THE OHIO AGENCY DASHBOARD

Members:
Steven Adams – DODD
Michael Gonzalez – Lottery
Sue Price – BEMC
Kyle Karling - ODOT
• A simple, easy to use, customizable one stop shop for Dashboarding at the Executive level
• Allow Executives to select what they want to track
• Put all relevant data onto ONE simply designed page for quick analysis
• Not all Executives care about the same data so the need for customization is critical
• Key Performance Indicators (KPIs) are a type of performance measurement
• A good KPI can serve as a thermometer for an agency. Should cascade from State to agency to department.
• KPIs should measure continuing progress against an element of the organizations business strategy
  – Ex: an agency that administers grants may track the operational expense of administering their grants
• The amount of time required to collect and compare info
• Too many KPIs are burdensome to review and lose value
• Need continual evaluation for relevance to the organization
• Significant time devoted to evaluation by finance departments
• May fall into the data cruncher mode instead of the analyst mode
WHAT IS BUSINESS INTELLIGENCE?

• Is defined as the transformation of raw data into actionable intelligence for business analysis purposes
• Originated in a 1958 IBM research journal by H.P. Luhn
• Aims to aid decision makers in the interrelationships of relevant facts and data
• This allows executives to more efficiently make better and quicker decisions aligning to the organizations strategic goals
Business intelligence has morphed over the years, but the basic underlying concept is the same
- 1st reiteration brought on by advances in computer tech was called Decision Support Systems (DSS)

2nd reiteration transformed the focus to the executive level and became known as Executive Information Systems (EIS)
- EIS uses KPIs to separate vital and non-vital data to steer executive level decision making more in line with the organizations strategy

Currently business intelligence is referred to as Enterprise Resource Planning (ERP) systems
- Morphed again based on advances in tech to manage and interpret data from a myriad of sources
- Combined these sources to the ultimate mission of using data to make better decisions
A management tool used to track organizational health

Originated in the late 1990’s

Was complicated for executive level management due to complex and cumbersome software

A Microsoft VP, Charles Stevens, came up with the concept of the modern dashboard

Modern dashboard – linking several products into one portal interface consolidating the need for multiple software programs
Immediate determinations of an organization’s financial health

Timely/relevant summary information

Allow for immediate decision making

Eliminating data collection redundancies

By the finance department implementing a single set of numbers gives the concept of “Single Version of the Truth” (SVOT) the impression of data integrity across the organization
NEGATIVE ASPECTS OF DASHBOARDING

- Potential high implementation costs
- Difficult to quantify “time saved” by implementation
- Data may be less secure if accessed is more widespread across users
- Due to size difference between agencies, smaller agencies will not be able to take advantage of the economies of scale to make the most of the dashboard
- An agency with a single analyst may actually perform more work
• Business intelligence, KPIs and Dashboarding are all interrelated to each other
  – The idea to use data to make better decisions (BI)
  – The concept of measuring the success of the organization toward its goals (KPIs); and
  – A single source to pull all relevant data from a myriad of different sources (Dashboarding)
• These elements all need to come together in order for executives to efficiently make decisions that guide their organizations toward their goals
The Single Version of the Truth (SVOT)
  - The finance department of an organization can paint a clear picture of the direction of the organization with the SVOT concept

Working with executive leadership to create the SVOT is critical to an organization

This allows for a consistent message as well as correlated data for analysis

Dashboarding tracks with a consistent, measureable organizational direction
OhMi reviewed three representative agencies in the State
- The Lottery Commission
- Department of Developmental Disabilities
- Ohio Department of Transportation
• The mission of the Lottery is “To offer entertaining games and maximize profits for K-12 public education.”
• The key performance indicators are quantifiable.
• The Lottery Commission uses a number of independent software solutions and reporting software along with OAKS to manage its data.

• Launching Microsoft Power BI which has the capability to deliver dashboard to smartphones.
The mission the Department of Developmental Disabilities (DODD) is the continuous improvement of the quality of life for Ohio’s citizens with developmental disabilities and their families.

This mission represents an agency with key performance indicators that are more qualitative.
• DODD uses OAKS for its financial data. Cognos business intelligence (BI) and excel are used to manage the data.

• The department also relies on a separate data warehouse that includes demographic and health need information for the individuals it serves.
The mission of the Department of Transportation is “To provide movement of people and goods from place to place, we will:

- Take care of what we have;
- Make our system work better;
- Improve safety;
- Enhance capacity.”

