421.88	827,397.69	250,000	250,000
Non Ad-Valorem Revenue Bond Debt Service coverage ⁵		5.78	5.79	5.22	5.22
Number of County Departments/Offices actively using eKPI		31	31	28	28

Performance Measurement Data Sheet

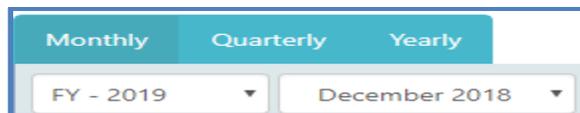
This intuitive data entry screen for manually entering information. The system can interface with departmental systems/databases/APIs for automating the processes; for data collection and reporting; to automatically extract data for display in an eKPI.

NOTE: Enter the data in the Performance Measurement Data Sheet before you run the Scorecard Report.

1. Click on **Data Entry** from the black Menu Ribbon at the top of the screen.
2. The Performance Measurement Data Sheet displays as shown below.

No.	Performance Measure	Measurement Type	2021 Min/Max	2021 Target	2021 Stretch Goal	Current Value	Unit of Measure	Key KPI	MR KPI	BB KPI
1	Total number of External Service Agreements	Demand		48	63		Unit Count			
2	Quotes Processed	Outcome					Unit Count			
3	Staff Productivity Factor	Effectiveness	70	75	80	0	%			
4	Student Interns	Input				0	Unit Count			
5	Vacant Positions	Workload					Unit Count			
6	% Completion of HRIS 2.0 Project	Outcome		50	80		%			
7	% Completion of eFDO Project	Outcome	25	35	80		%			
8	% Completion of ePZB Technology Refresh Project	Outcome	95	98	100		%			
9	Customer Satisfaction Rating	Outcome	85	90	95	100	%			
10	Mean Time to Problem Restoration (Hours)	Effectiveness	35	30	25	-41	Hours			
11	Past Due Problem Tickets	Effectiveness	10	6	4	0	Unit Count			
12	Staff Productivity Factor	Productivity	70	75	80	23.68	%			
13	% Completion of Online SBE Payment System	Outcome		0	100		%			
14	% Completion of ME Case Management System	Outcome					%			
15	% Implementation of Electronic Agenda Tracking Sys	Outcome		0	100		%			
16	% SLAs Met for Initial Response	Outcome	89	95	97	100.00	%			
17	% SLAs Met for Restoration	Outcome	89	90	95	100.00	%			

3. The Performance Measure Data Sheet is reported Monthly, Quarterly or Yearly.



4. Enter the Current Value.
5. The Unit of Measure will automatically be displayed from the KPI but can be changed.
6. Click on the **“Save”** button to save the data BEFORE inputting the next data value.
7. **NOTE:** The **green** highlighted data uploads in the system via the daily automated batch jobs through ISS support. (This input data cannot be changed or updated)
8. Click on the comment icon  to add comments for a reporting period to report any aberrations/deviations (staff shortage, hurricane, etc). The icon will turn green on the data entry page once commentary is saved indicating that comments were entered for this KPI.

Add Comments 

Performance Measure: % Completion of ePZB Online Submittal Module **Reporting Period:** September 2018

Comments:

9. Click on the paper clip icon  to add one or more attachments and save. The icon will turn green on the data entry page, indicating that there are attachments added to this KPI.

Add Attachments

Performance Measure: % Completion of PAPA Refresh Project **Reporting Period:** September 2018

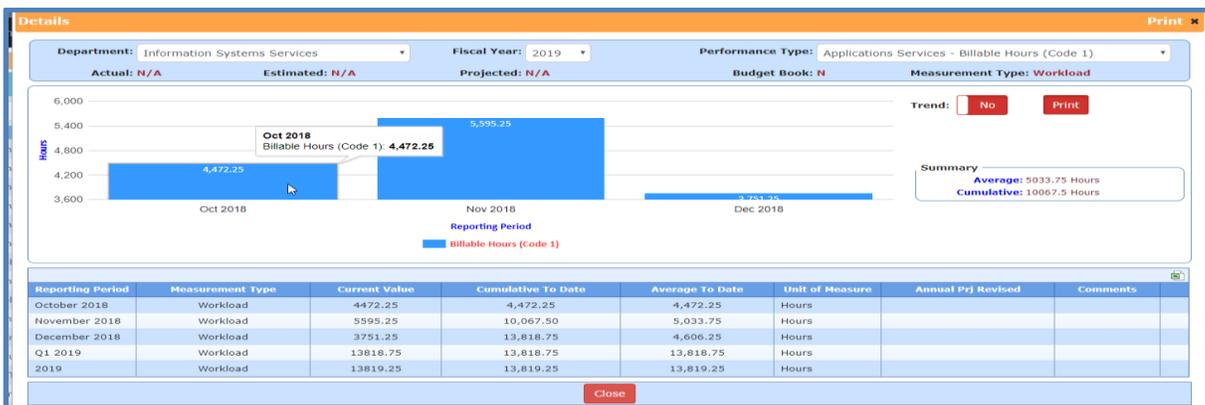
Title	File Name	Upload Date	Action
2017-May-ScanReport	MAY-2017-SCAN-STATS.XLSX	6/5/2017 1:13:22 PM	

Title:

File Path:

NOTE: If there is a no data entered in the current value, please enter 'NA' (not the number zero, unless that is the true data value being captured) in the current value field before saving any comment or attachment .

10. Click on the graph icon  to see detail information of that particular Performance Measure



Scorecard Report

NOTE: All the performance Indicators marked with a key are graphed on the **Key PERF Report**. **Make sure you enter the max, target and goal information on the Performance indicator screen.**

11. Click on the “**Scorecard**” button the following popup window appears

Information Systems Services - Performance Report

Depending on the number of KPIs for your department, this report may take a longer time to generate:

Division Program Applications Services

Cancel Ok, Print All Performance Indicators Ok, Print Management Report Ok, Print only Key KPI(s) Ok, Print only Budget Book KPI(s)

12. Click one of the options to print the report

- a. Click **All Performance Indicators** to print a complete report of ALL Performance Indicators, whether Key KPI’s or not.
- b. Click **Print Management Report** to print a Maximum of 10 KPI’s with one chosen frequency (Monthly, Quarterly, or Yearly). This is used for the Management Team Meeting in May and is associated with supplemental and budgetary requests.
- c. Click **Only Key KPI(s)** to print a full report of each of the Key KPI’s along with the summary page.
- c. Click **Budget Book KPI(s)** to print only the KPI(s) chosen for the Budget Book.
 - i. This is NOT the Budget Book report that prints in the Budget Book, although it looks similar. The Budget Book Report is printed from the “Department Info” page found on the homescreen when first logging into eKPI.

Note: All KPI’s selected for Management Report and Budget Book **MUST** be selected as Key KPI’s. If the KPI is not important enough to be a top (or Key KPI) for the department, then it’s not important enough to be in the Management Report or Budget Book.



INFORMATION SYSTEMS SERVICES

PERFORMANCE REPORT

February 2022

Mission:

To build and optimize the County's information technology (IT) infrastructure as a secure, reliable, and affordable resource for automating work processes, enabling management decision-making, and providing public access to County information and programs. Centralized oversight of technology resources will be established through enterprise policies, standards, strategic plans, and governance committees.

