Proposing Key Performance Measure (KPM) Changes

Agencies may request/propose changes to their Key Performance Measures (KPMs) and associated performance targets during Oregon's biennial budget development cycle. These change requests are entered into the KPM system in coordination with the Legislative Fiscal Office and DAS Chief Financial Office, and are then considered by the Legislature's Joint Ways and Means Committee (which approves any KPM changes as part of an agency's biennial budget bill).

All KPMs and associated targets that have been approved by the Legislature are documented in the Agency Budget Report, which is posted to the [Oregon Legislative Information System](#) (OLIS).
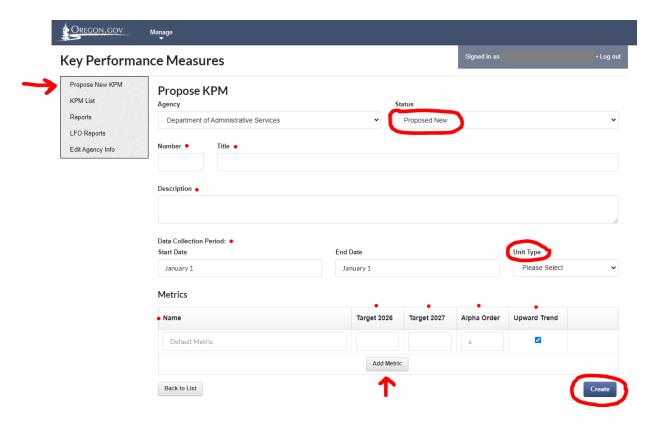
Possible KPM changes include:

- **Propose a new KPM:** Used when proposing a brand new KPM that does NOT replace an existing one.
- **Propose the deletion of a KPM:** Used when proposing to completely remove a KPM from agency reporting.
- **Propose a replacement KPM:** Used when the agency proposes to replace an existing KPM with a different measure (this provides an opportunity to enter narrative and targets for the new measure).
- **Propose a different KPM target:** Used to update the performance target for an existing KPM.

<u>All KPM Changes MUST BE approved by the agency's Legislative Fiscal Office and DAS Chief Financial Office budget analysts prior to consideration by the Legislature.</u>

These possible KPM changes are separately described in the following pages. In order to make any changes to an agency's KPM data, a user must log-in to the KPM system and verify that the correct Agency has been selected.

Propose a New KPM:

To propose a new key performance measure, click on "Propose New KPM" in the left navigation box. Your agency is selected by default if you only report on KPMs for one agency, but a choice may be needed if you are the KPM Coordinator for multiple state agencies. By clicking "Propose New KPM", the system will open a KPM editing session with the "Proposed New" status already selected.

Required Entries:
- KPM Number, Title, and Description (one-sentence)
- Correct Data Collection Period (default is calendar year)
- Unit Type for the measure
- Name for the KPM Metric (brief)
- Proposed KPM targets for the coming biennium (2026 and 2027 in this example, but it will always be even and odd years in the upcoming biennium), and indicate the order of any multi-dimensional targets using the alphabet (where "a" is displayed first, "b" second, and so on)
- Verify the "trend box" is appropriately indicated (default is checked, which means that an upward trend in reported data is an indicator of positive progress; if a negative trend is the desired indicator of progress, then this box must be unchecked).

---> NOTE: If the proposed measure has more than one dimension (for example, the Customer Service Measure for each agency has six dimensions: Helpfulness, Timeliness, Expertise, Availability of Information, Accuracy, and Overall), then once you have entered information about the first dimension, you would use the "Add Metric" button below the first set of targets to create the next dimension and record its targets. <---

