Enterprise Key Performance Indicators (eKPI)

User Manual

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



Palm Beach County ISS/OFMB Departments Last Updated – 02/23/2023

Contents

Overview1
Locating the eKPI Application Online2
Login3
Performance Indicator Screen
Update / Delete6
Performance Measurement Data Sheet10
Scorecard Report12
Sample Report (option "a" on previous page)13
Report
KPI Dashboard18
Email Dashboard
The Budget Book21

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 Managemennt 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: <u>https://pbcportal.pbcgov.org/ofmb/SPPM/default.aspx</u>.



Strategic Planning and Performance Management is in the Governmental Center, located at: 301 North Olive Avenue, 7th Floor, West Palm Beach, FL 33401 **Keith A. Clinkscale, Division Director:** <u>kclinkscale@pbcgov.org</u> Marcela C. Millett, Sr. Strategic Planning Performance Analyst: <u>mmillett@pbcgov.org</u>

Login

- 1. Click on <u>http://pbc/ekpi</u>
- 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.

Office of Financial Management & Budget		KP	1s D)ata Entry	Dashboard	eMail D	ashBoa	rd F	leport	Graphs			
	Performance Indicators												
Performance Type Search													
Office of Financial Management & Budget V All V 2024 V Key KPI No MR KPI No BB KPI No BB KPI No Bodget Book Scorecard													
Objective 7	Performance Type 7	Division Program Y	SP	Monthly 7	Quarterly	Yearly 7	KPI	MR	BB Act	ion			
Assure all budget transfers and amendments are processed in compliance with	Number of budget transfers and amendments	Budget Division	\$			Y				8			
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	0			Y	•	🛛 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	0			γ	Ø Ø	🛛 Y	ø 🚺	•			
Review and/or provide fiscal comments/recommendations to County Administrat	Percentage of agenda items submitted to OFMB past due date	Budget Division	0	Y			•	0	0 🚺	•			
Review and/or provide fiscal comments/recommendations to County Administrat	Number of agenda items received and reviewed	Budget Division	8	Y			00	٥	0 🚺	•			
Review and/or provide fiscal comments/recommendations to County Administrat	Percentage of agenda items reviewed without corrective action required	Budget Division	0	Y			0 <i>p</i>	0	0 🖸	•			
To ensure we are budgeting a reasonable amount for our major revenues, incl	Percentage of Major Revenues Collected vs. Budget	Budget Division	\$			Y	•	🛛 Y	•	•			
Ensure that all items reviewed and approved by CDC comply with PPMs, Board	Contract Review Committee items reviewed and processed.	Contract Division	0	Y			0 p	0	0 🚺	•			
Ensure that all items reviewed and approved by CDC comply with PPMs, Board	Contract-related items reviewed and processed.	Contract Division	0	Y			0 Ø	0	•	•			
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	0	Y			•	0	0 🚺	- 0			
Ensure that all items reviewed and approved by CRC comply with PPMs, Board	Percentage of Contract Review Committee items requiring rework.	Contract Division	0	Y			0 p	Z M	0 🚺	•			
Provide workshops to County Staff based on contracting and records procedur	Satisfaction of County staff pertaining to Contracting and Records Workshops.	Contract Division	\$			Y	•	0	0 🚺	•			
Provide workshops to County staff based on contracting and records procedur	Conduct Contracting and Records Workshops to County staff.	Contract Division	0			Y	•	0	•	•			
Review records destruction requests submitted by departments and submit fin	Percentage of records destruction requests from other departments requiring rework.	Contract Division	0	Y			Ø <i>p</i>	0	•	•			
Review records destruction convecto submitted by departments and submitting	Decede Denteruction request reviewed & processed.	Contract Division	\$	Y			2 ₍ 2)	0	•	•			
S 1 2 3 15 BB = Budget Book, MR = Management Report, SP = Strategic Priorities	ni report to vitate						Dis	playing	items 1 -	15 of 32			
	Add New Department Info												

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

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 Typ	e
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 Vunit of Measures* Rating V Measurement Types* Outcome V
Reported Monthly:	
Reported Quarterly:	
Reported Yearly:	
🔑 КРІ:	Yes
Budget Book KPI:	Yes
Management Report KPI:	Yes For this metric choose Yearly
	it monthly, quarterly or
	yearly for the Management Report. Please Select: *
	RAG:
	2022 Min: Monthly Min/Max Quarterly Min/Max 1
	2022 Target: Monthly Target Duarterly Target 1
	2022 Stretch Goal: Monthly Coal Duarterly Coal 1 I
	Monthly Quarterly Yearly
	0 00
	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
	S The Goal has been exceeded
	Update Close

- 4. 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:	NG/HOMELESSNESS												
Reported Quarterly:	ENVIRONMENTAL PROTECTION												
Reported Yearly:	PUBLIC SAFETY												
🔑 КРІ:	SUBSTANCE USE & BEHAVIOR DISORDERS												
Budget Book KPI:	Yes												
Management Report KPI:	Yes For this metric choose Yearly v whether you want to schow it monthly												

• 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.

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

- 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.

Strategic Priority:								
Fiscal Year:*	2022 🗸	Un	it of Measure:*	%	~	Measurement Type:*	Efficiency	~
Reported Monthly:								
Reported Quarterly:								
Reported Yearly:								
KPI:	Yes							
Budget Book KPI:	No							
Management Report KPI:	Yes	For this whether yo it month yearly for th Report. I	s metric choose u want to show aly, quarterly or he Management Please Select: *	Monthly	~			
		2022 Max:	15		Quarterly Mi	n/Max	arly Min/Max	
		2022 Target:	10		Quarterly Ta	rget Ye		
	2022	2 Stretch Goal:	5		Quarterly Go	al Ye	arly Goal	
			Monthly 10 15 5 0 100)	Quarter	ły	Yearly	

- 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.

Water Utilities		KPIs Data Entry	Dashboard	eMail DashBoard	Report	Graphs	User	Maintena	nce		
	Performance Indicators										
Performance Type Search											
Water Utilities	V 2022 V Key KPI NO MR KPI NO			Export Report	Budg	get Book	Scorec	ird			
Objective 🌱	Performance Type 7	Division Program 7	Measurement	Monthly Quarte	ri y Yeariy		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				• •	Ð		
Monitor monthly incoming call volume to establish workload	Call Center -call volume	Customer Service	Workload	Y		20		1 ×	Ð		
To monitor the increase of new customers	Call Center -WUD's new meter installations (new customers)	Customer Service	Efficiency	Y		1 1	Jpdate Ki	и	Ð		
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		-	Delete KF	I	Ð		
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		20		• •	Ð		

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

Water Utilities		KPIs Data Entry	Dashboard	eMail DashBoard	Report	Graphs	User	Maintenar	ice				
Performance Indicators													
Performance Type Search Water Unities All 2021 Key KPI No Bit KPI No													
Objective 🗸	Performance Type 7	Division Program	Measurement	7 Monthly Quarte	17 Yearly	КРІ	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		0	0 0		÷				
Monitor monthly incoming call volume to establish workload	Call Center -call volume	Customer Service	Workload	Y		•	•	1.	θ				
To monitor the increase of new customers	Call Center -WUD's new meter installations (new customers)	Customer Service	Efficiency	Y		1	View KP	1 1	0				
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		-	Delete KF	ч	Ð				
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		• 🔊			Ð				

2. Click on "Update KPI" and make the changes you want to the KPI.

Department:*	Office of Financial Management & Budget		
Division Program	and a mandar hangement a bridger		
Division Program:	Budget Division		
Objective:*	Receive Truth in Millage (TRIM) Certification as requi	ired by Florida Statutes	
Description:*	State Approval of TRIM material (Options are Approv	ved-1 or Not Approved-0)	
Metric Calculation:	Options are Approved-1 or Not Approved-0		
Strategic Priority:	× CENTRALIZED/SUPPORTING DEPARTMENT		
Fiscal Year:*	2022 Vilit of Measure:* Rating	Measurement Type:* Outcome	~
Reported Monthly:			
Reported Quarterly:	0		
Reported Yearly:			
🖉 КРІ:	Yes		
Budget Book KPI:	Yes		
anagement Report KPI:	Yes For this metric choose Yearly	~	
	RAG:		
	2022 Min: Manthly Mirchark	Concernity Ministeries 1	
	2022 Target:	Counterly narget 1	
	2022 Stretch Goal: Monthly Close	Quarterly Coul 1 I	
	Monthly	Quarterly Yearly	
	Preferred	Trend: Up	
	The Minimum/Maximum has not been met		
	The metric is at or below the Minimum/Maximu	im but not at the Target	
	The Target has been met or exceeded The Goal has been exceeded		

