

**DEPARTMENT OF MANAGEMENT SERVICES**

**LONG-RANGE PROGRAM PLAN**

Fiscal Years 2006-2007 through 2010-2011

*March 9, 2006*

*(Revised)*

**DEPARTMENT OF MANAGEMENT SERVICES**

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# Department Of Management Services

Long Range Program Plan FY 2006-2007 through 2010-2011

## Table of Contents

I.	INTRODUCTION/AGENCY MISSION	1.1
	ORGANIZATIONAL STRUCTURE	1.2
II.	AGENCY GOALS, OBJECTIVES AND SERVICE OUTCOMES WITH PERFORMANCE PROJECTION TABLES	2.1
III.	LINKAGE OF AGENCY GOALS TO THE GOVERNOR'S PRIORITIES	3.1
IV.	TRENDS AND CONDITIONS STATEMENT	4.1
V.	AGENCY WORKFORCE PLAN (LRPP EXHIBIT I)	5.1
VI.	PERFORMANCE MEASURES AND STANDARDS (LRPP EXHIBIT II)	6.1
VII.	PERFORMANCE MEASURE ASSESSMENT (LRPP EXHIBIT III)	7.1
VIII.	PERFORMANCE MEASURE VALIDITY AND RELIABILITY (LRPP EXHIBIT IV)	8.1
IX.	GLOSSARY OF TERMS AND ACRONYMS	9.1

# INTRODUCTION

## **DEPARTMENT OF MANAGEMENT SERVICES – A TRUSTED RESOURCE FOR SERVICE EXCELLENCE**

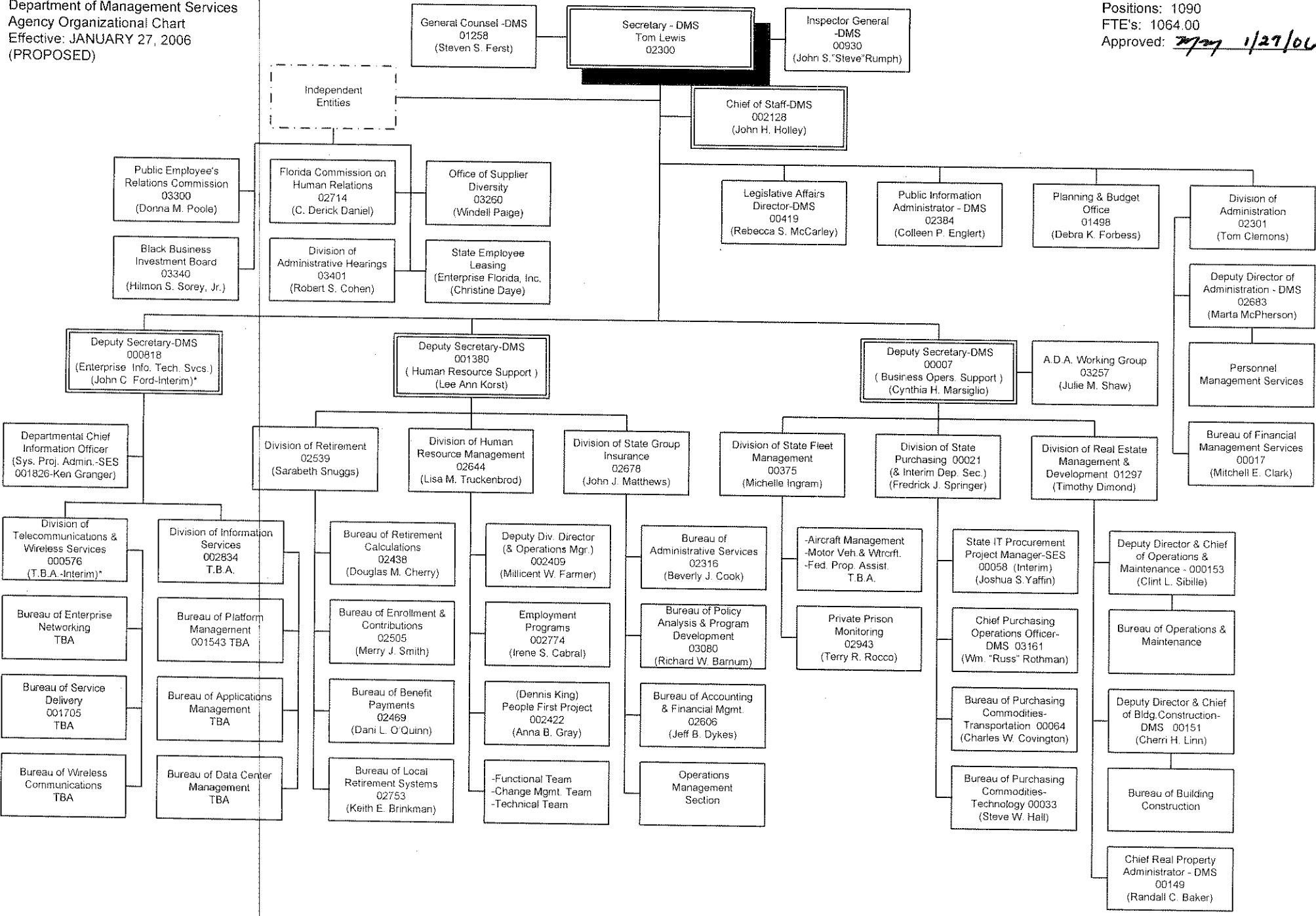
### **MISSION: TO DELIVER QUALITY, INNOVATIVE, RESOURCE-SAVING SOLUTIONS TO CONTINUALLY IMPROVE CUSTOMER SERVICE**

As a part of the Governor's team of agencies and a service-driven organization, the Department of Management Services is committed to developing and implementing key initiatives that focus on increasing citizen access to government, delivering cost-effective products and services, promoting and supporting economic development in Florida and improving government productivity in partnership with other government entities and the private sector, while providing excellence in customer service.

The Department strives to provide effective business solutions through technology, teamwork and partnerships. We are particularly focused on opportunities that enhance the relationship between governmental agencies and Florida's citizens through the use of technology. Several of the key initiatives are the Workspace Management Initiative, MyFloridaMarketPlace and People First.

The Department continues to enhance these initiatives, which are increasing the efficiency and effectiveness of standard administrative functions of state government. The resulting tax dollars saved by the Department allow more funds to be allocated to the Governor's priorities, such as education, elder services and helping our state's most vulnerable.

The employees of the Department are committed to making these strategies successful and freeing up resources throughout state government to be most effectively utilized in serving the needs of the people of Florida.



# DEPARTMENT OF MANAGEMENT SERVICES

## AGENCY GOALS, OBJECTIVES AND SERVICE OUTCOMES WITH PERFORMANCE PROJECTION TABLES

### Human Resource Support

**GOAL #1:** To ensure the value of quality services delivered to Florida's citizens, the Workforce Program administers employment, insurance benefits, and retirement programs to enhance the productivity, effectiveness, and efficiency of the state's workforce.

**OBJECTIVE 1A:** To recruit, retain, reward and recognize a high performance workforce for the State of Florida.

**OUTCOME:** Overall customer satisfaction rating.

	Baseline/ Year	FY 2006-07	FY 2007-08	FY 2008-09	FY 2009-10	FY 2010-11
Human Resource Management	85% 2000/2001	96%	96%	96%	96%	96%

**OBJECTIVE 1B:** To provide comprehensive and cost-efficient insurance benefits for the employees of the State of Florida utilizing technology.

**OUTCOME:** DMS Administrative cost per insurance enrollee.

	Baseline/ Year	FY 2006-07	FY 2007-08	FY 2008-09	FY 2009-10	FY 2010-11
State Group Insurance	\$13.90 (2001-2002)	\$10.27	\$10.27	\$10.27	\$10.27	\$10.27

**OBJECTIVE 1C:** To administer economical and efficient state retirement programs utilizing best technology.

**OUTCOME:** Percent of retired payrolls processed timely.

	Baseline/ Year	FY 2006-07	FY 2007-08	FY 2008-09	FY 2009-10	FY 2010-11
Retirement	100% (2000-2001)	100%	100%	100%	100%	100%

### Business Operations Support

**GOAL #2:** To get the best value in state purchasing and contracting opportunities while promoting supplier diversity.

**OBJECTIVE 2A:** Increase minority business state contracting opportunities.

**OUTCOME:** Average minority certification process time (in days).

**Business Operations Support** continued

	<b>Baseline/ Year</b>	<b>FY 2006-07</b>	<b>FY 2007-08</b>	<b>FY 2008-09</b>	<b>FY 2009-10</b>	<b>FY 2010-11</b>
Office of Supplier Diversity	45 (1998/99)	15	15	15	15	15

**GOAL #3:** To provide best value purchasing and fleet management services.

**OBJECTIVE 3A:** To use the combined purchasing power of the State of Florida to deliver the best total value in goods and services purchased by the State and eligible users.

**OUTCOME:** Percent state term contract savings.

	<b>Baseline/ Year</b>	<b>FY 2006-07</b>	<b>FY 2007-08</b>	<b>FY 2008-09</b>	<b>FY 2009-10</b>	<b>FY 2010-11</b>
State Purchasing	23% (1996/97)	28%	28%	28%	28%	28%

**OBJECTIVE 3B:** To provide the maximum amount of Federal excess/surplus property to eligible recipients without burdening state resources.

**OUTCOME:** Federal Property Distribution Rate.

	<b>Baseline/ Year</b>	<b>FY 2006-07</b>	<b>FY 2007-08</b>	<b>FY 2008-09</b>	<b>FY 2009-10</b>	<b>FY 2010-11</b>
Federal Property Assistance	86% (1999/00)	95%	95%	95%	95%	95%

**OBJECTIVE 3C:** To provide safe and efficient fleet management of aircraft and the Executive Aircraft Pool.

**OUTCOME:** Cost per flight hour-State vs. Private Provider.

	<b>Baseline/ Year</b>	<b>FY 2006-07</b>	<b>FY 2007-08</b>	<b>FY 2008-09</b>	<b>FY 2009-10</b>	<b>FY 2010-11</b>
Aircraft Management	\$1,836/\$1,822 (2000-2001)	\$2,549/\$2,666	\$2,676/\$2,799	\$2,811/\$2,939	\$2,951/\$2,086	\$3,098/\$3,241

**OBJECTIVE 3D:** To provide cost-effective and efficient fleet management of motor vehicles and watercraft

**OUTCOME:** State contract daily vehicle rental rate vs. Private Provider daily vehicle rental rate.

	<b>Baseline/ Year</b>	<b>FY 2006-07</b>	<b>FY 2007-08</b>	<b>FY 2008-09</b>	<b>FY 2009-10</b>	<b>FY 2010-11</b>
Motor Vehicle and Watercraft Management	\$28.99/\$53.73 (2000-2001)	\$25.62/\$55.11	\$26.90/\$57.87	\$28.25/\$60.76	\$29.66/\$63.80	\$31.13/\$66.99

**Business Operations Support continued**

**OBJECTIVE 3E:** To provide effective oversight and monitoring of the contracts between the Florida Department of Management Services, Bureau of Private Prison Monitoring, and the vendors who operate the private prisons, ensuring that pursuant to Section 957.01(1), F.S., cost savings to the state is at least seven (7) percent less than what is spent for public prisons.

**OUTCOME:** Number of private prison contracts monitored.

	<b>Baseline/ Year</b>	<b>FY 2006-07</b>	<b>FY 2007-08</b>	<b>FY 2008-09</b>	<b>FY 2009-10</b>	<b>FY 2010-11</b>
Private Prison Monitoring	7	7	7	7	7	7

**GOAL #4:** To provide a cost-effective, efficient and safe work environment.

**OBJECTIVE 4A:** To maintain a competitive rental rate.

**OUTCOME:** Average Department of Management Services full service rent - composite cost per net square foot (actual) compared to Average Private Sector full service rent - composite cost per net square foot in markets where the Department manages office facilities.

	<b>Baseline/ Year</b>	<b>FY 2006-07</b>	<b>FY 2007-08</b>	<b>FY 2008-09</b>	<b>FY 2009-10</b>	<b>FY 2010-11</b>
Facilities Management	\$15.39/\$16.51 (2000-2001)	\$16.05/\$17.79	\$16.37/\$18.15	\$16.70/\$18.51	\$17.03/\$18.88	\$17.37/\$19.26

**OBJECTIVE 4B:** To maintain a competitive construction rate.

**OUTCOME:** Gross square foot construction cost of office facilities for the Department of Management Services compared to gross square foot construction cost of office facilities for private industry average.

	<b>Baseline/ Year</b>	<b>FY 2006-07</b>	<b>FY 2007-08</b>	<b>FY 2008-09</b>	<b>FY 2009-10</b>	<b>FY 2010-11</b>
Building Construction	\$80.52 / 84.75 (1995/96)	\$112.87/\$125.02	\$118.51/\$131.27	\$124.44/\$137.83	\$130.66/\$144.73	\$137.19/\$151.97

**Enterprise Information Technology Services**

**GOAL #5:** To deliver and promote the development of high quality, innovative, cost-efficient information technology services, and in so doing provide support to state agencies and other end users in achieving their missions and goals.

**OBJECTIVE 1A:** Leverage technology to gain efficiencies across the enterprise, simplify citizen’s electronic access and improve customer service.

**OUTCOME:** Percent of customers satisfied.

	<b>Baseline/ Year</b>	<b>FY 2006-07</b>	<b>FY 2007-08</b>	<b>FY 2008-09</b>	<b>FY 2009-10</b>	<b>FY 2010-11</b>
	86.90% (2001-2002)	90%	90%	90%	90%	90%

**Commission on Human Relations**

**GOAL #6:** To insure fair treatment of both complainants and respondents in instances of alleged discrimination and to promote mutual respect and greater harmony among diverse groups.

**OBJECTIVE 1A:** Encourage fair treatment, equal access, and mutual respect.

**OUTCOME:** Percent of civil rights cases resolved within 180 days of filing.

<b>Baseline/ Year</b>	<b>FY 2006-07</b>	<b>FY 2007-08</b>	<b>FY 2008-09</b>	<b>FY 2009-10</b>	<b>FY 2010-11</b>
60% 2001-2002	70%	75%	75%	75%	75%

**Public Employees Relations Commission**

**GOAL #7:** To protect public labor and employment rights, and protect the public by preventing work stoppages.

**OBJECTIVE 1A:** Resolve disputes about the composition of bargaining units and alleged unfair labor practices; and, administer the Career Service System appeals process with regard to discipline, veteran's preference, drug-free workplace, age discrimination and whistle-blower's act.

**OUTCOME:** Percent of timely labor and employment dispositions.

<b>Baseline/ Year</b>	<b>FY 2006-07</b>	<b>FY 2007-08</b>	<b>FY 2008-09</b>	<b>FY 2009-10</b>	<b>FY 2010-11</b>
89% 2001-2002	94%	94%	94%	94%	94%



# DEPARTMENT OF MANAGEMENT SERVICES

## LINKAGE OF AGENCY GOALS TO THE GOVERNOR'S PRIORITIES

As a part of the Governor's team of agencies, the Department of Management Services is committed to providing the best customer service, while developing and implementing key initiatives which focus on increasing citizen access to government, delivering cost effective products and services, promoting and supporting economic development in Florida and improving government productivity in partnership with other government entities and the private sector.

### **#1 – Improving Education**

- Enterprise Information Technology Services Goal #5: To deliver and promote the development of high quality, innovative, cost-efficient information technology services, and in so doing provide support to state agencies and other end users in achieving their missions and goals.

### **#2 – Strengthening Families**

- Department of Management Services Goal #1: To ensure the value of quality services delivered to Florida's citizens, the Human Resource Support administers employment, insurance benefits, and retirement programs to enhance the productivity, effectiveness, and efficiency of the state's workforce.
- Commission on Human Relations Goal #6: To insure fair treatment of both complainants and respondents in instances of alleged discrimination and to promote mutual respect and greater harmony among diverse groups.

### **#3 – Promoting Economic Diversity**

- Department of Management Services Goal #1: To ensure the value of quality services delivered to Florida's citizens, the Human Resource Support administers employment, insurance benefits, and retirement programs to enhance the productivity, effectiveness, and efficiency of the state's workforce.
- Department of Management Services Goal #2: To get the best value in state purchasing and contracting opportunities while promoting supplier diversity.
- Department of Management Services Goal #3: To provide best value purchasing and fleet management services.

### **#4 – Reduce Violent Crime and Illegal Drug Use**

- Department of Management Services Goal #4: To provide a cost-effective, efficient and safe work environment.

### **#5 – Create A Smaller, More Effective, More Efficient Government**

- Department of Management Services Goal #1: To ensure the value of quality services delivered to Florida's citizens, the Human Resource Support administers employment, insurance benefits, and retirement programs to enhance the productivity, effectiveness, and efficiency of the state's workforce.
- Department of Management Services Goal #2: To get the best value in state purchasing and contracting opportunities while promoting supplier diversity.

- Department of Management Services Goal #3: To provide best value purchasing and fleet management services.
- Department of Management Services Goal #4: To provide a cost-effective, efficient and safe work environment.
- Enterprise Information Technology Services Goal #5: To deliver and promote the development of high quality, innovative, cost-efficient information technology services, and in so doing provide support to state agencies and other end users in achieving their missions and goals.
- Commission on Human Relations Goal #6: To insure fair treatment of both complainants and respondents in instances of alleged discrimination and to promote mutual respect and greater harmony among diverse groups.
- Public Employees Relations Commission Goal #7: To protect public labor and employment rights, and protect the public by preventing work stoppages.

#### **#6 – Enhance Florida’s Environment And Quality Of Life**

- Enterprise Information Technology Services Goal #5: To deliver and promote the development of high quality, innovative, cost-efficient information technology services, and in so doing provide support to state agencies and other end users in achieving their missions and goals.
- Commission on Human Relations Goal #6: To insure fair treatment of both complainants and respondents in instances of alleged discrimination and to promote mutual respect and greater harmony among diverse groups.
- Public Employees Relations Commission Goal #7: To protect public labor and employment rights, and protect the public by preventing work stoppages.

