

# INSTRUCTIONS: ANNUAL PERFORMANCE REPORT

Budget Form # 107BF04e

Please follow these instructions for completing Annual Performance Reports beginning in September 2004.

This report should be submitted yearly to the Oregon Progress Board on or before September 30. For the September 2004 report, all agencies are required to submit the Executive Summary and Parts I and II of the Annual Performance Report.

For all parts of the report (Introduction, Part I and Part II):

- Please add agency name in the footer (View > Header and Footer).
- Where indicated, show the fiscal year addressed by the annual report. For example, the report due September 30, 2004 will address fiscal year 2003-04. The report due September 30, 2005 will address fiscal year 2004-05.

## **Executive Summary**

Using the bulleted outline and table template shown below, please develop a one- to two-page Executive Summary.

Please include agency contact information in the Executive Summary.

- Summarize Performance Target Achievement using the table below.

<b>Performance Target Achievement</b>	<b>#</b>
<b>Total Number of Key Performance Measures (KPMs)</b>	
# of KPMs at target for most current reporting period	
# of KPMs not at target for most current reporting period	

- Degree and type of agency influence on agency's chosen benchmarks and high-level outcomes
- Summarize the year's successes and barriers to achieving performance measure targets.
- Future challenges

## **Part I. Managing for Results (template provided)**

Answer the five questions shown in the template. These questions shed light on how well performance measures and performance data are leveraged internally for process improvement and results-based management.

## **Part II. Key Measure Analysis (template provided)**

This provides a fuller picture of performance for each key measure. Please limit to one page per measure.

Please include agency name in the footer as shown in the template.

### Data

Please compare actual to targets in bar chart or other graphic representation. Include a table and chart showing data and targets by year. The table can be a copy of the data from the appropriate rows from the *Performance Data Summary Form*. To make it easier for readers to compare actual to target, please show data and targets as two series of one chart. See sample, next page.

Please specify the source of the data.

### Analysis

The analysis should follow the questions on the template. The questions guide the analysis to address the impact of any relevant high-level outcome data (such as linked Oregon Benchmark data); compare actual agency progress to performance measure targets; explain why any variance has occurred between the two; compare performance to other jurisdictions, like agencies or industry standard; and discuss any actions that are planned as a result of the performance data and analysis.

**SAMPLE**

**ANNUAL PERFORMANCE REPORT- PART II, KEY MEASURE ANALYSIS**

TIME PERIOD: FISCAL YEAR 200X – 200X

**HYPOTHETICAL EXAMPLE:**

Agency Name:		Agency No.:								
Performance Measure Definition		1999	2000	2001	2002	2003	2004	2005	2006	2007
KPM 4 – Acres planted by the Forest Resource Trust Program.	Target		600	600	200	200	200	200	200	200
	Data	62	88	38	222	103	62			

Data Source:

**Analysis**

To what goal(s) is this performance measure linked?

What do benchmark (or other high-level outcome) data say about Oregon relative to the goal(s)? What is the impact of your agency?

How does the performance measure demonstrate agency progress toward the goal?

Compare actual performance to target and explain any variance.

Summarize how actual performance compares to any relevant public or private industry standards.

What is an example of a department activity related to the measure?

What needs to be done as a result of this analysis?