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

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

Information Systems Services			KPIs Da	ita Entry	Dashboard	eMail Dash	Board	Report	Gra	aphs
	Performance Indicators									
Performance Type Search										
Information Systems Services 🔽 All 🔽 202	12 V Key KPI No MR KPI No	BB KPI No			Exp	ort Report	Budg	et Book	Scored	ard
										_
Objective	Performance Type 7	Division Program 🍸	Measurement Type Y	Monthly	Quarterly 7	Yearly	KPI	MR BB	Action	
Continue to expand the IT Partnership Program by establishing five new serv	Total number of External Service Agreements	Administration	Demand	Y	Y	Y			• •	a
Administration	Vacant Positions	Administration	Workload	Y	Y				• •	0
Administration	\$ Value of Lapsed Salary Savings	Administration	Input		Y				÷ -	•
Administration	Asset Items Una	× listration	Effectiveness			Y	U	pdate KPI		Ð
Administration	Student Interns	histration	Input	Y	Y	Y	D	elete KPI		-
Administration	FTE Contractor P Are you sure you wish to Delete this Reco	rd? histration	Input			Y			• •	•
Administration	FTE Permanent P	histration	Input			Y			<u>ب</u>	Ð
Administration	\$ Value Capital P OK Can	el vistration	Input			Y			* •	8
Administration	Capital Projects Managed	Administration	Workload			Y			• •	0
Administration	Staff Productivity Factor	Administration	Effectiveness	Y	Y	Y			• •	9
Administration	Service Agreements w/ External Agencies	Administration	Outcome		Y				÷ -	Ð
Administration	Travel Vouchers Processed	Administration	Workload		Y				<u>ب</u>	Ð
Administration	Procurement Documents Processed	Administration	Workload		Y				÷ -	Ð
Administration	BCC Agenda Items Processed	Administration	Workload		Y				<u>ب</u>	a
Administration	\$ Value of Assets Written Off	Administration	Effectiveness			Y			÷ +	a
3 1 2 3 4 5 6 7 8 9 10 15 BB = Budget Book, MR = Management Report;							Displayi	ing items 3	- 15 o	f 276
	Add New Department Info									

- a. Click **OK**, and a "Record deleted" message will appear.
- b. 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 messge will pop up when you try to select Budget book KPI without selecting Key KPI.

nformation Systems Services	KPIs Data	Entry Dashboard	d eMail DashBoar	d Report Graph	is Aut	tomatio		ser Ma	untenar	
	Performance Indicators									
Performance Type Search										
Office of Financial Management & Budget 💙 🛛 All	No		Exp	ort Report	t Buc	lget Bo	ok	Scoreca	rd	
								(8)		
Objective 7										
Assure all budget transfers and amendments are processed in compliance with	Number of budget transfers and amendments	Budget Division	Demand		Y					Ð
Assure receipt of GFOA'S Distinguished Budget Presentation Award to independent $\ensuremath{\boldsymbol{FOA}}$	Receipt of GFOA's Budget Presentation Award (Not Proficient-0, Proficient-1, Outstanding- 2)	Budget Division	Outcome		Y	2 P		•		Ð
Receive Truth in Millage (TRIM) Certification as required by Florida Statut	State Appro	Division	Outcome		Y	2 P				Θ
Review and/or provide fiscal comments/recommendations to County Administrat	Number of a Budget Book KPI must be Key KPI to be included in Budget!	Division	Demand	Y		2 P				⇔
Review and/or provide fiscal comments/recommendations to County Administrat	Percentage	Division	Efficiency	Y		2 P				⇔
Review and/or provide fiscal comments/recommendations to County Administrat	Percentage	OK	Output	Y		2 P				ə
To ensure we are budgeting a reasonable amount for our major revenues, incl	Percentage of Major Revenues Collected vs. Budget	Budget Division	Operating Statistic		Y	20				⇔
Ensure that all items reviewed and approved by CDC comply with PPMs, Board	Contract Review Committee items reviewed and processed.	Contract Division	Output	Y		Z <i>P</i>			17	æ
Ensure that all items reviewed and approved by CDC comply with PPMs, Board	Contract-related items reviewed and processed.	Contract Division	Output	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	Output	Y		•				ə

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

Information Systems Services		KPIS Data	Entry Dashboard	eMail DashBoard	Repor	t Graphs	Auto	omation	U	ser Main	tenance
	Performance Indicators										
Performance Type Search											_
Office of Financial Management & Budget 💟 All	V 2022 V Key KPI NO MR KPI NO	вв крі	No			Ехро	t Report	Bud	get Bo	ik Sci	orecard
Objective	Performance Type		Division 7	Measurement 7	Month	Quarter	Yearl	крт	MR	BB Act	ion
Assure all budget transfers and amendments are processed in compliance with	Number of budget transfers and amendments		Budget Division	Demand			Y				
Assure receipt of GF0A'S Distinguished Budget Presentation Award to indepen	Receipt of GFOA's Budget Presentation Award (Not Proficient-0, Proficient-1, Outstanding-2)		Budget Division	Outcome			Y	q		v	-
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	Outcome			Y	Ø 🖉	•	a 🚺		
Review and/or provide fiscal comments/recommendations to County Administrat	Number of agenda items reco	×	Budget Division	Demand	Y			Z 🎾		-	•
Review and/or provide fiscal comments/recommendations to County Administrat	Percentage of agenda items : Are you sure, This KPI will not be included in Budge and Management report if you uncheck Key KP?	t Book	Budget Division	Efficiency	Y			2 🖉		- •	•
Review and/or provide fiscal comments/recommendations to County Administrat	Percentage of agenda items	Cancel	Budget Division	Output	Y			2 🖉		•	•
To ensure we are budgeting a reasonable amount for our major revenues, incl	Percentage of Major Revenues Collected vs. Budget		Budget Division	Operating Statistic			Y	🛛 🖉	•	J 🚺	
Ensure that all items reviewed and approved by CDC comply with PPMs, Board	Contract Review Committee items reviewed and processed.		Contract Division	Output	Y			Z 🖉		- 1	
Ensure that all items reviewed and approved by CDC comply with PPMs, Board	Contract-related items reviewed and processed.		Contract Division	Output	Y			2 🖉		2	
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	Output	Y			Z 🖉		- 1		
Ensure that all items reviewed and approved by CRC comply with PPMs, Board	Percentage of Contract Review Committee items requiring rework.		Contract Division	Output	Y			2 🖉		- 1	- 0
Provide workshops to County Staff based on contracting and records procedur	Satisfaction of County staff pertaining to Contracting and Records Workshops.	Contract Division	Effectiveness			Y	¥ 🔑		- 1		
Provide workshops to County staff based on contracting and records procedur	Conduct Contracting and Records Workshops to County staff.		Contract Division	Output			Y	2 🖉		J 🚺	- 8

