

THE OHIO AGENCY DASHBOARD

Members:

Steven Adams – DODD

Michael Gonzalez – Lottery

Sue Price – BEMC

Kyle Karling - ODOT





THE FUTURE OF DASHBOARDING IN THE STATE

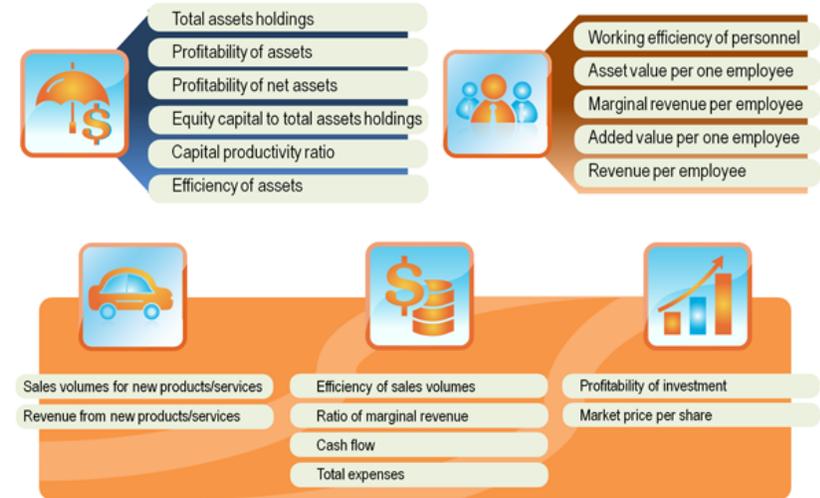
- A simple, easy to use, customizable one stop shop for Dashboarding at the Executive level
- Allow Executives to select what they want to track
- Put all relevant data onto ONE simply designed page for quick analysis
- Not all Executives care about the same data so the need for customization is critical



KPIs DEFINED

- 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

LIST OF SAMPLE KPIs IN FINANCIAL PERSPECTIVE



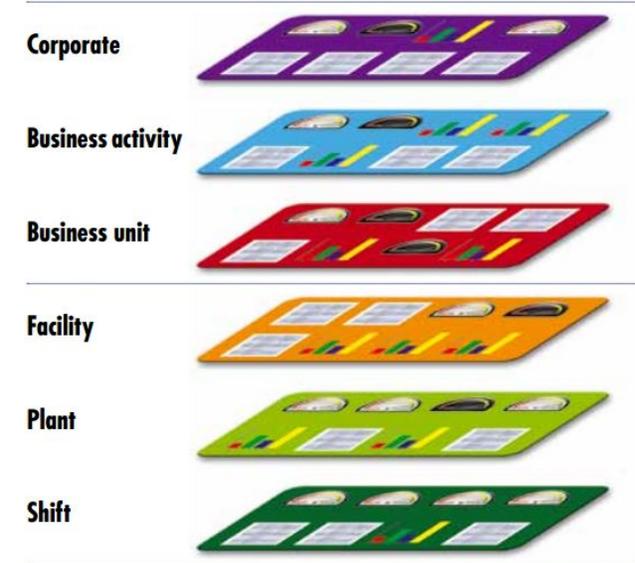
LIST OF SAMPLE KPIs IN 5 PERSPECTIVES OF BSC | WWW.BSCDESIGNER.COM



KPI CHALLENGES

- 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

Figure 7: Use of dashboards in a larger organisation





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



TRANSFORMATION OF BUSINESS INTELLIGENCE

- 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



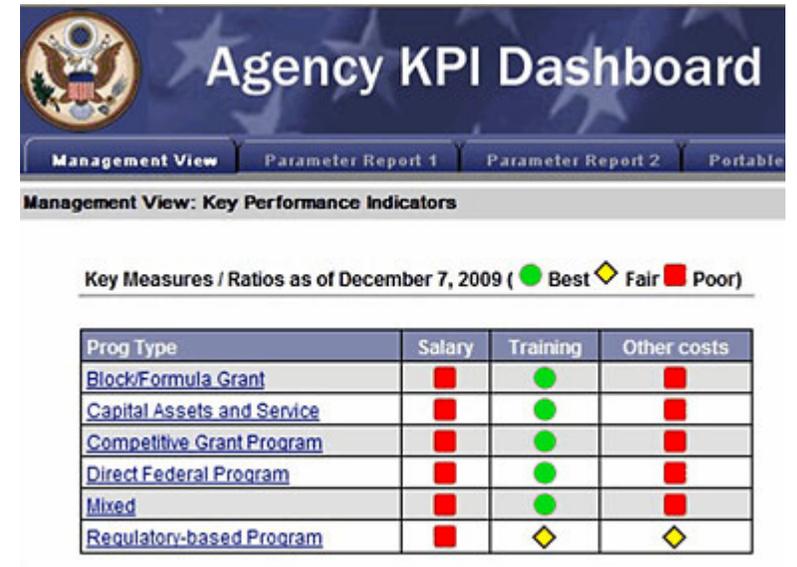
WHAT IS A DASHBOARD?

