
City of Portland
TriMet
TSCC Quarterly Meeting
August 18, 2015
What’s Driving the Interest in Performance Dashboards?

- Availability of data
- Public interest in open data sources
- Advances in technology to manage and visualize information

A **dashboard** is a visual display of the most important information needed to achieve one or more objectives; consolidated and arranged on a single screen so the information can be monitored at a glance.

*Stephen Few, 2004*
Why Have a Dashboard?

**External vs. Internal**
Dashboards can be targeted to communicate with the public and elected officials, or to show operational/internal data.

**Performance Monitoring & Decision Making**
Good performance measures provide leaders with useful information to monitor performance and make decisions.

**Ensure Alignment**
Ensure that bureau/agency missions, strategic direction, and programs are aligned with jurisdictional priorities and intended results.

**Improve Transparency & Accountability**
Dashboards of selective measures allow jurisdictions to better communicate the quality and breadth of services they provide.
Factors to Consider When Creating a Dashboard

- Collection of Data
- Frequency of updating
- Stakeholders involved in the process
- Explanatory information
- Supporting dataset
- Provide contact person

portlandoregon.gov/cbo/performance

KPM Data Dictionary
Tips for Format and Display

- Know what you want to say ~ clear goals
- Can you “visually” tell the story
- Select increments carefully
- Keep it SIMPLE
- Test and refine – ask for feedback
- Keep the dashboard current
- Carefully manage the combinations of tables, charts and text
- Quick links to definitions and data used
- Use color but not too much
- Make your dashboard interactive
- User friendly
Selection of Software

• High-tech vs. Low-tech (Tableau, Domo, Socrata, SAP, Fusion Charts, pdf).

• What is your data visualization needs?

• Who will be your audience and what is the preferred medium to communicate the data?

• Do you already have an “in house” product that may work?

Examples of other jurisdictions
Performance Dashboards for the City of Portland
Characteristics of Performance Management System

1. **Results.** A focus on results permeates strategies, process, organizational culture and decision.

2. **Relevant.** Measures, data, and goals are relevant to the priorities and well-being of the government and community.

3. **Transparent.** Information relating to performance, decision-making, and processes are transparent.

4. **Priorities.** Goals, programs, activities, and resources are aligned with priorities and intended results.

5. **Data driven.** All decision-making is driven by timely, reliable, and meaningful data.

6. **Sustainable.** The practices are sustainable over time and through organizational changes.

7. **Transform.** System has the ability to transform an organization, its management, and the policy-making process.

---

Guiding Principles

Focus on Performance **Management** vs. Performance **Measurement**

**Management:**
Uses Data as a Tool to Enhance Budget Decision-making

**Measurement:**
Collects, Reports, and Analyzes Data

Sources: National Performance Measurement Advisory Committee; Hatry (2014) "Transforming Performance Measurement"
Key Performance Measures: Highlighting metrics "above the timberline"

- Key Performance Measures
  - external performances measures
  - internal management measures

performance measures
(540 BRASS metrics published in the budget document)
City Bureau Performance Dashboards

- Objective: Simple presentation of 110 key performance measures from 20 bureaus
- Data sources: handful of performance metrics for each bureau spanning multiple fiscal years
- Data format: Excel data extracted from budget software
- Questions explored:
  - How do measures trend over time?
  - How does year-end data compare to prior year?
  - What are the strategic benchmarks?
  - How do I learn more details about specific measures?

portlandoregon.gov/cbo/performance
## Portland Police Bureau

### Return to Citywide Dashboard

<table>
<thead>
<tr>
<th>Key Performance Measure</th>
<th>FY12-13 Actual</th>
<th>FY13-14 Actual</th>
<th>FY14-15 Projected</th>
<th>FY15-16 Budget Base</th>
<th>FY15-16 Budget Target</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average travel time to high priority calls in minutes</td>
<td>5.13</td>
<td>5.38</td>
<td>5.50</td>
<td>5.50</td>
<td>5.50</td>
</tr>
<tr>
<td>Number of Part 1 person crimes per 1,000 residents</td>
<td>5.03</td>
<td>4.93</td>
<td>4.60</td>
<td>5.00</td>
<td>5.00</td>
</tr>
<tr>
<td>Percentage of residents who feel safe walking alone in their neighborhood at night</td>
<td>60%</td>
<td>62%</td>
<td>62%</td>
<td>62%</td>
<td>62%</td>
</tr>
<tr>
<td>Percentage of the DOJ action items implemented by milestone, established by the COCL</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>100%</td>
</tr>
<tr>
<td>Percentage of total new employees hired by the bureau comprised of minorities</td>
<td>19%</td>
<td>30%</td>
<td>30%</td>
<td>30%</td>
<td>30%</td>
</tr>
<tr>
<td>Percentage of total PPB officer arrests in which there was use of force</td>
<td>2.86%</td>
<td>2.64%</td>
<td></td>
<td></td>
<td>2.50%</td>
</tr>
</tbody>
</table>

Click on a key performance measure name above to view historical data. Hover over each data point in table above for more details.