 ECONOMIC DEVELOPMENT

 HOUSING/HOMELESSNESS

 ENVIRONMENTAL PROTECTION

 INFRASTRUCTURE

 PUBLIC SAFETY

 SUBSTANCE USE & BEHAVIOR DISORDERS

 CENTRALIZED/SUPPORTING DEPARTMENT

Performance Management Office

FY 2018 Highlight & Accomplishments

- Awarded Top Ten national ranking in 2018 Digital Counties Survey.
- Implemented and upgraded multiple internal systems including: Phase II of the Medical Examiner Case Management System, Phase II of eFDO System, upgrade to PAPA website and online applications, Online Public Records Request System, Summer Camp Database, HRIS replacement for legacy TimeServer application, and Countywide Email upgrade to Microsoft Exchange 2016.
- Added three new agreements for IT services provided by ISS to external agencies.
- Implemented new Countywide Interactive Voice Response (IVR) System.
- Selected new email archiving system and began converting archive Outlook records.
- Began conversion of former enterprise data center to office and cubicle work spaces.
- Increased data storage capacity with implementation of new enterprise data storage platforms.
- Provided critical staff support to Supervisor of Elections during multiple elections.
- Prepared an updated strategic plan for ISS Department for 2019 through 2021.
- Implemented capability for periodic security tests of employee phishing vulnerability.
- Installed 445 strand miles of fiber optic network cabling.
- Phase out of leased voice and data circuits reduced AT&T costs by \$360,500 annually.
- Revised Computer Operators' work schedules to reduce overtime by almost \$38,000 annually, and reassigned a vacant position for increased efficiency.
- Implemented Sharepoint Search as a replacement for Google Search for www.pbcgov.com.
- Installed Cylance Protect on all ISS managed agencies desktops as an endpoint threat protection in real-time as well as Trend Micro Deep Security on all enterprise servers.
- Refreshed enterprise wintel server hardware at Emergency Operations Center (EOC) and Operations Support Center (OSC).
- Upgraded OpenScape Contact Center to version 9 for more reliability and enhanced features.
- Maintained 16 Student Intern positions and hired two former Student Interns as full-time ISS employees.

FY 2019 Emerging Issues

- Some ISS staff will be displaced by renovations to the fourth floor in the Governmental Center and temporary office space must be identified.
- Competing capital funding priorities must address the need to upgrade components of the County's aging fiber-optic and wireless networks.
- Increased public interest and scrutiny of government operations and procurement practices underscore the need for countywide implementation of applications such as eKPI for performance management and eCMS for contract management.
- Cyber security remains a top priority in the face of increased threats of data theft and system disruption.
- Integrating the Traffic Division's fiber-optic network into the County network and recruiting the School District as a shared services partner could save substantial taxpayer dollars.
- Reorganization of the IT support function for Court Administration establishes a dotted-line reporting relationship of the Court Technology CIO and the ISS CIO.
- Opportunities for additional IT consolidation, if pursued, could reduce costs and complexity.
- Aging work force with numerous long-term employees will require the ability to attract highly skilled workers and implement succession planning.
- Retirement of long-term CIO and other management positions will usher in new leadership for the ISS Department.

INFORMATION SYSTEMS SERVICES DASHBOARD - FEBRUARY 2019 - Monthly

Applications Services	Max	Target	Goal	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
% Completion of eFDO Project				51	52	53	54	55							
% Completion of ME Case Management System				77.2	78.6	80	81.4								
% Completion of ePZB Online Submittal Module				55	60	65	71								
Applications Services	Min	Target	Goal	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
% SLAs Met for Initial Response	89	95	97	97.18	97.09	97.39	98.62	97.66							
% SLAs Met for Restoration	89	90	95	96.24	96.51	98.69	96.79	97.08							
Staff Productivity Factor	70	75	80	82.99	87.61	74.62	79.47	48.63							
Applications Services	Max	Target	Goal	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
Mean Time to Problem Restoration (Hours)	35	30	25	28.18	31.04	31.78	24.24	18.74							
Past Due Problem Tickets	10	6	4	6	5	4	3	4							

- The Minimum/Maximum has not been met
- The Metric is at or below the maximum but not at the Target
- The Target has been met or exceeded
- ✔ The Goal has been exceeded

Information Systems Services Performance Management Office February 2019



INFORMATION SYSTEMS SERVICES DASHBOARD - FEBRUARY 2019 - Quarterly

Applications Services	Max	Target	Goal	QTR 1	QTR 2	QTR 3	QTR 4
% Completion of eFDO Project				52	109		
% Completion of ME Case Management System				78.6	81.4		
% Completion of ePZB Online Submittal Module				60	71		
Applications Services	Min	Target	Goal	QTR 1	QTR 2	QTR 3	QTR 4
% SLAs Met for Initial Response	89	95	97	97.21	98.2		
% SLAs Met for Restoration	89	90	95	97.03	96.92		
Staff Productivity Factor	70	75	80	81.23	42.51		
Applications Services	Max	Target	Goal	QTR 1	QTR 2	QTR 3	QTR 4
Mean Time to Problem Restoration (Hours)	35	30	25	30.12	21.82		
Past Due Problem Tickets	30	18	12	15	7		

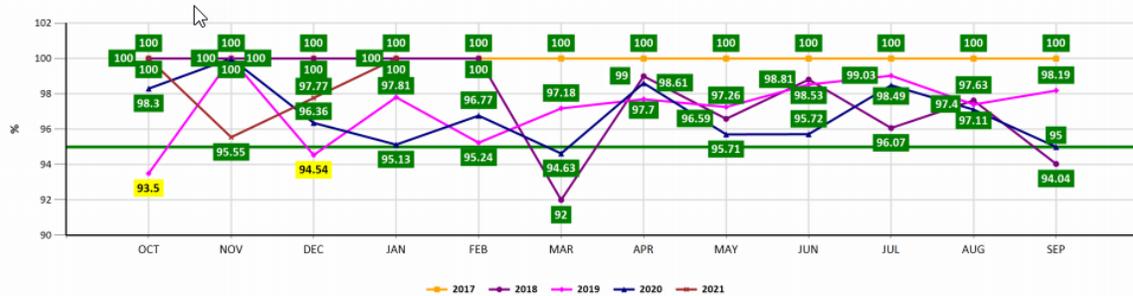
- The Minimum/Maximum has not been met
- The Metric is at or below the maximum but not at the Target
- The Target has been met or exceeded
- ✔ The Goal has been exceeded

Information Systems Services Performance Management Office February 2019



DEPARTMENT-WIDE - Customer satisfaction rating

	FY	Min	Target	Goal	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	
Customer satisfaction rating	2019	90	95	100	93.5	100	94.54	97.81	95.24	97.18	97.7	97.26	98.53	99.03	97.4	98.19	
	2020	85	90	95	98.3	100	96.36	95.13	96.77	94.63	98.61	95.71	95.72	98.49	97.11	95	
	2021	85	90	95	100	95.55	97.77	100									
	2022	85	90	95													



Description	Metric Calculation
Achieve a customer satisfaction rating of 95% or greater <i>Customer satisfaction rating</i>	
Comments/Narrative	

● The Minimum/Maximum has not been met
 ● The Metric is at or below the minimum/maximum but not at the Target
 ● The Target has been met or exceeded

Information Systems Services Performance Management Office February 2022

SERVICE LEVEL AGREEMENTS - Percentage of problem tickets resolved upon first intake - Quarterly

	FY	Min	Target	Goal	QTR 1	QTR 2	QTR 3	QTR 4
Resolve 20% or greater of problem tickets upon first intake <i>Percentage of problem tickets resolved upon first intake</i>	2019	15	20	25	16.05	13.56	15.87	12.7
	2020	10	15	20	15.06	15.3	12.25	11.15
	2021	10	15	20	13.69			
	2022	10	15	20				



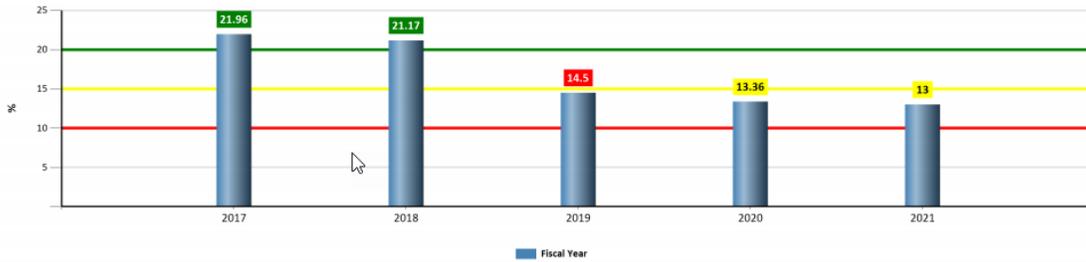
Description	Metric Calculation
Resolve 20% or greater of problem tickets upon first intake <i>Percentage of problem tickets resolved upon first intake</i>	
Comments/Narrative	

