



**GOVERNOR'S OFFICE OF
PLANNING AND BUDGET**

BUDGET TOOL

USER MANUAL

Section III – Performance Measures

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Program Measures and Prioritized Program Budgeting

Performance information helps agency officials and program managers monitor the effectiveness and efficiency of agency strategies and programs; provides crucial information for state decision-makers; and establishes context for the state's annual budget. Program measures, for example, can offer valuable insight when revenue shortfalls result in program funding reductions or when examining areas of need. Measures can tell the story of successful process improvements, impact of budget changes or the need to revisit a strategy.

Agencies will enter their program measures in the BudgetTool system using the step-by-step instructions in this user guide. Agency users and administrators should coordinate to access the BudgetTool system and enter the measures and data. In most agencies, the BudgetTool administrator is in the budget office.

The BudgetTool Program Measures module is currently available for data entry for approved users. Agencies must update their program measures in BudgetTool as part of their agency budget requests.

The process for the program performance measures consists of two primary steps:

1. Agencies review and update their program performance measures in BudgetTool
2. OPB reviews program measures and publishes select measures in the Governor's Budget Report

OPB requests that agencies identify three measures per budgeted program, including a workload measure, an efficiency measure and an effectiveness measure. Additionally, agencies are to provide four years of historical performance results for each measure, where possible. OPB will publish select performance measures in the Governor's Budget Report.

It is important to note that the measures in the Governor's Budget Report are published directly from the BudgetTool system. Consequently, agencies are responsible for ensuring that measures are entered correctly and the data is accurate.

Agency performance data are subject to periodic audits for completeness and quality. Accordingly, agencies need to keep all details of surveys and other data collection techniques for at least five years. Agency records must be detailed enough to satisfy a thorough review of the data collection methodology. Agencies must also validate their measures within Budget Tool to attest to the accuracy of performance information by checking the Validate box.

This user guide provides information on accessing the BudgetTool performance measures entry screens, and step-by-step instructions on entering and updating the measure data. If you have problems with the system, please submit a ticket from the BudgetTool welcome page following the procedure in the appendix of this manual. If you have other issues that cannot be resolved through the ticket system, please call OPB at (404) 656-3820 for technical assistance. For assistance with developing measures, please work with your agency's respective OPB analyst or contact James Taylor at (404) 656-6517 or via email at james.taylor@opb.georgia.gov.

Process Overview

ATTENTION

The agency prior year cutoff amendment must be loaded before performance measure data can be entered into BudgetTool.

- Step 1:** Agency administrator sets up agency performance measure users.
- Step 2:** Go to OPB's web site: <http://www.opb.georgia.gov/> and click on the **BudgetTool link on the homepage**.
- Step 3:** Agency user logs onto system from the BudgetTool welcome screen by clicking the **Start BudgetTool** button.
- Step 4:** The MS.NET software will automatically load onto the user's PC. For additional background and instructions for installing MS.NET, please read Sections I and II of the BudgetTool User Manual located on the BudgetTool main page: <http://budgettool.opb.georgia.gov/>.
- Step 5:** Update the program measures and performance data in the BudgetTool system. Detailed instructions for entering measures into BudgetTool follow.

