

LFO Revised Budget Form #107BF04c
Secretary of State
Annual Performance Progress Report (APPR)
for Fiscal Year 2006-07

Submission Date: November 2007

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AGENCY NAME SECRETARY OF STATE**I. EXECUTIVE SUMMARY**

Agency Mission: Provide stewardship of public resources by: a) facilitating access to government records and information, b) ensuring that the public dollars are well spent, c) offering registration services to businesses and consumers, d) safeguarding the democratic process, and e) overseeing state lands for the common school fund.

Contact: Jean Straight, Deputy Secretary of State	Phone: 503 986 1523
Alternate: Jeff Morgan, Director, Business Services Division	Phone: 503 986 2239

1. SCOPE OF REPORT

- Agency Programs/services addressed by key performance measures are the Audits Division, Corporation Division, Elections Division, Archives Division and the Internal Support Divisions (Business Services Division, Information Systems Division and Human Resources Division.)
- Agency programs/services, if any, not addressed by key performance measures. The internal support divisions conduct annual customer service surveys to determine quality of services provided.

2. THE OREGON CONTEXT

The Office of the Secretary of State is one of three constitutional offices established at statehood. The secretary of state is the custodian of the state seal and oversees the functions of seven divisions. As the auditor of public accounts, the secretary evaluates and reports on the financial condition and operations of state government and administers the Municipal Audit law. The secretary of state is the chief elections officer. His is responsible for uniformly interpreting and applying state election laws. He also acts as the filing officer for state offices, initiative and referendum petitions, campaign finance reports and other election documents. In addition, the secretary publishes and distributes the Voters’ Pamphlet and investigates and prosecutes election law violations. The secretary is the public records administrator for Oregon, a role that includes preserving official acts of the Legislative Assembly and state agencies, supervising the state archivist, publishing the administrative rules for state agencies and production the Oregon Blue Book. The secretary of state registers domestic and foreign corporations, assumed business names, and trade and service marks. The secretary prepares notarial applications and serves as filing officer for Uniform Commercial Code transactions. The secretary of state serves with the governor and state treasurer on the State Land Board, managing state-owned lands for the benefit of the Common School Fund. He also serves as Chair of the Oregon Sustainability Board.

3. PERFORMANCE SUMMARY

KPMs MAKING PROGRESS or trending toward target achievement: KPM #165-01 – Audit Cost Per Hour, KPM #165-06 – E-Government Services, KPM #165-07 – Business Registry Timely Document Processing, KPM #165-08 – Notary Timely Document Processing, KPM #165-09 – UCC Timely Document Processing, KPM #165-010- Voter’s Pamphlet Cost Per Page, KPM #165-012 – Work force Percentage, KPM #165-013 – Customer Satisfaction, KPM # 165-015 –Costs of Desktop Support by Workstation/User.

KPMs NOT MAKING PROGRESS or trending toward target achievement: KPM #165-004 – Audits Recommendations Implemented, KPM # 165-014 – Staff Certification.

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KPMs with UNCLEAR PROGRESS or target not yet set: KPM #165-002 – Audit Value of Savings, KPM #165-003 – Audit Dollar Savings Per Dollar Spent, KPM #165-005 – Notices published.

4. CHALLENGES

As an agency, the Secretary of State's office has some functions that work nicely with performance measures and some that clearly do not. For example, the Archives Division is responsible for maintaining and protecting the historical record of state government. While we firmly believe that public access to those records is important, simply ensuring that they remain available is a critical function of the Archives Division. It is important that we look after the original Oregon Constitution, whether anyone wants to look at it or not. We have struggled to find outcomes that reflect the importance of this function. Some of our divisions face unique challenges:

Audits Division:

The business of auditing is about the expertise of the employee. In order to continue to make progress in all of our performance areas, we need to continue our focus on the development and retention of our auditors. Unlike many occupations that are state service specific, a professional and well-trained auditor is highly sought after and is actively recruited by public agencies and private sector firms.

With the advent of Sarbanes Oxley, the 2003-05 salary freeze, and the increased emphasis on internal auditing within our state, we found it more and more challenging to retain our auditors. We found ourselves in direct competition with more lucrative public and private sector job options.

Recently we have seen a dramatic reversal in this trend. We feel this is in large part due to our overt attempts at recruiting and retention. We are hopeful that this trend will continue as our ability to perform quality audits that are as economical, effective and efficient as possible, rely on it.

Corporation Division:

The primary challenge facing the Corporation Division is maintaining performance levels for an increased volume of work with existing staff levels. The implementation of electronic filing and other e-Government initiatives holds great potential for increased efficiencies and the ability to absorb increased workload volumes with out increasing staff resources. Delays in implementing new e-filing applications can have an adverse impact in all areas of performance unless offset with other efficiencies or increases in staffing resources.

Elections Division:

A large proportion of the work of the Elections Division is controlled by factors beyond our control: the number of candidates that file for office, the number of initiatives and referenda filed, the number of active political committees, the number of voters' pamphlet statements filed and the number of times that we are sued. Identifying meaningful outcomes that we can have an impact on is difficult. As noted above, the measure related to the voters' pamphlet (#10, Cost per Page) is one where "success" may be achieved by decreasing its utility to voters. We hope to find a more effective measure in the future that balances usefulness and readability with cost.

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5. RESOURCES USED AND EFFICIENCY

The Secretary of States 2007-09 budget is:

GF- \$ 11,698,259

GF- \$ 1,800,000 (special appropriation for November 2008 Special Election Voters' Pamphlet costs and County costs)

OF- \$ 38,613,529

FF- \$ 9,158,195

In order to maintain the level of audit effort of past biennia, the Audits Division budget as submitted is the bottom line budget amount. If we are authorized for more FTE, this would expand our ability to perform even more high quality audits. Conversely, a reduction in FTE would limit our ability. As our professional development efforts continue to improve our audit expertise, we should see a continued improvement in our audit efficiency.

The Corporation Division KPM#6 e-Government services available is directly related to the Agency Technology Services POP#172 (\$1,200,000), which provides for contractor resources to build new e-government business applications. Successful deployment of e-government services will create new efficiencies in receiving and processing customer documents and filings which, in turn, support KPM#7 timely processing of business registrations, KPM#8 timely processing of notary public commissions, and KPM#9 timely processing of uniform commercial code filings. Additionally, processing time is a major component of customer satisfaction and also has an impact on KPM#13 customer service.

The Elections Division KPM#10 relates to printing the Voters' Pamphlet, which provides information to citizens at a reasonable cost

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KPM # 165-001	AUDIT COST PER HOUR AUDITS DIVISION – Cost Per Hour, Audits Division Compared to Private Auditors	Measure since: 2003
Goal	Quality Products: We are dedicated to producing a quality product that meets our customers’ needs in a timely, accurate, professional, and efficient manner.	
Oregon Context	Benchmark #35 - PUBLIC MANAGEMENT QUALITY Governing magazine's ranking of public management quality.	
Data source	The average hourly rate (including direct and indirect costs) of the Audits Division compared to the hourly rate that we pay contract auditors.	
Owner	Audits Division , Chuck Hibner, 503-986-2355	

Agency Name: Secretary of State			Agency No.: 16500				
Key Performance Measure (KPM)			2001-03	2003-05	2005-07	2007-09	2009-11
# - 165-001	Target		60/97	65/109	68/116	82/125	82/135
	Data		60/97	69/103	69/123		

1. OUR STRATEGY

This measure is part of our effort to ensure we are producing our products as efficiently and cost effectively as possible. This measure is only one part of the efficiency equation but does provide a comparator to equivalent costs in the private sector.

2. ABOUT OUR TARGETS

Presently, the target is what we expect to pay for private sector contractors and what we anticipate our direct bill rate to be in future fiscal years. This information is developed during our budget development process. We are in the process of revisiting our target development for this measure. Our initial thinking is that our target rate should be considered as some percentage of the private sector rate. We have yet to settle on a percentage that would adequately account for profit and other distinctions.

3. HOW WE ARE DOING

The nature of this measure is a comparison to private sector cost. In general, lower is better and the private sector rate is an important threshold to stay under. The trend has been and is projected into the near future to be that our direct bill rate will be between 60 and 65 percent of the private sector rate.

4. HOW WE COMPARE

I think we compare favorably. If we are able to develop a “profit percentage”, the results will have even more meaning.

5. FACTORS AFFECTING RESULTS

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II. KEY MEASURE ANALYSIS

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Having a relatively young staff has artificially depressed our rate. Over the long-term, as our staff matures and receives increases in pay, our direct bill rate should close in on the private sector rate. One factor that was affecting our turnover and simultaneously keeping our cost down was our salary structure, which was significantly below market. Now that we have completed a salary study and modified our salary matrix, I would expect our retention to improve and our rate per hour to increase accordingly.

Also a factor in private sector cost is that private sector firms are still in a sellers market. Most have significantly more work than they can handle and are turning potential clients away. The pricing of their services most likely reflect this fact and are higher than if audit services were not in such demand.