● The Minimum/Maximum has not been met
 ● The Metric is at or below the minimum/maximum but not at the Target
 ● The Target has been met or exceeded

Information Systems Services Performance Management Office February 2022

SERVICE LEVEL AGREEMENTS - Percentage of problem tickets resolved upon first intake - Yearly

	FY	Min	Target	Goal	Year
Resolve 20% or greater of problem tickets upon first intake <i>Percentage of problem tickets resolved upon first intake</i>	2019	15	20	25	14.5
	2020	10	15	20	13.36
	2021	10	15	20	13
	2022	10	15	20	



Description	Metric Calculation
Resolve 20% or greater of problem tickets upon first intake <i>Percentage of problem tickets resolved upon first intake</i>	
Comments/Narrative	

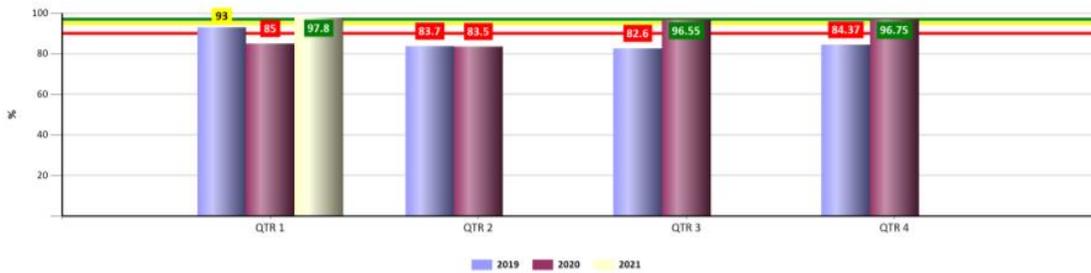


● The Minimum/Maximum has not been met
 ● The Metric is at or below the minimum/maximum but not at the Target
 ● The Target has been met or exceeded

Example of how Strategic Priority icons appear at top left of Scorecard when selected

IT SECURITY - Malicious emails blocked by Proofpoint - Total Percentage - Quarterly

	FY	Min	Target	Goal	QTR 1	QTR 2	QTR 3	QTR 4
Achieve 97% or greater of blocked malicious email communication <i>Malicious emails blocked by Proofpoint - Total Percentage</i>	2019	90	95	97	93	83.7	82.6	84.37
	2020	90	95	97	85	83.5	96.55	96.75
	2021	90	95	97	97.8			
	2022	90	95	97				



Description	Metric Calculation
Achieve 97% or greater of blocked malicious email communication <i>Malicious emails blocked by Proofpoint - Total Percentage</i>	
Comments/Narrative	



● The Minimum/Maximum has not been met
 ● The Metric is at or below the minimum/maximum but not at the Target
 ● The Target has been met or exceeded

Report

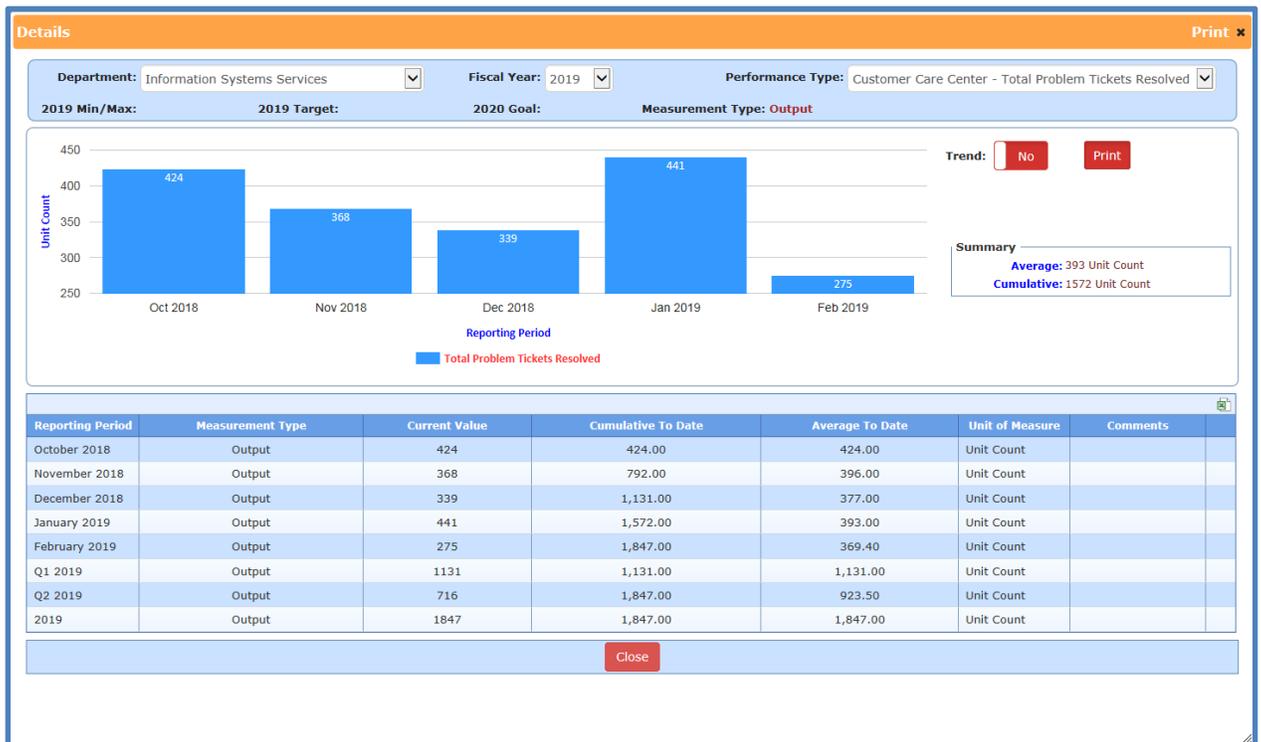
1. Click on Report on the menu, the following screen appears

