

MEMO

TO: PBEM Leadership Team

FROM: Jeremy Van Keuren

DATE: 10/17/2018

SUBJECT: *Key Performance Indicators (KPIs) for PBEM*

SUMMARY

Director Patterson asked me to research and compile my recommendations for revising PBEM's Key Performance Indicators (KPIs). Several PBEM employees (myself among them) have suggested that the current KPIs poorly represent the work we do.

I recommend the Leadership Team explore the following prospects:

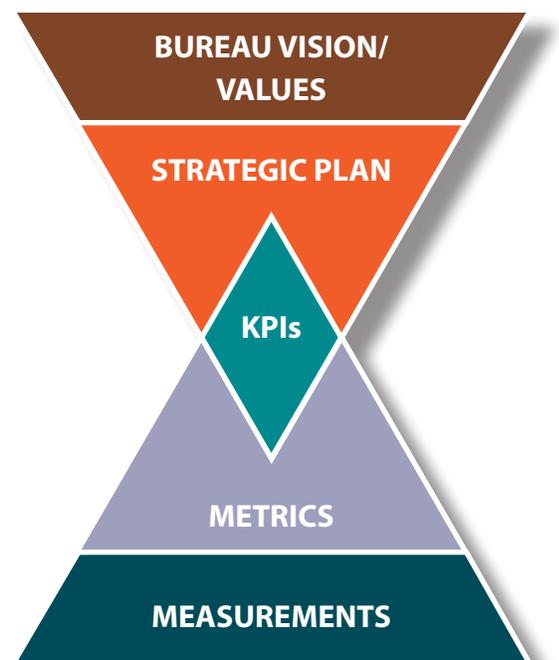
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I also recommend PBEM Leadership set a specific quarterly date by when all KPIs must be turned in to Somer. By this, we can eliminate the frequent scrambling staff need to do in order to collect data.

BACKGROUND: WHAT IS A KPI?

KPIs should reflect the bureau's "job description"; astute KPIs describe if (and to what degree) the bureau succeeds at its job. KPIs should also be actionable; that is, implementing policy determines the outcomes of KPIs. Conversely, KPIs help formulate policy as they indicate best practices or needed course corrections.

KPIs represent a point of intersection between a Bureau's strategic plan and the various metrics/measurements PBEM staff track. *Measurements* are any raw quantifiable data PBEM staff collect. For example:



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number of NET volunteers, website page views, number of media contacts, or trainees in ECC classes. *Metrics* are measurements sliced in different ways to reveal information. For example: average NET volunteers per neighborhood, or percentage of ECC trainees who clearly understand their emergency response role after they take a class. Metrics are expressed as averages, ratios, or percentages; and, are often associated with a specific time period (e.g. “NET program growth per fiscal year”). All KPIs are metrics, though not all metrics are KPIs.

Now if you want to get really crazy, you can combine several metrics/measurements into a weighted index (which the Budget Office has indicated in conversations they will accept as KPIs). A weighted index can more concisely and accurately paint a picture of how well the bureau progresses on work.

For example, Ernie and I use an Excel spreadsheet to automatically calculate a weighted index indicating “readiness” of the BEECN program. Each BEECN cache has an individual readiness score expressed as a percentage. The inputs into that percentage are: whether a cache is deployed or in storage (a cache scores an automatic 0% if it is stored), number of assigned volunteers, and how well it tests when we run a radio test on it. All of that adds up to a total score between 0% and 100% for each BEECN.

The indexed score for overall readiness of the entire BEECN program is comprised of all 50 of the individual BEECN cache scores calculated up (at present, the BEECN program is approximately 38% ready). That overall score is the weighted index metric for the BEECN program. To use an example with three BEECNs in the table below:

| BEECN # | Deployment Status | Assigned Volunteers | Testing Reliability | Cache Readiness | OVERALL READINESS |
|---------|-------------------|---------------------|---------------------|-----------------|-------------------|
| NW-1 | 1 | 3 | 5 | 39% | 34% |
| NW-2 | 0 | 8 | 4.5 | 0% | |
| NE-13 | 1 | 13 | 5 | 64% | |

The potential trouble with a weighted index comes in the word “weighted”. A program manager must assign the *importance* of an index component relative to the other parts. In the BEECN example, the most relevant weight is deployment status: a cache is either deployed or it’s not, and if it is not, the BEECN cannot score above 0% no matter how well it tests and how many volunteers PBEM assigns to it. As the program manager, I have *arbitrarily* decided that “deployment status” trumps all other metrics assigned to a cache. The arbitrariness of the weight of an index component can, if considered carelessly, distort the picture of how well a program really performs.