Entering Measures into BudgetTool

A. Accessing the Program Performance Measures in BudgetTool

1. Click the **Agency Setup** Shield

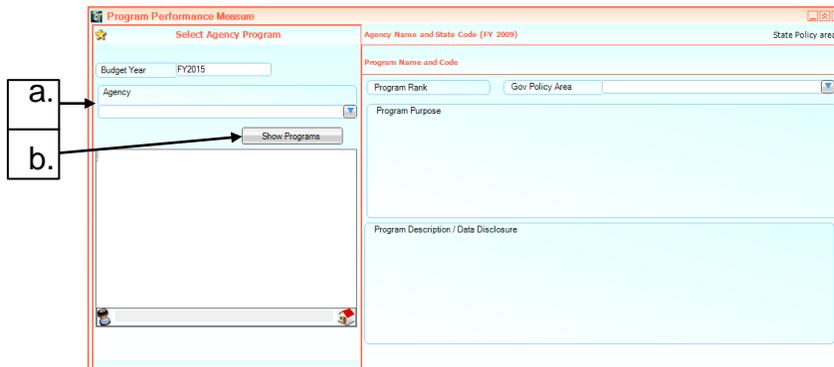


2. Click Program Performance Measure



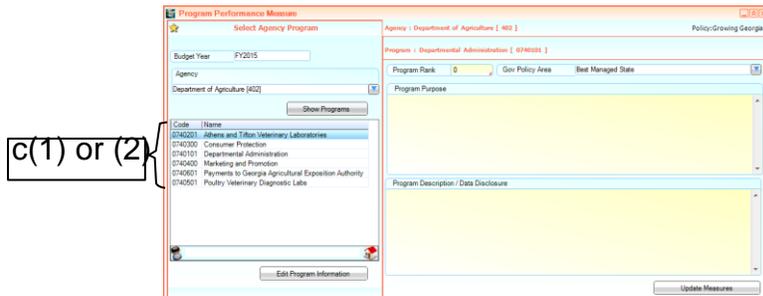
3. Update Program Performance Measure Screen

- a) Select the Agency from the menu list
- b) Click the **Show Programs** button



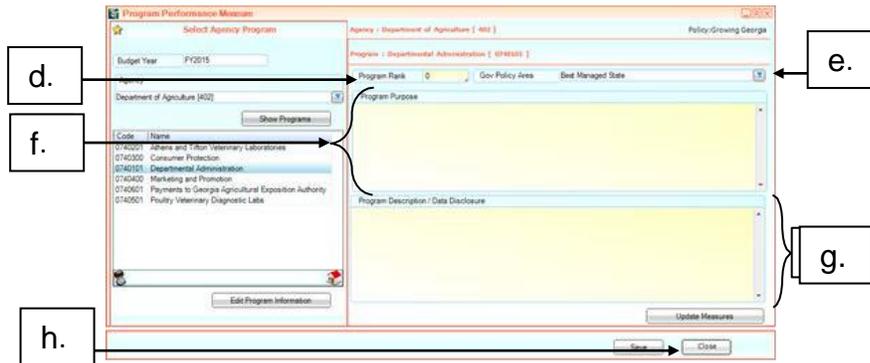
- c) (1) Double-click the program name or (2) highlight the program name and click the **Edit Program Information** button to view the Program Rank, Gov. Policy Area, Purpose and Description.

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- d) Program Rank: Changes to program ranking requires approval of the agency head, and notification by email of the OPB analyst
- e) Gov. Policy Area: The Governor's Policy Area should be prepopulated based on the primary policy area for which your agency is funded. Changes to this field may only be edited by the OPB.
- f) Program Purpose: The purpose statement can only be edited by OPB. The purpose statement should be the same as the program purpose statement in the most recent Appropriations Act. Agency users cannot change this section. The maximum character length is 4000.
- g) Program Description and Data Disclosure: Changes to this field can be made by the Performance Measure Agency Entry user. Agencies should use this section to provide additional detail about program operations that are not included in the purpose. This should help answer any questions about what the program does. In addition, the description should include significant data disclosures. Data disclosures include the time period covered by the data, key data definitions, data collection methodology, data limitations, data corrections, and the person responsible for reporting and explaining the data including e-mail address. The maximum character length is 4000.
- h) Click the **Close** button to exit the screen or Click **Update Measures** to update performance measure information.

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IMPORTANT NOTICE

BudgetTool pre-fills the measures based on what the agency submitted during the previous year's budget development process. Users can access the measures used for the Governor's Budget Report from OPB's website at <http://opb.georgia.gov/governors-budget-reports>.

The measures and data in this system will appear in the Governor's Budget Report exactly as they appear in BudgetTool. Therefore, **agencies are responsible for ensuring that measures are entered correctly, the data are accurate and that each measure has been validated in the Budget Tool system.**

B. Updating Measures

The agency is responsible for updating the performance measures and the related performance data. The steps to the process include:

- Reviewing the measure list and determining whether any measures need to be added changed, or deleted.
- Entering the most recent year's performance data, ensuring accuracy of prior years' data, and updating information as needed.
- Clicking validate to attest to the accuracy of the data submitted for each measure.

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Detailed descriptions for adding, changing and deleting measures follow.