6. WHAT NEEDS TO BE DONE

No immediate action is needed in response to the data.

7. ABOUT THE DATA

Our direct bill rates are calculated in conjunction with our calculation of agency assessment amounts heading into each biennium. The data used for the private sector rates are taken from the contracts signed by the private firms conducting audit work for OAD. We update this performance measure and create a new target as a part of our strategic planning process, which we do each fiscal year.

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KPM # 165 - 002	VALUE OF SAVINGS AUDITS DIVISION – Value of revenue enhancements, savings , or questioned costs in audit reports	Measure since: 2003
Goal	Quality Products: We are dedicated to producing a quality product that meets our customers’ needs in a timely, accurate, professional, and efficient manner.	
Oregon Context	Benchmark #35 - PUBLIC MANAGEMENT QUALITY Governing magazine's ranking of public management quality.	
Data source	Data is an accumulation of all revenue enhancements, savings, or questioned costs that we indentify in our audit reports for the period.	
Owner	Audits Division , Chuck Hibner, 503-986-2355	

1. OUR STRATEGY

This measure is a simple display of one of the primary benefits of our performance audit work. For audits where economy and efficiency is a focus, documenting the potential for savings through implementation of our recommendations is important. We feel potential savings is important information for decision makers to have when weighing the cost / benefit of implementing a change in processes or controls. This measure combined with measure 165-003, helps to measure our efficiency and the cost / benefit for the performance audit work that we do.

2. ABOUT THE TARGETS

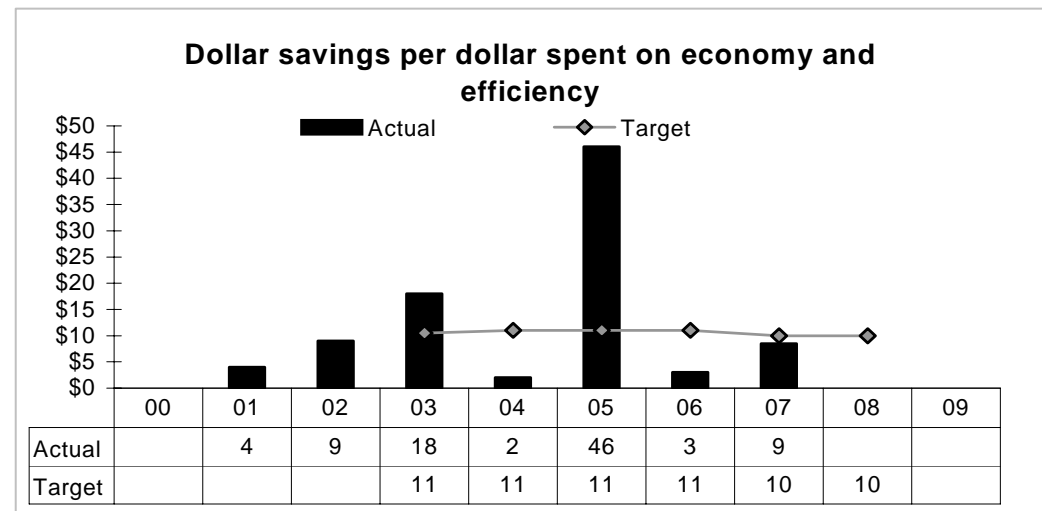
Creating a meaningful target for this measure is difficult. The basis for the estimate is historical information and our best guess as to how much future work will be dedicated to projects where significant economy and efficiency findings are likely and quantifiable.

1. HOW WE ARE DOING

We continue to identify revenue enhancements, savings, and questionable costs. Since we are responsible for selecting audit projects, you could surmise that we are selecting a percentage of projects that have identifiable and quantifiable savings. This information combined with measure 165-003 shows a history of audit work that identifies significant savings and does so at a net benefit.

2. HOW WE COMPARE

As we revisit our measure this next year, we will look for comparable data from other states.



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3. FACTORS AFFECTING RESULTS

Several factors can affect this measure including the amount of performance audit resources we choose to dedicate to projects without significant potential for quantifiable savings. Over this past year we have been receiving more requests from agencies, LFO, and JLAC that have influenced our choice of audit projects. Even though much of the work we are undertaking would not be classified as having great potential for identification of savings, the work is important for a number of other reasons. This unexpected seed change is affecting our ability to meet our projected savings target.

Another thought is that this target should continue to decline as agencies continue to improve through better management and their ability to self-identify the most economical and efficient ways to deliver programs. If we reach a point where we have difficulty identifying savings, this may be a good sign.

4. WHAT NEEDS TO BE DONE

We will continue to solicit and identify as many audit ideas as we can and make decisions as to which performance audit projects are the most important to undertake. We will continue to strive to strike a balance with our discretionary audit hours and devote a significant percentage to economy and efficiency work.

5. ABOUT THE DATA

This data is captured from our quality assured audit reports.

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KPM # 165 - 003	DOLLAR SAVINGS PER DOLLAR SPENT AUDITS DIVISION-Dollar savings per dollar spent on economy and efficiency	Measure since: 2003
Goal	Quality Products: We are dedicated to producing a quality product that meets our customers' needs in a timely, accurate, professional, and efficient manner.	
Oregon Context	Benchmark #35 - PUBLIC MANAGEMENT QUALITY Governing magazine's ranking of public management quality.	
Data source	This data is extracted from our timekeeping / project management system and our quality assured audit reports.	
Owner	Audits Division, Chuck Hibner, 503-986-2355	

1. OUR STRATEGY

This measure is designed to display the cost / benefit of our audit work, a measure of our efficiency where economy and efficiency audit projects are concerned.

2. ABOUT THE TARGETS

Similar to measure 165-002, creating a meaningful target for this measure is difficult. The basis for the estimate is historical information and our best guess as to how much future work will be dedicated to projects where significant economy and efficiency findings are likely and quantifiable.

3. HOW WE ARE DOING

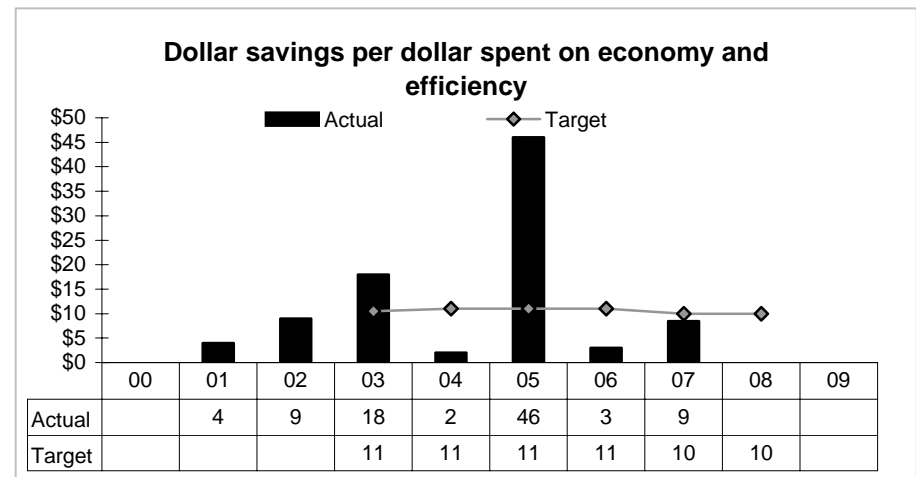
The historical trend has been up and down but never below \$1. This would be the point where we would be spending more on the work than we are identifying in savings. Given this fact, our performance in this area has been fine.

4. HOW WE COMPARE

As we revisit our measure this next year, we will look for comparable data from other states.

5. FACTORS AFFECTING RESULTS

As stated in measure 165-002, as agencies continue to improve through better management identifying those projects with big savings should become more and more difficult and the economy and efficiency work we do may focus on more medium sized projects. If we get to that point I would expect to see a decline in the cost / benefit target as a result. That being said, I would not expect to see this ratio below \$1 in the near future.



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6. WHAT NEEDS TO BE DONE

Similar to measure 165-002, we need to ensure that a percentage of our audit work is devoted to economy and efficiency audit projects where there is a high likelihood that the identifiable savings are greater than the costs. Further, our process attempts to ensure we are selecting the projects with the most potential first. This is done through our existing audit selection process where potential for savings is one of our four primary selection criteria.

7. ABOUT THE DATA

The data is from our timekeeping / project management system and our quality assured audit reports.

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KPM # 165 - 004	IMPLEMENTED RECOMMENDATIONS AUDITS DIVISION – Percentage of recommendations implemented	Measure since: 2003
Goal	Quality Products: We are dedicated to producing a quality product that meets our customers’ needs in a timely, accurate, professional, and efficient manner.	
Oregon Context	Benchmark #35 - PUBLIC MANAGEMENT QUALITY Governing magazine's ranking of public management quality.	
Data source	The data is captured in our recommendation data base.	
Owner	Audits Division, Chuck Hibner, 503-986-2355	

1. OUR STRATEGY

This measure is designed as a quality measure for recommendations we make as a result of our audit work. The recommendations we make should be implementable and we should be convincing enough to inspire the subject agency to follow through with implementation.