- 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



BENEFITS OF DASHBOARDING

- 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





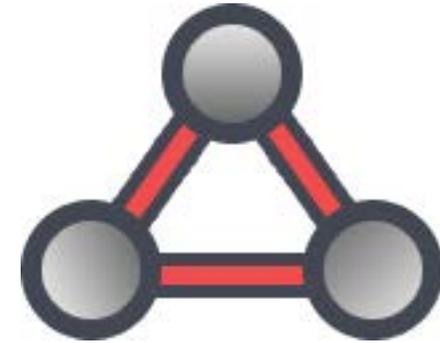
NEGATIVE ASPECTS OF DASHBOARDING

- 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



HOW DO THE TERMS FIT TOGETHER?

- 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





CONNECTION TO FINANCE

- 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





DASHBOARD LANDSCAPE IN THE STATE

- OhMi reviewed three representative agencies in the State
 - The Lottery Commission
 - Department of Developmental Disabilities
 - Ohio Department of Transportation





LOTTERY

- The mission of the Lottery is “To offer entertaining games and maximize profits for K-12 public education.”
- The key performance indicators are quantifiable.

LOTTERY™



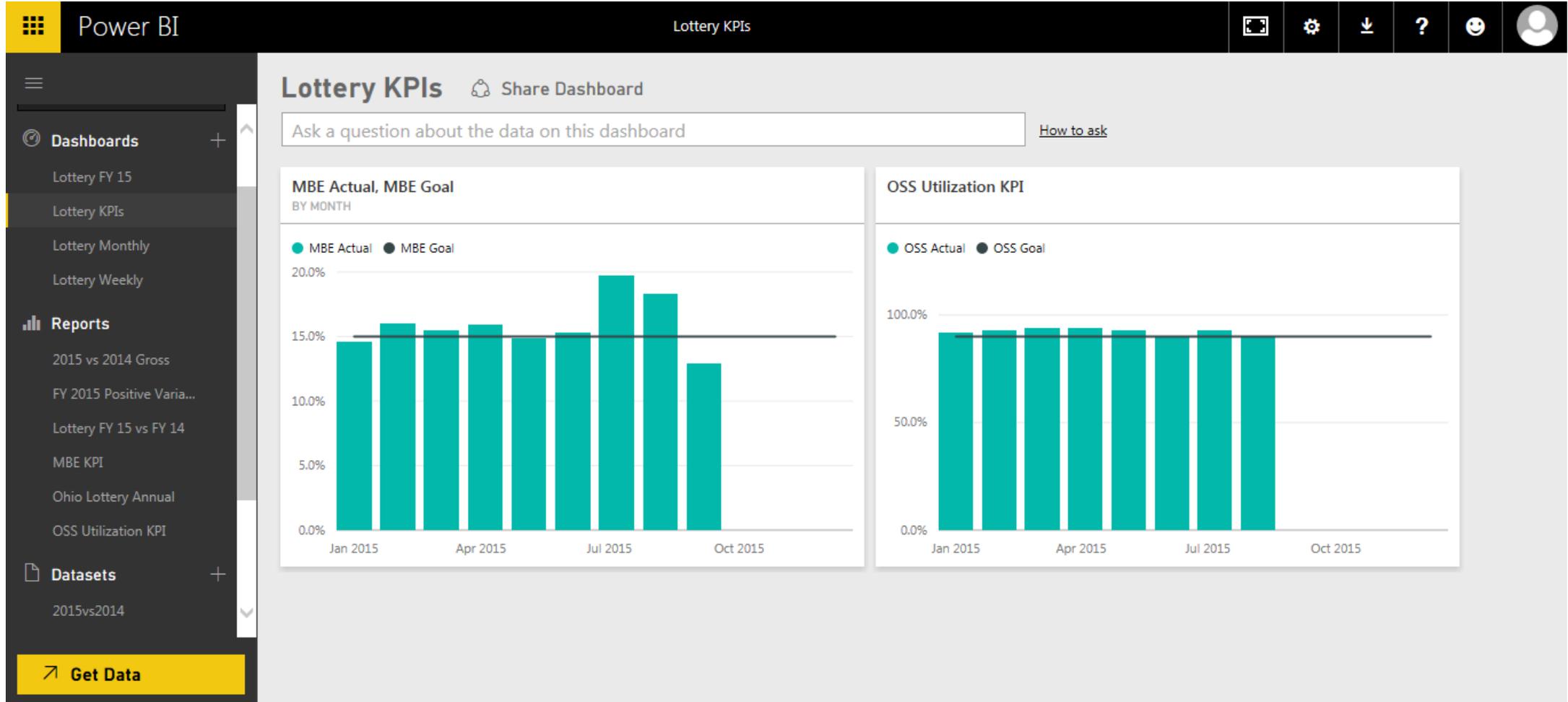
LOTTERY

- 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.

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LOTTERY





DEPARTMENT OF DEVELOPMENTAL DISABILITIES

- 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.

Ohio

**Department of
Developmental Disabilities**





DEPARTMENT OF DEVELOPMENTAL DISABILITIES

- 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.

Ohio

**Department of
Developmental Disabilities**





DEPARTMENT OF TRANSPORTATION

- 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.



DEPARTMENT OF TRANSPORTATION

- 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.



DASHBOARD LANDSCAPE OUTSIDE OF OHIO

- 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



OHIO CHECKBOOK

JOSH MANDEL
TREASURER OF OHIO

STATE OF OHIO

LOCAL GOV & SCHOOLS

OHIOCHECKBOOK.com

Need Help Getting Started? [Advanced Search](#)

Fiscal Year: 2015 (7/1/2014 - 6/30/2015) Agency: (147) Select Expense Type: (717) Select [Advanced Filters](#)