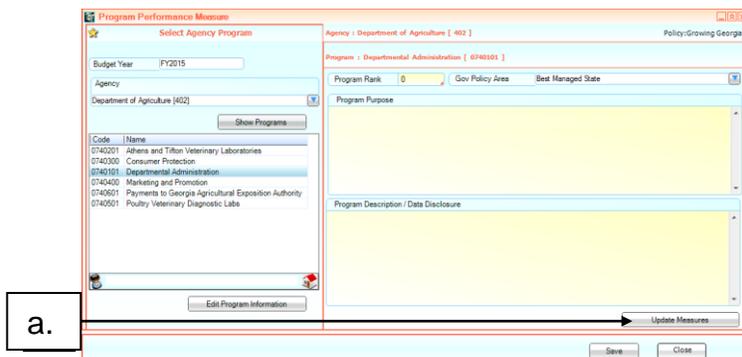
1. Updating Data But No Changes to Measure Descriptions

a) If there are no changes to the list of measures, then for each measure:

1. Confirm or update the Measure Type
2. Confirm or update the Measure Category
3. Confirm or update Measure Sequence
4. Enter most recent year's performance data
5. Review the prior years' data and related performance information, and
6. Click Validate. This indicates to OPB that the agency attests to the accuracy of the data submitted. *The measure must be re-validated each time a change is made.*
7. Click the **Save** button.

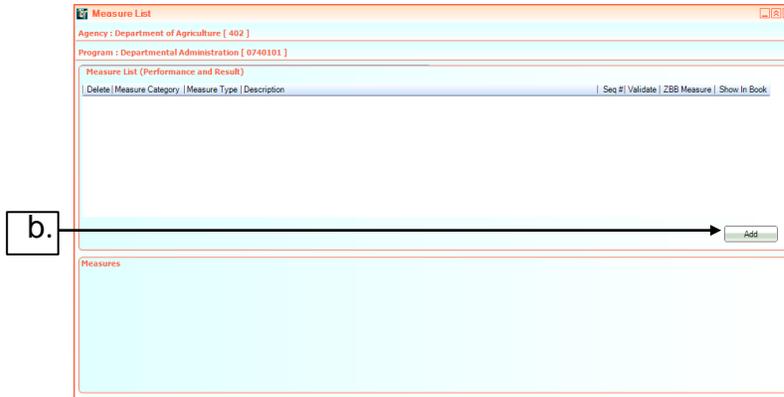
2. Adding New Measures

a) Click the **Update Measures** button to access the Measures screen



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b) Click the **Add** button to create a new Measure



c) Sequence Number: The sequence number will increment each time a new measure is added. This sequence is how the agency's measures will appear in the Governor's Budget Report. The user may change the sequence numbers if needed.

d) Measure Type: Choose the Measure Type from the menu list.

1. Cost per Unit
2. Dollars
3. Number
4. Percentage

e) Measure Category: Choose the category from the menu list.

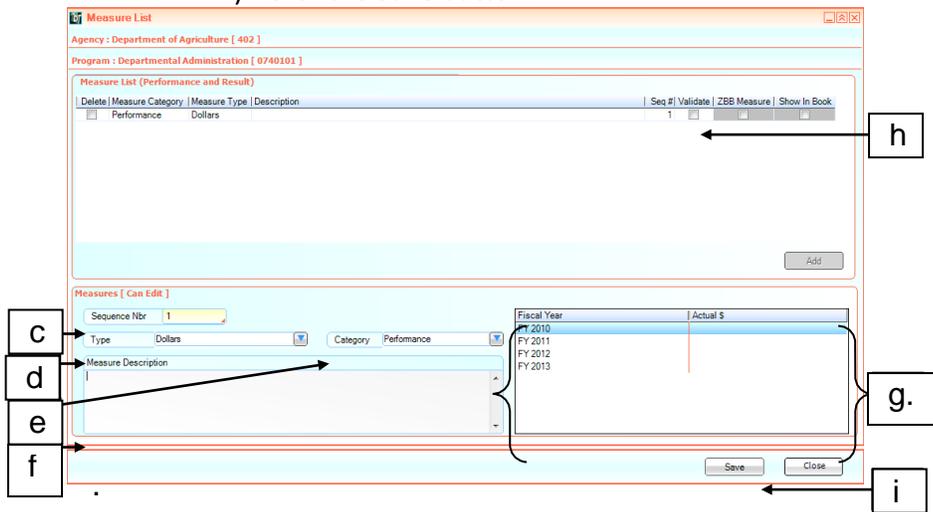
1. Performance
2. Result

Performance measures may include unit cost, program completion rates, workload ratios, customer satisfaction indices and activity counts. Typically, performance measures are output or efficiency measures that answer the questions:

- How much did we do?
- How well did we do it?

Result measures show whether program **outcomes** for clients are improving, declining, or stabilizing. Such measures may also compare program client outcomes to a national benchmark or to other clients who do not receive program services. Results measures should answer the question:
- Is anyone better off?