# **Human Resource Support**

## **Trends and Conditions Statement**

### DIVISION OF HUMAN RESOURCE MANAGEMENT

The mission of Human Resource Management is to implement enhanced human resource programs and systems in order to provide quality and innovative workforce statewide services and support.

In accordance with Section 20.04; Chapter 110 (excluding Sections 110.123 – 110.1239); Sections 112.011 – 112.046, Parts VI and VIII of Chapter 112, Florida Statutes, and Sections 215.94(5)(a)-(d) and 216.262 Florida Statutes, Human Resource Management develops and supports a human resource infrastructure designed to recruit, retain, reward and recognize a high performance workforce for the State of Florida's State Personnel System. This system of approximately 113,000 positions, or 67% of the total state government workforce, is comprised of employees in the Career Service, Selected Exempt Service and Senior Management Service pay plans within the Executive Branch of government. The remaining 33% is represented by the other six personnel systems: the Legislature, State Courts, Justice Administration, State University System<sup>1</sup>, Auditor General and the Florida Lottery.

Human Resource Management strives to make the State of Florida a competitive employer, capable of recruiting and retaining the best and brightest employees. This is accomplished through the development and enhancement of core human resource policies, practices and strategies for the majority of the executive branch agencies. These policies, practices and strategies are designed to provide the excellence in customer service and efficient and effective business solutions for managing a dynamic workforce. Specific functions include:

- Providing technical assistance and consultative services to help agencies administer effective and efficient human resource programs;
- Reviewing and approving changes to agency human resource management programs for compliance with laws, statutes and rules;
- Developing personnel rules, manuals, guidelines and forms for agency managers and employees;
- Establishing and maintaining a classification and compensation program addressing all Career Service, Selected Exempt Service and Senior Management Service positions;
- Establishing and maintaining a personnel information system for authorized and established positions;
- Developing a uniform performance evaluation system designed to provide the basis for evaluating and improving the performance of the state's workforce;

<sup>1</sup> *Effective January 7, 2003, each state university is now considered a public body corporate as prescribed by Section 1001.72, Florida Statutes.*

- Providing access to training and professional development opportunities for employees, supervisors and managers;
- Administering the adoption benefits program to establish policies and procedures, determine applicant eligibility and award benefits;
- Researching, compiling and analyzing statistical information for use by division professionals, agency staff, the Legislature, other states and the public; and
- Implementing best practices, streamlining human resource processes, and eliminating inefficiencies in the delivery of services.

It is our goal to make the State Personnel System the model human resource system for the public sector. Through partnerships with entities from the private and public sectors, Human Resource Management will continue to research and analyze trends, innovations and best practices and incorporate these into key human resource policies, practices and strategies to ensure the effective management of the State's most valuable resources.

Human Resource Management has established key priorities to attain its goal. The successful completion of these priorities will allow the State to become the employer of choice while enabling state agencies and employees to deliver the Governor's priorities to the people of Florida. A summary of the key priorities is as follows:

- Maintain and enhance the broadband classification and compensation system to optimize management flexibility, organizational effectiveness and human resource management;
- Provide a professional development program to senior managers for the systematic development of managerial, executive, or administrative skills to ensure effective management of the state's human resources;
- Enhance strategies for assessing, improving and rewarding employee performance and initiating career pathing and enhancement plans for each employee;
- Streamline and improve work processes to increase productivity and efficiency while fully harnessing the power of technology;
- Provide workforce-related information for trend analyses and effective human resource decision-making;
- Administer the contract for the People First Project to enhance human resource services and employee's and manager's access to state-of-the-art technology; and
- Assist agencies with workforce transition and placement of affected employees to ensure a smooth transition for agencies and employees adversely affected by a workforce reduction.

These process improvement strategies, as well as those designed to increase employee effectiveness and efficiency, will result in a smaller, more productive workforce. The Division strives to identify and incorporate enhancements to the human resource infrastructure to make managing the State's human resources easier and more effective. To assess Human Resource Management's performance in this effort, the outcome measure, "Overall Customer Satisfaction Rating," was developed. This measure reflects the ultimate impact of the products and services provided and relates directly to the Division's mission "to implement enhanced human resource programs and systems in order to provide innovative workforce statewide services and support." A 96 percent overall customer satisfaction rating is projected for each year over the next five years and is representative of previous ratings received from customer agencies.

## PEOPLE FIRST

The Department of Management Services' Division of Human Resource Management (Department) is responsible for the implementation of the Governor's Service First Initiative, which was designed to increase accountability of employees and managers, and improve services to Florida's citizens. This historical civil service reform legislation was signed into law by Governor Bush on May 14, 2001, and was the first major overhaul of Florida's civil service system in over 30 years. The new law modernized Florida's state workforce and addressed many of the concerns and suggestions expressed by state employees. Its goal was to provide improved benefits for state employees, more accountability to taxpayers, and streamlining of many of the personnel system's antiquated and bureaucratic processes.

As part of the Service First initiative, the State sought to outsource transactional services to a service provider for the advertisement of vacancies, collection of timesheets, processing of new employee appointments, classification, orientation, leave use and accrual, payroll preparation, benefit enrollment, and maintenance of employee records. In addition, the service provider was charged with assisting in recruitment and the training of state employees and administering the record keeping activities associated with a responsible workforce, while providing the State agencies and citizens the appropriate access to the information it maintains and manages. However, the State did not consider outsourcing, policy and management responsibilities. The State retained the selection of qualified applicants, specialized recruitment, labor relations, discipline, grievances, and appraisal of employee performance, and collective bargaining responsibilities.

Governor Bush's overall vision for the human resource outsourcing initiative was "to better serve Floridians and meet the needs of the new millennium" by obtaining a world-class service provider of human resource, payroll, and benefit administration services. In support of this initiative, the Department of Management Services completed a proof of concept case study for outsourcing personnel and payroll preparation services for most State agencies. This business case was developed in February 2001 and showed that by consolidating similar functions across agencies, the State would realize substantial gains in service delivery and cost avoidance.

The Department issued an Invitation to Negotiate for HR Outsourcing (ITN) on April 17, 2001. The purpose of the Invitation to Negotiate was to evaluate options and, if found to be in the best interest of the State, to enter into a contract for the outsourcing of the existing State Human Resource and Personnel services and systems. Based on the responses to the ITN, a business plan was developed in September 2001, and served as a decision document, and management tool, for determining the best solution for providing human resource services for the State of Florida.

As a result, the Governor recommended deployment of the project for FY 2002-03. In support of this project, known as the People First project, the Department of Management Services contracted with Convergys Customer Management Group, Inc. (Convergys/service provider) on August 21, 2002. This contract provided the State Personnel System with an information system and an enterprise-wide suite of human resource services. The ultimate goal was to streamline the transactional processes involved in the collection and capturing of timesheet information, processing of new employee appointments, leave use and accrual, payroll preparation, benefits administration, staffing services, retirement enrollment, and maintenance of employee records.

The first phase of the People First implementation was in May 2003, with the introduction of new staffing services. To ensure all state agencies and employees were comfortable with the remaining new services before they were fully implemented on a statewide basis, additional time was built into the process to allow for the parallel operation of both the new and old systems (Cooperative Personnel Employment Subsystem, "COPEs"). This allowed the State to implement system functionality based on input from the first phase; to continue to work with all state agencies to ensure that the new services were effective; and to devote additional time to testing the system, ensuring the end users were comfortable with the system interface. As a result, the Department utilized a phased implementation schedule, for the new system, for 2004, with the last set of agencies implementing in November of 2004.

The People First System incorporated all agencies into its benefit platform, beginning January of 2005, after a roll out period that occurred in the middle of hurricane season. Despite some problems experienced, all agencies, including the Universities, are served by the benefits portion of the system. The majority of Agencies' payroll and organizational management needs are handled by the People First system. The Universities and a few of the smaller agencies are not incorporated.

The People First Project has faced a number of challenges in providing a customized personnel information system that meets the needs of all the user agencies. Problems or issues are always anticipated when introducing a major system, or significant system change, especially given the magnitude of this project. Significant planning was, and continues to be done, to try to avoid problems and minimize disruptions to the end user. Due to the complexity of the system and the necessary variances in policies and procedures between the agencies, issues arose that were not anticipated. A concentrated and conscientious effort has been instituted, to address these issues, and substantial progress has been made. Permanent corrections for problems have been developed and deployed or will be deployed within the next six to nine months. Where problems have been identified, interim workaround measures have been developed and instituted, which are, in most cases, transparent to the end user. In addition, the Department has instituted several means to incorporate agency input on anticipated changes including Agency Personnel Officer meetings and joint Agency/People First working committees. This also includes issue resolution work groups to assist in the development and modification of business requirements for use in programming the People First system. These work groups have provided valuable input relative to flexible work schedules, personnel action requests (PAR), staffing and E-Learning, and will continue as an integral part of the People First project evolution.

The People First Team (Convergys and the Department) has fully realized the significance of past and current issues, and the need to quickly resolve them. Changes have been made to better manage the project and ensure optimal system utilization:

1. Convergys completed re-training of customer service center representatives.

2. The Department created a dedicated People First Project Team with functional leads and hired a full-time Project Manager.
3. Cross Agency/DMS/Convergys Teams identified system issues and improvements to gain more technological efficiencies and streamline transactional processes.
4. The People First team is conducting “root cause” analyses based on problematic trends.
5. The Department is providing proactive communications to the agencies with emphasis on personnel policies and rules.
6. The People First Team jointly reviewed contract performance metrics and the Department negotiated changes and development of new contract performance metrics, including increased performance credits for missing the metric(s) and a significant increase in the dollar cap amount for liquidated damages.
7. The Secretary of the Department of Management Services has implemented an active program of providing project status reports to Agency Heads, Chiefs of Staff and Chief Information Officers.
8. The People First Team meets regularly with Agency Personnel Officers and is working with individual Agencies to identify and analyze issues.
9. The People First project utilizes agency Human Resource professionals to serve as a source of frontline expertise so that issues can be expeditiously resolved.
10. New Modules for Staffing and Recruiting, Performance Evaluation and E - Learning will be rolled out within the next 6-9 months.

In addition, a Change Review Board was established to provide guidance and input to the People First project. The purpose of the Change Review Board is to evaluate the prioritized system modifications, training programs, and other key project decisions set by the People First team. The Change Review Board, comprised of representatives from the Agencies, Convergys, Legislature, and Executive, University and Judicial entities, had its first meeting on September 27, 2005, with regularly scheduled meetings to be held once a month. A Leadership Council is being contemplated and its purpose would be to provide overall project strategy and direction related to system design, integration with other state systems and general scope of the People First project. This Council will be strategic in nature and will be focused on the long-term direction of People First.

Over the next 5 years, the People First System should become a cost efficient and effective employee/manager self service based system, which is user friendly, and generates the type of data which will aid the State of Florida and its agencies to better estimate its personnel requirements, will address operational efficiencies and flexibility, and will enable increased capability to manage the State’s financial assets. In addition, the state will be able to measure and better manage business functions, such as payroll transaction costs, recruitment costs, cost per employee for service delivery, and time measurement for completion of personnel processes. Managers and Human Resource Professionals will have more time for value-added activities such as strategic planning, program management, employee relations, collective bargaining, workforce utilization, policy implementation, compliance, program management and governance. Not only will state employees be benefactors of improved performance in delivery of human resource services, but the citizens of the State of Florida will realize a more efficient government through cost reductions.

Concerning the future of the People First, or any other State of Florida Systems, the evolution and improvements in technology, over the next 3-5 years will create an environment that may be conducive to expansion, or combining the functionalities of these State Systems, into a “Megasytem - One Stop Shop”. The technology needs and resources of the State will govern

the feasibility and timeframe with which such change will occur. Based upon the lessons learned with People First, we must understand the needs of the user community fully, and involve the user community early in the process and in planning the roll out, to ensure success.

## DIVISION OF STATE GROUP INSURANCE

The mission of Insurance Benefits Administration is to develop and offer a high-quality, competitive portfolio of employee benefit products and services which will enable the State to attract and retain a highly competent, efficient, and effective workforce, thereby enhancing support of the Governor's priorities.

The level of satisfaction of state employees with various aspects of their health insurance is one method that is used to assess performance of the program. Therefore, an independent survey research entity was contracted to conduct a Customer Satisfaction Survey. Active and retired state employees were polled regarding various aspects of insurance benefits administered by the Insurance Benefits Administration. The survey conducted for fiscal year 2003-2004 reflects that 91% of the customers surveyed were "satisfied" or "very satisfied" with the insurance benefits program.

In accordance with Chapter 110, Florida Statutes, Insurance Benefits Administration offers and manages a comprehensive package of health and welfare insurance benefits, including a variety of health insurance options, flexible spending and health savings accounts, life insurance, and dental insurance. These benefits allow active and retired state employees and surviving spouses the option to choose pre-tax and post-tax benefit plans that best suit their individual needs. Specific administrative functions include, but are not limited to, client relations, benefit plan analysis, product development and procurement, contract management, compliance, financial control and management, and information technology support. To enhance service levels and cost efficiency, certain administrative functions were outsourced in connection with the People First Project.

In order for the Department to attain its goal of attracting and retaining a high performance workforce for the State of Florida, insurance benefit options must meet the needs of a mobile workforce and provide the flexibility needed to accommodate the demographic and social changes in the workforce. Per the Governor's initiatives, the Division of State Group Insurance added new innovative options to give employees and their families more access, choice, and flexibility for their healthcare. The new Health Investor plans offered have lower insurance premiums and an optional Health Savings Account, with contributions provided by the state for eligible employees. The new plans provide the same, or better quality health care, as well as greater financial flexibility for meeting their healthcare needs.

To achieve the ongoing objective of quality, choice, and affordability, the Insurance Benefits Administration has established key priorities, which will ensure the continued design and alignment of health and welfare insurance benefits with currently accepted clinical and employee benefit practices, and to calibrate benefit design and alignment as a function of market trends and employee needs. The successful implementation and completion of these key priorities will allow the State to be better positioned to attract and retain a high performance workforce. A summary of the key priorities are:

- Build upon the redesigned health insurance benefit platform by implementing industry best measures that effectuate a slowing in rising health care costs through programs such as:



- Health Care Promotion – By partnering with healthcare providers and promoting a healthier workforce through initiatives designed to support and enhance wellness, early illness identification and intervention, and disease prevention for employees, retirees, and dependents, improvements and reductions in claims costs will result.
- Demand Management – By educating and involving employees and retirees in their own healthcare decisions through increased offerings and incentives, such as the ability to participate in a Health Savings Account, the member has increased ownership in the healthcare outcomes and their financial impact.
- Disease Management – By recognizing that major costs are incurred as a result of complex disease states and treating those conditions holistically, the overall cost is reduced below the sum of treating each area separately. Prophylactic healthcare measures can be taken for future cost avoidance, while increasing the member’s quality of life.
- Design and offer a fully insured long-term care insurance plan. According to the US Government, by 2020, 12 million older Americans will need long-term care and those 65 years of age or older will likely have a 40 percent chance of entering a nursing home, with about 10 percent of those staying for five years or more. Expenditures for long-term-care services continue to increase at a rapid rate and the Department of Management Services is seeking to implement a voluntary, long-term-care plan for employees, retirees, and eligible family members of entities participating in the State’s Group Health Insurance Program. Studies reflect that workforce productivity increases and absenteeism decreases when employee concerns regarding the well-being of other family members are reduced.
- Design and offer an integrated short-term and long-term group disability insurance plan. Disability is something most people do not think about. But the chances that someone will become disabled are greater than most realize. Studies show that a 20-year-old worker has a 3 in 10 chance of becoming disabled before reaching retirement age. The US Government pays disability benefits through two programs: the Social Security disability insurance program and the Supplemental Security Income (SSI) program. While these benefits may help in the case of disability, they most likely will not cover the full needs of someone who becomes disabled. The State of Florida, by seeking to offer short and long term disability coverage to employees of entities participating in the State Group Insurance Program, will be expanding its portfolio of benefits products.
- Perform a health insurance plan benefit benchmarking analysis to ensure a best-benefit offering to active and retired state employees. By conducting a benchmarking analysis, the State of Florida will establish a reference for ensuring its benefits offerings are second to none when compared to other states and entities competing to attract and retain the finest workforce.

## DIVISION OF RETIREMENT

The Division of Retirement continually improves retirement programs in order to provide innovative state-wide workforce services and support.

In accordance with chapters 121, 122, 175, 185 and 238, Florida Statutes, as well as sections 112.05, 112.363, 215.28, and 250.22, Florida Statutes, the Division of Retirement administers the state retirement plans, including the Florida Retirement System (FRS), the fourth largest public state retirement system in the nation, comprised of more than 927,000 active and retired employees of 900 state, county, district school board, community college, city, and special district agencies. The Division also administers the State University System Optional Retirement Program, the Senior Management Service Optional Annuity Program, the Retiree Health Insurance Subsidy Program, and the Municipal Police and Firefighters' Premium Tax Program. Oversight of the actuarially sound funding of 520 local government retirement systems, pursuant to Part VII, Chapter 112, Florida Statutes, is also provided by the Division.

The Division of Retirement successfully fulfills its obligation to effectively and efficiently serve its customers—the members, retirees and surviving beneficiaries, and employing agencies of Florida's state-administered retirement programs. The Division's continuing commitment to quality customer service is reflected in the recurrent high satisfaction ratings reported by its customers. Over the past several years, the Division has achieved an increase in the percentage of members satisfied with the Division's retirement services, improving its FY 1998-99 satisfaction level of 93.7% to 95.9% in FY 2003-04.