Export Report Button

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

A	В	С	D	E	F	G	н	1	J	К	L	м	N	0	P	Q	R	S	т	U	V	W	Х	Y	ž 🔺
KPI_SEQ	DESCRIP	TIDIVISION	ACTUAL	ESTIMAT	TE PROJE	CTE MONTHL	Y QUARTEF	RIYEARLY	AUTOMA'	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	Q1	Q2	Q3 (Q4
8244	Total nur	m Finance	ar 4	6 5	i9	64 N	N	Y	N																
8111	Work Or	d Platform	n SN/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	FPlatform	n SN/A	N/A	N/A	Y	Y	Y	Y	24	18	21	26	16	19	23	11	18	12			63	61	52	
8119	Mean Tir	n Platform	n SN/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	- 1
8120	Past Due	Platform	n≦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 Ch	na Platform	n≦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 P	r Custome	er N/A	N/A	N/A	Y	Y	Y	N	1				0								1	0		
8131	FTE Cont	r: Custome	er N/A	N/A	N/A	Y	Y	N	N	0				0								0	0		
8133	Pages Pr	ir Custome	er N/A	N/A	N/A	Y	Y	N	N	23544	31633	210361	50786									265538	50786		
8134	Student	Ir Custome	er N/A	N/A	N/A	ΥÇ	Y	Y	Y	2	2	2	2	2	2	2	2	2	2			2	2	2	
8136	Custome	er Custome	er 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 Des	sk Custome	er 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 Custome	er N/A	N/A	N/A	Y	Y	N	N	4.07.23.36	5.14.06.19	2.06.00.15	7.07	2.09.14.29	2.14.05.56	3.18.52.11	3.18	2.22					7.07		
8141	Maximur	m Custome	er 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	FCustome	er N/A	N/A	N/A	Y	Y	N	N	692	731	753	697	701	699	706	658	658				2176	2097	2022	
8144	Staff Pro	d Custome	er 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	- 1
8145	Tickets A	s Custome	er 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 Pro	b Custome	er 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 Or	d Custome	er 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 Or	d Custome	er 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	FCustome	er 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 Tir	m Custome	er 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	- 1
8152	Past Due	\Custome	er N/A	N/A	N/A	Y	Y	Y	Y	23	18	28	21	29	22	20	24	30	14			69	72	74	
8153	Problem	TCustome	er 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	TCustome	er 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	TCustome	er 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 Des	sk Custome	er N/A	N/A	N/A	Y	Y	Y	N	1144	1066	1066	1004	768	865	972	952	953				3276	2637	2877	
8234	% Compl	le Applicat	ic 105	6 305	% ε	i0% Y	Y	Y	N	31	33	34	35	37	39	41	43	44	45			33	37	42	
8235	% Compl	le Applicat	ic 405	% 755	% 10	10% Y	Y	Y	N	76	79	81	86	90	95	100						77.5	88	100	
8236	Custome	r Custome	er 85	6 909	% 9	18% N	Y	Y	N																
8237	% Compl	le Platform	n 5 09	6 109	% 10	10% Y	Y	Y	N																
8238	Decrease	e Custome	er N/A	8	% 1	.0% N	Y	Y	N																
8239	Digital C	o Custome	er N/A	Top-10	Top-10) N	N	Y	N																
8241	% Compl	le Network	c5 05	6 05	% 5	i0% Y	Y	Y	N																
8242	Total Rev	ve Finance	ai \$455,627	\$508,294	\$610,6	00 N	N	Y	N																
8243	% Compl	le Applicat	ic 25	6 509	% 10	10% Y	Y	Y	N	60.4	61.8	63.2	64.6	66	67	68	70	71.6	73			61.8	65.3	69	-
(KPIRe	eport	+																						F

Scorecard Button

1. Click on the **"Scorecard"** 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:

1	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 All	
	Cancel OK, Print All Performance Indicators OK, Print Management Report OK, Print only 2 Key KPI(s) OK, Print only Budget Book KPI(s)	

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).

Office of Financial M

255

omments

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:

Please select the report Cancel Ok, Print Objectives/Performance Measures Ok, Print BB Mgt Report Office of financial Management & Budget Centre of the second control of the second contrel second conthe second control of the second contrel second con	Informat	ion 🚑	stems	Servi	ces - B	udget Book Report ×	
Cancel Ok, Print Objectives/Performance Measures Ok, Print BB Mgt Report Cancel Ok, Print Objectives/Performance Measures Ok, Print BB Mgt Report	Please	select t	he repo	ort			
Chica of financial Management & Budget Control of Bunchisters the County of Management & Budget Control of Bunchisters the County of Management & Budget Control of Bunchisters the County of County Control of County Control of County Coun	Cance	el Ok	k, Print (Objectiv	es/Perfo	rmance Measures Ok, Print BB Mgt Report	
Concision Management & Budget Frain Beach County, R. Intercenting and Beachs Artisul Frain Beach County, R. Intercenting and Beachs Frain Beach County, R. Target Travest Conduct Contracting and Beachs Frain Beach County, R. Target Travest Conduct Contracting and Beachs Frain Beach County, R. Target Travest Conduct Contracting and Beachs 9% 1.154 Debt per copilo (versit) 3 6.37 5.57 Contract-fielded items reviewed and project status 5.20.770.000 770.000 Non As-Valorem Review Bond Debt Service 5.78 5.77 5.22 5.22 Diata collected by extend efforts 1.03.8 119.6 6.4 6.4 Reventage of Invertification and meads representatives. Toronge. Contract, Watch Contract, Beach Contra							
Office of Financial Management & Budget Faint Beach County, R Sancial Management & Budget Actual Target Target Target FETORMANCE MASSREMENTS FY 2021 Target Target Target Status Conduct Contracting and Records 3 7 5 5 Conduct Contracting and Records 3 7 5 5 Contracting and Records 9% 1.154 Target Target Debt per copito (overal) ³ 435 3% 72 522 522 Debt per copito (overal) ³ 435 3% 72 522 522 Debt per copito (overal) ³ 435 3% 72 522 522 Delare copito (overal) ³ 13.83 94 96 Number of performance management/ totalce performance management/ totalce performance of the copito overal is an opticing of noncost is approved to them copies of the social overal is an opticing of noncost is approved to them copies of them copies overal is an opticing of the metodow is an opticing overal is an opticing of the metodow is an opticing overal is an optic			/				
DEPARTMENT SUMMARY DEPARTMENT SUMMARY MISSION STATEMENT TERCOMMANCE MEASUREMENTS Transet Transet TERCOMMANCE MEASUREMENTS Transet Transet TERCOMMANCE MEASUREMENTS Transet Transet TERCOMMANCE MEASUREMENTS Transet Transet Transet Transet Conduct Contracting and Records 3 To 5 Contract-Melance Tem reviewed and prove and provide is generative. Contract Melance Temperative. Contract Melance Temperative. State Contract Melance Temperative. Contract Melance Temperative. State Contrul (EDC) Division review of contract, melance Tempera						Office of Financial Management & Budget	Palm Beach County, Fl
Failed Wanagement & BudgetFaile Beach County, ff TargetActual PERFORMANCE MEASUREMENTSActual TargetTarget PY 2021Target PY 2023Target PY 2023Control The public media representatives, and cobing guernet againment agencies. Primary 						MISSION STATEMENT To manage, monitor, and maintain financial resources to achieve outstanding result Budget Division The Budget Division prepares and administers the County's annual budget in accor and policies of the Board of County Commissioners (BCC), and fuffils an oversign	s. Idance with Florida Statute It role on behalf of Count
PERFORMANCE MEASUREMENTSPT 2021PT 2022PT 2022PT 2024PT 2021PT 2022PT 2023PT 2024Conduct Contracting and Records375Contracting and Records375Contracting and Records375Contracting and Records9%1.154Contracting and loverall)3435390Debt per capita (overall)3435390Dollars collected by external efforts526.769.24142.345.86Number of performance management// tradegic planning frainings, courses or adapatine presentions5.785.79S.7785.795.225.22Number of performance management// tradegic planning frainings, courses or adapatine208196Recentor of COA's Budget Presention Award (Not Proficient-1)111Outstanding-2)1111Records Destruction request reviewed 6. processed.7357	ancial Management & Budget	Actual	Actual	Palm Beach Target	Target	Administration and the BCC. The division also provides general guidance of departments, members of the public, media representatives, and other government	and assistance to Count t agencies. Primary service
Conduct Contracting and Records3755Conduct Contracting and Records3755Conduct Contracting and Records9961.154issues, major project status, and departmential performance measurement data; releveling and contracting and representatives.Debt per capita (overall) 3435390529529Dalars calected by external efforts 4526/769.24162.365.86770.000770.000Non Ad-Valorem Revenue Bond Debt Service5.785.795.225.22Number of performance management/ drategic planning training, courses or department into service compliance for tracking, updating, courses or department into service constraintsContract Development & Control (CDC) Division serves as the clearing house for coordinating of contract Development & Control (CDC) Division serves as the clearing house for coordinating of contract Development & Control (CDC) Division serves as the clearing house for coordinating of contract Development & Control (CDC) Division serves as the clearing house for coordinating of contract Development & Control (CDC) Division serves as the clearing house for coordinating of contracts and related documents to ensure compliance with BCC policies, as well as, state Management requirements, course or any out its mandate, the Division for cloarest, work Orders, Quencila, as well as, state 	PERFORMANCE MEASUREMENTS	FY 2021	FY 2022	FY 2023	FY 2024	include preparing the County's annual operating and capital budgets; analyzing the adapted budgets analyzing the adapted budgets analyzing the constant requirements rec	and processing changes to
Contract-related items reviewed and processed. ² Debt per capita (overal) 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 5.78 5.79 5.22 5.22 Number of performance management/ strategic planning trainings, courses or 208 196 84 84 department presentations ⁴ Percentage of Major Revenues Collected vs. 103.8 113.83 96 96 Percentage of Inventoriable assets confirmed 98.48 no 99 99 Receipt of GFOA's Budget Presentation Award (Not Proficient-1, 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Conduct Contracting and Records Workshops to County staff. ¹	3	7	5	5	issues, major project status, and departmental performance measurement data; to on the fiscal impact of 80ard agenda items; and providing financial expertise, ass	eviewing and commenting istance, and information to
Debt per capita (overall) 3 435 390 529 529 Dalars 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/ trategic planning trainings, courses or department presentations 5 103.8 113.83 96 96 Percentage of Inventional Collected vs. Sudget 7 103.8 113.83 96 96 Recentor of COA's Budget Presentation Avard (Nat Proficent-D, Proficent-D, Proficent-D, Proficent-1) 1 1 1 Outstand Devenues 6.8 773 57 577 577	Contract-related items reviewed and processed. ²	996	1,154			Contract Development & Control Division	
Dollars collected by external efforts 4 526/76/24 162.365.86 770.000 770.000 Non Ad-Valorem Revenue Bond Debt Service 5.78 5.79 5.22 5.22 Number of performance management/ strategic planning trainings, courses or department presentations 4 5.78 5.79 5.22 5.22 Number of performance management/ strategic planning trainings, courses or department presentations 4 208 196 84 84 Percentage of Major Revenues Collected vs. Budget 7 103.8 113.83 96 96 Percentage of Inventional control 103.8 113.83 96 96 Receipt of GPA/s Budget Presentation Avord (Not Proficient-D, Proficient-1). 1 1 1 1 Outstanding-2() 73 57 57 57 57	Debt per capita (overall) ³	435	390	529	529	The Contract Development & Control (CDC) Division serves as the clearing house	for coordinating all forma
Non Ad-Valorem Revenue Bond Debt Service 5.78 5.79 5.22 5.22 Number of performance management/ strategic planning trainings, courses or department presentations 4 5.78 5.79 5.22 5.22 Number of performance management/ strategic planning trainings, courses or department presentations 4 208 196 84 84 Percentage of Major Revenues Collected vs. Budget 7 103.8 113.83 96 96 Percentage of Inventoriable assets confirmed Award (Nat Proficient-1). 1 1 1 1 Outstanding-2() Constraining-2() 73 57 57 57	Dollars collected by external efforts ⁴	526,769.24	162,365.86	770,000	770,000	contracts and related documents to ensure compliance with BCC policies, Management requirements. To carry out its mandate, the Division facilitates the	as well as, State Record initiation, completion, and
Number of performance management/ strategic planning training, courses or 208 196 84 84 exportment presentations ⁶ 103.8 113.83 96 96 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 GFOAs Budget Presentation Award (Not Proficient-0, Proficient-1, 1 1 1 1 1 Quitationing-21 73 57 57 57	Non Ad-Valorem Revenue Bond Debt Service coverage $^{\rm 5}$	5.78	5.79	5.22	5.22	approval process of contract related items through the review of contracts, or Proposals (RFP), bid documents and Change Orders, Wark Orders, Consultant Se product and latter of cract. A database is positationed for tracking updation	agenda items, Request fo ervice Authorizations, suret
Percentage of Major Revenues Collected vs. 103.8 113.83 96 96 Budget 7 Percentage of Inventoriable assets confirmed 98.68 na 99 99 Receipt of GFOA's Budget Presentation Award (Nathroficient-0. Proficient-1. 1	Number of performance management/ strategic planning trainings, courses or department presentations ⁶	208	196	84	84	contras, directed bases of orders. A calculate a manufaction indexing, opposing, and contrasts and related items approved by the BCC. Reports are provided in related approved contracts. The Division is represented or serves as chair for many count toplied reports management compliance for the Boord of the light body.	ition to change activity for ywide committees. Service
Percentage of inventoriable assets confirmed 98.68 na 99 99 Receipt of GFOA's Budget Presentation Award (Nat Proficient-0, Proficient-1) 1 <t< td=""><td>Percentage of Major Revenues Collected vs. Budget ⁷</td><td>103.8</td><td>113.83</td><td>96</td><td>96</td><td>Financial Management Division</td><td></td></t<>	Percentage of Major Revenues Collected vs. Budget ⁷	103.8	113.83	96	96	Financial Management Division	
Receipt of GFOAs Budget Presentation Award (Not Proficient-0, Proficient-1, 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Percentage of inventoriable assets confirmed	98.68	na	99	99	The Financial Management Division includes Debt Management, Fixed Assets I	Management (FAMO), the
Records Destruction request reviewed & 73 57 requests and conducting impact fee compliance reviews of municipalities, providing financial analysi for Department of Housing and Economic Sustainability (DHES) Housing and Urgan Development (H	Receipt of GFOA's Budget Presentation Award (Not Proficient-0, Proficient-1, Outstanding-2)	1	1	1	1	bioming for future financing needs, recording acquisitions and algorists inclu- conducting periodic inventories and recording acquisitions and algorists of conducting periodic inventories and recordilations of fixed assets, managing program and the Thrift store, ensuring the accurate calculation of impact fees. re-	County owned property the surplus asset dispose eviewing impact fee refund
or bepartient or housing and counter betreporter (in	Records Destruction request reviewed & processed. 8	73	57			requests and conducting impact fee compliance reviews of municipalities, providir for Department of Housing and Economic Sustainability (DHES) Housing and Urba	ng financial analysis suppor n Development (HUD) loar
State Approval of TRIM material (Options are 1 1 1 1 1 1 developing related countywide financial policies and procedures.	State Approval of TRIM material (Options are Approved-1 or Not Approved-0)	1	1	1	1	program and selected Purchasing RFPs, maximizing the collection of monies developing related countywide financial policies and procedures.	due to the County, and

1. In FY20, due to the In PP20, due to the Covid-19 pandemic, workshops were put on hold. One class was provided in PP20 to on department due to new staff coming nobbard. PP21 continued to be negatively impacted by the pandemic. Typically there are 4-5 trainings held per year (between March and September). Min/Max, Target, and Goal are not in departments 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 actuats 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.
- growin in population coupled win a decretase in the amount of decroutstanding. Performance Management and Strategic Finning took advantage of various virtual platforms to hold various presentations, workshops and trainings throughout many departments in the County. Several departments tasked for assistance with creating cross-divisional teams, updating core values, and providing guidance on creating meaningful KPIs. Feed Your mind also returned from a Covid-induced histus 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 FV22 and FV23 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 FV13 Market was lowered and revenues recovered more quickly than anticipated to
- 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.



erm The strategic Hanning and Performance Management Division supervises all activities Hauted to the long-term strategic plan and assists the SCC, Management Heam, 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.

ffice 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.