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Yet, that arbitrariness also gives a weighted index its strength. For example, if Jonna asks me how the BEECN program is doing, I could say: “We have 10 volunteers each assigned to all 50 BEECN caches, 10 of the BEECN caches are deployed, and 75% of the caches test at ‘excellent’ while the rest test at ‘good’”. Well alright, sounds like Jeremy and Ernie are doing a decent-ish job. But it would be more accurate and telling to say: the BEECN program is 20% ready overall (because only 10 of 50 caches are actually deployed). That rightfully sounds alarming and indicates a need for intervention and course corrections.

KPI RECOMMENDATIONS

The following KPIs are recommended on the basis of interviews I conducted with several PBEM staff (please note that my recommendations for new KPIs and for dropping others come from me, not necessarily from the staff I interviewed). This list is not intended to be exhaustive, but rather, is intended to act as a jumping off point of discussion for the PBEM Leadership Team.

I recommend any KPIs the Leadership Team chooses to adopt be confirmed by the PBEM staffer who manages it. Also, these recommendations point at how a KPI is composed, but not how they indicate goals or successes. The staffer who manages that KPI and their manager should make that decision (e.g. “Goal is to reach 75% readiness with the BEECN program by 2020”).

I. PBEM Executive/PIO/Finance KPIs

- A. Media Reach:** A proposed KPI, and it would be tricky. PBEM seldom influences our own media presence, since we get attention when something blows up (literally or figuratively). However, we do invest dollars into media campaigns. There may be a way to measure that input (campaign dollars) against outputs (perhaps a comprehensive index of PBEM website hits, social media hits, etc). Some research would be needed to arrive at a final KPI that makes sense (probably in the discipline of marketing), but it could be done (example: the PBEM/Univision campaign).
- B. Interactions with multicultural media:** A proposed KPI, but may do better as an internal metric. Track on relevant interactions we have with media such as The Skanner, Asian Reporter, etc. And/or, track on dollars spent promoting PBEM programming in those media.

These recommendations do not include KPIs for Finance or for RDPO, but the Leadership Team could and should consider them.

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Dan and I talked about a lot of PIO metrics that do not make much sense as KPIs, but could be worth tracking internally. For example: Growth of VOST in Portland, PBEM web hits (and which pages are getting clicked on the most), earned media incidents and/or value.

Recommended Executive KPIs to remove: “Percentage of bureau strategic plan objectives achieved or in progress”. This is a vague KPI that does not accurately reflect bureau effort/successes. Better constructed KPIs overall would eliminate the need for a KPI like this. Moreover, many PBEM staff do not characterize the strategic plan as reflective of bureau work anyway (which is a larger problem). “Number of new PublicAlerts registrations should be removed, as PBEM moves away from PublicAlerts and into Wireless Alerts.

II. PBEM Operations KPIs

- A. Percentage of completed improvement plan tasks completed within a year of creation:** An existing KPI. Katy remarked that it is a tough one to measure as written now because of long term IPs taking longer than a year. We could consider making this into a weighted index to better reflect progress and/or the importance of the IP item itself. This might involve breaking long term IPs into phases, and measuring progress to them annually.
- B. ECC Responder Bench:** A proposed KPI. Reflected as a percentage of the 100% total number of ECC responders we have citywide. As an option, this could be weighted to account for expected attrition and the fulfillment of staff in specific sections (e.g. Finance, Operations, etc). A weighted figure could also measure how far along Responders are with required training.
- C. ECC Responder Confidence:** A proposed KPI. Survey City ECC responders quarterly and set a target for Responders who feel “Very Confident” or “Confident” in their role as an ECC responder. Lower confidence would point to training needs.
- D. ECC Systems Readiness:** A proposed KPI. This would be a wide-ranging index incorporating success of equipment checks, key ECC IPs, and system uptime. Alternatively, this indexed metric could be combined with Ecc Responder Bench and ECC Responder Confidence to create an overall “ECC Readiness” KPI.