The Division's focus on continual improvement in the quality and cost effectiveness of the services delivered has brought significant benefits to those served. Following are highlights of customer service accomplishments achieved during FY 2004-2005:

- Continued the legacy of processing the monthly Retired Payroll in a timely manner 100% of the time. Achieving this extraordinary level of accuracy is paramount to ensuring benefit recipients will receive their monthly payments in a timely manner.
  - The growth of Retirees served increased by 12,500 to 238,500 monthly payees. This represents an annual payroll of \$3.6 billion.
  - It is expected that normal retirements and additional DROP retirements will increase the monthly Retired Payroll to more than 250,000 payees by FY 2006-07, a 40% increase since FY 1999-00 and, by FY 2010-11 it is projected that more than 300,000 members will be retired.
  - Assisted employing agencies in achieving 100% compliance in electronically reporting monthly payrolls. Each month 1,456 monthly payrolls are updated consisting of 717,144 lines of data with monthly salaries totaling more than \$2.1 billion and approximately \$192 million per month in contributions.
- Additional customer service accomplishments related to the Pension and Investment Plan include:
  - Responding to customer service inquiries by providing more than 75,000 estimates of retirement benefits and responding to more than 280,000 phone calls and 64,500 emails, which provided FRS members with detailed and specific benefit information on their account, thereby assisting them in planning for their future retirement. The Division also provides retirement counseling services to more than 3,000 members annually who personally visit the Division's office without the need of an appointment.

- Maintaining the timeliness of making employing agency contributions available for investment within two days, benefiting both the Investment and Pension Plans
- Processing approximately 9,500 Deferred Retirement Option Program (DROP) payouts in FY 2004-05. The Division projects that it will add approximately 6,700 DROP participants per year to the monthly Retired Payroll over the next five years.
- Updating 23,800 Investment Plan elections, 15,800 Pension Plan elections and 46,900 default pension elections on the Florida Retirement System database which is also provided on the FRS website to allow participating employers to retrieve election information. The Division calculated and processed the Accumulated Benefit Obligations (ABO) for 7,100 members transferring the present value of their benefits, totaling more than \$722 million, from the FRS Pension Plan to the FRS Investment Plan.
- Updating beneficiary information on more than 15,400 active member accounts.
- Processing 6,900 members' beneficiary claims upon deaths, an increase of 13.4% since FY 1999-00. The growth is expected to fluctuate but remain in proportion with the growth rate of the retiree membership.
- Analyzing and determining approximately 1,750 disability cases annually since FY 1999-00.
- Processing over 29,000 pieces of incoming mail each month (350,000 pieces annually), which is prepped, scanned, and indexed within 24 hours. Outgoing mail averages 22,500 pieces per month (270,000 pieces annually).
- Providing communications to FRS Pension Plan members through:
  - Mailing 588,000 Member Annual Statements to help vested members in their pre-retirement planning and understanding of their FRS account by providing their accrued service, retirement benefit information and general information.
  - Updating, printing, and shipping 635,000 Retirement Guides to FRS Pension Plan members. These guides are updated and provided every other year to apprise members of their rights and obligations under the plan pursuant to s. 112.66, F.S.
  - Continually updating the Division's website containing contact information; information about proposed and passed legislation, statutes, and rules affecting the FRS; accessible versions of forms and publications; and access to Retirement Online where members may access their retirement account information and active members may project benefit estimates. The Division's website had more than 674,000 visits during the 2004-05 year.
  - Producing and mailing the annual FRS Bulletin to the 635,000 active FRS Pension Plan members. The FRS Bulletin provides supplemental information to FRS Pension Plan members and serves to update members of plan changes for years in-between the biennial production of Retirement Guides.
  - Producing and mailing the FRS Retiree Newsletters to 238,500 FRS Pension Plan benefit recipients. These newsletters are provided each July and January.
  - Producing the following Supplemental Brochures: *The Deferred Retirement Option Program (DROP)* brochure, the *Preparing to Retire* brochure and the *After You Retire* brochure. The *DROP* and *Preparing to Retire* brochures are provided upon request as well as being included with each estimate requested by members. The *After You Retire*

brochure is provided as requested and automatically provided to Pension Plan retirees at the time they begin receiving monthly retirement benefits.

- Conducting the annual Satisfaction Surveys. Each year all employers participating in the FRS as well as a random sample of active and retired FRS Pension Plan members and beneficiaries are surveyed to determine their satisfaction with the service and information provided by the Division to Pension Plan members. The results of these surveys indicate that 99% of employer, 95% of active members, and 96% of retirees are satisfied with the information and service provided by the Division. This survey also allows our customers to indicate services they would like to receive or areas where information and/or service could be improved.
- Generated 117 bill analyses related to 73 separate bills introduced during the 2005 Legislative Session. Fourteen of these bills passed and were forwarded to the Governor for action. The Division of Retirement prepares analyses of proposed legislation each year for issues affecting the Florida Retirement System as well as local government retirement plans. These analyses include the actuarial fiscal impact if known, legal conflicts or potential concerns, and administration of the proposal in light of current law. The Division also provides reports to the Legislature on the potential impact of employer contribution rate changes and other information as requested.
- Worked with the Department's consulting retirement actuary to provide information and assistance as needed to perform the following actuarial services:
  - The 2004 Valuation of the FRS Pension Plan - This report is generated annually and shows the funded status of the FRS and recommends the employer contribution rates necessary to meet the actuarially sound funding mandated by the Florida Constitution.
  - The 1998 – 2003 Experience Study of the FRS - This study is performed every 5 years to measure the retirement system's actual experience against the funding assumptions used and to recommend any changes to make the system's assumptions.
- Further enhanced Retirement Online to provide additional value-added customer services. Originally deployed in July 2001, Retirement Online is the electronic gateway for members, retirees and employing agencies to access information and services from the Florida Retirement System through the Internet. Today, all 900 employing agencies use Retirement Online to process their monthly retirement reports and more than 215,000 members, retirees, and DROP participants have logged in and used Retirement Online.
- Distributed \$106.3 million in Insurance Premium Tax revenues to 366 Municipal Police Officer and Firefighter Pension Plans that were determined to be in compliance with the provisions of Chapters 175 and 185, Florida Statutes. There are 40,430 active and retired participants in these 366 pension plans.
- Sponsored the 36<sup>th</sup> Annual Pension Trustees' Conference in October 2004, and the 26<sup>th</sup> Annual Pension Trustees' School in March 2005, for the benefit of trustees of the Chapters 175 / 185 municipal police & fire pension funds. These three-day seminars are attended by pension trustees, participants, advisors and city representatives in order to keep abreast of issues relevant to the Chapters 175 / 185 pension programs.

In April 2005, the Division moved its operations to a new location at the Winewood Office Complex in Tallahassee after 30 years at its previous location. By thoroughly planning the move,

along with the dedicated efforts of our employees and contractors, the Division was able to be fully operational and transacting business after being closed for just two business days.

The Division is able to sustain and accomplish these significant improvements by employing a highly motivated, educated and customer service-oriented staff, supported by capable and experienced management and a full functioning, Integrated Retirement Information System (IRIS), representing the state of the art in imaging and workflow technology. This combination of quality resources has allowed the Division to accommodate the ongoing legislated changes to the Florida state-administered retirement programs, including DROP and the Public Employees' Optional Retirement Program (PEORP, also known as the "FRS Investment Plan"), amidst increasing retirement membership and reductions in available appropriations and staffing.

# **Business Operations Support**

## **Trends and Conditions Statement**

### **STATE PURCHASING**

The mission of State Purchasing is to provide excellent purchasing services in order to deliver innovative, resource-saving solutions.

Mandated by Chapters 112 part III, 119.07, 120.57, 283, 287, 413.031, 413.036, 413.037, 812.081, and 946.515, Florida Statutes, State Purchasing uses the combined purchasing power of the State of Florida to deliver the best value in goods and services for the State and eligible users. Our goal is to develop and implement sound procurement practices in accordance with executive policy and legislative mandates. State Purchasing is dedicated to build strong relationships with our key constituents – other agencies, local government, and vendors. State Purchasing provides professional leadership and guidance in understanding and using the best resources available.

State Purchasing promotes fair and open competition in the State's procurement process. All sources of supply are canvassed, acquisitions planned and scheduled, and contracts for the purchase, lease or acquisition of commodities and services are implemented. Additionally, State Purchasing promotes efficiency, economy and conservation of energy through the natural gas, fuel oil and other environmentally sensitive contracting efforts.

In order to assist the Governor in the achievement of building economic opportunity for all, State Purchasing will continue to provide training, outreach and registration for vendors to broaden contracting opportunities to a more diverse vendor population. State Purchasing will continue to coordinate vendor workshop participation at the annual Florida Government Conference with other state agencies, universities, cities and counties to educate vendors about how to participate in purchasing opportunities.

Many factors affect State Purchasing's ability to meet performance standards for our outcome measure, percent of state term contract savings (e.g., market conditions, competition, and state agencies' usage of state term contracts). However, over the next five years, State Purchasing anticipates that migration to online pricing efforts will provide significant cost savings of up to \$166 million to the State through use of state negotiated contracts/agreements.

### **MYFLORIDAMARKETPLACE**

To further its mission, State Purchasing has implemented a new statewide electronic procurement system, known as MyFloridaMarketPlace. MyFloridaMarketPlace will help the State better direct, coordinate, evaluate, and resource its procurement process. By aggregating spending on products and services, the State will be better positioned to negotiate contracts with suppliers based on economies of scale. As a result, buyers will benefit from increased competition among the State's vendors, and vendors will benefit by reaching a greater purchasing audience. In addition to generating savings via the reduced cost of goods and services, MyFloridaMarketPlace

will generate process efficiencies from reduced paperwork, overhead, and processing costs. For example the system provides:

- State of the art tools: Electronic, Internet-based transactions provide a consistent and more efficient way of doing business with the State - less paperwork and manual steps.
- Increased access to buying entities: Registering with MyFloridaMarketPlace will provide vendors with access to all buyers using the system.
- Enhanced economic development opportunities for small businesses: MyFloridaMarketPlace will enhance economic development opportunities for small businesses by increasing access to the "State" marketplace.

## FLEET MANAGEMENT & FEDERAL PROPERTY ASSISTANCE

### AIRCRAFT MANAGEMENT

The mission is to deliver safe and efficient executive on-demand air travel for the Governor, Cabinet, and other state officials to enable the Division of Fleet Management & Federal Property Assistance to provide exceptional service.

In accordance with Chapter 287.161, F.S., Aircraft Management is responsible for the management of state-owned and operated aircraft including operational and safety standards and assignment, use, and reporting policies and procedures. The service operates an Executive Aircraft Pool, which consists of one Cessna Citation Bravo, one King Air 300, and one King Air 350, from a central aviation facility in Tallahassee. The Executive Airpool provides on-demand executive air transportation to the Governor, Cabinet Officers, and other high level officials and employees on a priority first call, first serve basis. Per Chapter 60B-4.006, State Executive Aircraft Pool, the following scheduling priorities will be exercised when an insufficient number of aircraft are available:

First priority: the Governor, the Lt. Governor, a Cabinet Officer, the Speaker of the House of Representatives, the President of the Senate, the Chief Justice of the Supreme Court. Second priority: Justices of the Supreme Court, appointed secretaries and executive directors of the executive branch, chairpersons of standing committees of the Legislature, chairpersons of the Public Service Commission and the Parole Commission, and the Chancellor of the Board of Regents. Third priority: other authorized persons.

The Executive Aircraft Pool provides transportation to destinations throughout Florida, including cities with limited or nonexistent commercial airline service, and to numerous cities outside the State. The Executive Aircraft Pool also provides support for the State Emergency Operations Center and state executives in times of disaster such as hurricanes, tornadoes, floods, etc. In addition, Aircraft Management provides state agencies' technical assistance, guidance and support in the acquisition, use, operations, maintenance, overhaul and disposal of aircraft.

The aircraft pool is supported by an aircraft maintenance facility and aircraft mechanics that are required to provide timely and quality repairs and service to the pool aircraft in the Executive Aircraft Pool. Due to its age, the King Air C90 needed to be taken out of the fleet. In the fiscal

year '04-'05, the Department brought a used King Air 350 aircraft into the fleet, replacing this aircraft and providing more efficient and safe travel for our customers.

## MOTOR VEHICLE and WATERCRAFT MANAGEMENT

The mission is to deliver safe and efficient vehicles and watercraft including acquisition, tracking, and disposal to state agencies to enable the Division of Fleet Management & Federal Property Assistance to provide exceptional service.

In accordance with Chapter 287, Part II, F.S., Motor Vehicle and Watercraft Management manages the acquisition, operation, maintenance, and disposal of the state's fleet of motor vehicles and watercraft. The state's fleet includes approximately 25,000 units, including automobiles & light trucks, medium and heavy trucks, construction & industrial equipment, tractors & mowers, and small utility, motorcycles & ATVs. Responsibilities of this program area include developing policies and practices for effective and efficient acquisition, assignment, use, maintenance and disposal of vehicles and watercraft. In addition, Motor Vehicle and Watercraft Management determines motor vehicles and watercraft to be included on state contracts; develops technical bid specifications; and assists in evaluating the contracts. This area ensures the cost-effective acquisition of safe, energy-efficient and quality vehicles and watercraft. This service also approves the purchase of vehicles and watercraft, develops equipment purchase approval guidelines, develops fleet replacement criteria, and administers the state's federally mandated alternative fueled vehicles program. In addition, Motor Vehicle and Watercraft Management provides an Equipment Management Information System and reporting system that provides the management and cost information required to effectively and efficiently manage the state's fleet and provides accountability of equipment use and expenditures.

The service also manages the disposal of used and surplus state vehicles and watercraft. Additionally, Motor Vehicle and Watercraft Management develops and administers the state's fuel and fleet credit card program. This allows state employees to purchase gas in their state-owned vehicles when traveling. The Bureau also administers the rental vehicle contract. This contract is used statewide to assist in transportation needs of state employees. State employees pay 50% of the average price for a private rental vehicle.

Motor Vehicle and Watercraft Management anticipates demand for the acquisition of vehicles and watercraft to decline slightly this year and in future years as the size of state government is reduced due to efficiencies and privatization.

An outside fleet consulting firm is to conduct an objective analysis of the program. The analysis and findings as reported by the fleet consulting firm may be used as baseline data for future improvements to the fleet program.

## FEDERAL PROPERTY ASSISTANCE

The mission is to deliver as much federal surplus property as possible to Florida non-profits, political subdivisions and law enforcement to enable the Division of Fleet Management & Federal Property Assistance to provide exceptional service.



Pursuant to Chapter 217.03, F.S., and EO #77-36, 40 USC 203.10 USC 2573 (A), Federal Statutes, Federal Property Assistance is responsible for acquiring and distributing federally owned tangible personal property declared excess/surplus to the needs of the Federal government and allocated to the State of Florida for the benefit of the citizens of Florida through public agencies and private/nonprofit health and education organizations. This service is being provided by a government entity because it is non-profit and assists only those other organizations within the scope of various levels of government and education. Federal Property Assistance reviews available assets physically on-site at military and Federal civilian agency holding depots. The program also utilizes web-accessible surplus/excess databases of the U.S. General Services Administration (USGSA) and the U.S. Defense Logistics Agency. Acquisition of federal surplus equipment and supplies by eligible organizations results in major cost avoidance in asset procurement, which translates into tax dollar savings.

Similarly, Federal Property Assistance is also responsible for acquiring and distributing U.S. Department of Defense owned tangible personal property declared excess to the needs of the military and approved for the State of Florida for the benefit of state and local law enforcement agencies. Federal Property Assistance has created state/local government partnerships to review available assets physically on-site at military holding depots and to transport those approved by the U.S. Department of Defense for Florida law enforcement agencies to the distribution center in Florida. Acquisition of military excess through the program by state and local law enforcement agencies results in major cost avoidance, which translates into tax dollar savings. The program also enables agencies to have equipment they may otherwise not have the resources to purchase.

Federal Property Assistance programs are now housed in one facility. The new 1122 Program that provides for our statewide law enforcement entities to procure new equipment from Federal GSA contracts is housed in the Orange County Sheriff's Office. Our department has oversight and audit authority only.

Due to the war effort and reduced amounts of equipment available, this trust funded Bureau has not been able to sustain current levels of funding for staff. The staff for the two programs in Starke has been reduced to five employees. We hope that this step will allow for a more stable funding environment for the Bureau.

#### PRIVATE PRISON MONITORING

The mission of Private Prison Monitoring (formally the Correctional Privatization Commission, or CPC) is to ensure that the private sector performs state services in the most effective, productive, and cost efficient manner for the citizens of the State of Florida. The objective is to provide effective oversight and monitoring of the contracts between the Florida Department of Management Services, Bureau of Correctional Privatization, and the vendors who operate the private prisons, ensuring that pursuant to Section 957.01(1), Florida Statutes, cost savings to the State of Florida is at least seven (7) percent less than what is spent for public prisons. For each facility, the Commission had entered into an "Operations and Management Contract" with a private vendor to operate the facility for an agreed daily per diem. The contracted per diems include cost for the following operating expenditures: personnel, general operating expenditures, operating equipment, food services, medical services, maintenance and repair, educational programs, substance abuse programs, sales tax, salary and expenses of a DMS employed Contract Monitor position, property taxes or grants to the counties that have private prisons, and corporate taxes.

Funding to pay the Debt Service and operations per diem to vendors for the facilities listed above is appropriated in the Department of Correction’s annual budget. The Debt Service of the two subleased facilities is appropriated in the Department of Juvenile Justice’s budget. Funding of employee salaries, other than those paid by the vendor for contract monitoring, is appropriated in the Department of Management Services’ budget. The Bureau of Correctional Privatization has eight authorized positions.

Section 957.07, Florida Statutes, states that Private Prison Monitoring may not enter into a contract unless it determines that the contract or series of contracts in total for the facility will result in a cost savings to the state of at least seven percent over the Department of Corrections. All five of the current contracts have been renewed until June 30, 2005. The Division is reviewing options and impacts to determine the most viable course to take at that time. Chapter 2001-379, Laws of Florida, established the Prison Per Diem Workgroup for the purpose of developing consensus per diem rates to be used when determining per diem rates of privately operated prisons. The Office of Program Policy Analysis and Government Accountability, the Office of the Auditor General, and the staff of the appropriations committee for both the House of Representatives and the Senate are the principals of the workgroup.