2015 State Spending

\$65,097,249,203.41 total

Expense Categories

Year to Year State Spending

Fiscal Year

What is this? [Compare](#)

Popular Searches: [Glossary](#), [State Budgets](#), [State Salaries](#), [FAQ](#)

How Are We Doing? [Drop us a note.](#)

Largest Expense Types of 2015[®]

Expense Type	Amount
Medical & Rehab State Assistance	\$20,789,086,541.34
Grant - Paid to Government or Non-pr...	\$18,278,469,715.58
Other Distributions	\$3,547,077,972.92
Base Salaries & Wages	\$2,312,257,419.31
Tax Refunds	\$1,876,715,348.73
Construction - Roads & Highways	\$1,841,670,226.58

Highest Paid Companies of 2015[®]

Paid To	State	Amount
UNITEDHEALTH GROUP	CT	\$303,082,822.18
SHELLY & SANDS INC	OH	\$224,890,844.44
KOKOSING CONSTRUCTION CO INC	OH	\$214,112,805.92
OHIO POWER COMPANY	OH	\$208,224,511.12
MEDICAL MUTUAL OF OHIO	OH	\$157,557,531.20
SHELLY COMPANY	OH	\$150,381,869.47

Fiscal Year: 2015 Agency: Department of Transportation Expense Type: Debt Services [Advanced Filters](#)

Selected Expenditures
State of Ohio > 2015 > Agency > Department of Transportation > Debt Services

There are 154 transactions available to view

View By: Expense Type - Type

\$170,922,396.36 total

View, sort and click the checkbook below[®] [Export](#) 25 50 100 1 2 3 4 5

Date	Paid From	Paid To	Voucher ID	Amount
03/27/2015	Department of Transportation	HUNTINGTON NATIONAL BANK	00810893	\$170,000.00
03/27/2015	Department of Transportation	BANK OF NEW YORK MELLON TRUST COMP...	00810892	\$160,000.00
03/27/2015	Department of Transportation	BANK OF NEW YORK MELLON TRUST COMP...	00810892	\$115,784.00
03/27/2015	Department of Transportation	HUNTINGTON NATIONAL BANK	00810893	\$94,657.53
03/27/2015	Department of Transportation	BANK OF NEW YORK MELLON TRUST COMP...	00810892	\$1,412.00