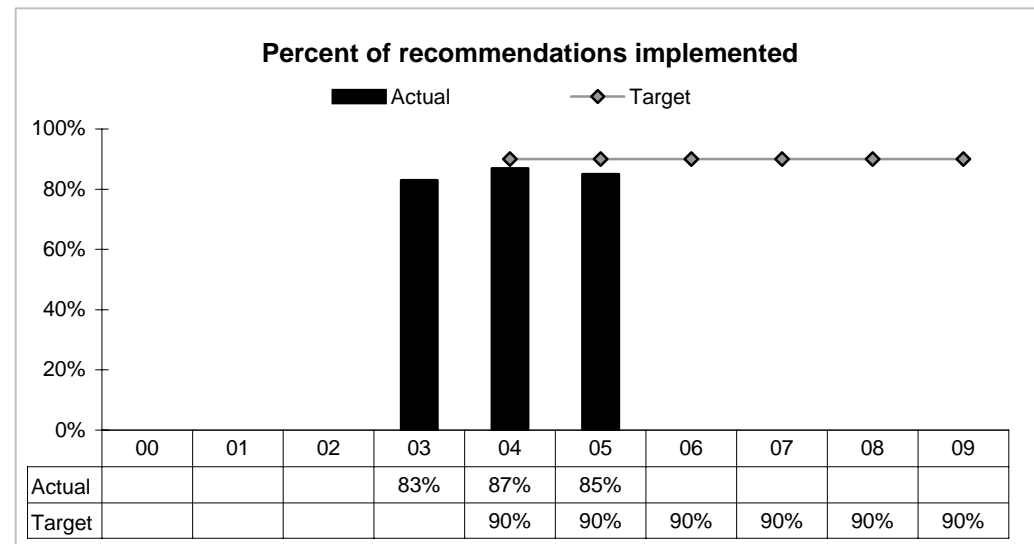
This measure is also designed to ensure that we are following up on recommendations that result from non-recurring work. For those projects that we do every year, follow up is easy, inevitable, and one of our audit standards. For work that we may only undertake once, we need to be taking some steps to ensure agencies are implementing those recommendations as well.

2. ABOUT THE TARGETS

Similar to measure 165-002 & 165-003, creating a meaningful target for this measure is difficult. The basis for the estimate is historical information and an approach that we should be able to do better than we have in the past. Our experience has been that a number of our recommendations are not implementable within 1 year. Our target for implementation will never be 100%.

3. HOW WE ARE DOING

In reviewing the follow up forms and developing a feel for how agencies are responding, it appears that agencies are typically responsive and are implementing most of our recommendations within 1 year, if at all possible. It appears that 85 to 90 percent is a good target and a good result.



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4. HOW WE COMPARE

As we revisit our measure this next year, we will look for comparable data from other states.

5. FACTORS AFFECTING RESULTS

A primary factor in implementation is an agencies willingness to implement our recommendations. The only influence we have is in showing a convincing argument for implementation and reporting the status of recommendation implementation. Outside factors would include the Governor's or the Legislature's interest in a particular program or set of recommendations. Recommendations that we make and their status are also reported as a part of an agency's Ways and Means budget packet.

6. WHAT NEEDS TO BE DONE

We need to continue to improve our discipline and our process for follow up of recommendations made for non-recurring audit work. The next 3 – 5 % will most likely result from our following up consistently serving as a reminder that outstanding recommendations need to be implemented.

7. ABOUT THE DATA

The recommendation follow up information is captured either through the following years audit work or through a follow up form sent to the agency asking for the status of each recommendation. Once returned to OAD the responsible audit manager will verify the accuracy of the response and undertake any additions work needed to confirm their response prior to entry into our database.

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KPM # 165 -005	NOTICES PUBLISHED ARCHIVES DIVISION – PERCENTAGE OF NOTICES PUBLISHED ELECTRONICALLY AND IN PAPER
Goal	New goal- Change to tracking number of rules filed electronically vs. percent of rules published in paper and electronically
Oregon Context	This KPM does not link to any specific Oregon Benchmark.
Data source	Data will be obtained from the Rules filing unit that shows how many rule notices were filed electronically vs. in paper.
Owner	Archives Division, Mary Beth Herkert (503) 378-5196

1. OUR STRATEGY

The number of rulemaking notices filed increases annually. The costs and time needed to publish these notices also increases. However, notices that are filed electronically cost significantly less and take less time to publish than notices filed in paper. The Archives Division will work with agencies over the coming years to encourage electronic filing through training and by refining the electronic process to make it easy and efficient. Based on the success of this process, we can eventually begin to receive rule text on-line. This provides us with a measure of success.

2. ABOUT THE TARGETS

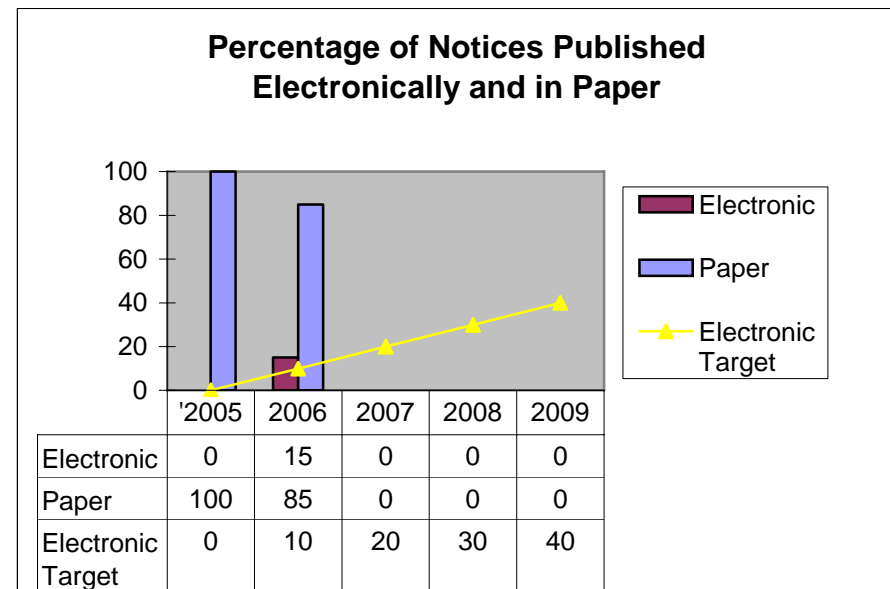
As we further develop and refine the process for online notice filing we should notice that the number of notices filed electronically increases over the number of notices filed in paper.

3. HOW WE ARE DOING

We began receiving online notice filings on a trial basis at the end of 2005 and then began training agency Rules Coordinators on the process in 2006. Early numbers show that approximately 15% of rule notices filed in 2006 were done electronically. More importantly, we have identified improvements that need to be made to the online form that will make the process more useful to agency Rules Coordinators.

4. HOW WE COMPARE

Other states Administrative Rules/Codes agencies are currently developing similar processes. We are looking closely at these states with an eye toward improving our process.



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5. FACTORS AFFECTING RESULTS

Because of staff size and other publications commitments (i.e. the Oregon Blue Book) for 2006, we were not able to update our online form mid 2006. However, that will be corrected for 2007.

6. WHAT NEEDS TO BE DONE

The online form needs to be revised to accommodate the needs of agency Rules Coordinators. This will be done in 2007.

7. ABOUT THE DATA

The data collected is raw in that no mechanism was established up front to determine actual numbers of notices filed electronically vs. paper. This has been changed so that every calendar year we can accurately calculate the number of notices filed electronically vs. paper.

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KPM #	E-GOVERNMENT SERVICES	Measure since:
165 - 006	CORPORATION DIVISION - Number of electronic government services available	2005
Goal	E-GOVERNMENT SERVICES Reduce costs for businesses through faster, more efficient processes, electronic filing for services, and integration of government services.	
Oregon Context	165-006 E-GOVERNMENT. The Secretary of State does not have a primary link to the Oregon Benchmarks.	
Data source	List of electronic government services available through division applications.	
Owner	Corporation Division, Peter Threlkel (503) 986-2205	

1. OUR STRATEGY

The Division is working to automate our service delivery processes by increasing the number of electronic government services available to the public. The Division is working in collaboration with the Department’s of Revenue, Employment, and Consumer and Business Services to expand the Central Business Registry.

2. ABOUT THE TARGETS

More electronic government services are better. Each electronic government service represents a manual process that has been enabled for customer self-service over the internet. The division set very aggressive biennial targets for 2005-07 and 2007-09. Targets need to be revised into Oregon fiscal year expectations.