Chapter 957, Florida Statutes, created the Correctional Privatization Commission (Commission) for the purpose of entering into contracts for the design, construction, and operation of privately operated correctional facilities. Since the program was shifted totally to the Department of Management Services (DMS), effective July 1, 2004, there have been several updates to the program.

DMS currently oversees the operation of the following facilities:

<b>Facility</b>	<b>Type</b>	<b># of Beds</b>
Bay Correctional Facility	Adult male, medium security	750
Moore Haven Correctional Facility	Adult male, medium security	750
South Bay Correctional Facility	Adult male, close custody	1,861
Lake City Correctional Facility	Youthful Offender	893
Gadsden Correctional Facility	Adult female, medium security	<u>1,036</u>
	<b>Total Beds</b>	<b><u>5,290</u></b>

The “Criminal Justice Estimating Conference” projects the number of beds that the Florida Prison System will need over the next five years. During the 2005 legislative session, the Legislature directed the DMS to issue an invitation to negotiate to current facility vendors for a contract for 854 additional beds for expansion at existing private facilities. The following facilities will be impacted through these expansions:

Bay Correctional Facility:	235 Additional Beds
Gadsden Correctional Facility:	384 Additional Beds
Moore Haven Correctional Facility:	235 Additional Beds

These additional beds are to be on-line by July, 2007. The 2005 legislative session also directed DMS to add 220 more beds into the new facility at Graceville that had previously been set at 1,280 beds. This procurement is moving through the process. The 1,500 beds are to be on-line by September 2007.

All five contracts were set to expire on June 30, 2005. However, the contracts for Bay, Gadsden, and Moore Haven were renewed for an additional two years and expire June 30, 2007. The contracts for South Bay and Lake City were renewed for one year and expire June 30, 2006. The 2005 legislative language directed DMS to contract with the existing vendors for the three expansion projects listed above so we have renewed these for two years to cover the construction timeline.

Further, the 2005 legislative session directed DMS to procure with an outside vendor to provide a study to determine the cost savings issue surrounding the private prison/public prison per diems. We are in the procurement process for this as well.

## FACILITIES MANAGEMENT AND BUILDING CONSTRUCTION

In accordance with Chapters 216, 255, 272 and 287 Florida Statutes, the mission of the Facilities Program is to provide best practice facility solutions in order for state agencies to effectively deliver public services. The Facilities Program continues to reengineer and automate its activities and tasks by establishing direct client agencies access to services and their facilities related administrative information. Primary responsibilities cover Fixed Capital Outlay (FCO) Planning and Appropriations Management, Operations and Maintenance of the Florida Facilities Pool, Real Property Management of both public and private office space leasing, Paid Parking and Project Management Oversight of construction projects for the Department of Management Services (DMS) and other state agencies through Client Agency Agreements. The Facilities Program has realigned tasks over the past year to enhance the functional clarity of the activities performed and to directly improve the performance of client services.

### Facilities Program Initiatives

Initiatives update includes:

- The Workspace Management Initiative (Executive Order 04-118) established a compilation of strategies aimed at improving overall quality of office space, increasing operational efficiencies, controlling costs, and asset maximization of the State's real estate. The initiative currently consists of three main components:
  - Centralized Leasing - A strategy centered on market correction activities in private leased space across the state.
  - Space Reconfiguration - Improving the quality and utilization of space in state-owned buildings.
  - Disposition Activities – Reduction in the number of functionally obsolete facilities managed by DMS.
- Chapter 943.0311, F.S. requires state agencies identify their security needs and prioritize them for all buildings, facilities, and structures managed. Using methods and instruments made available by the Florida Department of Law Enforcement, the identified security needs are to be prioritized and submitted to the Chief of Domestic Security. DMS performed security assessments as required by the Chief of Domestic Security in 2004, which will assist in this initiative of identifying and prioritizing security needs.

- Under the authority of section 365.172 (11)(e), Florida Statutes, the Facilities Program establishment 60H.9 rules for the leasing of state-owned property by private providers for the placement of E-911 cell towers. Implementation of the placement on specific state-owned sites identified by the wireless industry has been initiated.
- Guaranteed Energy Performance Savings Contracts, which invest in energy conservation measures through payments with a qualified contractor to reduce the amount of energy consumed and produces long-term savings (Section 489.145, Florida Statutes). First year savings is expected to be reported in October 2006.
- Additional activities have been added to the Facilities Accountability Communication Tool (FACT), which now covers the majority of the information and data management tasks of the Facilities Program and supports other areas of DMS. Automation of private leases as well as a work order and preventative maintenance component is currently being implemented to track agency's "Request for Space Need" and manage the "Invitation to Negotiate" process with private providers over the web in real time.

The use of better data collection and analysis has allowed for better oversight and improved staff performance, allowing for the redistribution of workloads to assist with offsetting significant reductions in personnel. Over the past three years, the success of FACT has resulted in numerous Davis Productivity Awards (sponsored by Florida TaxWatch and the Florida Council of 100). Potential leveraging of this tool has resulted in the Department's of Health and Veterans Affairs to request connectivity to FACT, for assisting them with the oversight of the facilities they manage.

#### FACILITIES MANAGEMENT

Facilities Management provides building management services for 7.9 million gross square feet in the Florida Facilities Pool as mandated by 255.501 and 272, Florida Statutes. This includes diverse activities, such as FCO planning and appropriations management, operations and maintenance, real property management and parking administration. The delivery of these activities are financed through the Bonded Building Program and supported by agency rental fees paid into the Supervision Trust Fund. Facilities Management strives to be a prudent manager of taxpayers' dollars through outcomes achieved as a result of the efficient management of the public's real estate holdings, application of advancing technologies and continued innovation in the delivery of the core program activities.

By alleviating state agencies from tasks not related to their missions, Facilities Program services assist them in carrying out their core activities. Facilities Management supports the Department's focus "We serve those who serve Florida" through customer-oriented practices that have enabled state agencies to have a greater concentration on delivering their statutory requirements and the Governor's priorities to the people of Florida. The various activities provided by Facilities Management are highlighted below.

#### Operations and Maintenance

Under Section 709 of the Florida Facilities Pool Bond Resolution, Facilities Management is responsible for the operation and maintenance of 22 regional facilities and 44 Tallahassee facilities, which comprise the 7.9 million, gross square feet in the Florida Facilities Pool. The Florida Facilities Pool is composed of office buildings, conference facilities, crime laboratories,

public records storage facilities, museums, computer centers, an emergency operations facility and historic sites. Management continuously reviews the way customer-focused services are delivered in an effort to maintain productive workplace environments and public historic sites. The strategic use of contract vendors and optimizing personnel to lower the cost of operating and maintaining the buildings is critical in meeting service goals and objectives. Section 709 states, "The Department of Facilities Management shall at all times operate or cause to be operated the facilities properly and in efficient and economical manner, and shall maintain, preserve, reconstruct and keep the same or cause the same to be so maintained, preserved, reconstructed, and kept with the appurtenances and every part and parcel thereof, in good repair, working order, and condition, and shall from time to time make or use its best efforts to cause to be made, all necessary and proper repairs, replacements, and improvements so that at all times the operation of the facilities may be properly and advantageously conducted."

The Capital Depreciation Reserve Fund established in the 1980's, finances all maintenance and improvement projects associated with the Florida Facilities Pool. Throughout the normal depreciation of pool assets over time, Fixed Capital Outlay (FCO) funding has remained at a constant level and resulted in an increasing number of Deficiency Correction Projects, which currently totals over \$95 million. DMS managed facilities face increasing hardships as major maintenance items are deferred to the next year and the service and investment value of the pool continues to diminish. In order to remain in compliance with bond resolution requirements the state must pursue an alternative approach in resolving outstanding deficiencies in the Florida Facilities Pool.

The 2004 legislature required state agencies to use reclaimed water for irrigation, aesthetic features, cooling water, and other useful purposes to the greatest extent practicable. Actions included an assessment of the potential no-costs as well as opportunities requiring appropriations. At the Capital Circle Office Center, a permit has been submitted to reengineer and utilize gray water for irrigation.

#### Real Estate Asset Management

Facilities Management coordinates 9.4 million square feet of space leased from the private sector and other governmental entities and over 5.9 million net square feet of leaseable space in the Florida Facilities Pool. A goal of the Facilities Program is to maximize occupancy of existing state-owned facilities and reduce the amount of private sector square footage leased.

The Florida Facilities Pool rental rate is a composite of facilities costs charged back to the customers in a cost-recovery system to maintain the properties and tenant services. In 2000 the full service rental rate charged to tenant agencies statewide was established at \$15.39 per square foot statewide. In July of 2002 the full service rental rate was reduced to \$14.69 per square foot in order to draw down excess cash in the fund and provide a savings to the tenant agencies. As a result of extending the initial one-year reduction to the current fee per square foot, the Supervision Trust Fund has depleted all available cash reserves and may not meet the requirements set forth in Section 202-H of the bond covenants. In order to provide an influx of revenue to meet current debt obligations, continue to operate the facilities at bond resolution requirements and maintain the fund in good standing, an increase in the full service office rental rate must occur.

The 2005 Legislature provided for a rental increase necessary to bring the Supervision Trust Fund back in balance. This increase was contingent upon DMS producing a Florida Facilities Pool and Workspace Management Initiatives report. This report was delivered, which provided an analysis

of the level of income vs. expenses required for maintaining tenant services and to provide required funding for the maintenance of the state's investment. The proposed rental increase of \$15.86 is below the state market average of \$17.10 currently being paid by state agencies leasing private space in the same market.

Facilities Management assists with the efficient consolidation of space needs, an activity that would normally be required by each of the various state agencies. Throughout the Florida Facilities Pool buildings, Facilities Management will continue to provide the benefits of competitive rental rates for state agencies and the associated benefits of being a long-range owner through the Florida Facilities Pool.

Governor Bush signed Executive Order 04-118, which directs each executive agency to utilize the Department of Management Services as the State's central leasing authority. This requires executive agencies under the Governor and requested all other agencies to enter into an inter-agency agreement with the Department of Management Services to procure and manage all leases of 5,000 square feet or more. The Executive Order also directed each agency to immediately assess current private sector leases and implement strategies to improve space use and lease terms.

The Centralized Leasing strategy includes a regional approach that has resulted in 32 original leases being reduced to four in the Leon County area, for an expected savings of \$62 million over a 15-year term and a tenant improvement allowance increase of \$19 million. A completed market analysis of South Florida has targeted a 10% reduction in current rates, which would provide a \$6.9 million savings over a 15-year term. A Central Florida market analysis is in progress and a market analysis of the Jacksonville area is pending.

The Space Reconfiguration strategy in state-owned buildings requires appropriations in order to convert existing space into achieving the defined standard of 180 square feet per FTE (exclusive of special use areas). Space Reconfiguration results in additional benefits such as better lighting, lower operating costs, reduction of redundant systems (copiers, fax machines, etc.), office standardization, rolling file systems, and aesthetic improvements. Two Leon County area projects were completed. These include the Turlington Building's ninth, eleventh and fourteenth floors (reduced from 302 square feet per FTE to 196 with an expected savings of \$6.2 million over a 15 year period) and the second and third floors of Building 4050 at the Capitol Circle Office Center (reducing from 375 square feet per FTE to 188, with an expected savings of \$7.9 million over a 15 year period). Other state-owned facilities have been identified for reconfiguration in South and Central Florida and will be completed pending future funding. If facilities are restacked, contiguous vacant space in state facilities can be backfilled from higher cost private sector leases in an easier manner than when small pockets of vacant space exist. A five-year strategic plan is currently under development by Ernst and Young, which will specifically address the impact of the Workspace Management Initiative.

The Disposition strategy is designed to reduce the number of functionally obsolete facilities managed by DMS, to increase available revenues from the sale, reduce maintenance costs due to inefficient spaces, place the properties back on the tax roles and reduce the list of building deficiencies to be corrected. Properties currently identified in Leon County are the Johns/Clemons block, the Chevron/319 block and the Warren block. Potential South Florida properties include the Gore Building in Ft. Lauderdale. In Central Florida, the City of Winter Park has offered first right of refusal on the McCarty Building, which is pending an appraisal.

DMS is also engaged in the determination of future development at the Capital Circle Office Center in Tallahassee by developing a business case that outlines development options, agency impacts, parcel reverter ramifications, financial modeling and business justification for the undertaking. The 2005 Legislature provide \$1 million for the planning and design phase of an office building at the Capital Circle Office Center. Conducted by an independent third party consultant, a five-year year strategic plan is currently under development. A Master Strategic Plan for the Management and Development of Florida's Real Estate Portfolio was established out of the need for a comprehensive and integrated process to maximize the performance and flexibility of the portfolio. DMS engaged the expertise of an independent third party consultant, the Ernst and Young's Real Estate Advisory Services Group, for data collection, analysis, and recommendations for developing a master strategic plan. The results of this effort outlined key components by identifying both strategic and tactical actions as well as long-term goals for the successful management of the State's portfolio. This included both state-owned real estate assets as well as leased properties, by market. The initial analysis of the portfolio focuses on the financial status of the inventory as of August 15, 2005. This quantitative financial data was used in conjunction with a modeling program to determine the 'best' and 'worst' facilities in the DMS inventory as well as identified facilities in each market that provided opportunities for beneficial strategic management. Based on the cost, quality of existing space, and their efficiency, recommendations were made using the following factors:

- Existing rates the state was paying in individual markets.
- Costs per FTE as compared to other locations in the market.
- Large amounts of deficiencies requiring correction at a facility.
- High operating costs
- Poor space efficiency per FTE.

Due to time and budget constraints, other qualitative data was not analyzed. However, on-going tactical analysis is now being implemented and action plans are being created and executed from the recommendations contained in the Master Strategic Plan for the Management and Development of Florida's Real Estate Portfolio.

Real Property Management allocates 24,036 parking spaces statewide. Centralized administration ensures that parking facilities owned by the state are utilized to the maximum extent possible, and are equitably provided to members of the state's workforce. Customer service has improved by providing parking forms and other related administrated functions on-line. Additional efficiency are being achieved by extending loading zone permits from one to three years, which has reduced administrative costs for customer agencies.

#### Building Security and Safety

Tasks retained by the Facilities Program from the transfer of Capitol Police to the Department of Law Enforcement (FDLE) include the responsibility for contracting with private companies to provide security at most of the state-owned buildings in the Florida Facilities Pool. This is accomplished through a security provider contract, interagency agreements and tenant agency security contracts. Actions taken included:

- Security assessments were performed as required by 943.0311, F.S. on all buildings, facilities, and structures managed by DMS and submitted to the Chief of Domestic Security.

- DMS provided assistance to the Chief of Domestic Security with obtaining information related to state facilities not managed by DMS through the State Facilities Inventory database.
- Implemented new exemptions to the Public Records law, Chapter 119, F.S., related to the access of both public and private entity building plans and security system documents as well as performed an inventory of the approximately 40,000 printed and electronic documents.

The 2005 Legislature approved new tasks for homeland security, which requires the Chief of Domestic Security to provide instruments and methods to state agencies for determining their security needs and report them in priority order. This task is to include all buildings, facilities, and structures that are owned or occupied (leased) by the agencies. The Chief of Domestic Security is to report to the Governor and Legislature and make recommendations for future enhancements.

#### Fixed Capital Outlay Planning and Appropriations Management

The FCO planning process for maintaining state facilities is conducted on an annual basis for renovation and repair of the Florida Facilities Pool buildings to maintain the public's real estate investment. Interaction with state agencies allows DMS to understand customer requirements and address long range plans to meet their diverse and changing facility needs. FCO Planning prepares the Capital Improvement Program Plan. The Capital Improvement Program includes plans for general repairs plumbing, electrical, heating and air systems and general repairs. The Capital Improvement Program includes plans for renovations to existing buildings and provides the Legislative Budget Request (LBR) to maintain state-owned facilities as required by the contractual covenants of the Bond Building Program. In addition, this planning activity address the correction of deficiencies that exist due to wear and damage, regulatory changes, advancements in technology and upgraded service standards for agency customers. Examples include requirements such as life safety, ADA compliance, environmental, tenant space refurbishment and capital depreciation projects, in addition to new priorities such as homeland security enhancements and recent storm damage remediation. Priorities are determined by the critical nature of the project, impact on the life cycle of the building and tenant needs (e.g., repairs are funded from the rental rate). Funding is critical for the safety of the citizens and employees that conduct the public's business within the buildings, to fulfill the pledge to the Florida Facilities Pool bond investors, responding to hurricane damage, addressing security needs and to protect the value of the real estate assets of the State of Florida.

To establish maintenance of the Florida facilities Pool inventory, the capital depreciation fund was created in 1986 through an assessment of \$1.25 per square foot per the guidelines noted in the Florida Building and Facilities Act, Section 255.518 (5)(b), Florida Statutes. In 1987, this rate was increased to \$1.38, where it stands today. This 1987 rate is insufficient to address the current inventory needs as well as the accumulated Deficiency Correction Projects of the pool facilities. According to the publication Financial Trend Forecaster, the normalize calculation of \$1.38 in 1987 would now be the equivalent of \$2.36 based on the average annual inflation index. To have the same dollar-for-dollar purchasing power today would require a 70.91% increase over the 1987 rate.

Fixed Capital Outlay appropriations management is an essential responsibility of the Executive Branch, pursuant to s. 216.192(1), F.S. This includes implementing appropriations, managing encumbered funds, assuring contract compliance, certifying the budget releases and project



budget management. FCO appropriations management assures that no FCO projects exceed the total appropriation available to the state agency. FCO appropriations management requires knowledgeable and professional level staffing in specific skills areas to assure the process of implementing the intent of the Legislature. FCO appropriations management oversight prepares fund release documentation, tracks and reports FCO appropriations, budget, project schedules, status reports and workload analyses. Without this, taxpayers and the Legislature would not be assured that the appropriated funds are expended in accordance with state law.

The current method of collection and disbursements of the rental revenue through the Supervision Trust Fund is required to ensure the integrity of the Florida Facilities Pool created under s. 255.506, F.S. Providing funds sufficient to meet debt service obligations and support the operation and maintenance requirements of the properties is a public obligation for compliance with the Florida Facilities Pool Revenue Bond Resolution and with Federal guidelines relative to tenant agencies that receive Federal funding.