WHAT MICHIGAN CALLS A DASHBOARD

Michigan - Open Perfor × +

midashboard.michigan.gov

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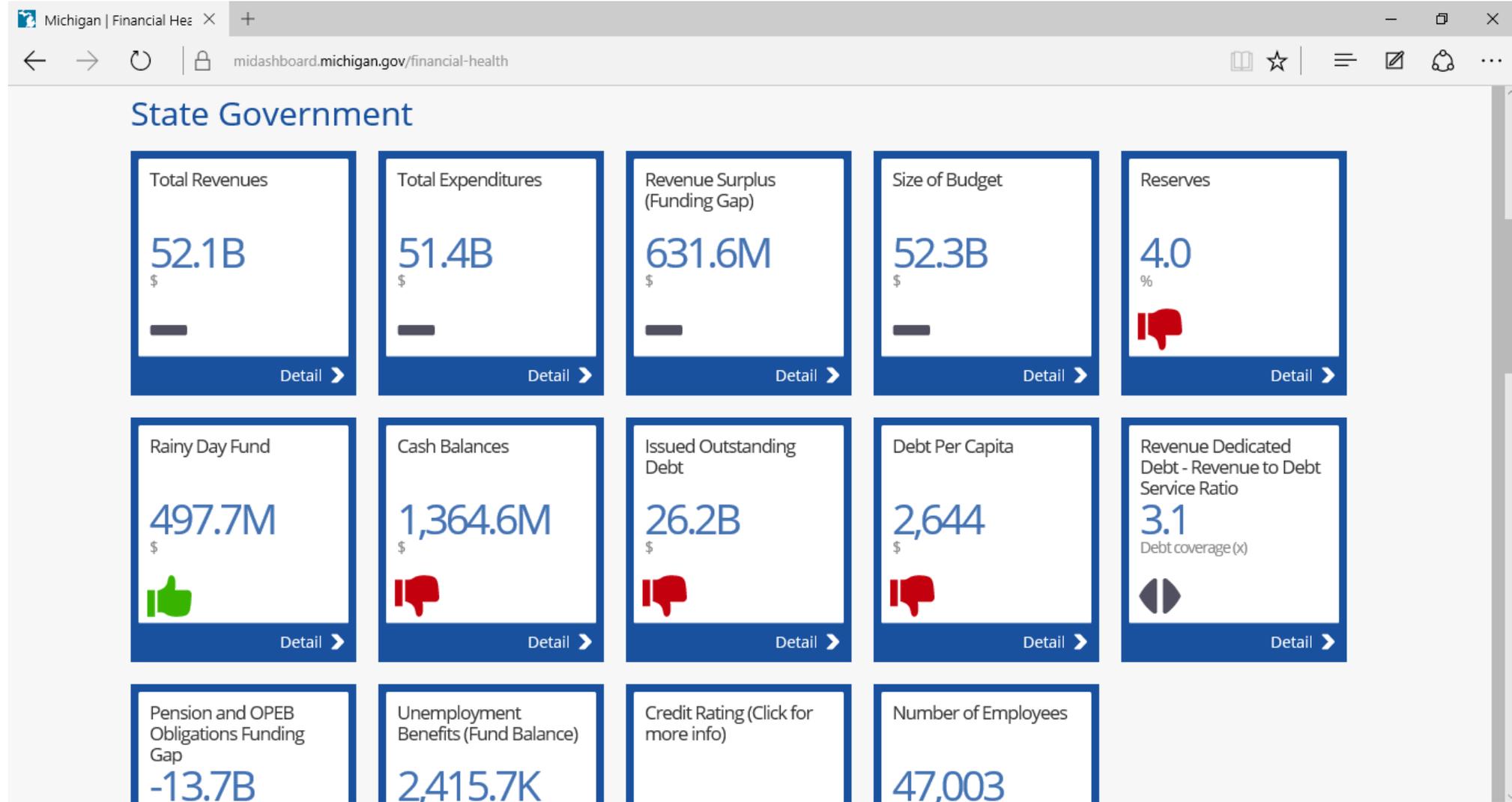
Measuring Michigan's Performance

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.