Once all are entered/validated, click the "Create" box at the bottom right of the screen.
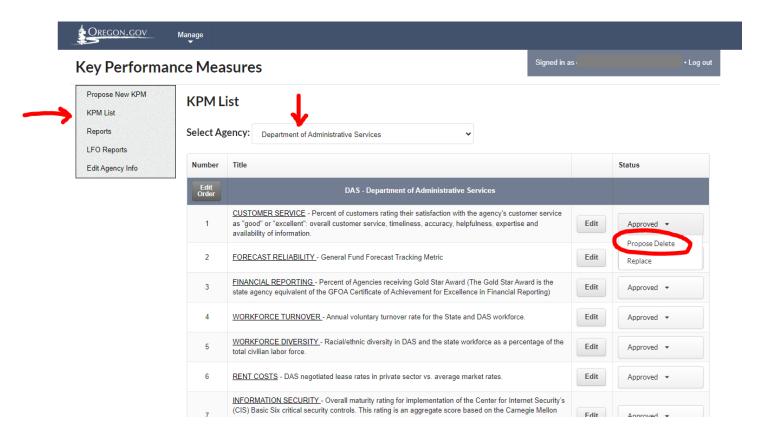
KPM data elements:

- **Number** – the KPM number your agency wishes to assign to the KPM
- **Title** – short title of KPM
- **Description** -- short description of the measure
- **Data Collection Period for the measure** – timeframe during which the KPM data will reflect (Ex: Jan 1 – Dec 31st or July 1 – June 30th)
- **Unit Type** -- Choices are: Dollars, Decimal Dollars (to the third decimal), Number, Decimal Number (to the third decimal), Percent, and Decimal Percent (to the third decimal)
- **Metric(s)**
  - Name for the measure
  - If measure is multi-dimensional, click "Add Metric" button to add more dimensions. An example of a multi-dimensional measure is the Customer Service Measure where we measure accuracy, timeliness, helpfulness, etc. NOTE: Multi-dimensional KPMs must all be of the same "Unit Type."
  - Enter target measure for the upcoming biennium even-year (Ex. 2026, 2028, etc.)
  - Enter target measure for the upcoming biennium odd-year (Ex. 2027, 2029, etc.)
- **Alpha order** – enter only if you are tracking more than one metric
- **Upward Trend:** Default checked box means "Upward Trend" over time is good, otherwise uncheck the box to signify that a downward trend is good.

The KPM will now display in your KPM list as a "Proposed New" KPM.
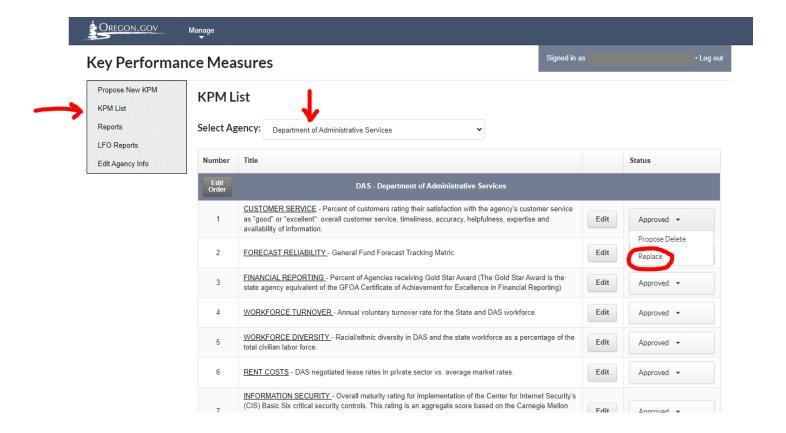
Propose the Deletion of an Approved KPM