Infor	nation Systems Services			КР	s Data Entry Das	shboard eMail DashBoard	Report Grap	hs .	Autom	ation	User Ma	iintenar	ice
		Perfo	ormance Measure	ment Data Shee	et								
Mor	thly Quarterly Yearly					Depar	tment In	io F	ixcel Report	Scor	ecard		
							T. T						
FY -	2021 V February 2021 V			Information Systems Servic	25 *	All							
			0004.01.00	0001 7					iey KPI		MR KPI	BBI	KPI
NO.	Performance Measure	Measurement Type	2021 Min/Max	2021 Target	2021 Stretch Goal	Current Value	Unit of Measure		0 1		Key M	КВВ	
1	Iotal number of External Service Agreements	Demand		48	63		Unit Count V	•	N	4			•
2	Quotes Processed	Outcome					Unit Count V	•	N	4			0
3	Staff Productivity Factor	Effectiveness	70	75	80	0	% *	•	8	1 0			0
4	Student Interns	Input				0	Unit Count 💙		8 L	1 0			0
5	Vacant Positions	Workload					Unit Count 💙		۹ L	<u>#</u>			Ð
6	% Completion of HRIS 2.0 Project	Outcome		50	80		% v		8	<u>a</u>			€
7	% Completion of eFDO Project	Outcome	25	35	80		% ~		8	<u>a</u>			Ð
8	% Completion of ePZB Technology Refresh Project	Outcome	95	98	100		% •		8	<u>u</u>			0
9	Customer Satisfaction Rating	Outcome	85	90	95	100 💿	%		8				0
10	Mean Time to Problem Restoration (Hours)	Effectiveness	35	Jm 30	25	.41 💿	Hours 🗸		۹ L	. 0			₽
11	Past Due Problem Tickets	Effectiveness	10	6	4	0 0	Unit Count 🗸		8	. 0			θ
12	Staff Productivity Factor	Productivity	70	75	80	23.68	%		8	. 0			Θ
13	% Completion of Online SBE Payment System	Outcome		0	100		% ~		۹ L				Ð
14	% Completion of ME Case Management System	Outcome					(% v)		8	<u>d</u>			Ð
15	% Implementation of Electronic Agenda Tracking Sys	Outcome		0	100		%		۹ L	at 🛛			₽
16	% SLAs Met for Initial Response	Outcome	89	95	97	100.00 🗢	% ~		8	a 0			0
17	% SLAs Met for Restoration	Outcome	89	90	95	100.00 🗢	% ~		۹ L	a 0			θ
			Save										

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.

ld Comments 🚓	
Performance Measure: % Completion of ePZB Online Submittal Module	Reporting Period: September 2018
Comments:	
Save	Close

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 F	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:*	Browse		
	Save		

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 ito see detail information of that particular Performance Measure

Details							1	Print
Department:	Information Systems Servic	es 🔻	Fiscal Year: 2019 T	Performance	Type: Applicatio	ns Services - Billable Hours (C	Code 1)	•
Actual:	N/A Estimat	ed: N/A	Projected: N/A	Budget I	Book: N	Measurement Type: Wo	rkload	
6,000						Trend: No	Print	
5,400	Oct 201	3 Hours (Code 1): 4 472 25	5,595.25					
₫ 4,800	4.472.25	louis (code 1): 4,472.25				Summary		
						Average: 5033 Cumulative: 1006	.75 Hours 7.5 Hours	
3,600	Oct 2018		Nov 2018	Dec 2018				
			Reporting Period					
			Billable Hours (Code 1)					
								Ę
Reporting Period	Measurement Type	Current Value	Cumulative To Date	Average To Date	Unit of Measure	Annual Prj Revised	Comments	
October 2018	Workload	4472.25	4,472.25	4,472.25	Hours			
November 2018	Workload	5595.25	10,067.50	5,033.75	Hours			
December 2018	Workload	3751.25	13,818.75	4,606.25	Hours			
Q1 2019	Workload	13818.75	13,818.75	13,818.75	Hours			
2019	Workload	13819.25	13,819.25	13,819.25	Hours			
			Clos	e				

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 Skey 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.
 - This is NOT the Budget Book report that pints 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 loging 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

1005ING/HOMELESSNESS

1NFRASTRUCTURE

- **CENTRALIZED/SUPPORTING DEPARTMENT**
- PUBLIC SAFETY

M ENVIRONMENTAL PROTECTION

SUBSTANCE USE & BEHAVIOR DISORDERS

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.

Applications Services	Max	Target	Goal	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
6 Completion of eFDO Project				9 51	5 2	9 53	 54	 55							
6 Completion of ME Case Management ystem				77.2	78.6	80	81.4								
6 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
6 SLAs Met for Initial Response	89	95	97	97.18	97.09	97.39	98.62	9 7.66							
6 SLAs Met for Restoration	89	90	95	96.24	9 6.51	98.69	9 6.79	9 7.08							
Staff Productivity Factor	70	75	80	Ø 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	9 18.74							
Past Due Problem Tickets	10	6		6	• 5	9 4	9 3	9 4							

🔮 The Goal has been exceeded

INFORMATION SYSTEMS SERVICES DASHBOARD - FEBRUARY 2019 - Quarterly Applications Services Max Goal % Completion of eFDO Project **52 0** 109 **81.4** % Completion of ME Case Management System **78.6** % Completion of ePZB Online Submittal Module 0 60 71 Applications Services **9**7.21 **98.2** % SLAs Met for Initial Response **9**7.03 % SLAs Met for Restoration **42.51** Staff Productivity Factor Max Goal Applications Services QTR 4 OTR 3 Mean Time to Problem Restoration (Hours) 30.12 • 15 **9** 7 Past Due Problem Tickets 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 Perfo

1







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



Report

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

📀 Palm Beach County - eKP						_					Home LogOff Amit Sawant
Information Systems Services			KPIs	Data Entry	Dashboard	eMail DashBoard	Report	Graphs	Automation	User Maintenance	Budget Book -
			Report								
Department:	Information Systems Services	~	Fiscal Year:* 2019	~		Performa	nce Type:	Select From	m Here		V
Reporting Period:	Select From Here 🔽		Reporting Value: Sele	ct From Here	~				Search		
- Search Department: Reporting Period:	Information Systems Services		Fiscal Year:* 2019 Reporting Value: Sele	Ct From Here	~	Performa	nce Type:	Select Fror	m Here Search		

- 2. Enter the filter you want for your report and then click on the "Search" button
- 3. The following screen appears

Palm Beach County	/ - eKPI												Home LogO Amit Sawan
Information Systems Services					KPIs	Data Entry	Dashboard	eMail Dash	Board Repo	rt Graphs A	Automation User	Maintenance	Budget Book -
					Report								
- Search	partment: ng Period:	Information	systems Services	~	Fiscal Year:* 201 Reporting Value: S	9 🔽 elect From Here	-	Pe	rformance Ty	Pe: Applications Set	rvices - % Completion Search	of ME Case Mana	gement Syster 🗸
													8
Department 7	Reporti	1g Period 🍸	Performance Type	Y	Measurement Type 1	Budget Book 7	Actual 7	Estimated	Projected	Current Value 🍸	Unit of Measure	7 Annual Prj	Revised 7 KP7
Information Systems Services	Oct	2018	% Completion of ME Case Management System		Outcome	Y	50%	75%	100%	77.2	96		Let.
Information Systems Services	Nov	2018	% Completion of ME Case Management System		Outcome	Y	50%	75%	100%	78.6	%		Let.
Information Systems Services	Dec	2018	% Completion of ME Case Management System		Outcome	Y	50%	75%	100%	80	96		Lat.
Information Systems Services	Q1	2019	% Completion of ME Case Management System		Outcome	Y	50%	75%	100%	78.6	96		Lat.
Information Systems Services	20	19	% Completion of ME Case Management System		Outcome	Y	50%	75%	100%	78.6	%		Lat.
S 1 10 -												Displaying	items 1 - 5 of 5

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.