3. HOW WE ARE DOING

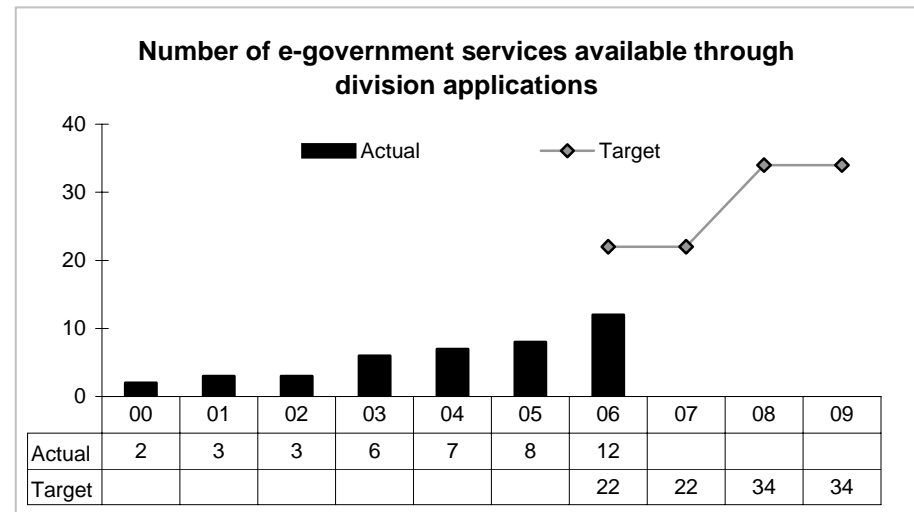
The Division implemented 4 new electronic government services in 2006, for a total of 12 electronic government services. The Division has already implemented 4 new electronic government services in 2007, with an additional 6 expected to be implemented this year. The Division expects to meet the target of 22 electronic government services by the end of fiscal year 2007.

4. HOW WE COMPARE

Benchmarking with other jurisdictions has not been completed.

5. FACTORS AFFECTING RESULTS

Limited staff resources to develop and manage projects, and test applications while still managing and maintaining existing production systems can limit the number of new electronic government services that can be developed and implemented. Other agency and government priorities can delay availability project start and completion dates. Contracted vendors may overstate capability and available resources to deliver key electronic government services and project deliverables, leading to delays in implementation of contracted projects and other subsequent projects. Availability of project funding can also delay or limit development of new electronic government services.



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6. WHAT NEEDS TO BE DONE

Funding of POP 172 will allow the division to continue automating manual processes, giving customers more options for service delivery, and increasing opportunities for operational efficiencies and future program cost containment.

While this measure is useful in measuring the growth and development of electronic government services, the Division will eventually run out of manual processes that make sense to automate for customer self-service over the internet. This measure needs to transition into measuring the percentage of total customer transactions completed through electronic government service applications.

7. ABOUT THE DATA

The reporting cycle is an Oregon fiscal year. Electronic government services are manual processes requiring staff assistance that have been automated for customer self-service over the Internet. Electronic government services support and compliment manual processes to provide improved customer service, reduce processing delays, and travel requirements for businesses, while still providing customers with options for personal staff assisted service.

Previous electronic government services include: UCC online database search, Copies of UCC images online, Business Registration database search, Annual Report renew online, Business name renew online, Online Business Wizard, Associated name search of the Business Registration database by business, and Business name availability search.

New electronic government services implemented in fiscal year 2006 include: Associated name search of the Business Registration database by individual name, Business Registration database search by active or inactive records, Generate full annual report online, and Generate dissolved business reinstatement application online.

New electronic government services implemented, to date, in fiscal year 2007 include: Online Notary Public training tutorial, Testing and scoring of online Notary Public examination, Generate Notary Public certificate of training online, Online filing for new assumed business name registration through the Central Business Registry.

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KPM # 165 - 007	TIMELY DOCUMENT PROCESSING CORPORATION DIVISION - Business Registration document processing turnaround time from receipt	Measure since: 2005
Goal	TIMELY DOCUMENT PROCESSING Business Registration documents submitted for filing and registration are completed timely.	
Oregon Context	165-007 TIMELY DOCUMENT PROCESSING. The Secretary of State does not have a primary link to the Oregon Benchmarks.	
Data source	Excel spreadsheet tracking oldest receipt date to be processed at start of each business day.	
Owner	Corporation Division, Peter Threlkel (503) 986-2205	

1. OUR STRATEGY

The goal is to reduce the average time delay to process a business registration document, from receipt to completion.

2. ABOUT THE TARGETS

Lower turnaround time is better. Faster document processing means fewer delays for business owners. The Division revised targets, based on expectations of customers and comparison to peers in other states.

3. HOW WE ARE DOING

In 2006, document processing turnaround time increased from an average of 2.0 days to 2.1 days. When asked, 97 % of customers indicated that document processing timeliness was excellent or above average.

4. HOW WE COMPARE

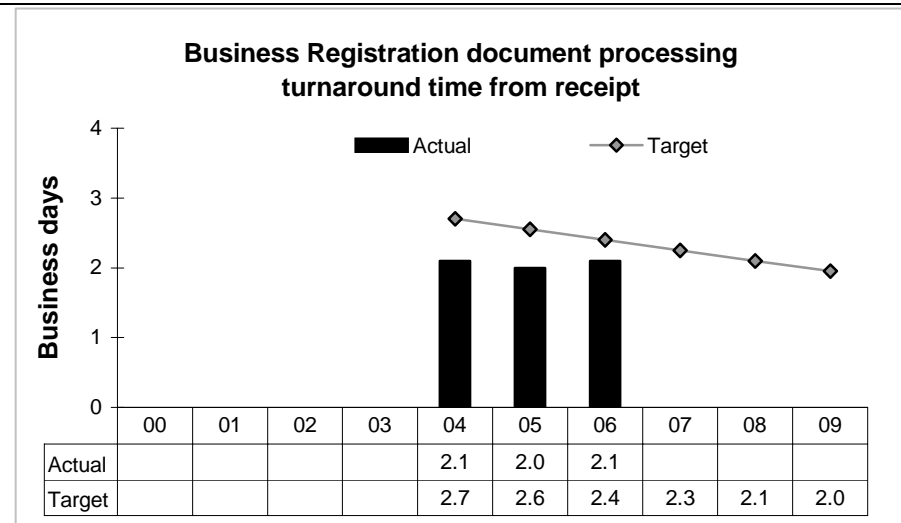
The Division is currently outperforming even the best of our peers in the States of California, Nevada, New Mexico, Washington, and Wyoming. When we asked these states to report the date of the oldest unprocessed business registration filing, results ranged from 3 to 58 days, an average of 15.8 days. This compares favorable the the Division’s 2006 result of 2.1 days.

5. FACTORS AFFECTING RESULTS

Delays in implementing electronic filing applications for business registration require the division to rely on labor intensive processing of documents. While anticipating earlier implementation of electronic filing, the Division eliminated vacant positions to avoid the need for layoffs once efficiencies are achieved through electronic filing.

6. WHAT NEEDS TO BE DONE

Implement planned electronic filing applications and maintain existing staffing levels until efficiencies from electronic filing can be fully achieved.



AGENCY NAME: SECRETARY OF STATE

II. KEY MEASURE ANALYSIS

Agency Mission: Agency Mission: Provide stewardship of public resources by: a) facilitating access to government records and information, b) ensuring that the public dollars are well spent, c) offering registration services to businesses and consumers, d) safeguarding the democratic process, and e) overseeing state lands for the common school fund.

7. ABOUT THE DATA

The reporting cycle is an Oregon fiscal year. Data is tracked and collected by reviewing the date of the oldest document needing to be processed at the start of each business day. Data is entered into an excel spreadsheet to determine average processing turnaround time in business days.

AGENCY NAME: SECRETARY OF STATE

II. KEY MEASURE ANALYSIS

Agency Mission: Agency Mission: Provide stewardship of public resources by: a) facilitating access to government records and information, b) ensuring that the public dollars are well spent, c) offering registration services to businesses and consumers, d) safeguarding the democratic process, and e) overseeing state lands for the common school fund.

KPM # 165 - 008	TIMELY DOCUMENT PROCESSING CORPORATION DIVISION - Notary Public document processing turnaround time from receipt	Measure since: 2005
Goal	TIMELY DOCUMENT PROCESSING Notary Public documents submitted for filing and registration are completed timely.	
Oregon Context	165-008 TIMELY DOCUMENT PROCESSING. The Secretary of State does not have a primary link to the Oregon Benchmarks.	
Data source	Excel spreadsheet tracking oldest receipt date to be processed at start of each business day.	
Owner	Corporation Division, Peter Threlkel (503) 986-2205	

1. OUR STRATEGY

The goal is to reduce the average time delay to process a notary public application document, from receipt to completion.

2. ABOUT THE TARGETS

Lower turnaround time is better. Faster document processing means fewer delays for notary applicants. The Division revised targets, based on expectations of customers and comparison to peers in other states.