#### Facilities Management Summary

Facilities Management continuously evaluates the services it provides along with the related costs. Through these evaluations, the program has recognized the need to change business practices through the increased use of automation, better training for field personnel and the outsourcing of facilities maintenance services, where cost effective.

The major cost factors associated with the provision of Facilities Management services are utilities, expenses and salaries. \$14.2 million is funded to pay for the utilities associated with the operation of the 7.9 million gross square feet within the Florida Facilities Pool. Increasing costs of utilities (i.e. fuel and electric rates) resulted in an increase of \$1.6 million in utility appropriation for the 05/06 fiscal/year. \$11.7 million is funded for expenses, which is primarily used to pay for private contractual obligations related to the operations and maintenance of the Florida Facilities Pool. These obligations include contracts for operations and maintenance services, custodial services, elevator maintenance, HVAC maintenance, etc. \$12.4 million is funded for the salaries associated with a significantly reduced 308.5 FTE, which provides for building oversight and maintenance services.

Record-setting utility costs have contributed to budgetary overruns and the inability to properly forecast expenditures for operations over the past 18 months. Capitol Police salary increases have also put pressure on Facilities Management to cut costs out of other necessary programs in order to fund those expenditures. In addition, the failure to pursue a reasonable program of eliminating capital deficiencies has caused many facilities to incur increased operating and maintenance costs that would not occur if the deficiencies were corrected.

#### BUILDING CONSTRUCTION

Building Construction serves as the Owner-Representative on behalf of the State in FCO project management oversight. Building Construction acts in the public interest to ensure that the value received is equal to the funds expended and that the State's safety and construction standards are maintained as mandated by Chapters 216.044, 255.29, 255.31 and 287.055, Florida Statutes, Building Construction provides a resource for the delivery process of public construction projects. In a process that often involves substantial tax dollars, project oversight ensures the public's interest is equitable and executed as intended by the Legislature.

## Project Management Oversight

Project management oversight is provided for the construction, renovation, repair, modification, or demolition of buildings, utilities, parks, parking lots, or other facilities or improvements. The Department contracts with private sector providers for all architectural, engineering and construction manager services. This is accomplished through a competitive selection process mandated by Chapter 287.055(7); Florida Statutes, to assure the best-qualified provider is selected for the specific needs of each individual project. For project funds that are appropriated to the Department of Management Services, Building Construction serves as the Owner-Representative on behalf of the State as mandated by Chapter 255.31(1), Florida Statutes. Some construction project funds are appropriated directly to State agencies that can enter into a fee for services contract with the Department to manage the delivery of their projects as mandated by Chapter 255.31(2), Florida Statutes. Building Construction serves as a valuable resource to state agencies by alleviating tasks that are not a part of their core activities and by providing cost effective delivery of various types of facilities, which address needs specific to the State. Chapter 216.044, Florida Statutes, requires DMS to evaluate state agency and Judicial Branch FCO requests and make recommendations on construction requirements and costs.

FCO project management is a core responsibility of the Executive Branch as it provides oversight of funds appropriated and implements the law as intended by the Legislature. Currently, all design and construction funds managed by DMS are contracted with the private sector providers in that the State retains its residual oversight responsibility but contracts with private industry for the delivery of construction projects. The retained organization is composed of the functions the state must continue to perform, which are policy and managerial in nature. If DMS did not perform these services, it would be required by each agency that may not have the expertise required. Another requirement of Building Construction is to review all State agencies' FCO Capital Improvement Plans. Building Construction historically has managed FCO projects for agencies, such as the Executive Office of the Governor, Department of Agriculture and Consumer Services, Department of State, Department of Environmental Protection, Florida Wildlife Conservation Commission, Department of Law Enforcement, Spaceport Florida Authority, South Florida Water Management District, Veterans' Affairs, Highway Safety and Motor Vehicles, Military Affairs as well as the Legislative and Judicial Branch of the State government.

FCO, Project Management Oversight requires professional level staffing in specific skilled areas to assure the process of implementing the intent of the Legislature. Licensed and professional experts to perform the required tasks are the costs factor of this service. Without this, taxpayers and the Legislature would not be assured that the appropriated funds are expended in accordance with State law. This oversight assures the value received is equal to the funds expended and that the State's safety and construction standards are maintained for the public's interest.

(1) Source: Facilities Accountability Communication Tool leasing data as of June 30, 2005

Note: Quantitative numbers are subject to change as fiscal year final data is available.

## AMERICANS WITH DISABILITIES ACT WORKING GROUP (ADAWG)

ADA compliance is a foundation of all customer service initiatives implemented by DMS in order to enable state agencies, employees and ADAWG customers to deliver or benefit from the Governor's priorities.

The Americans with Disabilities Act (ADA) Working Group (ADAWG) was recreated by Executive Order (03-137) and is maintained to encourage a cooperative effort of compliance with the ADA between all customers including state and local governments, the education community, the business community, the private sector, and the community of people with disabilities. In this collaborative effort, ADAWG is charged with providing information, referrals, education, and recommendations for compliance and implementation of the ADA in order to increase the independence and quality of life for citizens of Florida with disabilities. ADAWG's activities and areas of focus are on employment, public accommodations, transportation, state and local government services, telecommunication, and accessible electronic information. ADAWG tracks all federal and state court decisions affecting the structure, enforcement, or any other aspect of the ADA, as well as legislation at the federal and state level which impact the lives of persons with disabilities residing in the State of Florida.

The ADA Working Group serves as the administrative entity that houses and oversees the Clearinghouse on Disability Information and the Real Choice Partnership Project.

The ADA Working Group board members meet and hold public meetings on a quarterly basis. These meetings are held across the state to allow citizens easy and equal access to government. The public hearings focus on current issues facing people with disabilities and assist ADAWG in recognizing and remedying any gaps in state compliance.

The trends in the types of services needed have changed drastically over the last three years and the ADA Working Group has stepped up to the challenges by functioning as the lead source of technical information, amending training plans to serve hot topic issues within the disability community and state government, expanding the state employees' professional knowledge to better serve our customers and, most importantly, staying on the cutting edge of information in order to provide excellent guidance to the Department of Management Services, other state agencies and all of our customers.

One current challenge for state agencies is providing electronic information in such a way that people with disabilities can access the information. On June 24, 2005 the Governor announced the creation of an Accessible Electronic Information Technology (A-eIT) Task Force to provide guidance in improving the accessibility of the state's electronic and information technology to persons with disabilities. Created by Executive Order 05-133 the Task Force will make recommendations regarding the accessibility of current state web-based systems and it shall adopt Section 508 of the Rehabilitation Act as amended as the standard for the state and the basis for their recommendations. The purpose is to improve accessibility so that all Floridians can participate and enjoy the benefits of state services, programs and opportunities. It is expected that the time ADAWG devotes to Accessible Electronic Information and Technology (A-eIT) will continue to increase as the state transitions further into eGovernment since all such technology needs to be compliant with the provisions of the ADA.

Another challenge for ADAWG and DMS is to institutionalize contractual practices that assure and require demonstrations of accessibility in all purchases of technology programs and hardware while we further our efforts to guide all state agencies in the area of web page accessible design.

The ADA Working Group plans to continue to accelerate ADA compliance in Florida by:

- Reestablishing quarterly ADA Coordinator networking meetings for state ADA Coordinators, and the creation of a certification process to improve classification status and importance of their role in the state workforce;
- Continuing to submit recommendations regarding necessary changes to statutes, administrative rules, policies, and/or procedures of the state in order to remove any conflicts with the ADA, remove any negative or derogatory references towards people with disabilities, and establish a coordinated system to receive requests for alternative formats, production, and dispersion in a cost-effective, simplified manner;
- Continuing complaint resolution activities;
- Continuing educational seminars on the ADA and related topics throughout the State of Florida;
- Continuing the provision of a biennial statewide training by offering continued education credits to licensed professional in the areas of building construction, rehabilitation counseling, educators and law; and,
- Providing the leadership in formulating the state's efforts to improve compliance with the Olmstead decision. (See Real Choice Partnership Project)

#### CLEARINGHOUSE ON DISABILITY INFORMATION PROGRAM

The Clearinghouse on Disability Information Program was created by Executive Order 03-137 as a commitment to the concepts, duties, responsibilities and functions of the information and referral services created by House Bill 1519, building upon the leadership and activities of the Americans with Disabilities Act (ADA) Working Group. Expanding services to people with disabilities has been one of the Governor's highest priorities. The purpose of the Clearinghouse is to eliminate the confusing and expensive process of calling various state departments and agencies to acquire information on disabilities and services. The goal is to make information on all resources for persons with disabilities easily available and readily accessible. An additional standard of service is to make sure callers obtain a realistic expectation of the limitation of services as they exist currently in state government, as mandated by the Executive Order.

The Clearinghouse is a comprehensive, efficient "one-stop" central point of contact to access information and referral services for people with disabilities, families, agencies, providers of services and the private business community. The Clearinghouse helps promote the economic growth of Florida's state government and economic development organizations by bringing together a positive blend of resource materials needed to meet the needs of our disability population. Our program has linked individuals to needed community resources, provisions, services, and facilities.

Since implementation of the program in 2001, the demand for services continues to escalate at more than a 100% increase each year. The number of callers assisted began at 900 for the first

year and the program is currently fielding more than 33,000 calls the fourth year. It is not evident that the demand for disability information has reached its capacity or leveled off.

Another trend revealed this year is reflected in the quickly increasing numbers of calls related to service animal owners being denied access into government settings, recreational settings and places of business. The complaints have escalated to the point where an effort to train law enforcement officers is being formally planned and implemented with the support of a senate office and staff.

New program trends include an increasing number of calls from outside of Florida seeking information about moving to Florida in order to access Home and Community Based Medicaid Waiver services despite the growing waiting lists.

The Clearinghouse continues to be recognized as a best practice model and efforts to duplicate the program are underway in other states.

A new group of people with disabilities is emerging and expanding as armed forces personnel return home from the Middle East. Many of their needs are quite extensive as the result of becoming a person with a disability. Access to basic information about resources is the primary request, followed by benefit information, veteran's preference in employment and how to seek a job as a person with a disability.

#### REAL CHOICE PARTNERSHIP PROJECT

In September of 2001, the ADA Working Group received a three-year, two million dollar grant from the Centers for Medicare and Medicaid Services (CMS) to implement and administer Florida's Real Choice Partnership Project (RCP). This grant was recently extended through October 30, 2006. The grant supports Florida's Olmstead movement, and ties in President Bush's New Freedom Initiative for individuals with disabilities. The federal grant program creates effective and enduring improvements in community long-term support systems to enable children and adults of any age who have a disability or long-term illness to:

1. Live in the most integrated community setting appropriate to their individual support requirements and their preferences;
2. Exercise meaningful choices about their living environment, the providers of services they receive, the types of supports they use and the manner by which services are provided; and
3. Obtain quality services in a manner as consistent as possible with their community living preferences and priorities.

Florida's RCP Project grant proposal identifies and implements improvements in community long-term support systems to enable people who have a disability or long-term illness to live and participate in their communities. The grant's goals are summarized below:

Goal 1: Create linkages among the key stakeholders that will result in communication and coordination of services for people with severe disabilities and long-term illnesses.

Goal 2: Improve the delivery of services to consumers by increasing access to providers and streamlining the Aged and Disabled Adult Waiver, the Project AIDS Care Waiver, the Traumatic Brain Injury and Spinal Cord Waiver, and the Assisted Living for the Elderly Waiver.

Goal 3: Create a comprehensive single point of contact/inquiry for Floridians with disabilities and/or long-term illnesses, caregivers and service providers to obtain information and links to state and local resources.

Goal 4: Develop community capacity to assist people with disabilities and long-term illnesses to live in integrated community settings of their choice, when appropriate, as demonstrated in three Florida counties.

Florida's work is receiving statewide and national recognition in several areas that address trends and conditions of persons with disabilities in the state:

1. Staff has implemented three long-term care pilot site contracts to examine best practices for assisting people with disabilities and long-term illnesses to live in integrated community settings. These pilots are administered by the United Way of Palm Beach County and Gulf Coast Jewish Family Services, Inc. They will operate through March of 2006, at which time it is expected that they will be sustained by the local communities.
2. Grant staff has executed an agreement with the University of South Florida to provide technical assistance on affordable and accessible housing to the pilots, and to help facilitate cross-disability a housing model that can be replicated statewide. This agreement has been extended through March 2006.
3. Grant personnel supported the first demographic research on the relationship of housing and persons with disabilities in Florida. This research project was spearheaded by the University of Florida Shimberg Center for Affordable Housing. This work has been incorporated into Florida's Web-based Housing Data Clearinghouse providing access widespread access to the information.
4. The most comprehensive Medicaid Waiver analysis conducted in Florida is in its final review process. This analysis is being tailored around Florida's Medicaid reform efforts, and will prove invaluable in addressing the spiraling costs of Medicaid services in the state.

In addition to the initiatives above, RCP staff members are working to develop the following:

1. Nursing Home Transition Initiative: A Nursing Home Transition Initiative in partnership with the Agency for Health Care Administration (AHCA) Medicaid program, our pilot sites, Centers for Independent Living and other organizations is on hold pending contract review. AHCA requested that RCP's staff work with the agency to develop the agencies Nursing Home Transition Initiative to move persons out of nursing homes into home and community based services. This program would initially be implemented in the pilot site areas to develop and test a best practices transition model. This model will then be replicated statewide. However, delays by AHCA have placed the program in jeopardy for two consecutive fiscal years losing legislative appropriations in excess of 5 million dollars.
2. Emergency Preparedness: Grant staff members are developing emergency preparedness resources for persons with disabilities. The Program received a small grant in the amount of \$3,000 to create, disseminate, implement and evaluate of set of comprehensive best

practice guidelines for ensuring that Florida's disaster response efforts comply with the Americans with Disabilities Act (ADA). RCP has also created a public/private partnership to respond to the Florida Department of Health's desire to develop first-responder bioterrorism standards and training for persons with disabilities.

3. Accessible Information Technology program: The staff has implemented a unique accessible electronic and information technology software loan program to state agencies. Activities include: creation of an interagency cross-disability testing team; testing state agency information technology application development and privatized e-commerce; developing administrative rules; working to facilitate accessible information technology (IT) procurement; and, providing training and technical assistance to state agencies, IT companies, and non-profit disability organizations.

The RCP expects to receive a no-cost extension to at least run through September of 2006. Grant staff also actively participates in a variety of state and national conferences and workgroups. Staff members conduct presentations and public hearings with a variety of organizations across the state. Rutgers University, in partnership with the Centers for Medicare and Medicaid Services, Department of Health and Human Services, provides oversight of the program.

# Enterprise Information Technology Services

## Trends and Conditions Statement

Based on funding actions taken within the FY 2005-06 General Appropriations Act (GAA), effective July 1, 2005 functions previously performed by the State Technology Office (STO) were placed under the umbrella of the Department of Management Services' (DMS) Enterprise Information Technology Services (EITS). Under the leadership of the Deputy Secretary for Information Technology, the EITS encompasses the three budget entities previously overseen by the STO: Telecommunications Services, Wireless Services, and Information Services. With regard to statewide information technology (IT), the focus of the former STO's mission had been in two primary areas, Enterprise Operations and Enterprise Strategies, defined as follows:

**Enterprise Operations** is a centralized IT service utility for state government, municipalities, political subdivisions, educational institutions, public safety agencies, and qualifying non-profit organizations, offering a wide range of telecommunications and managed technology services. Enterprise Operations also addresses a number of regulatory and public safety concerns on behalf of state and local entities, including coordination of Enhanced 911 (E911) service, mutual aid radio support, and the Statewide Law Enforcement Radio System (SLERS).

**Enterprise Strategies** sets statewide strategic direction and policy for implementing IT and promoting excellence in IT investment and project management. The enterprise governance model seeks to employ standardized investment management, risk management and portfolio management practices to ensure that state investments in IT are made in a judicious manner. The former STO sought to implement this approach by developing guidelines and standards for project management and establishing rules, policies, procedures and standards governing project management and IT investment management. For example, the Information Technology Life Cycle rule was published in FY 2004-05, establishing the minimum standards and a best practice model for all agencies to adopt a structured approach for life cycle management of information technology resources.

As restructured in the FY 2005-06 GAA, the primary focus of the EITS will be on Enterprise Operations. As such, the following are anticipated to be some of the important initiatives for the Program:

- **Oversight of Data Center Operations and Applications Management:** As of December 30, 2004, EITS, (formerly STO) terminated its *MyFlorida Alliance* contracts with BearingPoint and Accenture, the primary vendors who had been providing data center operations and applications management services to the former STO on an outsourced basis. The primary reasons for contract termination were deficiencies in the contracts and in the planning and procurement processes that led to their creation. During the 90 days leading up to termination, the former STO engaged in a business case evaluation process that ultimately recommended a staff augmentation approach as a short-term solution to providing these services after December 30, 2004. Based on this analysis, contracts were signed with three different vendors to provide staff augmentation services for a 12 month period ending December 30, 2005. To date, the staff augmentation approach has worked well and resulted



in significant operational cost savings. As part of its responsibilities for this area, the EITS is currently engaged in another business case evaluation process, this one to determine the optimum long-term model for the provision of these services. It is anticipated that this business case will provide a recommendation for a post-December 2005 service implementation model from one of the following: 1) continuation of staff augmentation; 2) adoption of a revised service outsourcing approach; or 3) adoption of complete service insourcing, the model used prior to November 2003. Based on the recommended service provision model, it is possible that EITS could require that additional positions be re-established, from as few as 10 FTE to as many as several dozen.

