Accountancy, Board of

Annual Performance Progress Report

Reporting Year 2018

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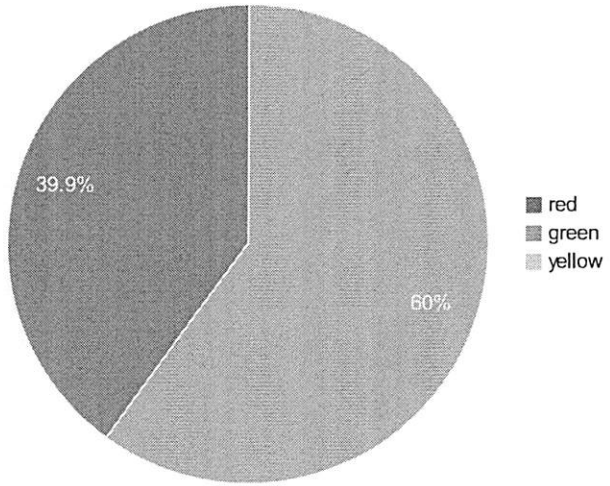
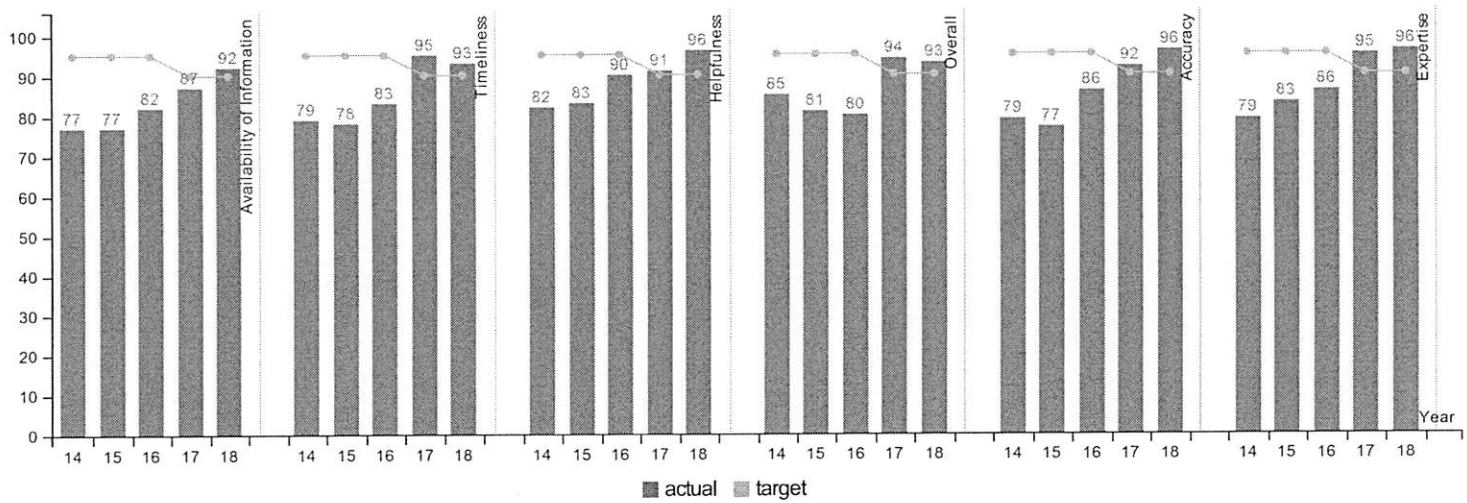
KPM #	Approved Key Performance Measures (KPMs)
1	CUSTOMER SATISFACTION - Percent of customers rating satisfaction with agency services as "good" or "excellent": overall customer service, timeliness, accuracy, helpfulness, expertise and availability of information.
2	Number of days from date of Complaints Committee recommendation to date of preliminary Board determination -
3	Number of days from date of letter advising parties that an investigation has begun to completion of investigative report -
5	Percentage of complaints wherein letters advising the parties of whether or not an investigation will be initiated are mailed within five business days of the receipt of the complaint -
7	BEST PRACTICES - Percent of total best practices met by the Board.



Performance Summary	Green	Yellow	Red
	= Target to -5%	= Target -5% to -15%	= Target > -15%
Summary Stats:	60%	0%	40%

KPM #1 CUSTOMER SATISFACTION - Percent of customers rating satisfaction with agency services as "good" or "excellent": overall customer service, timeliness, accuracy, helpfulness, expertise and availability of information.

Data Collection Period: Jul 01 - Jun 30



Report Year	2014	2015	2016	2017	2018
Availability of Information					
Actual	77%	77%	82%	87%	92%
Target	95%	95%	95%	90%	90%
Timeliness					
Actual	79%	78%	83%	95%	93%
Target	95%	95%	95%	90%	90%
Helpfulness					
Actual	82%	83%	90%	91%	96%
Target	95%	95%	95%	90%	90%
Overall					
Actual	85%	81%	80%	94%	93%
Target	95%	95%	95%	90%	90%
Accuracy					
Actual	79%	77%	86%	92%	96%
Target	95%	95%	95%	90%	90%
Expertise					
Actual	79%	83%	86%	95%	96%
Target	95%	95%	95%	90%	90%

How Are We Doing

The agency assessment of customer service performance for FY18 continues to exceed the targets in all categories. Even though the Board's overall performance dropped 1%, the Board saw a 5% jump in availability of information and a 4% in accuracy. The Board will continue to improve timeliness of services by looking for operational improvements and efficiency.

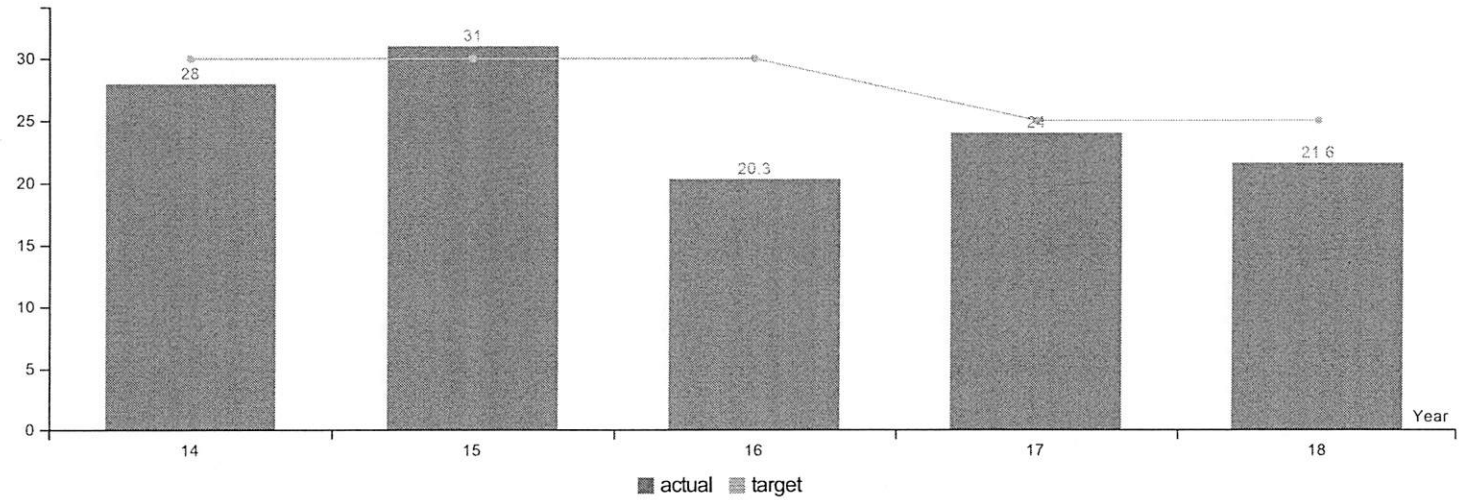
Factors Affecting Results

The Board has recognized the need that information should be readily available and accessible to the public, licensees, applicants and candidates and has worked diligently to provide up-to-date information on the Board's website. In addition, forms and communications have been reviewed and updated to provide clear and understandable language. In an effort to protect the public, the Board has developed and published on the Board's website a public record request form as well as a complaint form to help the public obtain the information they seek and the knowledge and ability to file a complaint.

While the Board had a 1% drop in overall performance, the availability which has historically been a weak area jumped 5%. We can contribute these successes to the Board's continued efforts to improve public protection and provide realiable information.

KPM #2	Number of days from date of Complaints Committee recommendation to date of preliminary Board determination - Data Collection Period: Jul 01 - Jun 30

** Upward Trend = negative result*



Report Year	2014	2015	2016	2017	2018
Number of days from Complaints Committee recommendation to determination by Board					
Actual	28	31	20.30	24	21.60
Target	30	30	30	25	25

How Are We Doing

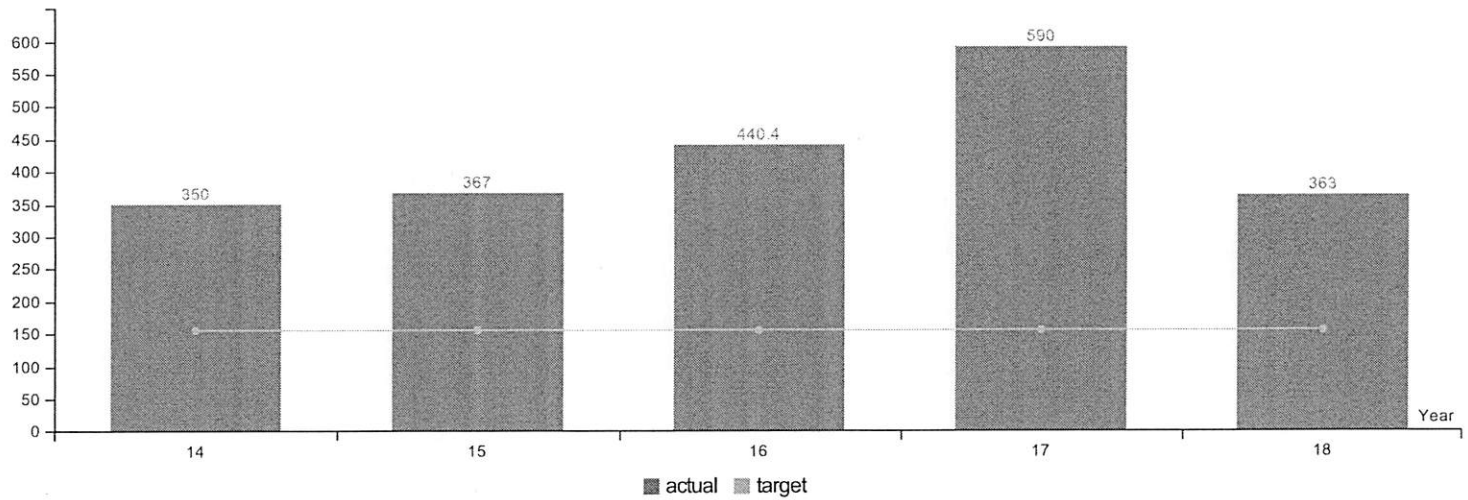
The Board continues to realize the benefit of a more streamline and efficient process for investigations. The efficiencies achieved pertain to process improvements and do not compromise the Board's core values of fairness and integrity. More expedient case resolution is consistent with the Board's mission to protect Oregon citizens. This measure is part of the Board's key strategic plai adopted in 2017.

Factors Affecting Results

The continued improvement in this measure can be attributed to the Board's efforts to find more efficent and streamlined processes.

KPM #3	Number of days from date of letter advising parties that an investigation has begun to completion of investigative report - Data Collection Period: Jul 01 - Jun 30

** Upward Trend = negative result*



Report Year	2014	2015	2016	2017	2018
Number of days taken to complete investigative report					
Actual	350	367	440.40	590	363
Target	155	155	155	155	155

How Are We Doing

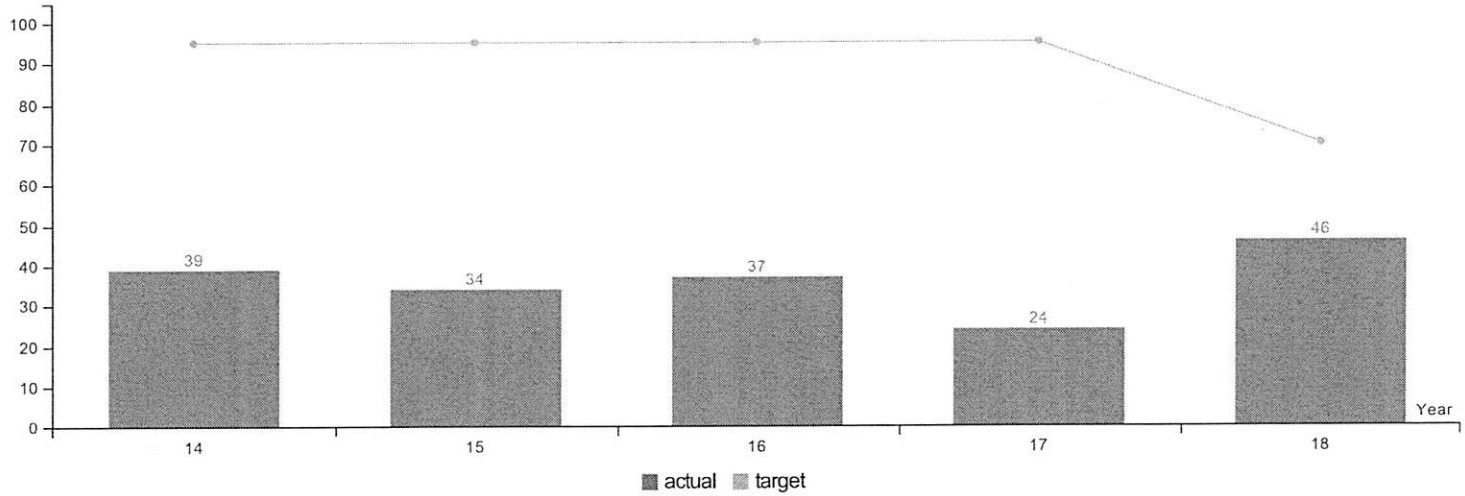
This key performance measure continues to improve through the efficiency improvements, however the Board continues to work on the backlog of complaints. The Board has made the backlog a top operational priority which is also reflected in the Board's strategic plan adopted in 2017.

Factors Affecting Results

The downward trend in this measure reflects the Board staff focusing on resolving its oldest cases, and streamlining processes to gain further efficiency.

KPM #5 Percentage of complaints wherein letters advising the parties of whether or not an investigation will be initiated are mailed within five business days of the receipt of the complaint - Data Collection Period: Jul 01 - Jun 30

** Upward Trend = positive result*



Report Year	2014	2015	2016	2017	2018
Percentage of cases wherein parties are notified within 5 days of receipt of complaint					
Actual	39%	34%	37%	24%	46%
Target	95%	95%	95%	95%	70%

How Are We Doing

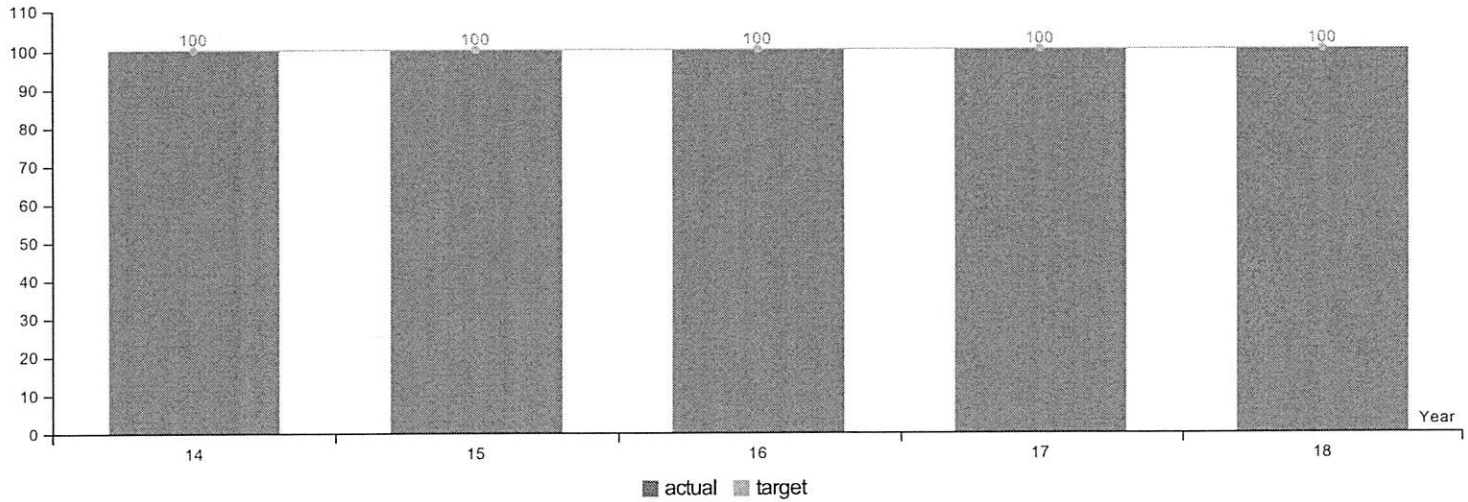
Overall the Board has been improving on this measure. The agency has established a two-tiered process of handling complaints whereas an initial inquiry is completed allowing the Board to triage complaints. In so doing, approximately 20% of complaints progress to a full investigation. This process has allowed the Board to properly assess and understand a complaint prior to formal notification.

Factors Affecting Results

The upward trend in this measure is a reflection of the efforts put forth in initiating an inquiry process, wherein information is reviewed and understood before formal notification is sent out. This allows the Board and investigators to target the information necessary to either initiate an investigation or resolve the matter.

KPM #7	BEST PRACTICES - Percent of total best practices met by the Board.
	Data Collection Period: Jul 01 - Jun 30

** Upward Trend = positive result*



Report Year	2014	2015	2016	2017	2018
Metric Value					
Actual	100	100	100	100	100
Target	100	100	100	100	100

How Are We Doing

The Board is committed to maintaining full compliance with this KPM.

Factors Affecting Results

The Board is committed to best practices and the Executive Director monitors this measure for full compliance.