2. Enter the filter you want for your report and then click on the “Search” button

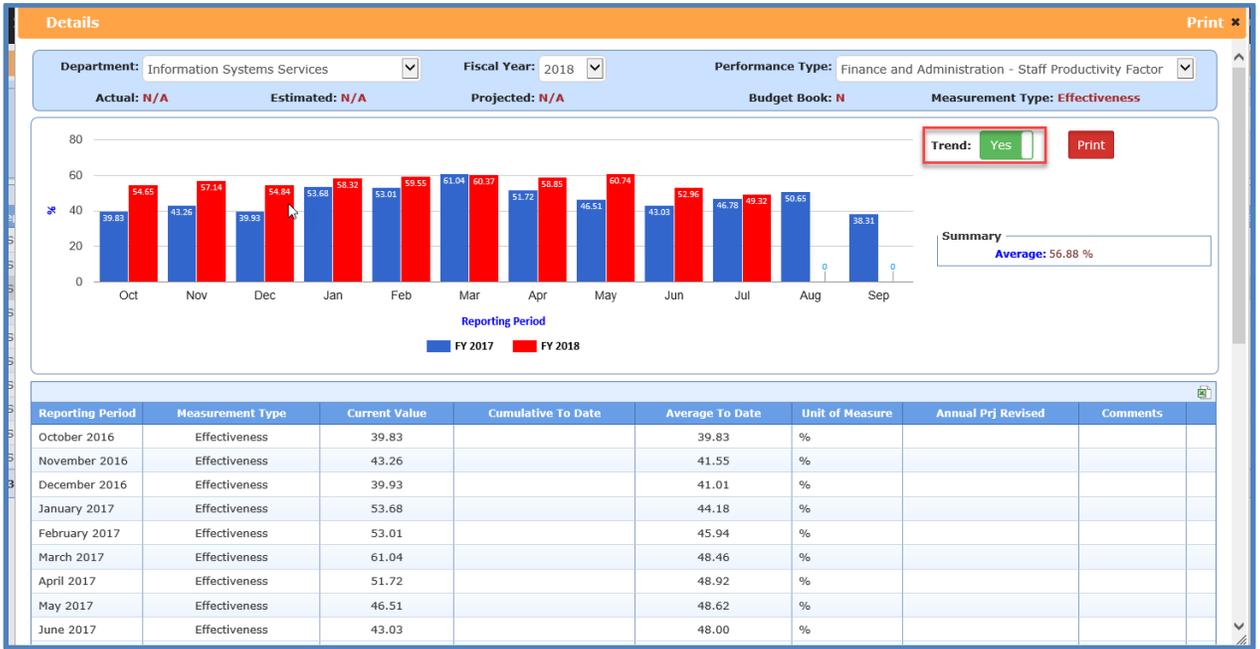
3. The following screen appears

Department	Reporting Period	Performance Type	Measurement Type	Budget Book	Actual	Estimated	Projected	Current Value	Unit of Measure	Annual Prj Revised	KPI
Information Systems Services	Oct 2018	% Completion of ME Case Management System	Outcome	Y	50%	75%	100%	77.2	%		
Information Systems Services	Nov 2018	% Completion of ME Case Management System	Outcome	Y	50%	75%	100%	78.6	%		
Information Systems Services	Dec 2018	% Completion of ME Case Management System	Outcome	Y	50%	75%	100%	80	%		
Information Systems Services	Q1 2019	% Completion of ME Case Management System	Outcome	Y	50%	75%	100%	78.6	%		
Information Systems Services	2019	% Completion of ME Case Management System	Outcome	Y	50%	75%	100%	78.6	%		

4. Click on the graph icon  in the KPI column to see detail information about the graph



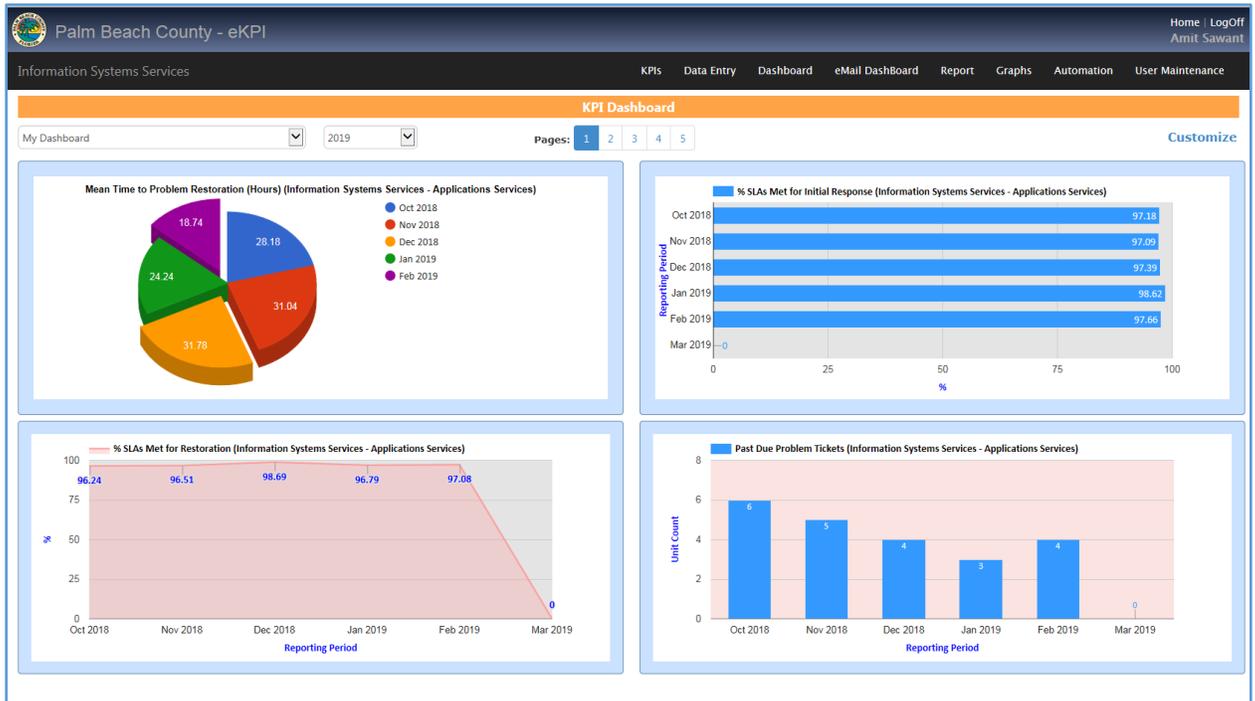
5. Choose "Yes" for the Trend to see a Trend Analysis chart



6. Click on "Print" if you want to print the detail report.

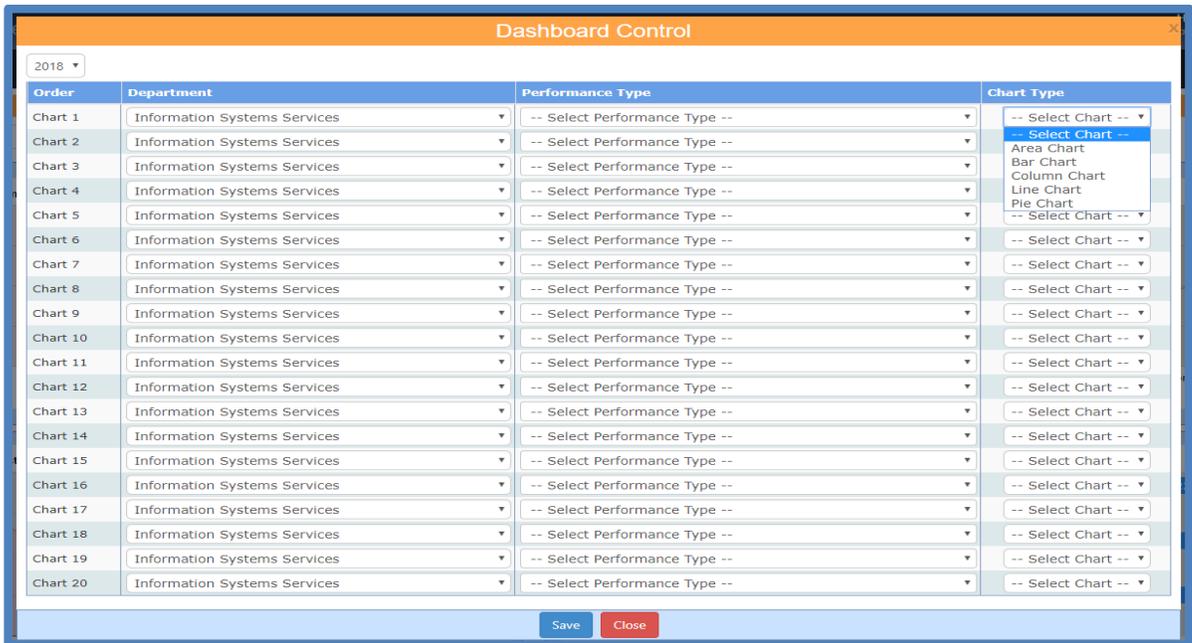
KPI Dashboard

NOTE: The graphs on the dashboard will only populate after you entered the data for any of the KPIs. Go to Page 4 for steps to enter your KPIs and then set up your graph.