As a side note, Aaron pointed out “uses of ECC” (including meetings and trainings) as an interesting metric. That could be a factor in ECC readiness. Or, it may be a metric we want to consider tracking internally that helps us demonstrate the taxpayer value of the ECC.

Recommended Ops KPIs to remove: “Number of hours completed by students in PBEM exercises annually”; “Number of City employees in PBEM exercise or training annually”; and

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“Percentage of participants who rate PBEM classes and exercises as ‘good’ or ‘excellent’”. These measurements would be redundant/inconsequential with KPIs tracking Responder Bench and Responder Confidence. However, they could be tracked internally.

III. PBEM Planning KPIs

- A. Bureau Response Lead Confidence:** A proposed KPI. Survey city bureau employees responsible for coordinating their bureau’s disaster response plan and target for “Very Confident” or “Confident”. Lower confidence would point to training needs and PBEM intervention. Could be indexed to weight infrastructure and public safety bureaus higher. An index could also incorporate participant impressions after response tabletops.
- B. Bureau COOP Plan Score/COOP Readiness:** A proposed KPI. Compile Anne’s COOP scoring system to formulate a citywide indexed COOP score. Index would weight infrastructure and public safety bureau higher.

Recommended Planning KPIs to remove: “Percentage of bureaus with updated COOP plan that meets or exceeds FEMA standard”. Anne pointed out that there is no FEMA standard, so this metric is not logical. Also eliminate “Percentage of bureau plans that are up-to-date according to published standards”. This might be a useful internal metric, but is vague as a KPI and does not convey information useful to persons who do not work in Emergency Management.

IV. PBEM Community Resilience KPIs

- A. PBEM Reach and Influence:** A proposed KPI. Survey recipients of PBEM training/presentations/materials after six months to gauge changes in behavior, and if they passed the message on to neighbors/friends/family. This would be technically difficult, but feasible. It would also demonstrate appropriate investment of taxpayer dollars and establish best outreach practices. This KPI could also be surveyed for equity, gauging our reach and influence in underserved communities.

Additionally, there may be a way to measure trust building with underserved communities by measuring the increase of participation in PBEM programs from a given community year to year. For example, one year we might see a total of 20 members of the Somali community at PBEM trainings. The next, we see 40, and so on. In this context, we should include (or break out, but still measure) youth involvement.

- B. Percent of Outreach Event Hours with Underserved Communities:** A proposed KPI. The Outreach Tracker already measures how many hours we spend at an outreach event, and whether those events support underserved communities. We could easily compare outreach hours with underserved communities to total outreach hours. This could include PBEM staff as well as outreach conducted by NET volunteers.
- C. BEECN Readiness:** A proposed KPI. Indexed BEECN program readiness score with goals to increase score and then maintain at 95%. Index accounts for cache deployment status, testing viability, and volunteer numbers. It could also account for BEECN volunteer confidence.
- D. NET Status Score:** A proposed KPI. Indexed status (“readiness”) score accounting for advanced training and certifications of volunteers, number of volunteers, and number/strength of teams in Portland (also including volunteer secondary affiliations and ATVs). I have kept track of and set goals with this score as an internal metric already.
- E. Volunteer Demographics:** A proposed KPI. This may make more sense as an internal metric. Reports on the demographic makeup of NET/BEECN volunteers and ATVs. Goal is to increase involvement of underserved communities.
- F. Volunteer Activity Parity:** A proposed KPI. May also make more sense as an internal metric, though it is very important. NET/BEECN logged hours currently run at 20% of volunteers log 75% of the service hours. The PBEM CRT needs to “flatten” that number out as close to a 1 to 1 ratio as possible. Alternatively, or compounded with this number into an index, could be the percentage of active volunteers who make their minimum service contribution of 12 hours per year.

Recommended Resilience KPIs to remove: “Number of new Neighborhood Emergency Team volunteers trained per year”. This is redundant with a metric that reflects how the NET program is doing overall. At the very least, “number of volunteer hours logged” would be a similar but more meaningful measurement. “Number of NET volunteers participating in advanced training per year”. This has never been a particularly logical KPI. Would also be redundant with a KPI that tracks overall NET program status. “Number of active NET teams” and “Percentage of neighborhoods with active NET teams” not only fail to paint a picture of how NET is doing, but are redundant with each other and absolutely should be eliminated (though tracked as an internal metric).