3. HOW WE ARE DOING

In 2006, document processing turnaround time increased from an average of 2.7 days to 3.2 days. When asked, 97 % of customers indicated that document processing timeliness was excellent or above average.

4. HOW WE COMPARE

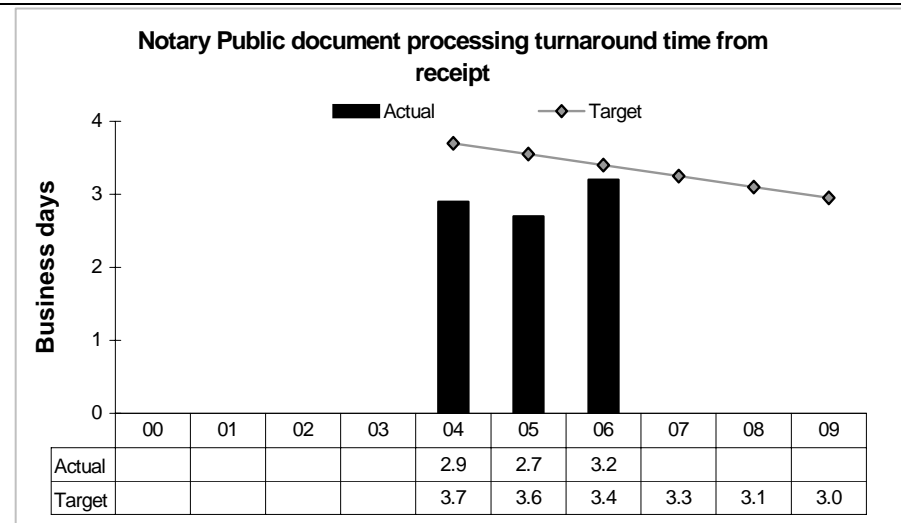
The Division is currently outperforming even the best of our peers in the States of California, Nevada, New Mexico, Washington, and Wyoming. When we asked these states to report the date of the oldest unprocessed notary public application, the results ranged from 5 to 14 days, an average of 8.0 days. This compares favorably to the Division’s 2006 result of 3.2 days.

5. FACTORS AFFECTING RESULTS

In anticipation of other electronic filing applications, the Division eliminated vacant positions in the prior biennium. Delays in implementing and stabilizing a new UCC system and prior reductions in staff have caused the increase in 2006 document processing turnaround times.

6. WHAT NEEDS TO BE DONE

The Division plans to conduct a business process review to identify potential streamlining measures and system improvements that can be implemented.



AGENCY NAME: SECRETARY OF STATE

II. KEY MEASURE ANALYSIS

Agency Mission: Agency Mission: Provide stewardship of public resources by: a) facilitating access to government records and information, b) ensuring that the public dollars are well spent, c) offering registration services to businesses and consumers, d) safeguarding the democratic process, and e) overseeing state lands for the common school fund.

7. ABOUT THE DATA

The reporting cycle is an Oregon fiscal year. Data is tracked and collected by reviewing the date of the oldest document needing to be processed at the start of each business day. Data is entered into an excel spreadsheet to determine average processing turnaround time in business days.

AGENCY NAME: SECRETARY OF STATE

II. KEY MEASURE ANALYSIS

Agency Mission: Agency Mission: Provide stewardship of public resources by: a) facilitating access to government records and information, b) ensuring that the public dollars are well spent, c) offering registration services to businesses and consumers, d) safeguarding the democratic process, and e) overseeing state lands for the common school fund.

KPM # 165 - 009	TIMELY DOCUMENT PROCESSING CORPORATION DIVISION - Uniform Commercial Code document processing turnaround time from receipt	Measure since: 2005
Goal	TIMELY DOCUMENT PROCESSING Uniform Commercial Code documents submitted for filing and registration are completed timely.	
Oregon Context	165-009 TIMELY DOCUMENT PROCESSING. The Secretary of State does not have a primary link to the Oregon Benchmarks.	
Data source	Excel spreadsheet tracking oldest receipt date to be processed at start of each business day.	
Owner	Corporation Division, Peter Threlkel (503) 986-2205	

1. OUR STRATEGY

The goal is to reduce the average time delay to process a uniform commercial code filing document, from receipt to completion.

2. ABOUT THE TARGETS

Lower turnaround time is better. Faster document processing means fewer delays for business customers. The Division revised targets, based on expectations of customers and comparison to peers in other states.

3. HOW WE ARE DOING

In 2006, document processing turnaround time increased from an average of 1.7 days to 2.4 days. When asked, 97 % of customers indicated that document processing timeliness was excellent or above average.

4. HOW WE COMPARE

The Division is currently performing on par with our peers in the States of California, Nevada, New Mexico, Washington, and Wyoming. When we asked these states to report the date of the oldest unprocessed uniform commercial code filing, the results ranged from 1 to 4 days, an average of 2.4 days. This matches the Division's 2006 result of 2.4 days.

5. FACTORS AFFECTING RESULTS

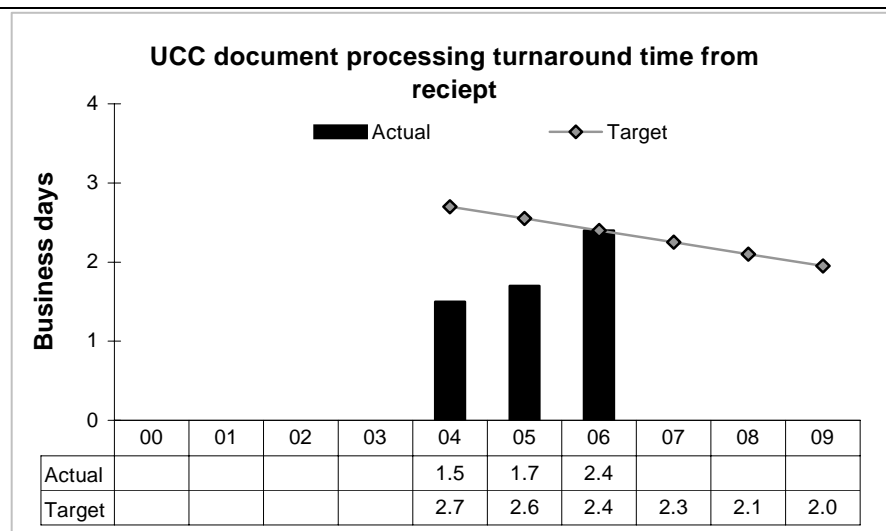
Delays in implementing a new UCC system and electronic filing capabilities and staff reductions in the prior biennium caused the increase in 2006 processing turnaround times. The new system has been stabilized and plans are underway to implement the electronic filing capabilities of the system in 2007.

6. WHAT NEEDS TO BE DONE

Implement planned electronic filing applications, and maintain existing staffing levels until efficiencies from electronic filing can be fully achieved.

7. ABOUT THE DATA

The reporting cycle is an Oregon fiscal year. Data is tracked and collected by reviewing the date of the oldest document needing to be processed at the start of each business day. Data is entered into an excel spreadsheet to determine average processing turnaround time in business days.



AGENCY NAME: SECRETARY OF STATE

II. KEY MEASURE ANALYSIS

Agency Mission: Agency Mission: Provide stewardship of public resources by: a) facilitating access to government records and information, b) ensuring that the public dollars are well spent, c) offering registration services to businesses and consumers, d) safeguarding the democratic process, and e) overseeing state lands for the common school fund.

KPM # 165 - 010	VOTERS' PAMPHLET COST ELECTIONS DIVISION – Voters' Pamphlet Cost Per Page Printed	Measure since: e.g. 1999
Goal	To provide useful elections information to Oregonians in a cost-effective manner.	
Oregon Context	165-010 VOTERS' PAMPHLET COST. The Secretary of State does not have a primary link to the Oregon Benchmarks.	
Data source	Actual costs taken from vendor invoices and pages mailed to Oregon households.	
Owner	Elections Division , John Lindback , (503)-986-2339	

1. OUR STRATEGY

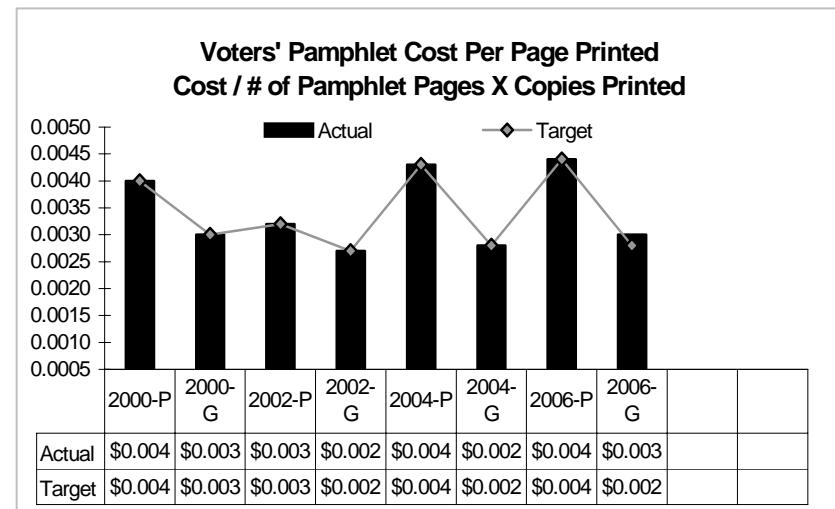
To produce the Voters' Pamphlet in a cost efficient manner.