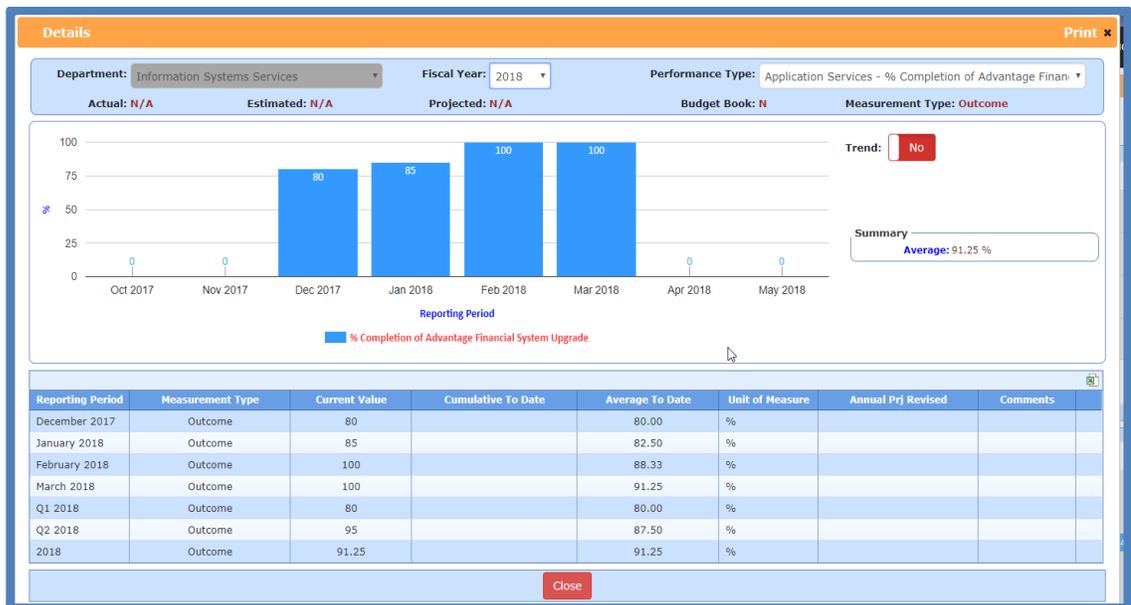


The KPI dashboard provides a window into the department's performance through simplified data visualizations such as graphs.

1. To change the graph click on the customize button on the screen.



2. Choose the chart type from the “Chart Type” dropdown list
3. Click on the “Save” button to save the chart type. Click on “Close” to go back to the graphs
4. Intuitive drill-downs providing instant access to understandable metrics that are intuitive, informative, and actionable. (Click on any parts of the graph to see the details)



Email Dashboard

1. Click of the eMail Dashboard from the menu item
2. The Email dashboard screen appears

The screenshot displays the 'Email Dashboard' interface for Palm Beach County - eKPI. The page header includes the logo, 'Palm Beach County - eKPI', and user information 'Home | LogOff | Amit Sawant'. A navigation bar contains links for 'Information Systems Services', 'KPIs', 'Data Entry', 'Dashboard', 'eMail Dashboard', 'Report', 'Graphs', 'Automation', 'User Maintenance', and 'Budget Book'. The main content area is a table with the following structure:

No.	Subject	Recipients	Frequency	Day	Time	Active
2	Reminder - Update eKPI numbers for your service area	ykazi@pbcgov.org;asawant@pbcgov.org;lerickso@pbcgov.org;lmayorga@pbcgov.org;fcevallo@pbcgov.org;pvarak@pbcgov.org;dBennette@pbcgov.org;gaulakh@pbc.gov.on	Monthly	4	7:00 AM	<input checked="" type="checkbox"/>
1	eKPI Monthly Performance Report for Application Services	asawant@pbcgov.org;ISS-APS-Managers@pbcgov.org	Monthly	11	7:00 AM	<input checked="" type="checkbox"/>
3		Enter ';' between two recipients	Select a Frequency	Select a day	Select a Time	<input type="checkbox"/>
4		Enter ';' between two recipients	Select a Frequency	Select a day	Select a Time	<input type="checkbox"/>
5		Enter ';' between two recipients	Select a Frequency	Select a day	Select a Time	<input type="checkbox"/>

A 'Save' button is located at the bottom center of the table area.

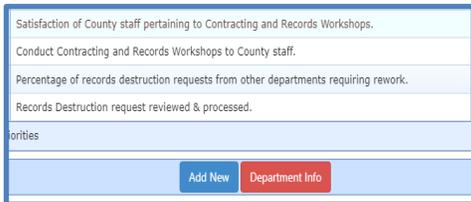
3. Enter the person(s) email(s) that you want to share your dashboard
4. Enter the subject information
5. Choose the frequency, day and time
6. Check the checkbox under "Active" to mark which of the recipient you want to share your dashboard with logging into the application.
7. A batch job is run daily to send the link to the recipient(s) email to share your dashboard

The Budget Book

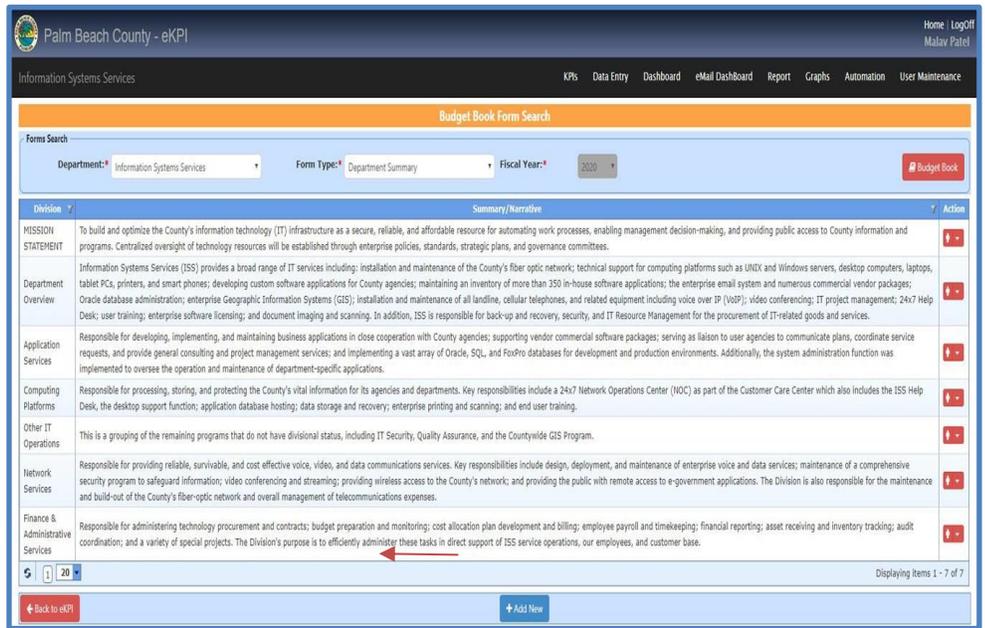
Budget Book Form Search:

1. **Form Type:** Department Summary Screen. (Click from drop-down list will display this page)

a. Click the **Add New** button to display the Add Department Summary Narrative screen as shown below. The Fiscal Year is auto-populated. The Title and Narrative fields are required.



Click on the red "Department Info" button found at bottom of main KPI Performance Indicators screen to get to Budget Book screen.



1. Click **Save** to display entry into the Department Summary grid (shown above).

2. Click **Add New** button to continue adding additional Divisions and Summary/Narratives.



3. Click **Clear** to clear the fields.

4. Click **Close** to close this window.

b. The Department Summary/Narratives can also be Updated or Deleted by clicking the Action drop-down list as shown below and selecting either **Update Narrative** or **Delete Narrative**.