Γ		D	ashboard Control	×				
ſ	2018 🔻							
ł	Order	Department	Performance Type	Chart Type				
ŀ	Chart 1	Information Systems Services	Select Performance Type	Select Chart 🔻				
L	Chart 2	Information Systems Services	Select Performance Type	Select Chart Area Chart				
ł	Chart 3	Information Systems Services	Select Performance Type	Bar Chart				
0	Chart 4	Information Systems Services	Select Performance Type	Line Chart				
L	Chart 5	Information Systems Services	Select Performance Type	Select Chart V				
L	Chart 6	Information Systems Services	Select Performance Type	Select Chart 🔻				
	Chart 7	Information Systems Services	Select Performance Type	Select Chart 🔻				
ł	Chart 8	Information Systems Services	Select Performance Type	Select Chart 🔻				
	Chart 9	Information Systems Services	Select Performance Type	Select Chart 🔻				
	Chart 10	Information Systems Services	Select Performance Type	Select Chart 🔻				
ŀ	Chart 11	Information Systems Services	Select Performance Type	Select Chart 🔻				
	Chart 12	Information Systems Services	Select Performance Type	Select Chart 🔻				
L	Chart 13	Information Systems Services	Select Performance Type	Select Chart 🔻				
ł	Chart 14	Information Systems Services	Select Performance Type	Select Chart 🔻				
4	Chart 15	Information Systems Services	Select Performance Type	Select Chart 🔻				
L	Chart 16	Information Systems Services	Select Performance Type	Select Chart 🔻				
	Chart 17	Information Systems Services	Select Performance Type	Select Chart 🔻				
1	Chart 18	Information Systems Services	Select Performance Type	Select Chart 🔻				
	Chart 19	Information Systems Services	Select Performance Type	Select Chart 🔻				
	Chart 20	Information Systems Services	Select Performance Type	Select Chart 🔻				
			Save Close					

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

- 2. Choose the chart type from the "Chart Type" dropdown list
- 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)



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

Palm Beach County - eKPI Home i Lo Amit Sav									
In			KPIs Data Entry Dashboard eMail	DashBoard Report	Graphs Automatic	on User Maintenance	Budget Book -		
Email Dashboard									
	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;imayorga@pbcgov.or rg;fcevallo@pbcgov.org;pvarak@pbcgov.org;DBennette@pbcgov.org;gaulakh@pbc ow orn	Monthly	4	7:00 AM	N		
	1	eKPI Monthly Performance Report for Application Services	asawant@pbcgov.org;ISS-APS-Managers@pbcgov.org	Monthly	11 💌	7:00 AM 💌			
	3		Enter ';' between two recepients	Select a Frequer	Select a day	Select a Time			
	4		Enter ';' between two recepients	Select a Frequer	Select a day	Select a Time 💟			
	5		Enter ';' between two recepients	Select a Frequer	Select a day	Select a Time			
			Save						

- 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: <u>Department Summary Screen</u>. (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.

	Palm Beach County - eKPl	Malav Pati
	Information Systems Services VPs Data Entry Dashboard eMail DashBoard Report Graphs Automation	User Maintenance
	Budget Book Form Search	
satisfaction of County staff pertaining to Contracting and Records Workshops.	Form Stand - Department, ⁴ Information Catano Capital Form Type, ⁴ Parameters Comman Fiscal Year, ⁴ 2001 •	Redact Book
onduct Contracting and Records Workshops to County staff.		a cooger book
centage of records destruction requests from other departments requiring rework.	Division Y Summary/Normalive	Y Actio
cords Destruction request reviewed & processed.	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 STATEMENT programs. Centralized oversight of technology resources will be established through enterprise policies, standards, strategic plans, and governance committees.	and 💽 -
es Add New Department Info	Information Systems Services (ISS) provides a broad range of IT services including: installation and maintenance of the Country's fiber optic network; technical support for computing platforms such as URIX and Windows services, desktop compute Department Tublet FXs, printers, and summary compared country agencies; maintaining an investory on the has 30 in-house software applications; the temprise and numerous commercial under software applications; the temprise appli	ers, laptops, lages; it; 24x7 Help
1	Application Services Inspection of the evolution of the e	service s
	 Computing Responsible for processing, storing, and protecting the County's vital information for its agencies and departments. Key responsibilities include a 24:07 lettwork Operations Center (IVIC) as part of the Customer Care Center which also includes the Platforms Desk, the desktop support function; application database hosting; data storage and recovery; enterprise printing and scanning; and end user training. 	ISS Help
Click on the red	Other IT Operations This is a grouping of the remaining programs that do not have divisional status, including IT Security, Quality Assurance, and the Countrylold GIS Program.	
"Department Info"	Reportible for providing reliable, survivable, and cost effective voice, video, and data communications services. Key responsibilities include design, deployment, and maintenance of enterprise voice and data services maintenance of a comprehe services services and providing the public with remote access to the County's memory and providing the public with remote access to e-government applications. The Division is also responsible for the r and build word of the County's feestive tendors: advocating and a services.	nsive maintenance
button found at bottom	Finance & Responsible for administering technology procurement and contracts; budget preparation and monitoring; cost allocation plan development and billing: employee payroll and timeleeping; financial reporting; asset receiving and invertory tracking	; audit
of main KPI Performance	Services coordination; and a variety of special projects. The Division's purpose is to efficiently administer these tasks in direct support of ISS service operations, our employees, and customer base.	
Indicators screen to get	S [] 20 M Disp	aying items 1 - 7 of 7
	€ Back to e07	
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.

Information Systems Services - Add Department Summary/Narrative	×
Fiscal Year * 2020 +	
Title *	
Narrative *	
	1
+ Add New Ø Clear Save ★ Close	

- 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**.

🙆 Palm Be	Palm Beach County - eKPI Home Logofi Amit Sawant							
Information Syste	ems Services KPIs Data Entry Dashboard eMail DashBoard Report Graphs Automation User Maintenan	ce						
	Budget Book Form Search							
– Forms Search – Departmei	nt:* Information Systems Services 🔽 Form Type:* Department Summary V Fiscal Year:* 2020 V	k						
Division 🍸	Summary/Narrative Ad	tion						
MISSION STATEMENT	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, ind 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.							
Department Overview	Information Systems Services (ISS) provides a broad range of IT services including: installation and maintenance of the County's fiber optic network; technical support for computing platforms suc a C Update Narrative Windows servers, desktop computers, laptops, tablet PCS, printers, and smart phones; developing customs oftware applications for County agencies; maintaining an inventory of more than 350 in og Delete Narrative applications; the enterprise email system and numerous commercial vendor packages; Oracle database administration; enterprise Geographic Information Systems (GIS); installation and maintenance of all landline, cellular telephones, and related equipment including voice over IP (VoIP); video conferencing; IT project management; 24x7 Help Desk; user training; enterprise software licensing; and document ascanning. In addition, ISS is responsible for back-up and recovery, security, and IT Resource Management for the procurement of IT-related goods and services.							
Application Services	Responsible for developing, implementing, and maintaining business applications in close cooperation with County agencies; supporting vendor commercial software packages; serving as liais to user agencies to communicate plans, coordinate service requests, and provide general consulting and project management services; and implementing a vast array of Oracle, SQL, and FoxPro databases for development and product management services; and implementing a vast array of Oracle, SQL, and FoxPro databases for development and product management services; and implementing a vast array of Oracle, SQL, and FoxPro databases for development and product management services; and implementing a vast array of Oracle, SQL, and FoxPro databases for development and production environments. Additionally, the system administration function was implemented to oversee the operation and maintenance of department-specific applications.	-						
Computing Platforms	Responsible for processing, storing, and protecting the County's vital information for its agencies and departments. Key responsibilities include a 24x7 Network Operations Center (NOC) as part of the Customer Care Center which also includes the ISS Help Desk, the desktop support function; application database hosting; data storage and recovery; enterprise printing and scanning; and end user training.	-						
Other IT Operations	This is a grouping of the remaining programs that do not have divisional status, including IT Security, Quality Assurance, and the Countywide GIS Program.	•						
Network Services	Responsible for providing reliable, survivable, and cost effective voice, video, and data communications services. Key responsibilities include design, deployment, and maintenance of enterprise voice and data services; maintenance of a comprehensive security program to safeguard information; video conferencing and streaming; providing wireless access to the County's network; and providing the public with remote access to e-government applications. The Division is also responsible for the maintenance and build-out of the County's fiber-optic network and overall management of telecommunications expenses.	-						
Finance & Administrative Services	Responsible for administering technology procurement and contracts; budget preparation and monitoring; cost allocation plan development and billing; employee payroll and timekeeping; financial reporting; asset receiving and inventory tracking; audit coordination; and a variety of special projects. The Division's purpose is to efficiently administer these tasks in direct support of ISS service operations, our employees, and customer base.	-						
S 1 20 -	Displaying items 1 - 7 c	of 7						
← Back to eKPI	+ Add New							