2. ABOUT THE TARGETS

It is difficult to establish a target to affect an impact on the cost per page for the Voters' Pamphlet. These services are contracted out through a competitive process. We do believe we have done a very good job of producing the Voters' Pamphlet in a cost effective manner.

3. HOW WE ARE DOING

The Elections Division's performance measure related to cost-per-page of the state voters' pamphlet shows once again that the Division contained costs. It must be pointed out once again, however, that judging the pamphlet on low cost-per-page does not lead to a reader-friendly document. The Division has taken numerous steps throughout the year to reduce both production and mailing costs but some voters believe that the voters' pamphlet is too big and difficult to read.



The Elections Division is launching a new customer service performance measure this year. Surveys will be sent to customers, which will provide a benchmark for future improvements in the ways the Division serves candidates, political committees, chief petitioners for state initiatives and referendums, the legislative assembly, county and city elections officials and almost 2 million voters. The Division intends to randomly select voters for part of the survey to inquire into their views of the readability and usability of the voters' pamphlet.

4. HOW WE COMPARE- We have not been able to collect data from other states to see how we compare.

AGENCY NAME: SECRETARY OF STATE

II. KEY MEASURE ANALYSIS

Agency Mission: Agency Mission: Provide stewardship of public resources by: a) facilitating access to government records and information, b) ensuring that the public dollars are well spent, c) offering registration services to businesses and consumers, d) safeguarding the democratic process, and e) overseeing state lands for the common school fund.

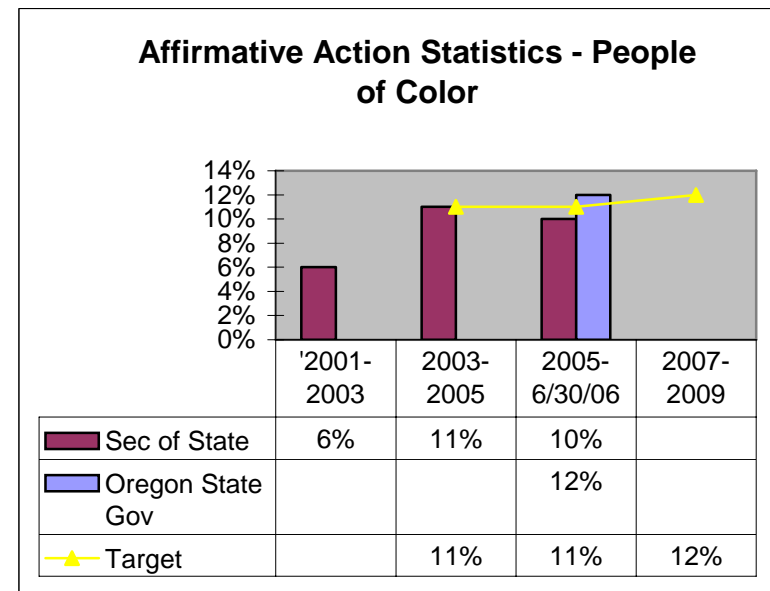
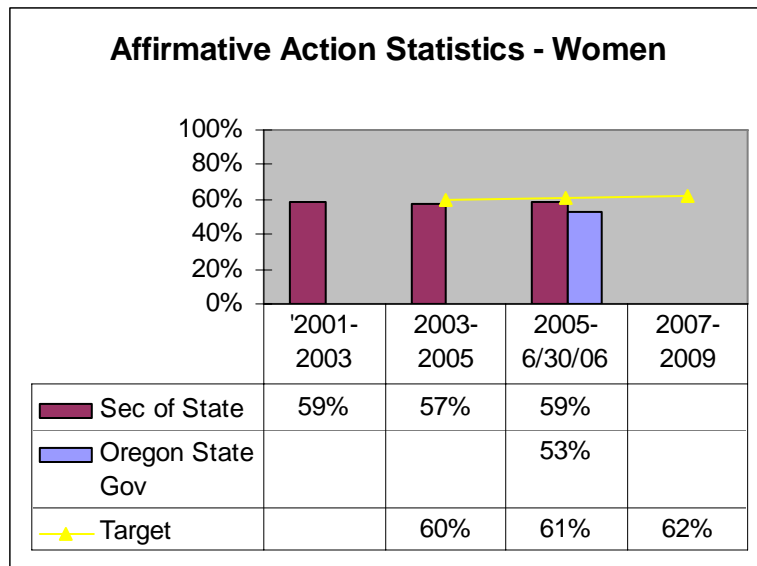
5. **FACTORS AFFECTING RESULTS-** Many factors affect our ability to produce the Voters' Pamphlet in a cost effective manner. The size of the pamphlet, number of arguments submitted in favor and opposition, number of candidates, etc. In addition, the Division contracts out for these services through a competitive process. Cost of postage and paper can impact the cost of the pamphlet as well.
6. **WHAT NEEDS TO BE DONE-** Continue to seek ways to produce the pamphlet in a way that keeps the cost per page reasonable.
7. **ABOUT THE DATA-** The data provided shows, based on a history of cost per page, we continue print the Voter's Pamphlet in a cost efficient manner.

AGENCY NAME: SECRETARY OF STATE

II. KEY MEASURE ANALYSIS

Agency Mission: Agency Mission: Provide stewardship of public resources by: a) facilitating access to government records and information, b) ensuring that the public dollars are well spent, c) offering registration services to businesses and consumers, d) safeguarding the democratic process, and e) overseeing state lands for the common school fund.

KPM # 165 - 012	WORKFORCE PERCENTAGE AGENCY WIDE – Percent of women, people of color, and persons with disabilities as a percentage of SOS’ workforce and also percentage of Oregon State Government workforce.	Measure since: 2003
Goal	Adaptable government for future generations	
Oregon Context	165-012 WORKFORCE PERCENTAGE. Mission: Pursue excellence in state government; OBM #35 – Governing Magazine’s ranking of public management quality.	
Data source	Department of Administrative Services Affirmative Action Report as of June 30, 2006 and Statewide Workforce Counts spreadsheet received from the Governor’s Affirmative Action Office.	
Owner	Jen Coney, Human Resource Division, 503.986.2168	



AGENCY NAME: SECRETARY OF STATE

II. KEY MEASURE ANALYSIS

Agency Mission: Agency Mission: Provide stewardship of public resources by: a) facilitating access to government records and information, b) ensuring that the public dollars are well spent, c) offering registration services to businesses and consumers, d) safeguarding the democratic process, and e) overseeing state lands for the common school fund.

1. OUR STRATEGY

The strategy is to create a work environment and employment opportunities to attract and retain diverse and skilled workers.

2. ABOUT THE TARGETS

The agency targets were set to gradually increase the percentage of women, people of color and persons with disabilities in the Secretary of State workforce.

3. HOW WE ARE DOING

We are holding steady on the percentages of women, people of color and persons with disabilities in the Secretary of State workforce. Our percentages mildly fluctuate from biennia to biennia, with minor gains and losses in categories. The agency has not met the targets set.

4. HOW WE COMPARE

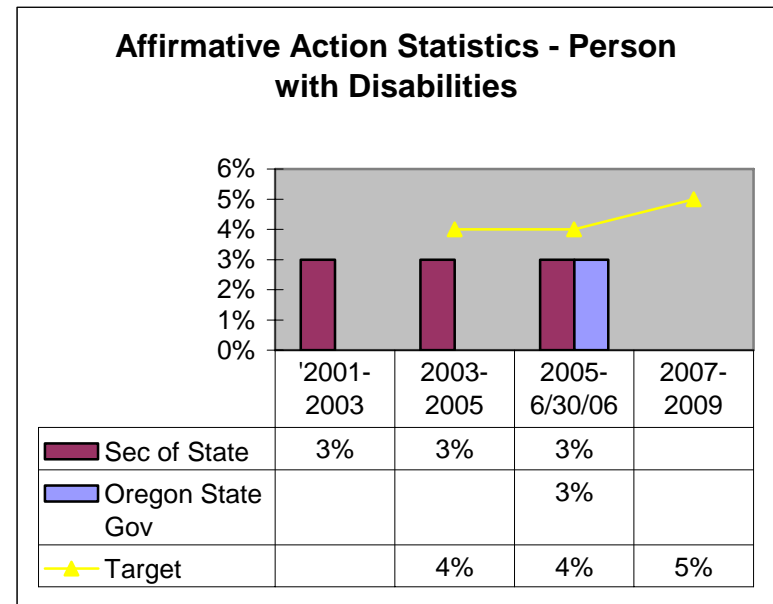
The Secretary of State’s Office is reflective of the State of Oregon government workforce. Our percentages of persons with disabilities is identical to that of the rest of state government. In the categories of people of color, the Secretary of State’s Office is two percentage points lower than Oregon state government as a whole. In the category of women, the Secretary of State’s Office is six percentage points higher than the rest of Oregon State government.