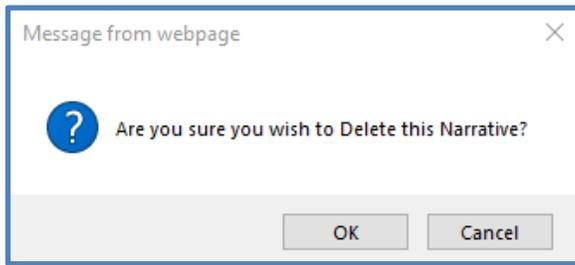
The screenshot displays the 'Budget Book Form Search' interface. At the top, there are navigation links for Home, LogOff, and Amit Sawant. Below that, a search bar allows filtering by Department (Information Systems Services), Form Type (Department Summary), and Fiscal Year (2020). A table lists various divisions with their respective summaries. The 'Action' column for the 'MISSION STATEMENT' row is highlighted with a red box, showing 'Update Narrative' and 'Delete Narrative' options. A red arrow points from the 'Update Narrative' option to the 'Update Department Summary' screen shown in the next screenshot.

c. Click **Update Narrative** action and the Update Department Summary screen is displayed, as shown below:

The screenshot displays the 'Update Department Summary' screen. The 'Fiscal Year' is set to 2020. The 'Title' field contains 'MISSION STATEMENT'. The 'Narrative' field contains the text: 'To build and optimize the County's information technology (IT) infrastructure as a secure, reliable, and affordable resource for automating work processes, enabling management decision-making, and providing public access to County information and programs. Centralized oversight of technology resources will be established through enterprise policies, standards, strategic plans, and governance committees.' At the bottom, there are buttons for 'Add New', 'Clear', 'Save', and 'Close'.

1. Make the required changes to the Title and Narrative.
2. Click **Save** to save the changes in the Department Summary grid.
3. Click **Add New** to Save the changes you made and continue adding a NEW Summary Narrative.
3. Click **Clear** to clear both fields and start over.
4. Click **Close** to close this window.

d. Click **Delete Narrative** action, and be prompted to confirm the deletion as shown below:



1. Click **OK** to delete.
2. Click **Cancel** to stop the deletion.

2. Form Type: Highlight / Emerging Issue List

(Click from drop-down list and the following is displayed)

The screenshot shows the 'Budget Book Form Search' interface. At the top, there is a navigation bar with 'Home | LogOff' and 'Malav Patel'. Below that, a menu bar includes 'Information Systems Services', 'KPIs', 'Data Entry', 'Dashboard', 'eMail Dashboard', 'Report', 'Graphs', 'Automation', and 'User Maintenance'. The main search area has a title 'Budget Book Form Search' and a search bar with the following filters: Department: Information Systems Services, Form Type: Highlights/Emerging Issues, and Fiscal Year: 2020. A 'Budget Book' button is located to the right of the search bar. Below the search bar is a table with columns 'Row Type', 'Description', and 'Action'. The table contains 20 rows of data, each with a description of a project or achievement and a corresponding action button. At the bottom of the table, there is a legend: 'HL = Highlight Issue; EI = Emerging Issue'. A 'Back to eKPI' button is on the left and an 'Add New' button is on the right.

a. Click the **Add New** button to display the Add Highlights/Emerging Issues screen as shown below. The Fiscal Year is auto-populated.

The screenshot shows the 'Information Systems Services - Add Highlights/Emerging Issues' form. The form has a title bar with the text 'Information Systems Services - Add Highlights/Emerging Issues'. Below the title bar, there are two radio buttons: 'Highlights & Accomplishments' and 'Emerging Issues'. The 'Highlights & Accomplishments' radio button is selected and highlighted with a red box and a red arrow. Below the radio buttons, there is a 'Fiscal Year' dropdown menu set to '2020'. Below the dropdown menu, there is a large text input field labeled 'Highlights & Accomplishments'. At the bottom of the form, there are four buttons: 'Add New', 'Clear', 'Save', and 'Close'.

1. Select either **Highlights and Accomplishments** or **Emerging Issues**.
2. Enter the verbiage in the selected field.
3. Click **Save** to add to the **Highlights/Emerging Issues** grid, as shown above.
4. Click **Add New** to continue adding either Highlights or Emerging-I.
5. Click **Clear** to clear the fields.
6. Click **Close** to close this window.

b. The Highlights and Emerging Issues can also be Updated or Deleted by clicking the Action drop-down list as shown below and selecting either

Update Highlight or Delete Highlight
Update Issue or Delete Issue

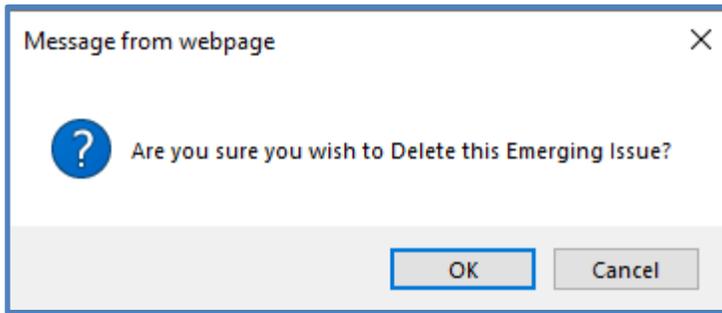
The screenshot shows a web application interface for 'Forms Search'. At the top, there are filters for 'Department' (Information Systems Services), 'Form Type' (Highlights/Emerging Issues), and 'Fiscal Year' (2020). A 'Budget Book' button is in the top right. Below the filters is a table with columns: 'Row Type', 'Description', and 'Action'. The first row is highlighted in red, and its 'Action' column is also highlighted, showing a dropdown menu with 'Update Highlight' and 'Delete Highlight' options. A red arrow points to this dropdown menu. The table contains 28 rows of highlights and emerging issues. At the bottom of the table, there is a legend: 'HL = Highlight Issue; EI = Emerging Issue.' and a status bar indicating 'Displaying Items 1 - 20 of 28'. There are also buttons for 'Back to eKPI' and '+ Add New'.

c. Click **Update Highlight or Update Emerging-I** action and the Update Department Summary screen is displayed as shown below:

The screenshot shows a window titled 'Information Systems Services - Update Department Summary'. At the top, there are two tabs: 'Highlights & Accomplishments' (selected) and 'Emerging Issues'. A red arrow points to the 'Highlights & Accomplishments' tab. Below the tabs, there is a 'Fiscal Year' dropdown menu set to '2020'. The main content area is labeled 'Highlights & Accomplishments' and contains a text field with the description: 'Digital Counties Survey awarded Palm Beach County seventh place among large counties in 2019.' At the bottom of the window, there are four buttons: '+ Add New', 'Clear', 'Save', and 'Close'.

1. Select and make the required changes to either **Highlights and Accomplishments** or **Emerging Issues**.
2. Click **Save** to Update the Department Summary grid.
3. Click **Add New** to save the changes you made and continue adding a NEW Highlight or Issue.
3. Click **Clear** to clear the field and start over.
4. Click **Close** to close this window.

d. Click **Delete Highlight** or **Delete Emerging-I** action, and be prompted to confirm the deletion as shown below:



1. Click **OK** to delete.
2. Click **Cancel** to stop the deletion.

3. **Form Type:** Financial Summary (Click from drop-down list and the following is displayed)

Row Type	Description	Actual '18	Budget '19	Budget '20	Action
Finance-Revenue	Charges for Services	9,301,784.00	10,661,157.00	9,081,683.00	
Finance-Revenue	Other	18,006.00	0.00	0.00	
Finance-Expense	Personal Services	21,961,980.00	24,413,935.00	24,130,097.00	
Finance-Expense	Operating Expenses	11,079,456.00	11,151,839.00	9,754,465.00	
Finance-Expense	Capital Outlay	50,320.00	102,910.00	100,500.00	
Finance-Advalorem		23,771,967.00	0.00	0.00	
Finance-Position	Positions	213.00	213.00	213.00	

a. Click the **Add New** button to display the Add Financials screen, as shown below. The Fiscal Year is auto-populated. All other data fields are required.