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

Information S	iystems Services - Update Department Summary x
Fiscal Year *	2020 •
Title *	MISSION STATEMENT
Narrative *	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.
-	
-	+ Add New / Clear 🛱 Save 🛪 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: <u>Highlight / Emerging Issue List</u>

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

	Mar Davidson Delikard Alexandro Carde Astronomic Broute	
mation	Systems Services KPS Data Entry Dastroard eMail	tenan
	Budget Book Form Search	
ms Searc	A	_
D	apartment:* Information Systems Services. • Form Type:* Highlights/Emerging Issues • Fiscal Year:* 2020 •	et 800
v Typer	Decompose Decomp	Ad
nu G	Depart volumes survey and year and each volume server in parts and in any sources in 2015.	
16.	Analose egis nasonal associatio di Countes (ne.o) analos (to 5 di Sudmitta) foi a varies (oi applicatoris tuta vere ovvelope in colacoratori min partier agences.	H
11.	Achieves a lavotaise custome sastracton rating of greater than 1995.	H
	Successing updated the inclusion inclusion of Successing and Succe	H
	Consolution intrastructure for senti rian and set execute.	H
с /	L'earde an internation Security Unition.	
н. (Complete a feet do to te attrative de Cocket a une rento verso kende.	H
	nepuede duv minesa kussa runt derikte autos tire County.	H
	Impermentar ana active series and in terms to be used. Comprise.	H
	Replace une voogle appliede nin au uue vinaerenin seelui engile.	H
L.	Secret new minal dUmmy system and began conversing allower outputs records.	M
ii.	Implemented and upgalaced imagine approximation including species, we not considered to require training account of the require training account of the requirement of the requirement account of the requirement account of the requirement account of the requirement of the r	0
L	Implemented SOLR search for Integration with business application.	(
L	Increased data storage capacity with implementation of new enterprise data storage platforms.	t
IL.	Provided critical staff support to Supervisor of Elections during elections and recounts.	ł
L	Installed 7,732,464 strand miles of fiber optic network cabling (35 miles).	t
L	Completed the update of the strategic plan for ISS for 2019 through 2021.	¢
iL.	Completed the Fiber Run to Belle Glade.	1
K.	Implemented capability for periodic security tests of employee phishing vulnerability.	t
łL.	Commencement of Windows 10 upgrade.	t
0.	20 v Hill = Highlight Isolas El = Emarging Isolas	20 of

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

Ĩ	formation Systems Services - Add Highlights/Emerging Issues	×
	Ighlights & Accomplishments	
	Fiscal Year * 2020 V	
	Highlights & Accomplishments*	
	+ Add New 🥒 Clear 🖹 Save 🗶 Close	
L		

- 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

	budget book i ofin Search	
– Forms Sear Dep	artment:* Information Systems Services V Form Type:* Highlights/Emerging Issues V Fiscal Year:* 2020 V	Budget Book
Row Type	Description	Y Action
HL	Digital Counties Survey awarded Palm Beach County seventh place among large counties in 2019.	
HL	Awarded eight National Association of Counties (NACo) Awards (100 % of Submittal) for a variety of applications that were developed in collaboration with partner agencies.	🕼 Update Highlight
HL	Achieved a favorable customer satisfaction rating of greater than 96%.	🛍 Delete Highlight
HL	Successfully upgraded the intranet website to SharePoint 2016.	<u> </u>
HL	Consolidated infrastructure for Palm Tran and Fire Rescue.	÷ -
HL	Created an Information Security Division.	÷ -
HL	Completed a refresh of the hardware located at the North West Regional Data Center.	()
HL	Replaced 300 Wireless Access Point devices across the County.	(† -
HL	Implemented Palo Alto Next Generation firewalls to be used Countywide.	÷ -
HL	Replaced the Google appliance infrastructure with the SharePoint search engine.	1
HL	Selected new email archiving system and began converting archive Outlook records.	1
HL	Implemented and upgraded multiple applications including: Card Tracking System, Vendor Directory, Office of Equal Business Opportunity Online Portal, Facilities Development & Operation's Security Log a Zoning, & Building's Online Search Request, technical refresh of the eP2B application, Property Appraisers' Homestead portability and Tangible Address change module, Online Platting Application for Engin application, enterprise Contract Management System rollout to various county departments, Ontractar Monitoring System, Vitual Appointments for Community Services repeat clients, Advanced Metering In Contractor Change Out module and Credit Card Payments (Lobby Point of Sale) for Water Utilities, Laboratory, Toxicology, Evidence and Records Management for Medical Examiner.	pplication, Planning, eering, Golden Palm frastructure
HL	Implemented SOLR search for Integration with business application.	1
HL	Increased data storage capacity with implementation of new enterprise data storage platforms.	1 - C
HL	Provided critical staff support to Supervisor of Elections during elections and recounts.	1
HL	Installed 7,732,464 strand miles of fiber optic network cabling (35 miles).	1
HL	Completed the update of the strategic plan for ISS for 2019 through 2021.	1
HL	Completed the Fiber Run to Belle Glade.	1
HL	Implemented capability for periodic security tests of employee phishing vulnerability.	1
HL	Commencement of Windows 10 upgrade.	(
S 12	20 HL = Highlight Issue; EI= Emerging Issue.	Displaying items 1 - 20 of 28
🗲 Back to	KPI + Add New	

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

Information Systems Services - Update Department Summary	×
Highlights & Accomplishments Emerging Issues	_
Fiscal Year * 2020 V	
Highlights & Digital Counties Survey awarded Palm Beach County seventh place among large counties in 2019. Accomplishments*	
+ Add New 🥒 Clear 🖺 Save 🗶 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: <u>Financial Summary</u> (Click from drop-down list and the following is displayed)

Palm Beach County - eKPI Home : Logoff Malav Patel											
				KPIS C	Data Entry	Dashboard	eMail DashBoard	Report Graphs	Automation	User Mainte	nance
		Bu	dget Book Form Search								
Forms Search Department:*	on Systems Services	Form Type:* Financial Summary	• Fiscal Year:*	2020	×					Budget	Book
Row Type	1	Description				7	Actual '18	Budget '19	Budget	'20	Action
Finance-Revenue	Charges for Services						9,301,784.00	10,661,157	00 9,0	81,683.00	÷ =
Finance-Revenue	Other						18,006.00	0	00	0.00	÷ -
Finance-Expense	Personal Services						21,961,980.00	24,413,935	00 24,1	30,097.00	* -
Finance-Expense	Operating Expenses						11,079,456.00	11,151,839	00 9,7	/54,465.00	1 ×
Finance-Expense	Capital Outlay						50,320.00	102,910	00 1	100,500.00	• -
Finance-Advalorem							23,771,967.00	0	00	0.00	÷ -
Finance-Position	Positions						213.00	213	00	213.00	• •
S 1 20 -									Display	ing items 1 -	7 of 7
+ Back to eKPI			+ Add New Significant	Changes							

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.