5. FACTORS AFFECTING RESULTS

Factors that affect the results include agency turnover rates, the applicant pool for the vacant positions and a growing economy. Agency turnover rates have fluctuated over the last three biennia from 7.4% in 2003 to 9.5% in 2006, with a high of 13.2% in 2005. The Audits Division has experienced the majority of turnover in staff, with the economy playing a significant role. A stronger economy attracts a larger and presumably more diverse workforce labor pool. However, a stronger economy also increases competition between employers for workers.

6. WHAT NEEDS TO BE DONE

The agency needs to do a better job of recruiting, hiring and retaining workers in minority groups. Human Resources will incorporate respectful workplace training and cultural competency/diversity training into its 2007-2009 agency training plan.



AGENCY NAME: SECRETARY OF STATE**II. KEY MEASURE ANALYSIS**

Agency Mission: Agency Mission: Provide stewardship of public resources by: a) facilitating access to government records and information, b) ensuring that the public dollars are well spent, c) offering registration services to businesses and consumers, d) safeguarding the democratic process, and e) overseeing state lands for the common school fund.

7. ABOUT THE DATA

The data used to determine agency percentages of women, people of color and persons with disabilities was taken from the Department of Administrative Services Affirmative Action report as of June 30, 2006. This information is pulled from the Position and Personnel DataBase (PPDB).

The data to determine Oregon State government percentages was taken from the Statewide Workforce Counts 2006 information received from the Governor's Affirmative Action Office. For comparative purposes, the July 2006 data was used.

AGENCY NAME: SECRETARY OF STATE

II. KEY MEASURE ANALYSIS

Agency Mission: Agency Mission: Provide stewardship of public resources by: a) facilitating access to government records and information, b) ensuring that the public dollars are well spent, c) offering registration services to businesses and consumers, d) safeguarding the democratic process, and e) overseeing state lands for the common school fund.

KPM # 165 - 013	CUSTOMER SATISFACTION Percent of customers rating their overall satisfaction with the agency excellent or above average	Measure since: 2005
Goal	CUSTOMER SATISFACTION Percent of customers rating their satisfaction with the agency as excellent or above average.	
Oregon Context	165-013 CUSTOMER SERVICE. The Secretary of State does not have a primary link to the Oregon Benchmarks.	
Data source	Customer response to survey mailed with acknowledgement letter are entered into survey tracking system.	
Owner	Corporation Division, Peter Threlkel (503) 986-2205	

1. OUR STRATEGY

Listen to our customers and respond to their needs. Provide training and support to employees to provide high levels of customer service.

2. ABOUT THE TARGETS

A higher percentage means more customers are satisfied with the level of service received. Providing excellent customer service is a top priority for the agency and our customers.

3. HOW WE ARE DOING

Our customers consistently give us high ratings for: Overall level of service provided, Timeliness of the services provided, Accuracy in processing requests, Helpfulness of our employees, Knowledge and expertise of our employees, and Making information easily available. All targets are being exceeded.

4. HOW WE COMPARE

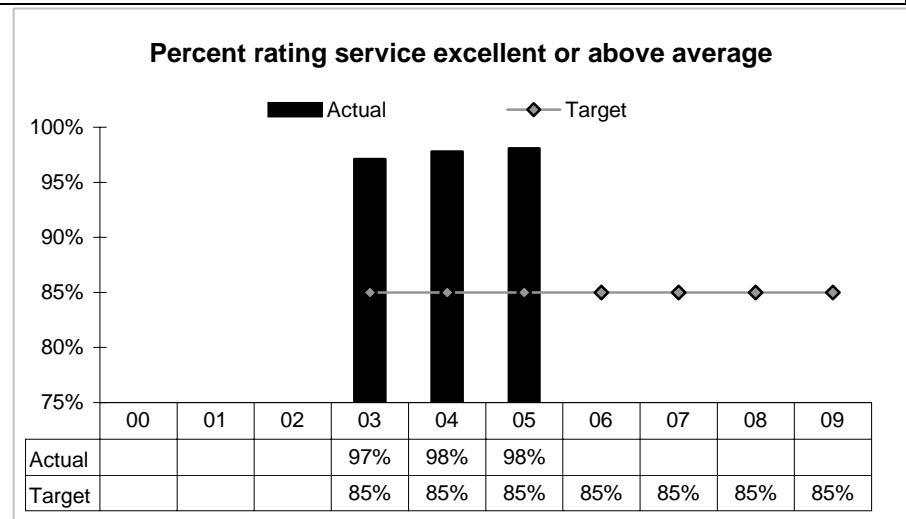
Benchmarking with other state agencies will be completed following the 2007 fiscal year.

5. FACTORS AFFECTING RESULTS

Customers want timely and accurate filing and processing of their documents and requests. Listening to our customers allows the Corporation Division to develop and provide services that meet the customer's needs.

6. WHAT NEEDS TO BE DONE

The Corporation Division plans to continue using feedback from surveys to identify areas where additional improvement is required. Archives and Elections Division survey results will begin reporting results in 2007.



AGENCY NAME: SECRETARY OF STATE

II. KEY MEASURE ANALYSIS

Agency Mission: Provide stewardship of public resources by: a) facilitating access to government records and information, b) ensuring that the public dollars are well spent, c) offering registration services to businesses and consumers, d) safeguarding the democratic process, and e) overseeing state lands for the common school fund.

7. ABOUT THE DATA

The reporting cycle is an Oregon fiscal year. During one to two weeks each year, customer surveys are mailed with acknowledgement letters to all customers who file a business registration, notary public, or uniform commercial code transaction. Completed survey responses are entered into a database.

AGENCY NAME: SECRETARY OF STATE

II. KEY MEASURE ANALYSIS

Agency Mission: Provide stewardship of public resources by: a) facilitating access to government records and information, b) ensuring that the public dollars are well spent, c) offering registration services to businesses and consumers, d) safeguarding the democratic process, and e) overseeing state lands for the common school fund.

KPM # 165 – 014	STAFF CERTIFICATION BUSINESS SERVICES DIVISION- Percent of Purchasing and Contracts Staff with professional certification through the National Institute of Governmental Procurement (NIGP)	Measure since: 2007
Goal	PROCUREMENT STAFF CERTIFIED: Agency goal is to have 100% of staff certified in public procurement, either at the national or state level of certification.	
Oregon Context	165-014 STAFF CERTIFICATION. This KPM does not link to any specific Oregon Benchmark.	
Data source	Data recovered from personnel files.	
Owner	Business Services Division, Purchasing and Contracts Section, Rob Rickard, CPPO, 503-986-2357.	

1. OUR STRATEGY

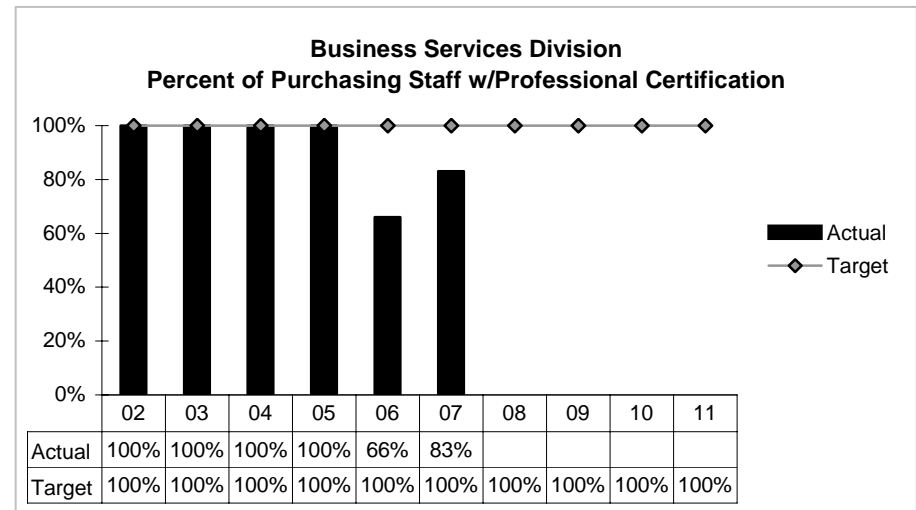
Procurement Certification is achieved through years of experience in procurement, specialized training focused on procurement issues and laws, including ethics, and a demonstration of comprehension through testing and achieving at least a minimum score.