MiDashboard Education Health and Wellness Infrastructure Talent Dashboard



WHAT MICHIGAN CALLS A DASHBOARD





WHAT MICHIGAN CALLS A DASHBOARD

Financial Health Dashboard | midashboard.michigan.gov/Financial-Health-Dashboard/Financial-Health-Dashboard/x5y3-8gur

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Michigan.gov Home | Open Michigan | Michigan Dashboards | Performance | Spending | data.michigan.gov

Financial Health Dashboard
Open Michigan (OpenMichigan@michigan.gov) is the official State of Michigan account. Any items created by other user accounts

Find in this Dataset

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	School District Expenditure Value	School District Reserves	School District Cash Balances	School District Issued Outstanding Debt	School
1					
2					
3					
4					
5	12.53%				
6	14.68%	7.6%	2,000,000,000	19,400,000,000	
7	5.64%	7.29%	2,300,000,000	21,100,000,000	
8	19.19%	8.98%	2,200,000,000	22,100,000,000	
9	47.97%	7.2%	2,200,000,000	22,800,000,000	
10		5.92%	2,200,000,000	12,900,000,000	
11		4.64%	2,500,000,000	12,800,000,000	
12		6.88%	2,400,000,000	15,400,000,000	

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WHAT INDIANA CALLS A DASHBOARD

OMB: Performance Measure Oracle BI Interactive Da: X +

State of Indiana [US] mybi.omb.in.gov/analytics/saw.dll?Dashboard

IN.gov GOVERNOR MIKE PENCE Visit his Home Page

Signed In As pm_read

Performance Measures Agency Summary Performance By Program Performance by Fund

Agency Name: Higher Education, Commission for [Apply]

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 post secondary 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?
Degree Completion: Count of degrees conferred to resident students in a given fiscal year (July 1 - June 30). Residents is based

Annual degree completion at public postsecondary institutions
Reporting Period: Fiscal Year

Fiscal Year	Actual Performance Value	Superior Benchmark
Year 1	~42,000	~55,000
Year 2	~46,000	~55,000
Year 3	~49,000	~55,000



WHAT INDIANA CALLS A DASHBOARD

OMB: Performance Measure Oracle BI Interactive Da: X +

State of Indiana [US] mybi.omb.in.gov/analytics/saw.dll?Dashboard

IN.gov

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Performance Measures

Agency Summary Performance By Program Performance by Fund

Mission Statement:
To ensure that its games are 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?
$$\text{Surplus Revenue} = \text{Net Income before the Fair Market Value adjustment.}$$

How were the goals determined?

Reporting frequency: Yearly

Notes (Optional):

Surplus Revenues Returned to State
In Dollars
Reporting Period: Fiscal Year

Quarter/Year	Actual Performance Value	Superior	Satisfactory
2010 Q2	185,000,000	150,000,000	100,000,000
2011 Q2	195,000,000	150,000,000	100,000,000
2012 Q2	215,000,000	150,000,000	100,000,000
2013 Q2	230,000,000	150,000,000	100,000,000
2014 Q2	250,000,000	150,000,000	100,000,000

Print - Export



WHAT OHIO CALLS A DASHBOARD

OMB: Performance Measure | State of Ohio Overtime | +

apps.das.ohio.gov/hrddashboard/overtime_view.aspx

Ohio.gov | Department of Administrative Services

Living in Ohio | Education | Working & Employment | Tourism & Recreation | Business | State Employees | Government

State of Ohio Overtime Dashboard

[Click here to view how overtime is defined...](#) [Login](#) | [View Archive Data](#)

Total: \$23,002,130.21

2015 Agencies Overtime Totals
2 Quarter

Agency	Overtime Cost	View Agency Comments
Accountancy Board of Ohio	\$0.00	
Adjutant General	\$15,537.69	
Administrative Services	\$204,298.66	
Air Quality Development Auth	\$0.00	
Alcohol & Drug Addiction Svcs	\$0.00	
Athletic Commission	\$0.00	
Attorney General	\$548,728.86	
Auditor of State	\$42,823.58	
Bd of Examiners of Architects	\$177.47	
Board of Barber Examiners	\$0.00	
Board of Cosmetology	\$829.55	
Board of Dietetics	\$0.00	
Board of Engineers & Surveyors	\$0.00	
Board of Nursing	\$298.24	
Board of Osteopathic Examiners	\$0.00	



BENEFIT TO STATE

- 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



BENEFIT TO FINANCE STAFF

- 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



CONCLUSION AND RECOMMENDATION

- 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



CONCLUSION AND RECOMMENDATION

- 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