- f) Measure Description: Enter the Measure Description as you would like it to appear in the Governor's Budget Report/OPB website.
- g) Fiscal Year: Enter actual performance amounts or percentages for each fiscal year. Tab through to each entry box or click in the field.
- h) Validate: Once data for measure has been entered, check the description, fiscal year data and related performance measure information for accuracy and completeness, and then click Validate. This indicates to OPB that the agency attests to the accuracy of the data submitted. *The measure must be re-validated each time a change is made.*
- i) Click the **Save** button.

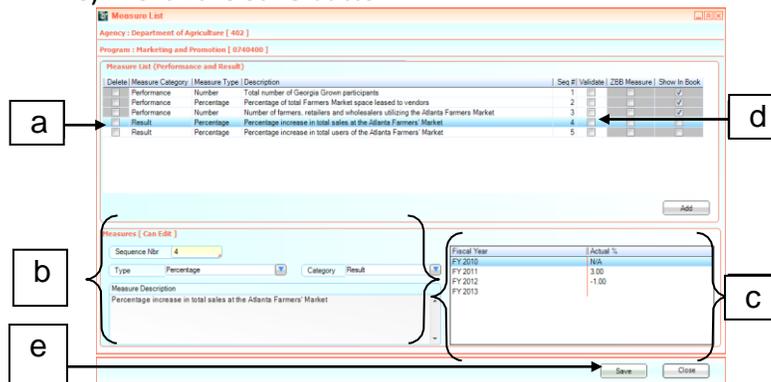


3. Changing or Editing Measures

- a) Highlight the measure to be updated in the Measure List. You may not change measures flagged as ZBB measures without approval from OPB.
- b) Edit the measure Type, Category or Description as needed.

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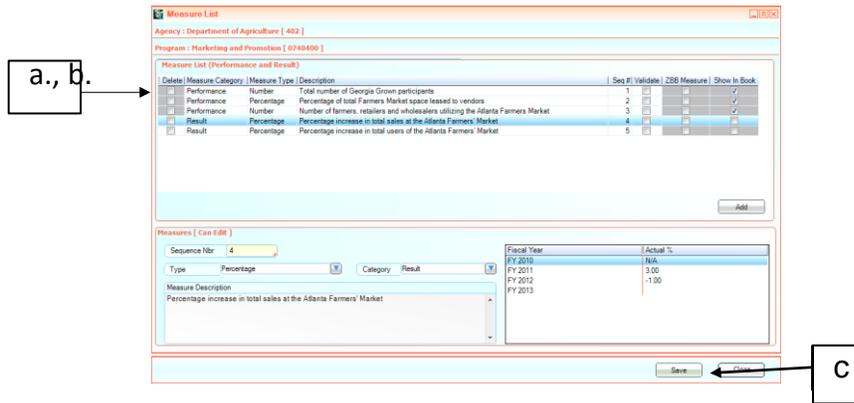
- c) **Fiscal Year:** Enter actual performance amounts or percentages for each fiscal year. Tab through to each entry box or click in the field.
- d) **Validate:** Check the description, fiscal year data and related performance measure information for accuracy and completeness, and then click Validate. This indicates to OPB that the agency attests to the accuracy of the data submitted. *The measure must be re-validated each time a change is made.*
- e) Click the **Save** button.



4. Deleting a Measure

- a) Highlight measure to be deleted in the Measure List.
- b) Check the **Delete** box to delete the Measure. (If the box is shaded out then you cannot delete this measure without contacting OPB.)
- c) Click the **Save** button.

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Deleting a Measure

NOTE: You cannot delete a measure that has been marked as ZBB or Show in Book. You may contact your OPB budget analyst to discuss your reasoning for deleting one of these measures.

Deleting a measure will remove the measure from the measure list. The sequence number for remaining measures will not automatically update following deletion. You may update the sequence number manually to establish consecutive numbering.

C. Management Review

Once you have updated your measures, you may generate a performance measure report for management review and approval. (Refer to the Reports section of the BudgetTool User Manual Section II.A – Agency User Guide for detailed instructions.). If the management review results in changes to the performance information, return to the performance measure data entry screen and make edits as appropriate. *Please note that any changes to the performance information will require the user to re-validate the data in the system.*

D. Submission Date

Final performance measure information is due in BudgetTool along with the agency budget requests. Please ensure that all measures are “Validated” in the system before this date. *The measure must be re-validated each time a change is made.*

E. OPB Review

OPB staff will review the performance measures and data submitted in BudgetTool and may contact agency performance measure liaisons with questions about the measures. Once the agency and OPB are satisfied with the content and all measures have been validated, OPB will make the final determination about which measures to include in the Governor’s Budget Report.