Row Type	Description	Actual '18	Budget '19	Budget '20	Action
Finance-Revenue	Charges for Services	9,301,784.00	10,661,157.00	9,081,683.00	
Finance-Revenue	Other	18,006.00	0.00	0.00	
Finance-Expense	Personal Services	21,961,980.00	24,413,935.00	24,130,097.00	
Finance-Expense	Operating Expenses	11,079,456.00	11,151,839.00	9,754,465.00	
Finance-Expense	Capital Outlay	50,320.00	102,910.00	100,500.00	
Finance-Advalorem		23,771,967.00	0.00	0.00	
Finance-Position	Positions	213.00	213.00	213.00	

1. Type: Select from the drop-down list box.
2. Non-Ad Valorem Revenues: Select from the drop-down list box.
3. FY – Enter the appropriate values for each year.
4. Click **Save** to add the Financial to the grid display.
5. Click **Add New** to Save what has been entered then clear the fields for a new entry.
6. Click **Clear** to clear fields.
7. Click **Close** to close the window.
8. You can also Update or Delete each record by selecting the corresponding icon in the  Action Column.

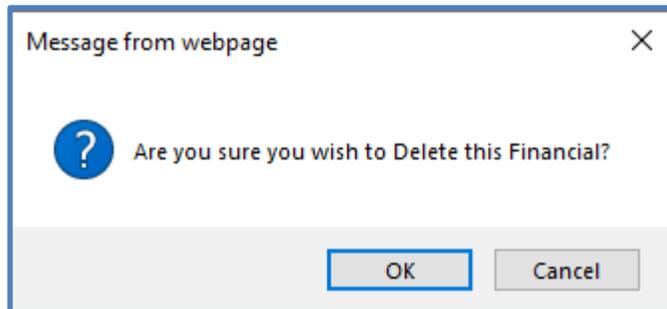
b. You can also Update Financials or Delete Financials from the Financial Summary primary screen, as shown below:

The screenshot shows the 'Budget Book Form Search' interface. At the top, there is a navigation bar with 'Home | LogOff | Amit Sawant' and a menu with 'KPIs', 'Data Entry', 'Dashboard', 'eMail DashBoard', 'Report', 'Graphs', 'Automation', and 'User Maintenance'. Below this is a search bar with 'Department: Information Systems Services', 'Form Type: Financial Summary', and 'Fiscal Year: 2020'. A 'Budget Book' button is on the right. The main area is a table with columns: Row Type, Description, Actual '18, Budget '19, Budget '20, and Action. A red box highlights the 'Action' column for the row 'Finance-Expense | Operating Expenses', showing 'Update Financial' and 'Delete Financial' buttons. A red arrow points to the 'Update Financial' button. At the bottom, there are buttons for 'Back to eKPI', '+ Add New', and 'Significant Changes', and a status 'Displaying Items 1 - 9 of 9'.

Row Type	Description	Actual '18	Budget '19	Budget '20	Action
Finance-Revenue	Charges for Services	9,301,784.00	10,661,157.00	5,000,000.00	[Update Financial] [Delete Financial]
Finance-Revenue	Other	18,006.00	0.00		[Update Financial] [Delete Financial]
Finance-Expense	Personal Services	21,961,980.00	24,413,935.00		[Update Financial] [Delete Financial]
Finance-Expense	Operating Expenses	11,079,456.00	11,151,839.00	9,754,465.00	[Update Financial] [Delete Financial]
Finance-Expense	Capital Outlay	50,320.00	102,910.00	100,500.00	[Update Financial] [Delete Financial]
Finance-Expense	Grants and Aids	100.00	100.00	100.00	[Update Financial] [Delete Financial]
Finance-Expense	Transfers	100.00	100.00	100.00	[Update Financial] [Delete Financial]
Finance-Advalorem		23,771,967.00	0.00	0.00	[Update Financial] [Delete Financial]
Finance-Position	Positions		500.00	500.00	[Update Financial] [Delete Financial]

1. Click **Update Financial** and be presented with the Update Financials window which is identical to the Add Financials window above.

2. Click Delete Financial and be prompted to confirm the deletion as shown below:



a. Click **OK** to delete the record.

b. Click **Cancel** to stop the deletion.

c. On the Financial Summary page, click the **Significant Changes** button and the following page is displayed: (The Fiscal Year defaults to current year).



The screenshot shows the 'Budget Book Form Search' interface for 'Information Systems Services'. The 'Fiscal Year' is set to 2020. A modal window titled 'Information Systems Services - Significant Changes' is open, displaying a text editor with the following content:

Significant Changes

Non-Ad Valorem Revenues
Charges for Services - Decrease in revenue is due to changes in enterprise services. Phone charges moved to General Government. The move in phone charges is also directly related to the decrease in operating expenses.

Appropriations
Personal Services - Decrease is primarily due to the retirement of the previous Chief Information Officer and a reduction in insurance cost.

The modal window includes a rich text editor toolbar and buttons for 'Clear', 'Save', and 'Close'. In the background, a table shows budget items for 'Budget '20'.

	Budget '20	Action
1,157.00	9,081,683.00	↑ ↓
0.00	0.00	↑ ↓
3,935.00	24,130,097.00	↑ ↓
1,839.00	9,754,465.00	↑ ↓
2,910.00	100,500.00	↑ ↓
0.00	0.00	↑ ↓
213.00	213.00	↑ ↓

1. Add any appropriate text to describe the Significant Changes affecting this budget cycle. You can cut and paste into this text box from another source.
2. Click **Save** to add or change the Significant Changes. A successful message will be displayed. Your changes will NOT save if you click the Close button.
3. Click **Clear** to clear all verbiage in the Significant Changes text box.
4. Click **Close** to close this window.

4. **Form Type:** Department Summary / Highlights – Emerging Issues (Combination Form)

(Click from drop-down list and the following is displayed)

This form is a combination of the **Department Summary Form** and the **Highlights / Emerging Issues Form** as described previously. It provides both sets of information in ONE grid as shown below.

Item Type	Item Description	Action
Department Narrative	To provide the highest quality of service in the most cost effective manner. Manage the equipment/vehicle policy fund, including specifications, assignment, funding, and disposal. Provide preventive and corrective maintenance services on vehicles and equipment. Purchase fuel and manage County fueling sites.	Mission Statement
Highlight	Worked with Information Systems Services (ISS) to create upgrades to the Fleet Information System including electronic parts requests, better visibility of work order status for supervisors, improved search and sort capabilities for users, improved billing processes, electronic inspection capabilities, electronic work order requests for users, and the capturing of new data points. Upgrades are on track to be implemented in FY 2020.	
Highlight	Successfully upgraded the fuel system console for 13 of the 15 countywide fuel sites, including Jet A. These upgrades allowed for better monitoring of the fuel system by providing real time alerts and better visibility of fuel levels and potential problems. Alarms can now be researched and resolved remotely within a matter of minutes, as opposed to the travel and diagnostic time required, at all hours of the day, for certain alarms.	
Emerging Issue	Continue to work with ISS to upgrade the Fleet Information System. The testing and implementation phase is to be completed in FY 2020. Implementation should increase productivity, provide more information regarding cost factors, streamline processes, eliminate the need for paper, and provide improved work order scheduling, thereby increasing asset availability.	
Emerging Issue	Many vehicle manufacturers are focusing on innovation and new technology, such as autonomous vehicles and electric vehicles. It is our responsibility to stay current with these innovations and evaluate the feasibility of implementing electric vehicles as the price of those vehicles decline. Consideration should include costs of vehicles and infrastructure, available incentives or funding, vehicle maintenance implications, and departmental needs for implementing electric vehicles for certain applications.	
Emerging Issue	It is important for user departments to have information on all costs surrounding employee transportation to ensure that the most economical and efficient decisions are made. Research will be done to provide information to departments, so informed business decisions can be made on whether to purchase or replace vehicles, use mileage reimbursements, or use rental and loaner vehicles.	
Emerging Issue	Continue to stay current with advancements in technology that may create cost savings or efficiency opportunities, such as automating in-house fuel truck delivery, capturing electronic signatures, or capturing new vehicle data.	