[Portland Police Bureau Dashboard](portlandoregon.gov/cbo/performance)
Click on a measure
Percentage of residents who feel safe walking alone in their neighborhood at night

- FY06-07 Actual: 55%
- FY07-08 Actual: 51%
- FY08-09 Actual: 60%
- FY09-10 Actual: 60%
- FY10-11 Actual: 59%
- FY11-12 Actual: 60%
- FY12-13 Actual: 62%
- FY13-14 Actual: 62%
- FY14-15 Projected: 62%
- FY15-16 Budget Base: 62%
- FY15-16 Budget Target: 62%

Click to print or download dataset

portlandoregon.gov/cbo/performance
Interpreting the Dashboard

**Trend Arrows:**
Comparison of FY 2012-13 to FY 2013-14

- **Trending in the favorable direction**
  Comparing the past two fiscal years, this performance measure is trending in the favorable direction.

- **Trending in the adverse direction**
  Comparing the past two fiscal years, this performance measure is trending in the adverse direction.

- **No trend**
  Comparing the past two fiscal years, this performance measure has not changed.

- **Insufficient data**
  Measure is new or contains only one year of data.

- **Workload Measure**
  Measure tracks workload in contrast to efficiency or effectiveness.

**Questions to Evaluate Performance**

- What about the program or service is working well?
- Is there any reason why the target will not be met?
- What are potential threats to continuing this trend?
- Should the target be adjusted upward?

- What actions might the City take to resolve adverse trends in performance? What is the bureau doing to address the issue?
- What additional resources might turn around the adverse projection?
- Can Council assist with coordinating efforts across bureaus?
Example 2: Portland Parks & Recreation Dashboard

### Portland Parks and Recreation

#### Return to Citywide Dashboard

<table>
<thead>
<tr>
<th>Key Performance Measure</th>
<th>FY12-13 Actual</th>
<th>FY13-14 Actual</th>
<th>FY14-15 Projected</th>
<th>FY15-16 Budget Base</th>
<th>FY15-16 Budget Target</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facility Conditions Index</td>
<td>6.90</td>
<td>7.30</td>
<td>7.50</td>
<td>7.00</td>
<td>7.00</td>
</tr>
<tr>
<td>Number of acres of invasive weeds treated annually</td>
<td>2321.00</td>
<td>2563.00</td>
<td>2500.00</td>
<td>2500.00</td>
<td>2800.00</td>
</tr>
<tr>
<td>Percentage of residents living within one-half mile of a park or natural area</td>
<td>80%</td>
<td>80%</td>
<td>81%</td>
<td>82%</td>
<td>82%</td>
</tr>
<tr>
<td>Percentage of residents living within three miles of a full service community center</td>
<td>70%</td>
<td>69%</td>
<td>69%</td>
<td>69%</td>
<td>69%</td>
</tr>
<tr>
<td>Percentage of residents rating the overall quality of parks as good or very good</td>
<td>86%</td>
<td>85%</td>
<td>85%</td>
<td>85%</td>
<td>90%</td>
</tr>
<tr>
<td>Percentage of residents rating the overall quality of recreation centers and activities as good or very good</td>
<td>75%</td>
<td>74%</td>
<td>77%</td>
<td>77%</td>
<td>77%</td>
</tr>
</tbody>
</table>
Percentage of residents living within one-half mile of a park or natural area

Bureau Strategic Goal = 90%

Bureau strategic goal

“How to Build Dashboards that Persuade, Inform, and Engage”, Jeff Pettiross, Tableau.


Tell me and I forget.

Teach me and I may remember.

*Involve* me and I learn!

- Benjamin Franklin

The City’s performance analysis efforts aim to *involve* the consumer of data through interactive data visualizations.
Performance Dashboard

Performance

- Ridership
- Efficiency
- Budget
- Safety

- Updated monthly
- Snapshot of TriMet’s financial & operating performance.
- Measure of our efficiency & effectiveness
- Let us know how we can make it more useful to you.

**********************************

View data
Monthly analysis
Get updates by email
Ridership

Weekly Boarding Rides

Bus (2015-2014), June, 1,192,100
MAX (2015-2014), June, 730,700
Efficiency

Operating Cost per Boarding Ride

Bus (All) June 2015, $3.17
Efficiency

On-Time Performance

June 2015, 730,700, Extreme heat weather conditions; 76.70%
Budget

**Tax Revenue***

*Budgeted*-payroll tax revenues are an estimate of fiscal year payroll tax cash receipts.

*Actual*-are an accrual of payroll taxes from wages & salaries earned in TriMet service district.
## Budget

**Passenger Revenue**

<table>
<thead>
<tr>
<th></th>
<th>FY2014</th>
<th>FY2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actual</td>
<td>114.6m</td>
<td>116.7m</td>
</tr>
<tr>
<td>Budget</td>
<td>119.6m</td>
<td>119.4m</td>
</tr>
</tbody>
</table>

(Bar chart showing passenger revenue in millions for FY2014 and FY2015, with actual and budget figures indicated.)
Safety

Bus Collisions per 100,000 Miles

- Current 12 Months (2015-2014)
- Prior 12 Months (2014-2013)
Safety

Collision Types for June 2015

- 53 Total
- 2 Total
- 0 Total

- Collision-Crossing Gates
- Collision-Animal
- Non-Injury Fixed Object Collisions
- Injury Bike Collisions
- Non-Injury Bike Collisions
- Injury Vehicle Collisions with Transport
- Minor Injury Vehicle Collisions
- Non-Injury Vehicle Collisions