Fiscal	Year * 2020 +						
	Type* Revenue						
ion-Ad Valorem Reve	anues* Select From Here						
	*FY 2018 Actual (\$)	* FY 2019 Budget (\$)	*FY 2020 Budget (\$)				
			Clear 🔛 Save 🗶 Close				
Row Type	*	+ Add New 2 0	Clear 🗈 Save 🗶 Close	Actual '18	Budget *19	Budget '20	Ac
Row Type	Charges for Services	+ Add New 2 0	Clear 🗈 Save 🗙 Close	Actual '18 9,301,784.00	Budget *19 10,661,157.00	Budget '20 9,081,683.00	۸c
Row Type hance-Revenue hance-Revenue	Charges for Services Other	+ Add New Ø	Clear 🖻 Save 🗶 Close	Actual '18 9,301,784.00 18,006.00	Budget *19 10,661,157.00 0.00	Budget '20 9,081,683.00 0.00	۸c
Row Type hance-Revenue hance-Revenue hance-Expense	Charges for Services Other Personal Services	Add New Oescription	Clear E Save X Close	Actual '18 9,301,784.00 18,006.00 21,961,980.00	Budget '19 10,661,157.00 0.00 24,413,935.00	Budget '20 9,081,683.00 0.00 24,130,057.00	Ac
Row Type hance-Revenue hance-Revenue hance-Expense hance-Expense	Charges for Services Other Personal Services Operating Expenses	Description	Clear E Save X Close	Actual '18 9,301,784.00 18,006.00 21,961,980.00 11,079,456.00	Budget '19 10,661,157.00 0.00 24,413,935,00 11,151,839.00	Budget '20 9,081,683.00 0.00 24,130,097.00 9,754,465.00	Ac
Row Type ance-Revenue ance-Revenue ance-Expense ance-Expense ance-Expense		◆ Add New ♂ O	Clear E Save X Close	Actual '18 9,301,784.00 18,006.00 21,961,980.00 11,079,456.00 50,320.00	Budget *19 10,661,157.00 0.00 24,413,935.00 11,151,839.00 102,910.00	Budget *20 9,081,683.00 0.00 24,130,097.00 9,754,465.00 100,500.00	AC
Row Type hance-Revenue hance-Revenue hance-Expense hance-Expense hance-Expense hance-Advalorem		◆ Add New ♂ O	Clear E Save X Close	Actual '18 9,301,784.00 18,006.00 21,961,980.00 11,079,456.00 50,320.00 23,771,967.00	Budget *19 10,661,157.00 0.00 24,413,935.00 11,151,839.00 102,910.00 0.00	Budget '20 9,081,683.00 0.00 24,130,097.00 9,754,465.00 100,500.00 0.00	Act 1 1 1 1

- 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 L	Jpdate o	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:

🎐 Palm Beach Cou	nty - eKPI							Amit S
			KPIs Data Entry	Dashboard	eMail DashBoard	Report Graphs Ai	itomation l	User Maintenar
		Budg	et Book Form Search					
Forms Search Department:* Informatic	n Systems Services	Form Type:* Financial Summary	▼ Fiscal Year:*	2020				🛢 Budget Bo
Row Type	Y	Description		Y	Actual '18	Budget '19	Budget	t'20 Aq
Finance-Revenue	Charges for Services				9,301,784.00	10,661,157.00	5,00	01,000.00
inance-Revenue	Other				18,006.00	0.00	🕑 Up	odate Financia
inance-Expense	Personal Services				21,961,980.00	24,413,935.00	🛍 De	elete Financial
inance-Expense	Operating Expenses				11,079,456.00	11,151,839.00	9,75	54,465.00
nance-Expense	Capital Outlay				50,320.00	102,910.00	10	00,500.00
inance-Expense	Grants and Aids				100.00	100.00		100.00
inance-Expense	Transfers				100.00	100.00		100.00
inance-Advalorem					23,771,967.00	0.00		0.00
inance-Position	Positions				500.00	500.00		500.00
G 1 20 -							Displayi	ng items 1 - 9
← Back to eKPI			+ Add New Significant Ch	anges				

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:

Message from webpage	<
Are you sure you wish to Delete this Financial?	
OK Cancel	

- a. Click **OK** to delete the record.
- b. Click **Cancel** to stop the deletion.

c. On the Financial Summary page, click the Significant Changes



and the following page is displayed: (The Fiscal Year defaults to current year).

Information Systems Services							KPIs	Data Entry	Dashboard	eMail DashBoard	Report	Graphs /	Automation U	ser Maintenance
Forms Search Department:* Information	on Systems S	ervices T	Form Type:* Financial S	B	udget Book Fo	orm Search iscal Year:*		2020 7					1	& Budget Book
Row Type Finance-Revenue Finance-Revenue	Char Othe	Information Systems So Fiscal Year *	ervices - Significant	t Changes								x 9 1,157.00 0.00	Budget *2 9,08	0 Action 1,683.00
Finance-Expense Finance-Expense Finance-Expense Finance-Advalorem	Oper Capi	Significant Changes	B I U 8 S	X ¹ X ₁ 15 •	Verdana •	A •	= = =	= • T!•				3,935.00 1,839.00 2,910.00 0.00	24,13 9,75 10	4,465.00 () 0,500.00 () 0.00 ()
Finance-Position S 1 20 € Ead: to eKP	Posit		Non-Ad Valorem Reven Charges for Services - De Government: The move in Appropriations Personal Services - Dec reduction in insurance co	S ues ecrease in revenue is n phone charges is al rease is primarily d st.	due to changes in so directly related ue to the retirem	HANGES a enterprise so to the decreat ent of the pr	rvices. Phi se in opera	one charges mo ting expenses.	oved to General 1 Officer and a			213.00	Displayir	213.00 1 • • 7 of 7
				2	Clear 🛛 🖹 Sav	e 🛛 🗙 Clos						Å		

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: <u>Department Summary / Highlights – Emerging Issues</u> (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.

🕘 Paln	n Beach County - eKPi	Hom Mal	ie LogO av Patel
Information	Systems Services KPts Data Entry Dashboard eMail DashBoard Report Graphs Automation	User Mainte	enance
	Budget Book Form Search		
Forms Search	partment:* Pleet Management • Form Type:* Department Summary/Highlights-Emerging • Fiscal Year:* 2020 •	Budget	t Book
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 3et 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 155 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 feel truck delivery, capturing electronic signatures, or capturing new vehicle data.		÷ -
5 1 2	D = Division; O = Objective; P = Performance Indicator; DN = Department Narrative Displ	ying items 1	- 7 of 7
← Back to eK	P Add New		

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

FI	eet Manager	nent - Add		t Summary	/Highlight/	Emerging I				×
D	epartment Sum	nmary ing Issues	-							
	Fiscal Year *	2020 🗸	l							
	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/Highli	ght/Emerging Issues	×
Highlight/Emerging Issues		
Highlights & Accomplishments		
Fiscal Year * 2020 V		
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):

🥘 Palm B	Beach County - eKPI	Home LogOl Amit Sawan
Information Sy	stems Services KPIs Data Entry Dashboard eMail DashBoard Report Graphs Automa	tion User Maintenance
Forms Search	Budget Book Form Search	
Departm	eent:* Fleet Management V Form Type:* Department Summary/Highlights-Em Fiscal Year:* 2020 V	Budget Book
Item Type 🍸	Item Description	Y 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 .
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 trac be implemented in FY 2020.	 Update Narrative Delete Narrative
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 the day, for certain alarms.	of 💽 🗧
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 cartian applications.	e 🕴
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.	• •
S 1 20	D = Division; O = Objective; P = Performance Indicator; DN = Department Narrative	Displaying items 1 - 7 of 7
← Back to eKPI	+ Add New	

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.

it - Budget Book Report	,	×
report		^
Dk, Print Department Summary/Highlights-Emerging Issues		
•	nt - Budget Book Report	nt - 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.

rports				Palm Beach	County, FL
	PERFORMANCE MEASUREMENTS	Actual FY 2019	Actual FY 2020	Target FY 2021	Target FY 2022
S	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
<u>sillilli</u>	Concession Revenue Per Enplanement	12.24	13.12	11.22	11.22
	Debt Service Coverage	3.87	3.76	3.25	3.25
<u> </u>	Maintenance Department: Ratio of closed vs open corrective work orders.	83.25	90.5	85	85
U	Maintenance Department: Ratio of closed vs open preventive work orders.	85.25	84.75	85	85
O	Number of completed airfield safety and regulatory inspections ²	1,292	1,428	1,140	1,200

Comments

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.

 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.