- **Next Generation State Telecommunications Network:** For over two years, the former STO was engaged in an evaluation and negotiation process with private vendors to design and implement a successor to SUNCOM -- the current statewide telecommunications network -- in order to address the continuing rapid growth in telecommunications services and utilization. As envisioned, this initiative would establish a public/private partnership offering data, voice, video and Internet services all over a single IP network. This next generation network would also provide a resilient core design that gives the state a more flexible and efficient communication platform. The former STO was unable to come to a final agreement with the vendors that was satisfactory to all parties, and negotiations were terminated in the spring of 2005. However, given the importance of this initiative EITS is undertaking a process of evaluating its options for moving forward with this project.
- **Public Safety Communications:** Initiatives in this important area include managing the ongoing development and use of the Statewide Law Enforcement Radio System (SLERS), coordination of wireless 911 service development throughout the state, and administration of federal domestic security grants for the design and implementation of public safety communication interoperability and mutual aid channels. The Task Force on State Agency Law Enforcement Communications provides information on member agency needs for planning, designing, and establishing the statewide radio communications system to serve law enforcement units in this state. The SLERS provides Florida law enforcement with a state-of-the-art digital simulcast 800-megahertz radio communications system. This system is being developed through a public/private alliance, and when completed (scheduled for December 2005) this shared system will serve over 6,500 state and local law enforcement users with over 14,000 radios in patrol cars, boats, motorcycles, and aircraft wherever they are in the state.

Program support continues to be provided to the Wireless 911 Board, the group statutorily responsible for ensuring that each county in Florida fully develops its emergency 911 services so that ultimately no area of the state lacks coverage. Support includes serving as a member of the Board, providing administrative services, and ensuring distributions of resources to counties and service providers. As shown in Board reports, counties and service providers continue to make progress, and should continue to do so for the foreseeable future.

Finally, EITS continues administration of over \$35 million in federal domestic security grants provided to the state for the development and improvement of emergency communications systems. These grants, for the implementation of emergency communications interoperability and additional mutual aid channel coverage, will ensure that Florida's first responders to a disaster or other emergency will be able to seamlessly communicate among

themselves wherever they may be located. Both the interoperability and mutual aid projects should be completed by June 2006.

**Disaster Recovery:** Early in FY 2004-05, through one of its vendor partners the former STO began offering comprehensive IT disaster recovery services to state agencies and other customers. Since that time, the former STO signed contracts with almost a dozen state and local entities to provide them with the available disaster planning and recovery services. It is anticipated that EITS will continue to grow this service as time goes on, signing up additional state and local customers.

**MyFlorida.com State Portal:** The state's Internet portal, [www.myflorida.com](http://www.myflorida.com), gives computer users access to a wealth of information about Florida, for both the public and private sectors, with the same convenience they experience using commercial Internet services. MyFlorida.com provides a single, consistent interface through which users can access a vast array of state data and services. Although funding for the portal has been significantly reduced from previous levels, EITS will continue to operate and maintain the portal at a basic level for the foreseeable future.

Performance measures previously linked to the former STO will also be applicable to EITS, inasmuch as most of them are related to enterprise operations. Indeed, the former STO's -- and now EITS's -- primary outcome measure is the percent of customers satisfied. However, because many of the performance measures originated from other organizational entities that were merged to form the former STO, they do not adequately assess or measure current IT operations or the progress made in this area. This is especially evident with the measures that relate to managed services (data center operations and applications management), as they focus on only one platform or reflect operations that have dramatically changed or no longer exist. EITS will continue to work with the appropriate parties to design and implement performance measures that are more indicative of how the program operates.

To summarize, EITS will continue the former STO's primary operational objective of providing quality enterprise-level IT services to its diverse customer base at rates that are reasonable, yet still allow for the recovery of all program costs. It is anticipated that the next couple of years will see a focus on improving services already being provided, developing the tools and processes required to ensure that all EITS are being provided to customers at the maximum possible levels of efficiency and effectiveness.

# Public Employees Relations Commission

## Trends and Conditions Statement

Pursuant to Article I, § 6, and Article III, § 14, of the Florida Constitution, Chapter 120, Sections 110.227, 112.0455, 295.07-.11, and, principally, Chapter 447, Part II, Florida Statutes, the Public Employees Relations Commission (PERC) handles all cases involving public sector employment and labor law including certification and registration of unions, unfair labor practices, career service matters, drug-free workplace issues and veterans preference cases. Florida Statutes, § 187.201(21), provides that it is a state goal that government economically and effectively provide the amount and quantity of services required by the public. PERC helps the state achieve its goal by promoting harmonious management/employee relations. This is achieved by expeditiously resolving local and state government employment and labor law controversies in a fair and economical manner and by preventing work stoppages.

PERC is a quasi-judicial tribunal with the primary function of mediating and resolving labor/employment disputes among hundreds of thousands of state and local government employees, job applicants, and their public employers. The authority for quasi-judicial tribunals is contained in Article V, § 1, Fla. Const.

Specifically, in regulating collective bargaining, PERC acts as the impartial to mediate impasses and disputes, monitors those disputes possessing the potential to become strikes, prevents strikes and imposes punishment on strikers, if necessary. PERC ensures that public sector unions provide pertinent financial and officer disclosure through its licensing desk. It decides disputes concerning bargaining unit configuration/modification and alleged unfair labor practices involving state and local governments pursuant to legislative instructions and case precedent. PERC also issues declaratory statements to avoid future labor disputes and conducts elections throughout Florida for state and local government employees voting for establishing or maintaining union representation. These functions are constitutionally required. Art. I, § 6, Fla. Const.: Dade County CTA v. Legislature, 269 So.2d 684 (Fla. 1972).

PERC also acts as the neutral to mediate and, if necessary, decide career service disputes between state employees covered by civil service, and their employers. This function is constitutionally required. Art. III, § 14, Florida Constitution. In 1997, a blue-ribbon Legislative committee that would be recognized by this Administration determined that the Commission was a cost efficient means of providing this required due-process function. Also, in 2001 the Legislature thoroughly reviewed PERC and its various jurisdictions and made significant changes. (SB 466 – “Service First”)

PERC also mediates and, if necessary, decides employment disputes regarding drug testing, whistle-blower and forced retirement for state employees. It also decides veterans’ employment disputes for both state and local governments. Federal and state constitutional due process of law requires that a neutral adjudicate these disputes.

As with any quasi-judicial agency, it is difficult to predict with any degree of certainty the future demand for PERC’s services, since the advocates practicing before it control demand. For the three-year period between 1996 and 1999, PERC had 1,334, 1,341, and 1,307 filings,

respectively. Case filings were reduced in FY 1999-00 to 1,210 filings. This trend was repeated in FY 2000-01, and FY 2001-02, during which 1,229 cases and 1,150 cases were filed, respectively. In the first 11 months of FY 2004-05 case filings have decreased to 1,020.

While career service case filings decreased over the previous 3-year period, they appear to be stabilizing when compared to last year's data. The reduction in career service cases may be largely attributable to the major reforms in this area that were made through the Service First legislation in 2001. Significantly, this legislation removed attorney's fees and costs from being assessed when an employee is wrongfully disciplined, thereby eliminating the possibility for legal representation based upon a contingency fee arrangement. Some of the historical decrease is also a consequence of changes in what is considered to be inputs (filings) as defined in 1999 for performance based program budgeting.<sup>1</sup>

The significant 2001 legislative revisions of Chapter 447, Part II, and Section 110.227, Florida Statutes, and the reorganization of State agencies occurring between 2000 and 2002, makes precise forecasting for the FY 2004-05 virtually impossible. It is very likely the past years will not provide a reliable base line due to the aforementioned legislative actions. Also, it should be recognized that labor activity has been affected by a number of factors, including the abolishment of the State Board of Regents, which had a number of certified bargaining agents throughout the statewide university system. Upon the implementation of the eleven separate boards of trustees as independent public employers on January 7, 2003, significant labor activity occurred at those institutions and will continue to do so over the next several years. Furthermore, recent decisions of the Florida Supreme Court have expanded PERC's jurisdiction to cover deputized personnel, including deputy sheriffs, and attorneys employed by the State. Given these factors, we would generally predict an increase in labor cases over the next five years. The labor cases are publicly visible and thoroughly litigated. Thus, the actual amount of work performed by the diminished PERC staff has actually increased.

Although data for the FY 2004-05 has not been completed at the present time, it appears that case filings during this fiscal year will be around 1,113, which is a decrease of approximately 580 cases.<sup>2</sup> This is a decrease in case filings of approximately 34%. This may or may not be statistically significant and, thus, it is assumed that filings will remain essentially the same, if no other factors were to be considered. However, due to the factors addressed above, it is anticipated that there will be an increase in labor filings of approximately 3% for each of the next 5 years. This 3% increase in case filings (inputs) will be reflected in a 3% increase in outputs (disposition of cases) over this 5-year period. Thus, case outputs are projected as follows.

2005-2006 = 1,277  
2006-2007 = 1,315  
2007-2008 = 1,354  
2008-2009 = 1,395  
2009-2010 = 1,437

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<sup>1</sup> In creating the measures and standards for performance based program budgeting, PERC eliminated the counting of special master cases, as these cases are largely privatized. Thus, we have corrected this document to delete these cases from the FY 1996-97, FY 1997-98, and FY 1998-99 totals.

<sup>2</sup> This projection is based upon case filings in June 2005 to predict filings for June 2006.

# **Florida Commission on Human Relations**

## **Trends and Conditions Statement**

Mission: To prevent unlawful discrimination by ensuring people in Florida are treated fairly and are given equal access to opportunities in employment, housing, and certain public accommodations; and promote mutual respect among groups through education and partnerships.

The Florida Commission on Human Relations (FCHR) was established in 1969. Throughout its thirty-five year history, the Commission has endeavored to serve the people of Florida by assuring equal protection against discrimination in employment, housing, and certain public accommodations. The Commission accomplishes its mission by enforcing the laws against discrimination, and educating businesses and citizens to avoid discriminatory practices.

The FCHR recognizes that the State of Florida will continue to become increasingly diverse and complex over the next 25 years. Currently, Florida ranks second only to California in diversity among states with large populations. According to the United States Census Bureau, the Hispanic population of Florida will more than double between 2000 and 2025, from 2.4 million to 4.9 million. During this same timeframe, Florida's minority population will increase from 5 million to 9.1 million, becoming 55 percent of the total population.

If Florida is to become a center for culture, innovation, and entrepreneurial activity, diversity and tolerance must be recognized as hallmarks of our communities. According to the New Cornerstone study published by The Florida Chamber Foundation, communities that have been most successful at generating innovations and producing new business activity have nurtured and invested in diversity.

In addition to becoming a more culturally diverse state, Florida will continue to become complex in industry and technology. New industries and technologies have affected an expanding business environment to complement Florida's traditional focus on tourism and agriculture. The growth of high-tech businesses clustered around Florida's major universities is just one element in this growth. Another is the growth of web-related technical firms spurred on by the increasing use of the Internet to conduct business.

To meet Governor Bush's vision of "serving as an enabler to achieve the State's business goals and challenges, including a smaller, more effective, more efficient government," the FCHR is addressing the current inventory of cases, upgrading technological hardware and software, and reengineering our outreach program to foster greater interaction among diverse groups.

In order to become more effective in investigating and resolving allegations of discrimination, the Commission will continue on-site investigations. On-site investigations are essential to the investigative process. Investigators evaluate firsthand the conditions under which the alleged discrimination occurred; they travel to various locations as they investigate cases to meet with the parties associated with a discrimination case face-to-face. These opportunities assist investigators in conducting a more prompt, thorough and detailed investigation. Greater focus on staff development will continue to sharpen their investigative techniques, writing quality, and

understanding of the law; thereby improving the overall quality of services provided to the people of Florida.

For over 15 years, the Commission has been using a nationwide computer system administered by the Equal Employment Opportunity Commission. This system is neither user-friendly nor does it allow states to customize applications to meet their demands. In Fiscal Year 01-02, the Legislature appropriated budget to allow the Commission to build Phase I of a Web-based system consisting of a new case-management system, online technical and administrative assistance, and other attributes to help increase our ability to serve the public. We know that much of the paperwork that we handle can be reduced through electronic workflow and document processing. Because of the implementation of a new case management system and the internal reorganization of staff we anticipate that the percent of cases resolved within 180 days will increase from 59% (FY 2000-01) to 75% (FY 2005-2006).

Our web-based system will have direct relevance to employers. The system will provide a best practices database accessible through the Internet that will enable employers to review examples and procedures and hopefully reduce discriminatory behavior. The FCHR believes that the best form of enforcement is education. Thus, the FCHR will continue to work with employers in a cooperative spirit to demonstrate that fair and equal treatment of their employees is essential to a productive workforce.

While cultural diversity is positive, it can also create problems in that different ethnic groups, races, religions may view each other with suspicion. Suspicion leads to fear and often to anger, which can result in harmful actions. Thus, the challenge and opportunity is to use limited resources to defuse potential discriminatory situations by working with community groups and others to educate Floridians on the positive values associated with equal treatment for all. FCHR initiatives focus on partnerships with communities, organizations, businesses, education groups, advocacy groups, and local, state, and federal governments. A primary initiative, introduced in 2003, is to bring the operations of the FCHR closer to Florida's residents as part of an outreach program that coincides with Commission meetings held across the State. Informational and educational workshops and other events presented in conjunction with Commission meetings give residents an opportunity for face-to-face interaction with the Commission, which allow residents to discuss issues of great concern to them.

During the year, FCHR underscored its commitment to "Building Inclusive Communities" by taking its services directly to the people. FCHR met with business and community leaders and held forums to facilitate discussion of problem solving. Also, this year we have implemented more youth-based programs as a proactive strategy to ensure the development of socially responsible leaders in every community. The Commission also plans to take a proactive role in being alert to situations before they materialize as discriminatory events. This will be accomplished through a variety of mechanisms, some of which are linked to the proposed web-based system. Working with libraries and community groups throughout Florida, we will publicize our web-based system and its capabilities to provide educational information to employers, employees and housing providers. Working with colleges and universities in Florida, we will conduct random sampling to identify potential problem areas and to ascertain how the public views the work of the Commission. Working with employers and community groups, we will conduct a series of workshops and forums in key areas of the State to focus on efforts to reduce inter-group tensions, thus promoting positive relations throughout Florida communities.

To meet Governor Bush's vision of a smaller, more effective, and more efficient government and to meet our mission, The Florida Commission on Human Relations continues to advance

technology, reorganize internally, develop staff, and create community partnerships. Through our community initiatives, we will focus on the essential element of our mission—helping people in Florida achieve their full potential in a society that values equality and human rights.

# Office of Supplier Diversity

## Trends and Conditions Statement

The mission of the Office of Supplier Diversity is to robustly expand economic opportunities for Minority/Women Business Enterprises (MWBE's) by focusing on Customer Service to better enable state agencies and employees to deliver more efficient and effective service to the people of Florida.

In accordance with Chapter 255, s.255.102, Contractors Utilization of Minority Business Enterprises; Chapter 288, Part IV, s.288.703, Definitions; s.288.7031, Application of Definitions; s.288.706, Minority Business Loan Mobilization Program; and primarily Chapter 287, , with specific reference to s.287.0943, Certification of Minority Business, s.287.0931, Statewide and Interlocal Agreements...; s.287.094, Minority Business Enterprise Programs...; s.287.09451, Powers and Duties ... it is in the interest of the public welfare to meaningfully assist minority business enterprises that are vital to the overall economy of this state. The Office of Supplier Diversity provides leadership and guidance on certification and the registration of minority vendors and as well as in providing assistance in the utilization of M/WBE's that provide goods and services to state agencies and universities.

The office is responsible for measuring the amount of spending by state agencies with certified minority businesses and conducting compliance audits of certified minority businesses and providing outreach to state agencies, organizations and vendors in all matters relating to state contracting opportunities. The office is charged with the responsibility of implementing the Minority Business Loan Mobilization Program and the Governor's Mentor Protégé Program and serves as a liaison between state agencies and minority vendors by reviewing state agency 90 day spending plans and informing vendors about contracting opportunities. Also the office reviews contract documents to ensure that the language is not prohibitive to minority participation and to ensure that minority vendors will have a fair opportunity to compete.

The number of certified minority businesses has continued to increase over the years with the establishment of reciprocal agreements and one way certification with local governmental entities. These agreements allow the State of Florida to recognize vendors as certified minority businesses if they have been certified with local governments that meet the basic eligibility criteria. There is a need, however, to restructure and re-institute many of these agreements, especially in light of the recent change to an electronic registration and certification system, MyFloridaMarketPlace. It is anticipated that the number of certified minority businesses will continue to increase as more minority business enterprises avail themselves of the automated certification procedures within MyFloridaMarketPlace. On-line certification is intended to reduce administrative functions and provide vendors with the capability of managing their own information regarding commodities and services offered to the state. The Office of Supplier Diversity anticipates that this process will reduce the current twenty day application processing time to fifteen days by fiscal year 2005-06.

The Office of Supplier Diversity is focusing on three key initiatives over the next 3 to 5 years. The first key initiative is to increase the reservoir of certified minority businesses available to provide goods and services to the State of Florida. This will be accomplished through



streamlining the certification process and allowing minority vendors to be certified on-line via the internet through the portal of MyFloridaMarketPlace. In addition, the Office of Supplier Diversity will expand the existing database tracking system through MyFloridaMarketPlace to ensure that state spending with minority vendors is more accurately identified. This expansion will involve linking the existing database to the State's purchasing subsystem, (SPURS) and the Profiler database, which is currently used by the Office of Supplier Diversity, and it will create new synergy between the two listings.

The second key initiative is to create a system for state agencies to contract with minority vendors using a race and gender neutral program, which is the primary intent and focus of the Governor's One Florida Initiative. This will involve promoting equity in contracting by conducting outreach activities and improvements to tracking and monitoring of contracts, as well as by reporting more accurately certified minority business impacts in agency purchasing activities. Outreach activities will include matchmaking, trade fairs, regional training workshops, and seminars. Training is provided for the public and private sector and will include diversity training, electronic procurement training, and economic development workshops.

The third key initiative is to maintain the integrity of an anti-discrimination and fraud enforcement program. In accordance with Section 287.0943(2), F.S., the Office of Supplier Diversity will conduct audits of certified minority businesses that meet the \$100,000 benchmark on an annual basis. The Office of Supplier Diversity will also conduct random audits of some of the remaining certified minority businesses. In addition, the Office of Supplier Diversity will be coordinating with agency Inspectors General as complaints of discrimination are filed against individuals or businesses.