2. ABOUT THE TARGETS

Helping purchasing and contract staff attain professional certification is a goal we are committed to helping our staff accomplish. It is our goal to have all purchasing and contracts staff 100% certified through the National Institute of Governmental Purchasing (NIGP) either as a Certified Professional Public Buyer (CPPB) or Certified Public Purchasing Officer (CPPO).

3. HOW WE ARE DOING

In 2003, the NIGP began tracking agencies across the country that had professionally certified staff. The Secretary of State was the first and only public entity in Oregon to achieve 100% professional certification of its purchasing and contract staff. The Secretary of State Purchasing and Contracts staff were featured in the 3rd Quarter 2003 issue of the NIGP national magazine “The Procurement Professional”. In 2006 we hired two new staff that did not have a professional certification through NIGP or any other professional purchasing organization. We anticipate those staff will achieve professional certification through NIGP within the next two years. In 2007, we had one of the new staff gain professional certification which in turn increased the overall certification rate from 66% to 83%.



AGENCY NAME: SECRETARY OF STATE**II. KEY MEASURE ANALYSIS**

Agency Mission: Provide stewardship of public resources by: a) facilitating access to government records and information, b) ensuring that the public dollars are well spent, c) offering registration services to businesses and consumers, d) safeguarding the democratic process, and e) overseeing state lands for the common school fund.

4. HOW WE COMPARE

In 2003 the Secretary of State was the only Oregon public entity (state and local government) with 100% professional certification of its procurement section staff . Nationally, in 2003, there were only 18 public entities with purchasing section staff achieving 100% professional certification. In 2007 we had a staff member gain professional certification which improved the percentage to 83% for 2007, We are confident we will get back to 100% in the next two years.

5. FACTORS AFFECTING RESULTS

The factor affecting the results is in recruitment. While we state in our recruitment that professional certification is desired, it is not required to qualify to interview for the position. When certified staff leave, new staff hired may or may not be certified. If they are not, this drops our professional certification percentage

6. WHAT NEEDS TO BE DONE

The one staff member that is not certified is process of preparing to take the exam for the Certified Professional Public Buyer. We expect him to obtain certification in the summer of 2008

7. ABOUT THE DATA

This information is tracked on a calendar year (January to December). The National Institute of Governmental Purchasing (NIGP) website (www.nigp.org) provides information regarding professional certification

AGENCY NAME: SECRETARY OF STATE

III. USING PERFORMANCE DATA

Agency Mission: Provide stewardship of public resources by: a) facilitating access to government records and information, b) ensuring that the public dollars are well spent, c) offering registration services to businesses and consumers, d) safeguarding the democratic process, and e) overseeing state lands for the common school fund.

KPM # 165-015	INFORMATION SERVICES DIVISION – Cost of Desktop Support by Workstation & System User	Measure since: 2004
Goal	Cost of Desktop Support: This KPM ties to one of the agency’s goals of striving for efficiencies and cost reductions in the delivery of services. The rating is based on percent of IT operating expenditures divided by total number of workstations and number of system users to determine a cost to support agency desktops.	
Oregon Context	This KPM does not tie to any specific Oregon Benchmark	
Data source	Data is provided through actual expenditures from the Agency Budget. This data is compiled and allows the division to determine how resources are being spent on IT and if it is in alignment with the Agencies overall mission and goals.	
Owner	Information Systems Division, Julie Pearson-Ruthven, Phone: 503 986 0521	

1. OUR STRATEGY

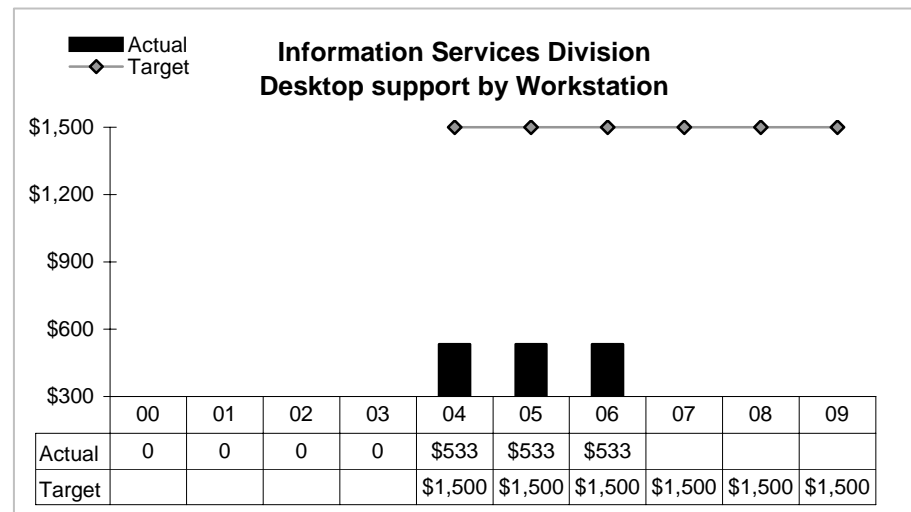
The Information Services Division (ISD) is one of three internal support divisions that provide administrative support to the agency. As an internal support division it is important to track our cost per workstation and cost per user. These numbers help us to determine our level of support in keeping our desktops up and running with maximum efficiency.

2. ABOUT THE TARGETS

The target in the graph show the goal is to achieve a low cost per user and workstations while maintaining a high percentage rating in our customer satisfaction survey.

3. HOW WE ARE DOING

The Division maintains well below target cost per workstation and above average customer service rating for Desktop support. We can assume from this that to achieve a higher customer service rating for desktop support we could spend more per workstation and end user. Using the customer service performance measure we can better decide where to spend more of our support resources to achieve our overall goals and targets.



AGENCY NAME: SECRETARY OF STATE**III. USING PERFORMANCE DATA**

Agency Mission: Provide stewardship of public resources by: a) facilitating access to government records and information, b) ensuring that the public dollars are well spent, c) offering registration services to businesses and consumers, d) safeguarding the democratic process, and e) overseeing state lands for the common school fund.

4. HOW WE COMPARE

Benchmark data is based on information from Gartner. We compare ourselves with other government agencies. The average cost per workstation from Gartner for Government Agencies average for 2004-2006 is \$1,600.00. We have continued to be well below with a consistent \$533 per workstation cost.

5. FACTORS AFFECTING RESULTS

Vacancies within the desktop support team can affect the rating. Hardware and software standards and approval processes play a large part in being able to efficiently meet support needs. These standards enable us to lower cost of purchases and it also allows our support staff to stay current on selected hardware and software applications. This helps them meet the users support needs in a timely manner which allows our users to be more efficient in their daily business

6. WHAT NEEDS TO BE DONE

We have determined that this is an acceptable level of support cost. More of our resources are being spend on the infrastructure and security to accommodate the users increasing need to move toward web based applications and remote access. Keeping on target for this Key Performance Measure, will require development of new standards to accommodate new technology needs and training of support staff to become proficient in the new technologies they support.

7. ABOUT THE DATA

The data is based on the overall Agency budget and actual expenditures of the Information Services Division; it is collected through the state accounting system (SFMA). Gartner information is assessed through their web page for supporting benchmark comparisons. This provides us with the opportunity to observe how we are spending our resources and analyze if we are moving in the right direction to meet our strategic goals.

AGENCY NAME: SECRETARY OF STATE

III. USING PERFORMANCE DATA

Agency Mission: Provide stewardship of public resources by: a) facilitating access to government records and information, b) ensuring that the public dollars are well spent, c) offering registration services to businesses and consumers, d) safeguarding the democratic process, and e) overseeing state lands for the common school fund.

Contact: Jean Straight, Deputy Secretary of State	Phone: 503 986 1523
Alternate: Jeff Morgan, Director, Business Services Division	Phone: 503 986 2239

The following questions indicate how performance measures and data are used for management and accountability purposes.	
1 INCLUSIVITY	<ul style="list-style-type: none"> • Staff: Staff reviewed and provided feedback performance measures and goals; • Elected Officials: Through review by the Oregon Progress Board, JLAC and Ways and Means; • Stakeholders: • Citizens: Customer based surveys <p>The Deputy Secretary of State, Division Directors and their management teams worked with staff to develop the performance measures. In areas where gaps exist, we will look to input during the Ways and Means process to more fully develop measures for the future.</p>
2 MANAGING FOR RESULTS	As part of a planned change in our personnel performance evaluation process, we will include performance measure progress as a performance standard.
3 STAFF TRAINING	As an agency, we place a special emphasis on training our employees. During the past year, we used both our annual all-employee meeting and individual division training sessions to discuss performance measures with our employees. As we move to a performance evaluation process that incorporates performance measure achievement, we will use the training opportunities surrounding this to reinforce that training.
4 COMMUNICATING RESULTS	<ul style="list-style-type: none"> • Staff: Through annual staffs meeting and soon through the development of a dashboard of critical measures to be updated monthly on the agency intranet; • Elected Officials: Through the budget process • Stakeholders: • Citizens: