

Accountancy, Board of

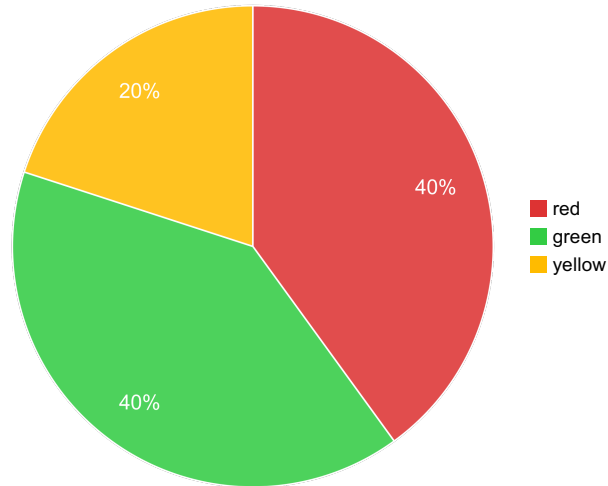
Annual Performance Progress Report

Reporting Year 2020

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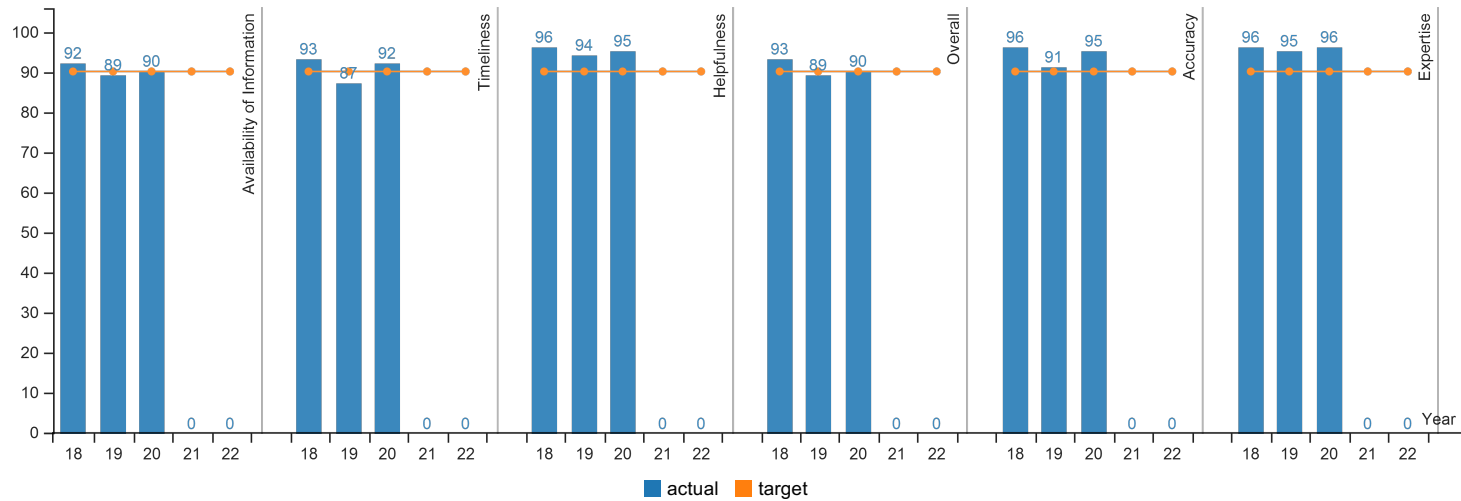
KPM #	Approved Key Performance Measures (KPMs)
1	CUSTOMER SATISFACTION - Percent of customers rating satisfaction with agency services as "good" or "excellent": overall customer service, timeliness, accuracy, helpfulness, expertise and availability of information.
2	TIMELY COMPLAINT RESPONSE - Percentage 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.
3	TIMELY INVESTIGATION - Average number of calendar days from date of letter advising parties that an investigation has begun to completion of investigative report.
4	TIMELY CASE RESOLUTION - Average number of calendar days from date of Complaints Committee recommendation to date of preliminary Board determination.
5	BEST PRACTICES - Percent of total best practices met by the Board.

Proposal	Proposed Key Performance Measures (KPMs)
Delete	TIMELY COMPLAINT RESPONSE - 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.
New	TIMELY RESPONSE TO COMPLAINANT - Number of days from when an initial complaint is received by the Board's compliance staff and initial correspondence is sent to the complainant.
Delete	TIMELY INVESTIGATION - Average number of calendar days from date of letter advising parties that an investigation has begun to completion of investigative report.
New	TIMELY INVESTIGATION - Number of days from the date of letter advising parties that an investigation has been opened to completion of investigation report and approval from Director.
Delete	TIMELY CASE RESOLUTION - Average number of calendar days from date of Complaints Committee recommendation to date of preliminary Board determination.
New	TIMELY REVIEW OF NEW COMPLAINTS - Number of days from the date of letter advising parties that an inquiry has been opened to completion of an inquiry report and approval from Director.



Performance Summary	Green	Yellow	Red
	= Target to -5%	= Target -5% to -15%	= Target > -15%
Summary Stats:	40%	20%	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	2018	2019	2020	2021	2022
Availability of Information					
Actual	92%	89%	90%	No Data	No Data
Target	90%	90%	90%	90%	90%
Timeliness					
Actual	93%	87%	92%	No Data	No Data
Target	90%	90%	90%	90%	90%
Helpfulness					
Actual	96%	94%	95%	No Data	No Data
Target	90%	90%	90%	90%	90%
Overall					
Actual	93%	89%	90%	No Data	No Data
Target	90%	90%	90%	90%	90%
Accuracy					
Actual	96%	91%	95%	No Data	No Data
Target	90%	90%	90%	90%	90%
Expertise					
Actual	96%	95%	96%	No Data	No Data
Target	90%	90%	90%	90%	90%

How Are We Doing

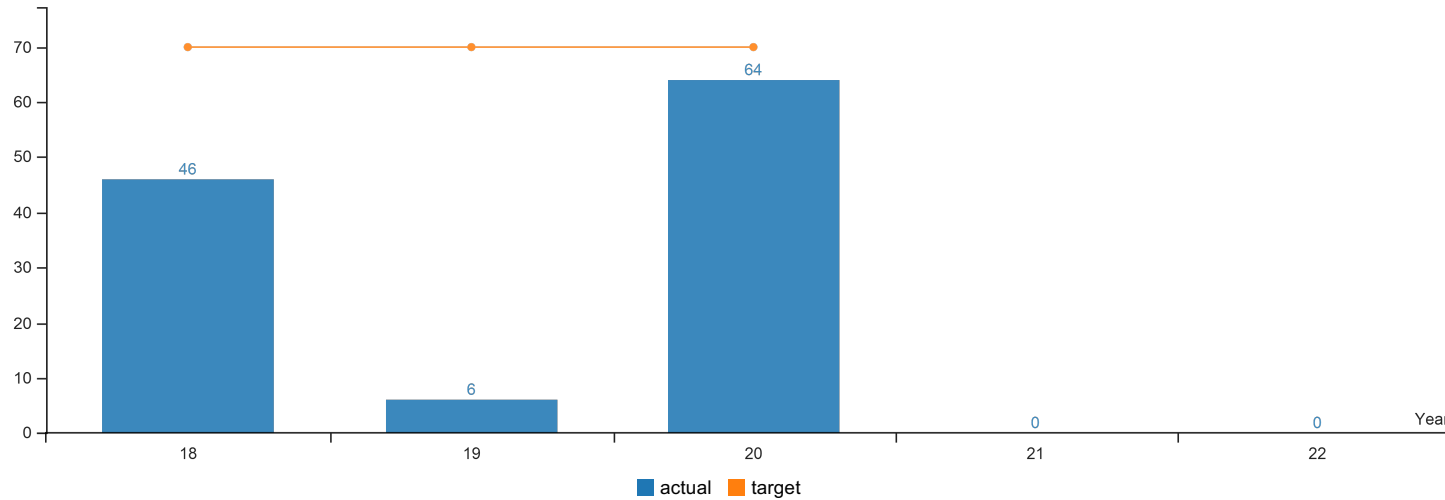
The agency assessment of customer service performance for FY 20 continues to meet or exceed the targets in all categories.

Factors Affecting Results

The Board has recognized the need that information should be readily available and accessible to the public, licensee, applicants and candidates. Earlier this year our agency undertook a whole revamp of our website, including removing outdated information and adding relevant content. This will provide the users to enjoy a more streamlined experience.

KPM #2	TIMELY COMPLAINT RESPONSE - 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	2018	2019	2020	2021	2022
Percentage of cases wherein parties are notified within 5 days of receipt of complaint					
Actual	46%	6%	64%	No Data	No Data
Target	70%	70%	70%	TBD	TBD

How Are We Doing

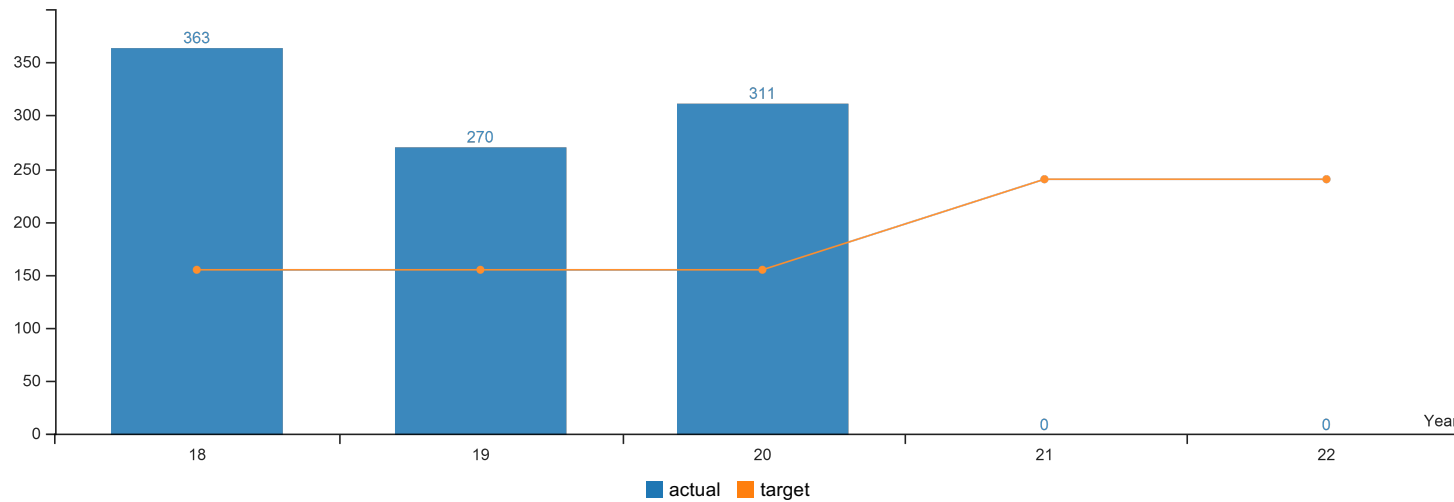
The Board has improved our numbers this year by 18%. Our agency implemented a two-tier process of handling complaints and have put additional tracking and policies in place to ensure we continue to improve on our correspondence with respondents and complainants.

Factors Affecting Results

The upward trend in this measure is further improved by our weekly compliance meeting, where our team discusses new complaints and formulates targeted information necessary to either initiate an investigation or resolve the matter.

KPM #3	TIMELY INVESTIGATION - Average number of calendar 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	2018	2019	2020	2021	2022
Number of days taken to complete investigative report					
Actual	363	270	311	No Data	No Data
Target	155	155	155	240	240

How Are We Doing

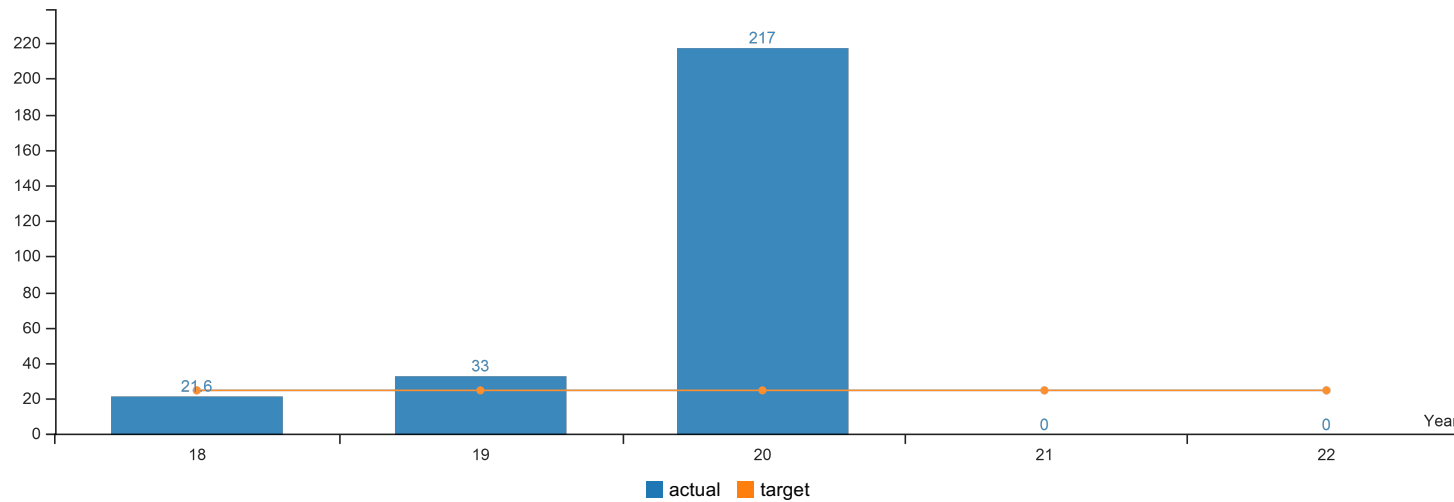
This key performance measure continues to improve through efficiency improvements, however the Board continues to work on the backlog of complaints. The Board has made the backlog a priority which is also reflected in the Board's strategic plan adopted in 2017.

Factors Affecting Results

The downward trend in this measure is due to the fact that investigators are becoming more efficient and focusing on older cases for resolution.

KPM #4	TIMELY CASE RESOLUTION - Average number of calendar 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	2018	2019	2020	2021	2022
Number of days from Complaints Committee recommendation to determination by Board					
Actual	21.60	33	217	No Data	No Data
Target	25	25	25	25	25

How Are We Doing

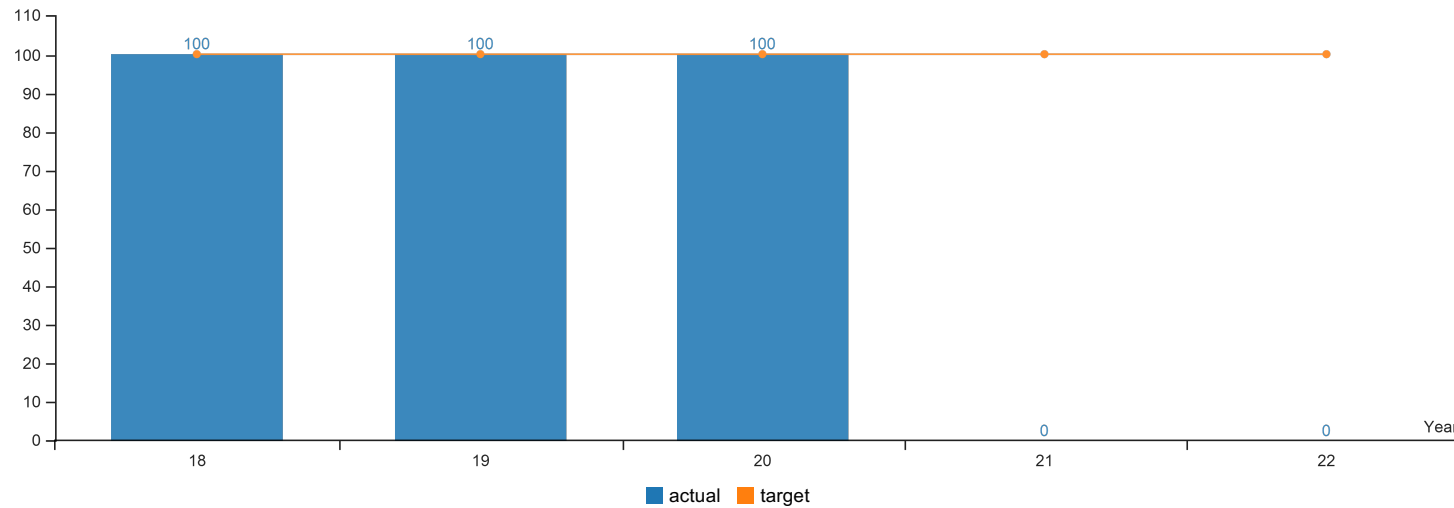
The Board continues to realize the benefit of a more streamline and efficient process for investigations. The efficiencies achieved pertain to process improvements and do not compromise the Board's core values of fairness and integrity. More expedient case resolution is consistent with the Board's mission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

Factors Affecting Results

While the actual number is quite high, there were 3 cases that significantly contributed to this number. If those cases were removed from the actuals, our average would have been 27 days.

KPM #5	BEST PRACTICES - Percent of total best practices met by the Board.
	Data Collection Period: Jul 01 - Jun 30

* Upward Trend = positive result



Report Year	2018	2019	2020	2021	2022
Metric Value					
Actual	100	100	100	No Data	No Data
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.