# Task Forces and Studies in Progress

We have conducted a review of task forces and studies performed by the Department. The following is a list of task forces and studies by program:

Program: **Human Resource Support - Americans with Disabilities Act Working Group/Real Choice Partnership Project-Grant.**

- Title: Accessible Electronic Information Technology Task Force (A-eIT)

Description: On June 24, 2005 the Governor announced the creation of an Accessible Electronic Information Technology (A-eIT) Task Force to provide guidance in improving the accessibility of the state's electronic and information technology to persons with disabilities. Created by Executive Order 05-133 the Task Force will make recommendations regarding the accessibility of current state web-based systems and it shall adopt Section 508 of the Rehabilitation Act as amended as the standard for the state and the basis for their recommendations. The purpose is to improve accessibility so that all Floridians can participate and enjoy the benefits of state services, programs and opportunities.

- Title: Real Choice Partnership Consumer Task Force

Description: The Task Force Provides advisory information that is from the perspective of consumers who have disabilities or long-term illnesses that are at risk of institutionalization. The task force members are advocates, parents or consumers who are cross-disability, cross-age group, and cross-cultural in composition. Each member represents a cross-section of a population in need of community-based care. The Task Force is a requirement of the Real Choice Partnership Grant to assure consumer input in all grant goals and objectives.

- Title: Real Choice Partnership Coalition

Description: The Coalition, an open-ended invitation group of consumers, advocates, non and for-profit representatives, faith-based program organizers and government employees delegated to the project from the departments that address the specific needs of individuals with disabilities or long-term illnesses. The purpose of the coalition is to have support and input from all sectors and communities on the goal and objectives of the Grant.

Program: **Enterprise Information Technology Services**  
Information Technology

- Title: The Task Force on State Agency Law Enforcement Communications.

Description: This Task Force is to advise the EITS of the member-agency needs for the planning, designing, and establishment of the statewide radio communications system to serve law enforcement units of state agencies, and to serve local law enforcement agencies through a mutual aid channel.

- Title: Chief Information Officers Council.

Description: The Chief Information Officers Council was established to facilitate the sharing and coordination of information technology resources management issues and initiatives among the agencies.

- Title: Digital Divide Council.  
Description: The Digital Divide Council is responsible for the planning and implementation of programs that are aimed at increasing citizen access to information technology resources.
- Title: Wireless 911 Board.  
Description: The Wireless 911 Board, with oversight by the EITS, was established to administer the E911 fee (under F.S. 365.172(8)) and distribute funds to counties and providers to improve the public health, safety, and welfare through the development of wireless emergency telephone assistance.
- Title: SLERS Quarterly Status Reports  
Description: Second quarter release of funds is contingent upon the Department of Management Services providing a quarterly status report on the Statewide Law Enforcement Radio System Project and a plan for transitioning, reducing, and reassigning project staff and resources upon project completion. The project shall be completed in December 2005 with the replacement of the original Phase 1 and Phase 2 Motorola radios. The plan shall describe the roles and responsibilities of the remaining staff in the ongoing management and administration of the statewide law enforcement radio system contract. The plan shall be submitted to the Executive Office of the Governor, the chair of the Senate Ways and Means Committee, and the chair of the House Fiscal Council no later than September 30, 2005.
- Title: Portal Three Year Plan.  
Description: By December 1, 2005, the Department of Management Services shall prepare a detailed three-year plan for the portal describing the business objectives, expected outcomes, project milestones, deliverables, and anticipated expenditures for the project. The plan shall be submitted to the Governor, the President of the Senate, and the Speaker of the House of Representatives.
- Title: Interoperable Communications Five Year Plan.  
Description: Interoperable Communications Solution and reappropriated funds are contingent on the submission of a 5-year plan by the Department of Management Services to the Executive Office of the Governor, the chair of the Senate Ways and Means Committee, and the chair of the House Fiscal Council on the development and implementation of the state Interoperability Network and Mutual Aid Buildout including the proposed governance structure and progress on implementation. The plan shall be submitted by October 1, 2005, and include but not be limited to:
  1. Detailed budget estimates for the project for the next five fiscal years beginning with Fiscal Year 2005-2006. The estimates shall segregate state costs from costs paid for by other project participants.
  2. Identification of factors that may influence future costs including, but not limited to, equipment, maintenance, and replacement costs.
  3. A funding strategy to address continued network operation following future reductions in federal funding and other unanticipated changes in available funding.

4. Detailed timelines noting major milestones and projected budget expenditures required to reach project completion by the target date.

5. Measures to assess project performance, timeliness, and cost efficiencies achieved.

The proposed governance structure shall include an outline of the current project components for which the department is responsible and those project functions that have been privately contracted. The governance structure shall specifically address oversight of project funding, operation, and administration, including contract management.

**LRPP Exhibit I: Agency Workforce Plan - DMS**

<b>Fiscal Years</b>	<b>Total FTE Reductions</b>	<b>Description of Reduction Issue</b>	<b>Positions per Issue</b>	<b>Impact of Reduction</b>
FY 2006-2007	46	Enterprise Information Technology Services (EITS)	20	Planned Reductions with Implementation of People First
		Division of State Group Insurance	26	Planned Reductions with Implementation of People First
FY2007-2008		DMS greatly surpassed the target workforce reductions. There are no additional reductions currently planned for FY 2007-2008, however, DMS is continuing to review programs and will make the determination if additional services could be more effectively outsourced or privatized.		
<b>Total*</b>	<b>46</b>			
* to equal remainder of target. The Department of Management Services has surpassed the target.				

**LRPP Exhibit II - Performance Measures and Standards**

<b>Department: DEPARTMENT OF MANAGEMENT SERVICES</b>	<b>Department No.: 72</b>
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Program: Administration Program	Code: 72010000
Service/Budget Entity: Executive Direction and Support Services	Code: 72010100

Approved Performance Measures for FY 2005-06	Approved Prior Year Standards FY 2004-05	Prior Year Actual FY 2004-05	Approved Standards for FY 2005-06	Requested FY 2006-07 Standard
Administrative costs as a percent of total agency costs	1.81%	1.45%	1.43%	1.43%
Administrative positions as a percent of total agency positions	6.51%	7.57%	6.51%	6.51%

Program: Administration Program	Code: 72010000
Service/Budget Entity: State Employee Leasing	Code: 72010300

Approved Performance Measures for FY 2005-06	Approved Prior Year Standards FY 2004-05	Prior Year Actual FY 2004-05	Approved Standards for FY 2005-06	Requested FY 2006-07 Standard
Number of employees in the State Employee Leasing Service	7	7	7	7

Business Operations Support	Code: 72400000
Service/Budget Entity: Facilities Management	Code: 72400100

Approved Performance Measures for FY 2005-06	Approved Prior Year Standards FY 2004-05	Prior Year Actual FY 2004-05	Approved Standards for FY 2005-06	Requested FY 2006-07 Standard
Average Department of Management Services full service rent-composite cost per net square foot (actual) compared to Average Private Sector full service rent-composite cost per net square foot in markets where the Department manages office facilities	\$14.69/\$17.89	\$14.69/\$17.10	\$14.69/\$18.00	\$16.05/\$17.79

**LRPP Exhibit II - Performance Measures and Standards**

<b>Department: DEPARTMENT OF MANAGEMENT SERVICES</b>	<b>Department No.: 72</b>
------------------------------------------------------	---------------------------

DMS average operations and maintenance cost per square foot maintained	\$5.12	\$4.94	\$5.12	\$5.22
Number of maintained square feet (private contract and agency)	7,511,769	7,511,759	7,511,769	7,511,759
Number of leases managed	1,605	1,527	1,605	1,527
Net square feet of state-owned office space occupied by state agencies	8,474,968	8,498,193	8,795,004	8,498,193
Net square feet of private sector office space occupied by state agencies	8,859,062	8,341,859	8,859,062	8,175,856
Number of facilities secured	20	20	20	20

Business Operations Support	Code: 72400000
Service/Budget Entity: Building Construction	Code: 72400200

Approved Performance Measures for FY 2005-06	Approved Prior Year Standards FY 2004-05	Prior Year Actual FY 2004-05	Approved Standards for FY 2005-06	Requested FY 2006-07 Standard
Gross square foot construction cost of office facilities for the Department of Management Services compared to gross square foot construction cost of office facilities for private industry average	\$87.59/\$94.19	\$93.28/\$103.32	\$80.69/\$98.81	\$112.87/\$125.02
Dollar volume of fixed capital outlay project starts	\$24 Million	\$25,692,498	\$14 Million	\$25,000,000

Business Operations Support	Code: 72600000
Service/Budget Entity: Aircraft Management	Code: 72600100

Approved Performance Measures for FY 2005-06	Approved Prior Year Standards FY 2004-05	Prior Year Actual FY 2004-05	Approved Standards for FY 2005-06	Requested FY 2006-07 Standard
Cost per flight hour - State vs. Private Provider	\$1,750/\$1,800	\$2,606/\$2,418	\$1,800/\$1,860	\$2,549/\$2,666
Number of flight hours	1,250	1,109	1,250	1,250

## LRPP Exhibit II - Performance Measures and Standards

<b>Department: DEPARTMENT OF MANAGEMENT SERVICES</b>	<b>Department No.: 72</b>
------------------------------------------------------	---------------------------

Business Operations Support	Code: 72600000
Service/Budget Entity: Federal Property Assistance	Code: 72600200

Approved Performance Measures for FY 2005-06	Approved Prior Year Standards FY 2004-05	Prior Year Actual FY 2004-05	Approved Standards for FY 2005-06	Requested FY 2006-07 Standard
Federal property distribution rate	95%	98%	95%	95%
Number of federal property orders processed	1,850	1,760	1,350	1,500

Business Operations Support	Code: 72600000
Service/Budget Entity: Motor Vehicle and Watercraft Management	Code: 72600300

Approved Performance Measures for FY 2005-06	Approved Prior Year Standards FY 2004-05	Prior Year Actual FY 2004-05	Approved Standards for FY 2005-06	Requested FY 2006-07 Standard
Miles of commercial rental vehicle contract service provided	38,275,000	37,385,837	38,275,000	37,385,837
State contract daily vehicle rental rate vs. Private provider daily vehicle rental rate	\$32.00/\$82.00	\$24.40/\$52.49	\$30.00/\$50.00	\$24.40/\$47.42

Business Operations Support	Code: 72600000
Service/Budget Entity: Purchasing Oversight	Code: 72600400

Approved Performance Measures for FY 2005-06	Approved Prior Year Standards FY 2004-05	Prior Year Actual FY 2004-05	Approved Standards for FY 2005-06	Requested FY 2006-07 Standard
Percent of state term contract savings	28%	30%	28%	28%
Number of state contracts and agreements executed	1,085	212	1,085	Delete
New Measure: Dollars expended by State Agencies using the State Term Contracts and Negotiated Agreements		473,525,560	432,145,935	432,145,935
Number of Private Prison Contracts Monitored		7	7	7



## LRPP Exhibit II - Performance Measures and Standards

<b>Department: DEPARTMENT OF MANAGEMENT SERVICES</b>	<b>Department No.: 72</b>
------------------------------------------------------	---------------------------

Office of Supplier Diversity	Code: 72600000
Service/Budget Entity: Office of Supplier Diversity	Code: 72600500

Approved Performance Measures for FY 2005-06	Approved Prior Year Standards FY 2004-05	Prior Year Actual FY 2004-05	Approved Standards for FY 2005-06	Requested FY 2006-07 Standard
Average minority certification process time (in days)	15	18	15	18
Number of businesses certified and registered	1,800	1,159	1,800	1,500
Number of businesses reviewed and audited	100	100	100	100

Human Resource Support	Code: 72750000
Service/Budget Entity: Human Resource Management	Code: 72750100

Approved Performance Measures for FY 2005-06	Approved Prior Year Standards FY 2004-05	Prior Year Actual FY 2004-05	Approved Standards for FY 2005-06	Requested FY 2006-07 Standard
Total state cost per position in the state agencies	\$388.73	\$388.73	\$388.73	\$392.82
Number of state agencies with established training plans	27	21	27	30
Percent of all contracted performance standards met (Outsourced HR)	100%	0%	100%	100%
Overall customer satisfaction rating	96%	78%	96%	96%
Percent of agencies at or above EEO gender parity with available labor market	87%	80%	87%	87%
Percent of agencies at or above EEO minority parity with available labor market	77%	60%	77%	77%
Number of positions in the state agencies supported by the HR automated system	139,022	149,893	139,022	140,000
Number of responses to technical assistance requests	25,000	43,236	25,000	25,000
Percent of dollars saved by eliminating and reducing expenses	19.25%	9.73%	19.25%	19.25%

## LRPP Exhibit II - Performance Measures and Standards

<b>Department: DEPARTMENT OF MANAGEMENT SERVICES</b>	<b>Department No.: 72</b>
------------------------------------------------------	---------------------------

Human Resource Support	Code: 72750000
Service/Budget Entity: Insurance Benefits Administration	Code: 72750200

Approved Performance Measures for FY 2005-06	Approved Prior Year Standards FY 2004-05	Prior Year Actual FY 2004-05	Approved Standards for FY 2005-06	Requested FY 2006-07 Standard
Percent of all contracted performance standards met	95%	92%	95%	95%
State Employees' Preferred Provider Organization Plan - per member/per year cost - (State) compared to the per member/per year cost - (National Benchmark)	\$7,494/\$7,653	\$6,211/0	\$7,494/\$7,653	\$7,494/\$7,653
DMS administrative cost per insurance enrollee	\$10.27	\$8.01	\$10.27	\$10.27
State Employees' Preferred Provider Organization Plan - vendor's administrative cost per insurance enrollee	\$348.76	\$348.88	\$348.76	\$348.76
Percent of insurance benefits administration customers satisfied	90%	0%	90%	90%
Number of Enrollees (Total)	512,286	528,799	518,682	518,682

Human Resource Support	Code: 72750000
Service/Budget Entity: Retirement Benefits Management	Code: 72750300

Approved Performance Measures for FY 2005-06	Approved Prior Year Standards FY 2004-05	Prior Year Actual FY 2004-05	Approved Standards for FY 2005-06	Requested FY 2006-07 Standard
Percent of members satisfied with retirement services	93.50%	95.9%	93.50%	93.50%
Percent of retired payrolls processed timely	100%	100%	100%	100%
Percent of service retirees added to the next payroll after receipt of all documents	99%	99%	99%	99%
Percent of monthly payrolls from FRS Employers processed within 5 days	99%	99.75%	99%	99%
Turn around times for benefit calculations - Information Requests (calendar days)	14	31.75	14	24

## LRPP Exhibit II - Performance Measures and Standards

<b>Department: DEPARTMENT OF MANAGEMENT SERVICES</b>	<b>Department No.: 72</b>
------------------------------------------------------	---------------------------

Percent of participating agencies satisfied with retirement services	98%	99%	98%	98%
Percent of agency payroll transactions correctly reported	98%	98.62%	98%	98%
Administrative cost per active and retired member	\$22	\$18.04	\$22	\$21
Percent of local retirement systems annually reviewed which are funded on a sound actuarial basis	97%	100%	97%	97%
Number of local pension plan valuations and impact statements reviewed	500	305	400	400
Number of FRS members	874,000	918,401	913,000	993,000

Enterprise Information Technology Services	Code: 72900000
Service/Budget Entity: Telecommunications Services	Code: 72900100

Approved Performance Measures for FY 2005-06	Approved Prior Year Standards FY 2004-05	Prior Year Actual FY 2004-05	Approved Standards for FY 2005-06	Requested FY 2006-07 Standard
Aggregated discount from commercially available rates for voice and data services	40%	50%	40%	Delete
Percent of telecommunications customers satisfied	86%	0%	86%	90%
Total revenue for voice service	\$71 Million	\$75,811,677	\$72.5 Million	\$80 Million
Total revenue for data service	\$54 Million	\$59,099,720	\$65.9 Million	\$65,556,428

Enterprise Information Technology Services	Code: 72900000
Service/Budget Entity: Wireless Services	Code: 72900200

Approved Performance Measures for FY 2005-06	Approved Prior Year Standards FY 2004-05	Prior Year Actual FY 2004-05	Approved Standards for FY 2005-06	Requested FY 2006-07 Standard
Percent of wireless customers satisfied	80%	100%	80%	84%
Percent of state covered by the Joint Task Force Radio System	100%	100%	100%	100%
Percent of all 800 MHz law enforcement radio system contracted performance standards met	98.75%	98.81%	98.75%	98.75%

LRPP Exhibit II - Performance Measures and Standards

Department: DEPARTMENT OF MANAGEMENT SERVICES Department No.: 72

Number of engineering projects and approvals handled for state and local governments	230	284	230	240
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## LRPP Exhibit II - Performance Measures and Standards

<b>Department: DEPARTMENT OF MANAGEMENT SERVICES</b>	<b>Department No.: 72</b>
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Enterprise Information Technology Services	Code: 72900000
Service/Budget Entity: Information Services	Code: 72900300

Approved Performance Measures for FY 2005-06	Approved Prior Year Standards FY 2004-05	Prior Year Actual FY 2004-05	Approved Standards for FY 2005-06	Requested FY 2006-07 Standard
Percent of information services customers satisfied	90%	0%	90%	90%
Percent utilization by the Unisys System as used for capacity planning and technology refresh, employing 80% maximum utilization standard	30%	25%	30%	60%
Percent utilization by the IBM System as used for capacity planning and technology refresh, employing 80% maximum utilization standard	75%	82%	78%	75%
Number of customers served	100	151	100	169
Percent of customers satisfied	80%	0%	80%	84%
Percent of scheduled information technology production jobs completed	99.90%	99.90%	99.90%	99.90%
Percent of information management center's data processing requests completed by due date	87.50%	99%	90%	98.50%
System design and programming hourly cost	\$52	\$60.47	\$75	\$70
Percent of Scheduled Hours Computer and Network is Available	99.95%	99.95%	99.95%	99.95%
Cost per MIP (millions of instructions per second)	\$14,216	0	\$8,111	Delete
Cost per CPU (Billing charge to users of computer)		0	<\$0.001	Delete
First Contact Resolution Rate	95%	32.36%	95%	45%
Cost per Help Desk case	\$8	\$14.89	\$8.50	\$13.25
Number of service requests completed on time	984	0	984	Delete
Number of scheduled production jobs completed	100,000	120,676	100,000	100,000
Scheduled Hours Computer and Network is Available	8,064	8,052	8,112	8,110
Number of Help Desk calls resolved within 3 Hours	2,500	6,765	2,500	9,000
Percent of agency service level agreements met	80%	98%	95%	95%