a. Click on Add New and Add Department Summary / Highlight / Emerging Issue page is displayed as shown below (Department Summary is the default page):

Fleet Management - Add Department Summary/Highlight/Emerging Issues

Department Summary
Highlight/Emerging Issues

Fiscal Year * 2020

Title *

Narrative *

+ Add New Clear Save Close

b. When selecting Highlight/Emerging Issues from the drop-down box, the following page is displayed (Two options are available in the second drop-down list box: (Highlights & Accomplishments or Emerging Issues – choose one)

Fleet Management - Add Department Summary/Highlight/Emerging Issues

Highlight/Emerging Issues

Highlights & Accomplishments
Emerging Issues

Fiscal Year * 2020

Highlights & Accomplishments *

+ Add New Clear Save Close

1. Select either **Department Summary** or **Highlight/Emerging Issues** from the drop-down list box. (Department Summary is the default)
2. For Highlight/Emerging Issues, there are two options available for selection as noted above – choose one.
3. Enter the information associated with either the Summary, Highlight, or Emerging Issue.
4. Click **Save** to Save the record grid on the previous page.
5. Click **+ Add New** to continue adding either additional summaries, highlights, or emerging issues.
6. Click **Clear** to clear all fields.
7. Click **Close** to close the window.

c. Since there are three categories on the combination form (see left side of page below)

1. Department Narrative (Summary)
2. Highlights
3. Emerging Issues

You can Update or Delete any of these by selecting the option from the drop-down list (see right side of the page below):

The screenshot displays the 'Budget Book Form Search' interface. At the top, there is a navigation bar with 'Home | LogOff | Amit Sawant' and a menu with 'KPIs', 'Data Entry', 'Dashboard', 'eMail DashBoard', 'Report', 'Graphs', 'Automation', and 'User Maintenance'. Below this is a search form with the following fields:

- Department:** Fleet Management
- Form Type:** Department Summary/Highlights-Em
- Fiscal Year:** 2020
- Buttons:** Budget Book

The main table has the following structure:

Item Type	Item Description	Action
Department Narrative	To provide the highest quality of service in the most cost effective manner. Manage the equipment/vehicle policy fund, including specifications, assignment, funding, and disposal. Provide preventive and corrective maintenance services on vehicles and equipment. Purchase fuel and manage County fueling sites.	Mission Statement Update Narrative Delete Narrative
Highlight	Worked with Information Systems Services (ISS) to create upgrades to the Fleet Information System including electronic parts requests, better visibility of work order status for supervisors, improved search and sort capabilities for users, improved billing processes, electronic inspection capabilities, electronic work order requests for users, and the capturing of new data points. Upgrades are on track to be implemented in FY 2020.	
Highlight	Successfully upgraded the fuel system console for 13 of the 15 countywide fuel sites, including Jet A. These upgrades allowed for better monitoring of the fuel system by providing real time alerts and better visibility of fuel levels and potential problems. Alarms can now be researched and resolved remotely within a matter of minutes, as opposed to the travel and diagnostic time required, at all hours of the day, for certain alarms.	
Emerging Issue	Continue to work with ISS to upgrade the Fleet Information System. The testing and implementation phase is to be completed in FY 2020. Implementation should increase productivity, provide more information regarding cost factors, streamline processes, eliminate the need for paper, and provide improved work order scheduling, thereby increasing asset availability.	
Emerging Issue	Many vehicle manufacturers are focusing on innovation and new technology, such as autonomous vehicles and electric vehicles. It is our responsibility to stay current with these innovations and evaluate the feasibility of implementing electric vehicles as the price of those vehicles decline. Consideration should include costs of vehicles and infrastructure, available incentives or funding, vehicle maintenance implications, and departmental needs for implementing electric vehicles for certain applications.	
Emerging Issue	It is important for user departments to have information on all costs surrounding employee transportation to ensure that the most economical and efficient decisions are made. Research will be done to provide information to departments, so informed business decisions can be made on whether to purchase or replace vehicles, use mileage reimbursements, or use rental and loaner vehicles.	
Emerging Issue	Continue to stay current with advancements in technology that may create cost savings or efficiency opportunities, such as automating in-house fuel truck delivery, capturing electronic signatures, or capturing new vehicle data.	

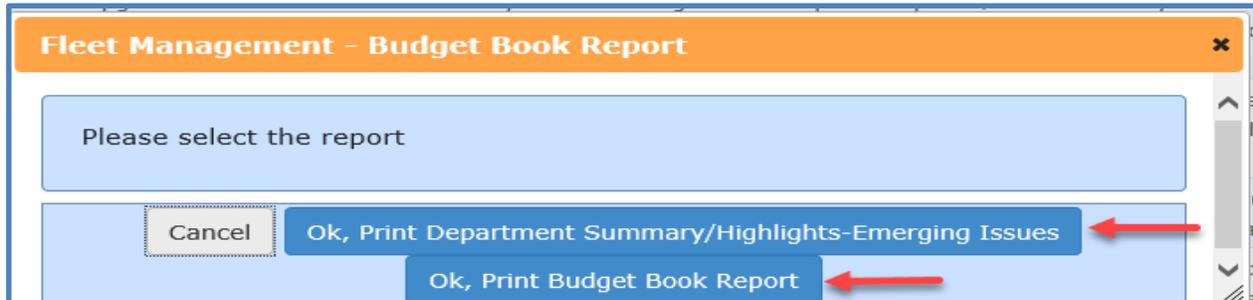
At the bottom of the table, there is a legend: 'D = Division; O = Objective; P = Performance Indicator; DN = Department Narrative' and a status 'Displaying Items 1 - 7 of 7'. Below the table are two buttons: 'Back to eKPI' and '+ Add New'.

5. Print Budget Book Button



Click the Budget Book button to display the Print options for the Budget Book. You will have the option to print the following:

1. "Form Type Page" displayed on the screen
2. The Budget Book Report.



Performance Measures selected to be printed in the annual Budget Document (*informally known as the Budget Book*) must have an accompanying comment or narrative explaining the information provided. This comment is entered in the main page in the eKPI application in the KPI edit drop down menu, under the "BB Comment" item.

Airports		Palm Beach County, FL			
<u>PERFORMANCE MEASUREMENTS</u>		<u>Actual FY 2019</u>	<u>Actual FY 2020</u>	<u>Target FY 2021</u>	<u>Target FY 2022</u>
	Airline Cost Per Enplanement (\$9.00 or less = The Cost for Airlines to operate at PBI divided by PBI Enplanements) ¹	4.72	7.92	5.37	8.92
	Concession Revenue Per Enplanement	12.24	13.12	11.22	11.22
	Debt Service Coverage	3.87	3.76	3.25	3.25
	Maintenance Department: Ratio of closed vs open corrective work orders.	83.25	90.5	85	85
	Maintenance Department: Ratio of closed vs open preventive work orders.	85.25	84.75	85	85
	Number of completed airfield safety and regulatory inspections ²	1,292	1,428	1,140	1,200
Comments					
1. Increase in costs for FY20 is direct correlation to the COVID-19 Pandemic effects. FY21 and FY22 targets were adjusted to account for long-term effects and the recovery time to return to pre-pandemic costs.					
2. Number of completed airfield safety and regulatory inspections (Target minimum based on 3 inspections per day, average 30-day month for 12 months = 1080 minimum). Targets have increased based on higher actuals achieved in FY19 and FY20.					