These represent KPIs which are both quantitative and qualitative.
• Internally there are already numerous KPIs referred to as “critical success factors.”
• ODOT uses a multitude of databases and reporting software to manage its funding and represents agencies with an extensive array of data reporting systems. Only a small portion of the data is captured in OAKS.
Ohio is behind in the area of Dashboarding

Indiana and Michigan have robust dashboards that are publicly available on their websites

They offer the detail behind each component of their dashboard by clicking on the KPI measurement on their webpages

The detail for the most part goes all the way down to the specific excel files the metrics are pulling from to create the KPIs
Measuring Michigan's Performance

Michigan's dashboards were implemented by Governor Rick Snyder to provide a quick assessment of the state's performance in key areas including: economic strength, health and education; value for money government; quality of life; and public safety. To view the dashboards click below.
**WHAT MICHIGAN CALLS A DASHBOARD**

### State Government

<table>
<thead>
<tr>
<th>Metric</th>
<th>Value</th>
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<tbody>
<tr>
<td>Total Revenues</td>
<td>52.1B</td>
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<tr>
<td>Total Expenditures</td>
<td>51.4B</td>
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<tr>
<td>Revenue Surplus (Funding Gap)</td>
<td>631.6M</td>
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<td>Size of Budget</td>
<td>52.3B</td>
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<td>Reserves</td>
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<td>Rainy Day Fund</td>
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<td>Cash Balances</td>
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<td>Issued Outstanding Debt</td>
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<td>Revenue Dedicated Debt - Revenue to Debt</td>
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<td>Service Ratio</td>
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<td>Pension and OPEB Obligations Funding Gap</td>
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<tr>
<td>Unemployment Benefits (Fund Balance)</td>
<td>2,415.7K</td>
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<td>Credit Rating (Click for more info)</td>
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<tr>
<td>Number of Employees</td>
<td>47,003</td>
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### Financial Health Dashboard

#### Michigan.gov Home > Open Michigan > Michigan Dashboards > Performance > Spending > data.michigan.gov

**Visualize**

**Calendar**

**Map**

**Chart**

**Visualization Type**

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WHAT INDIANA CALLS A DASHBOARD

**Agency**: Higher Education, Commission for

**Agency Head**: Teresa Lubbers
**OMB Liaison**: Ashley Schenck

**Mission Statement**: To plan and coordinate Indiana's state-supported system of postsecondary education.

**Key Performance Indicators (KPI)** are:
- Annual degree completion at public postsecondary institutions
- Change in net annual cost to attend public postsecondary institutions
- Indiana's educational attainment rate: percent of adult population with a postsecondary degree or quality workforce credential
- On-time completion rate for all public college students at 2 year institutions
- On-time completion rate for all public college students at 4 year institutions

**KPI Measures listed below**

**KPI Name**: Annual degree completion at public postsecondary institutions

Why is this KPI important?
The first component of our strategic plan is Completion. While we as a country and state have made great strides in college access, still far too few students graduate at all, leaving them with a worst-case scenario of debt and no degree. While on-time completion is the standard, every degree awarded counts toward our big goal, and should be counted.

How is the KPI computed?
Serious Completion: Count all degrees awarded to student students in a given timeframe. AKA has 30% graduation in board.

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**Annual degree completion at public postsecondary institutions**

**Reporting Period**: Fiscal Year
WHAT INDIANA CALLS A DASHBOARD

**Mission Statement:**

To ensure that its gaming is fair, and to maximize the revenue to the State.

**KPI Name:** Surplus Revenues Returned to State

**Why is this KPI important?**

The Lottery’s mission is to maximize Surplus Revenue turned over to the State. Surplus Revenue is turned over to the State to help fund the Police, Fire and Teacher pensions and to supplement the Build Indiana Fund.

**How is the KPI computed?**

Surplus Revenue = Net Income before the Fair Market Value adjustment.

**How were the goals determined?**

**Reporting frequency:** Yearly

**Notes (Optional):**
WHAT OHIO CALLS A DASHBOARD

State of Ohio Overtime Dashboard

Click here to view how overtime is defined...

Total: $23,002,130.21

<table>
<thead>
<tr>
<th>Agency</th>
<th>Overtime Cost</th>
<th>View Agency Comments</th>
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<tbody>
<tr>
<td>Accountancy Board of Ohio</td>
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<td>Adjutant General</td>
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<td>Bd of Examiners of Arch</td>
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<td>Bd of Barber Examiners</td>
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<td>Bd of Dietetics</td>
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<td>Bd of Engineers &amp; Surveyors</td>
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<td>Bd of Nursing</td>
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2015 Agencies Overtime Totals
2 Quarter
A study by the Information Technology and Innovation Foundation (ITIF) included dashboarding and creation of agency KPIs.

Although no exact cost savings figure can be gleaned from the study, it proposed that the State could save money through IT conversion.

The figure they came up with during this study was $281 million in potential total state of Ohio savings over 5 years through IT conversion.
• Through the use of Dashboarding, fiscal staff can eliminate any silos or duplication of efforts that go along with requested information by executive level management
• Through our research we found that many agencies feel that they duplicate efforts to provide executives with requested data
• Also, many agencies have to go to more than one source (people, systems or both) in order to provide executives with enough data to make decisions
• The consolidation and use of the SVOT concept will greatly reduce these barriers to efficient management of the agencies funding
• So what are our conclusions and recommendations?
  – A Single Version of the Truth for data across the State
  – A simple uniform way to measure our success through KPI Dashboarding
CONCLUSION AND RECOMMENDATION

• How can we make this happen?
  – Use the increased dashboarding capability in COGNOS to data mine a new external (to OAKS) dashboarding database
  – Have a dashboard professional at each agency to maintain the agency’s database and keep it up to date and relevant
Why is this important?

– Ensure that executive leadership across the state has:
  • The ability to select what they want to see on their dashboard
  • Only see what they have selected
  • A simple, easy to use, one page dashboard to manage the financial health of their agency