Click on "KPM List" in the left navigation box. For the KPM that you want the Legislature to consider deleting entirely from future reporting, use the pulldown menu to the right of the "Edit" button, and select "Propose Delete." (This will update to the status to "Proposed Delete.") You will want to be ready to describe the reasoning for the deletion for the benefit of the relevant budget analysts and will present information concerning the proposed deletion during the agency's budget hearing(s). This KPM will continue to display as an "Approved" measure in the agency's Annual Performance Progress Report (APPR), which must be reported on until any change approved by the Legislature takes effect.
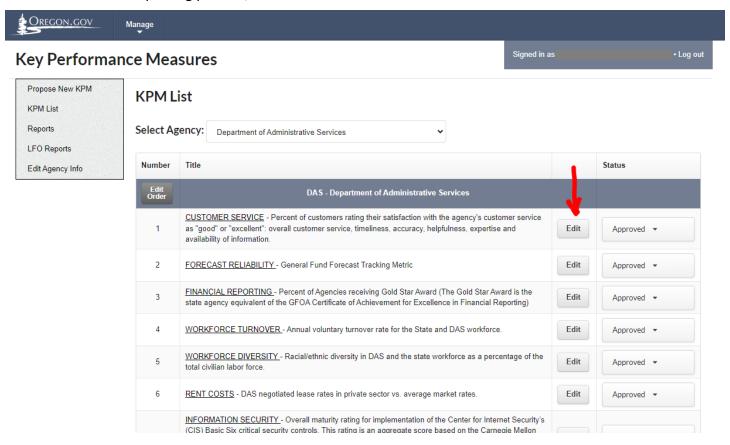
Propose the Replacement of an Approved KPM:

Click on "KPM List" in the left navigation box. For the KPM that you want the Legislature to consider replacing for future reporting, use the pulldown menu to the right of the "Edit" button and choose "Replace." This will update the status to "Proposed Delete" and create a new KPM for you to describe in the same manner that you would use if you were proposing a completely new measure (see earlier description). It will continue to display as an "Approved" measure in the agency's Annual Performance Progress Report (APPR), which must be reported on until the replacement measure approved by the Legislature takes effect.
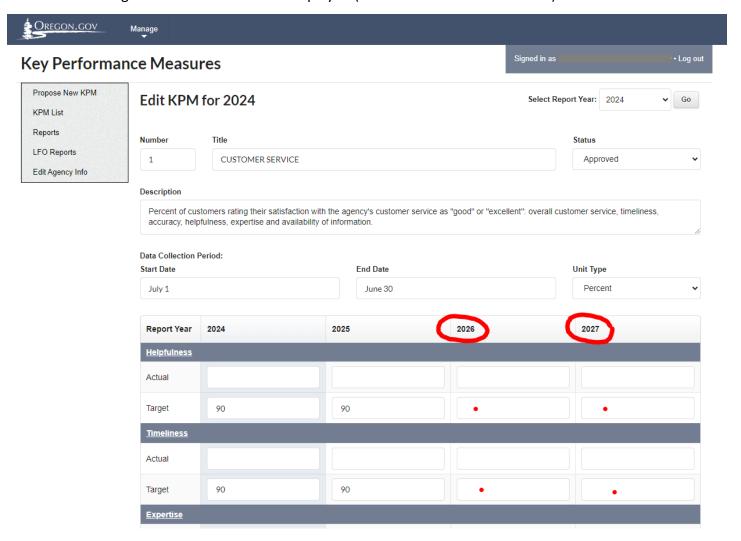
Proposing Changes to Existing KPM Targets:

Click on "KPM List" in the left navigation box. To propose a change to a target for an existing key performance measure for future reporting periods, click on the "Edit" button for that KPM.

This will open the "Edit KPM for [current calendar year]" screen. New biennial KPM targets are proposed in even years prior to the odd year Full Session, when budgets are being approved. To propose a target change, enter the new targets in the future biennia displayed (red dots in screen shot below).

Other possible actions needed:

In addition to proposing changes, an Agency may direct its KPM Coordinator to remove proposed KPM changes from Legislative consideration prior to the agency's budget hearings before the Joint Committee on Ways and Means. Here is related additional guidance for those tasks:

Delete a "Proposed New" KPM

- From the KPM List, in the status dropdown, select "Delete" for KPM with a "Proposed New" status
- The proposed New KPM is deleted and no longer displays in your KPM List
- If you accidentally delete a proposed new measure, send a message to the KPM System Administrator, as they have the permissions needed to make it appear again.

Change a "Proposed Delete" KPM back to APPROVED

- From the KPM List, in the status dropdown menu, select "Approve" for a KPM with a "Proposed Delete" status
- KPM will display as approved once again.