## LRPP Exhibit II - Performance Measures and Standards

<b>Department: DEPARTMENT OF MANAGEMENT SERVICES</b>	<b>Department No.: 72</b>
------------------------------------------------------	---------------------------

Program: Public Employees Relations Commission	Code: 72920000
Service/Budget Entity: Public Employees Relations	Code: 72920100

Approved Performance Measures for FY 2005-06	Approved Prior Year Standards FY 2004-05	Prior Year Actual FY 2004-05	Approved Standards for FY 2005-06	Requested FY 2006-07 Standard
Percent of timely labor dispositions	98%	98%	98%	98%
Percent of timely employment dispositions	90%	98%	90%	90%
Percent of dispositions not appealed	90%	97%	90%	90%
Percent of appealed dispositions affirmed	90%	92%	90%	90%
Number of labor dispositions	747	918	801	903
Number of employment dispositions	498	374	417	412

Program: Commission on Human Relations	Code: 72950000
Service/Budget Entity: Human Relations	Code: 72950100

Approved Performance Measures for FY 2005-06	Approved Prior Year Standards FY 2004-05	Prior Year Actual FY 2004-05	Approved Standards for FY 2005-06	Requested FY 2006-07 Standard
Percent of civil rights cases resolved within 180 days of filing	70%	75%	75%	75%
Number of inquiries and investigations	10,000	13,164	10,000	10,000

## LRPP Exhibit III: PERFORMANCE MEASURE ASSESSMENT

**Department:** Management Services

**Program:** Administration

**Service/Budget Entity:** Executive Direction and Support Services

**Measure:** Administrative Positions as a Percent of Total Agency Positions

**Action:**

- Performance Assessment of Outcome Measure
- Revision of Measure
- Performance Assessment of Output Measure
- Deletion of Measure
- Adjustment of GAA Performance Standards

Approved Standard	Actual Performance Results	Difference (Over/Under)	Percentage Difference
6.51%	7.57%	1.06% over	

**Factors Accounting for the Difference:**

**Internal Factors** (check all that apply):

- |                                                                                                                                                                                                                                                                                 |                                                                                                                                               |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li><input type="checkbox"/> Personnel Factors</li> <li><input type="checkbox"/> Competing Priorities</li> <li><input type="checkbox"/> Previous Estimate Incorrect</li> <li><input checked="" type="checkbox"/> Other (Identify)</li> </ul> | <ul style="list-style-type: none"> <li><input type="checkbox"/> Staff Capacity</li> <li><input type="checkbox"/> Level of Training</li> </ul> |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------|

**Explanation:** No material differences

**External Factors** (check all that apply):

- |                                                                                                                                                                                                                                                                                                                                                                                            |                                                                                                                                                                                                         |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li><input type="checkbox"/> Resources Unavailable</li> <li><input type="checkbox"/> Legal/Legislative Change</li> <li><input type="checkbox"/> Target Population Change</li> <li><input type="checkbox"/> This Program/Service Cannot Fix The Problem</li> <li><input type="checkbox"/> Current Laws Are Working Against The Agency Mission</li> </ul> | <ul style="list-style-type: none"> <li><input type="checkbox"/> Technological Problems</li> <li><input type="checkbox"/> Natural Disaster</li> <li><input type="checkbox"/> Other (Identify)</li> </ul> |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

**Explanation:**

**Management Efforts to Address Differences/Problems** (check all that apply):

- |                                                                                                                                 |                                                                                                                                          |
|---------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li><input type="checkbox"/> Training</li> <li><input type="checkbox"/> Personnel</li> </ul> | <ul style="list-style-type: none"> <li><input type="checkbox"/> Technology</li> <li><input type="checkbox"/> Other (Identify)</li> </ul> |
|---------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------|

**Recommendations:**

## LRPP Exhibit III: PERFORMANCE MEASURE ASSESSMENT

**Department:** Management Services

**Program:** Business Operations Support

**Service/Budget Entity:** Div. of Facilities Management & Building Construction

**Measure:** Number of Leases Managed

**Action:**

- |                                                                                     |                                              |
|-------------------------------------------------------------------------------------|----------------------------------------------|
| <input type="checkbox"/> Performance Assessment of <u>Outcome</u> Measure           | <input type="checkbox"/> Revision of Measure |
| <input checked="" type="checkbox"/> Performance Assessment of <u>Output</u> Measure | <input type="checkbox"/> Deletion of Measure |
| <input type="checkbox"/> Adjustment of GAA Performance Standards                    |                                              |

Approved Standard	Actual Performance Results	Difference (Over/Under)	Percentage Difference
1,605	1,527	(78)	(4.9%)

### Factors Accounting for the Difference:

**Internal Factors** (check all that apply):

- |                                                                 |                                            |
|-----------------------------------------------------------------|--------------------------------------------|
| <input type="checkbox"/> Personnel Factors                      | <input type="checkbox"/> Staff Capacity    |
| <input type="checkbox"/> Competing Priorities                   | <input type="checkbox"/> Level of Training |
| <input checked="" type="checkbox"/> Previous Estimate Incorrect |                                            |
| <input type="checkbox"/> Other (Identify)                       |                                            |

**Explanation:**

This measure represents the total number of active real property leases managed by Facilities Management and Building Construction. This includes leases with private sector vendors as well as leases for space within DMS pool facilities. The standard was based on historical data. The difference can be attributed to the decreasing size of state government, thereby resulting in fewer real property leases.

**External Factors** (check all that apply):

- |                                                                                             |                                                 |
|---------------------------------------------------------------------------------------------|-------------------------------------------------|
| <input type="checkbox"/> Resources Unavailable                                              | <input type="checkbox"/> Technological Problems |
| <input type="checkbox"/> Legal/Legislative Change                                           | <input type="checkbox"/> Natural Disaster       |
| <input type="checkbox"/> Target Population Change                                           |                                                 |
| <input type="checkbox"/> This Program/Service Cannot Fix The Problem                        |                                                 |
| <input type="checkbox"/> Current Laws Are Working Against The Agency Mission                |                                                 |
| <input checked="" type="checkbox"/> Other – Decreasing size of state government space needs |                                                 |



**Explanation:**

This measure represents the total number of active real property leases managed by Facilities Management and Building Construction. This includes leases with private sector vendors as well as leases for space within DMS pool facilities. The standard was based on historical data. The difference can be attributed to the decreasing size of state government, thereby resulting in fewer real property leases.

**Management Efforts to Address Differences/Problems** (check all that apply):

- Training  Technology  
 Personnel  
 Other – Account of diminishing size of State government workforce

**Recommendations:** N/A

## LRPP Exhibit III: PERFORMANCE MEASURE ASSESSMENT

**Department:** Management Services

**Program:** Business Operations Support

**Service/Budget Entity:** Div. of Facilities Management & Building Construction

**Measure:** Net square feet of state-owned office space occupied by state agencies

**Action:**

- |                                                                                     |                                              |
|-------------------------------------------------------------------------------------|----------------------------------------------|
| <input type="checkbox"/> Performance Assessment of <u>Outcome</u> Measure           | <input type="checkbox"/> Revision of Measure |
| <input checked="" type="checkbox"/> Performance Assessment of <u>Output</u> Measure | <input type="checkbox"/> Deletion of Measure |
| <input type="checkbox"/> Adjustment of GAA Performance Standards                    |                                              |

Approved Standard	Actual Performance Results	Difference (Over/Under)	Percentage Difference
8,474,968	8,498,193	23,225	0.27%

**Factors Accounting for the Difference:**

**Internal Factors** (check all that apply):

- |                                                                 |                                            |
|-----------------------------------------------------------------|--------------------------------------------|
| <input type="checkbox"/> Personnel Factors                      | <input type="checkbox"/> Staff Capacity    |
| <input type="checkbox"/> Competing Priorities                   | <input type="checkbox"/> Level of Training |
| <input checked="" type="checkbox"/> Previous Estimate Incorrect |                                            |
| <input type="checkbox"/> Other (Identify)                       |                                            |

**Explanation:**

Office space needs are met by housing state agencies in Private Sector and State-owned space. State-owned space consists of DMS managed facilities and facilities owned by other state agencies.

The amount of State-owned space displayed for future years starts with the actual total State-owned space at the end of the most recent fiscal year and makes adjustments by adding (or deleting) projected changes in DMS managed facilities. No adjustment is made for non-DMS state-owned facilities since DMS is not aware of other Agency's development plans.

The increase in the square footage of non-DMS office space is the primary factor in the difference between the Standard and actual results.

**External Factors** (check all that apply):

- |                                                                                                |                                           |
|------------------------------------------------------------------------------------------------|-------------------------------------------|
| <input type="checkbox"/> Resources Unavailable Problems                                        | <input type="checkbox"/> Technological    |
| <input type="checkbox"/> Legal/Legislative Change                                              | <input type="checkbox"/> Natural Disaster |
| <input type="checkbox"/> Target Population Change                                              |                                           |
| <input type="checkbox"/> This Program/Service Cannot Fix The Problem                           |                                           |
| <input type="checkbox"/> Current Laws Are Working Against The Agency Mission                   |                                           |
| <input checked="" type="checkbox"/> Other – Lack of knowledge of other agencies building plans |                                           |

**Explanation:**

Office space needs are met by housing state agencies in Private Sector and State-owned space. State-owned space consists of DMS managed facilities and facilities owned by other state agencies.

The amount of State-owned space displayed for future years starts with the actual total State-owned space at the end of the most recent fiscal year and makes adjustments by adding (or deleting) projected changes in DMS managed facilities. No adjustment is made for non-DMS state-owned facilities since DMS is not aware of other Agency's development plans.

The increase in the square footage of non-DMS office space is the primary factor in the difference between the Standard and actual results.

**Management Efforts to Address Differences/Problems** (check all that apply):

- |                                    |                                                                                              |
|------------------------------------|----------------------------------------------------------------------------------------------|
| <input type="checkbox"/> Training  | <input type="checkbox"/> Technology                                                          |
| <input type="checkbox"/> Personnel | <input checked="" type="checkbox"/> Other - Better coordination<br>with other state agencies |

**Recommendations:** N/A

## LRPP Exhibit III: PERFORMANCE MEASURE ASSESSMENT

**Department:** Mangement Services  
**Program:** Business Operations Support  
**Service/Budget Entity:** Div. of Facilities Management & Building Construction  
**Measure:** Gross Square Foot Const. Costs of Office Facilites for DMS compared to Private Industry

**Action:**

- |                                                                                      |                                              |
|--------------------------------------------------------------------------------------|----------------------------------------------|
| <input checked="" type="checkbox"/> Performance Assessment of <u>Outcome</u> Measure | <input type="checkbox"/> Revision of Measure |
| <input type="checkbox"/> Performance Assessment of <u>Output</u> Measure             | <input type="checkbox"/> Deletion of Measure |
| <input type="checkbox"/> Adjustment of GAA Performance Standards                     |                                              |

Approved Standard	Actual Performance Results	Difference (Over/Under)	Percentage Difference
\$87.59	\$93.28	\$5.69	6.5%

**Factors Accounting for the Difference:**

**Internal Factors** (check all that apply):

- |                                                      |                                            |
|------------------------------------------------------|--------------------------------------------|
| <input type="checkbox"/> Personnel Factors           | <input type="checkbox"/> Staff Capacity    |
| <input type="checkbox"/> Competing Priorities        | <input type="checkbox"/> Level of Training |
| <input type="checkbox"/> Previous Estimate Incorrect |                                            |
| <input type="checkbox"/> Other (Identify)            |                                            |

**Explanation:**

**External Factors** (check all that apply):

- |                                                                              |                                                      |
|------------------------------------------------------------------------------|------------------------------------------------------|
| <input type="checkbox"/> Resources Unavailable                               | <input type="checkbox"/> Technological               |
| <input type="checkbox"/> Legal/Legislative Change                            | <input type="checkbox"/> Natural Disaster            |
| <input type="checkbox"/> Target Population Change                            | <input checked="" type="checkbox"/> Other (Identify) |
| <input type="checkbox"/> This Program/Service Cannot Fix The Problem         |                                                      |
| <input type="checkbox"/> Current Laws Are Working Against The Agency Mission |                                                      |

**Explanation:** Actual performance was based upon prior costs escalated to account for inflation. However, recent inflation rates have exceeded past rates so the actual rate was adjusted to compensate for the net increase.

**Management Efforts to Address Differences/Problems** (check all that apply):

- |                                    |                                           |
|------------------------------------|-------------------------------------------|
| <input type="checkbox"/> Training  | <input type="checkbox"/> Technology       |
| <input type="checkbox"/> Personnel | <input type="checkbox"/> Other (Identify) |

**Recommendations:**

## LRPP Exhibit III: PERFORMANCE MEASURE ASSESSMENT

**Department:** Management Services

**Program:** Enterprise Information Technology Services

**Service/Budget Entity:** Division of Information Services

**Measure:** **Percent utilization** – UNISYS System as used for capacity planning and technology refresh, employing 80% maximum utilization standard

**Action:**

- |                                                                                     |                                              |
|-------------------------------------------------------------------------------------|----------------------------------------------|
| <input type="checkbox"/> Performance Assessment of <u>Outcome</u> Measure           | <input type="checkbox"/> Revision of Measure |
| <input checked="" type="checkbox"/> Performance Assessment of <u>Output</u> Measure | <input type="checkbox"/> Deletion of Measure |
| <input type="checkbox"/> Adjustment of GAA Performance Standards                    |                                              |

Approved Standard	Actual Performance Results	Difference (Over/Under)	Percentage Difference
30%	25%	5% under	-16.666%

**Factors Accounting for the Difference:**

**Internal Factors** (check all that apply):

- |                                                      |                                            |
|------------------------------------------------------|--------------------------------------------|
| <input type="checkbox"/> Personnel Factors           | <input type="checkbox"/> Staff Capacity    |
| <input type="checkbox"/> Competing Priorities        | <input type="checkbox"/> Level of Training |
| <input type="checkbox"/> Previous Estimate Incorrect |                                            |
| <input checked="" type="checkbox"/> Other (Identify) |                                            |

**Explanation:** Activity relative to the primary application executing within this environment, COPEs and COPEs Insurance, has gradually declined and finally curtailed (except for contingency purposes) as the transition to People First has occurred. The only remaining active application within this environment is the EMIS (Fleet Management) application, which along with COPEs Contingency, is being transitioned to a much smaller Unisys platform as this is being written. We are estimating a 60% utilization within this new Unisys environment. However, until the applications are fully transitioned and we have some time to establish a usage baseline, this is strictly an estimation.

**External Factors** (check all that apply):

- |                                                                              |                                                 |
|------------------------------------------------------------------------------|-------------------------------------------------|
| <input type="checkbox"/> Resources Unavailable                               | <input type="checkbox"/> Technological Problems |
| <input type="checkbox"/> Legal/Legislative Change                            | <input type="checkbox"/> Natural Disaster       |
| <input type="checkbox"/> Target Population Change                            | <input type="checkbox"/> Other (Identify)       |
| <input type="checkbox"/> This Program/Service Cannot Fix The Problem         |                                                 |
| <input type="checkbox"/> Current Laws Are Working Against The Agency Mission |                                                 |

**Explanation:**

**Management Efforts to Address Differences/Problems** (check all that apply):

- |                                    |                                           |
|------------------------------------|-------------------------------------------|
| <input type="checkbox"/> Training  | <input type="checkbox"/> Technology       |
| <input type="checkbox"/> Personnel | <input type="checkbox"/> Other (Identify) |

**Recommendations:**

## LRPP Exhibit III: PERFORMANCE MEASURE ASSESSMENT

**Department:** Management Services  
**Program:** Enterprise Information Technology Services  
**Service/Budget Entity:** Division of Information Services  
**Measure:** System design and programming hourly costs

**Action:**

- |                                                                                      |                                              |
|--------------------------------------------------------------------------------------|----------------------------------------------|
| <input checked="" type="checkbox"/> Performance Assessment of <u>Outcome</u> Measure | <input type="checkbox"/> Revision of Measure |
| <input type="checkbox"/> Performance Assessment of <u>Output</u> Measure             | <input type="checkbox"/> Deletion of Measure |
| <input type="checkbox"/> Adjustment of GAA Performance Standards                     |                                              |

Approved Standard	Actual Performance Results	Difference (Over/Under)	Percentage Difference
\$52	\$60.47	- \$8.47	16%

**Factors Accounting for the Difference:**

**Internal Factors** (check all that apply):

- |                                                      |                                            |
|------------------------------------------------------|--------------------------------------------|
| <input type="checkbox"/> Personnel Factors           | <input type="checkbox"/> Staff Capacity    |
| <input type="checkbox"/> Competing Priorities        | <input type="checkbox"/> Level of Training |
| <input type="checkbox"/> Previous Estimate Incorrect |                                            |
| <input checked="" type="checkbox"/> Other (Identify) |                                            |

**Explanation:**

Number of actual programming hours did not cover costs to provide service.

**External Factors** (check all that apply):

- |                                                                              |                                                 |
|------------------------------------------------------------------------------|-------------------------------------------------|
| <input type="checkbox"/> Resources Unavailable                               | <input type="checkbox"/> Technological Problems |
| <input type="checkbox"/> Legal/Legislative Change                            | <input type="checkbox"/> Natural Disaster       |
| <input type="checkbox"/> Target Population Change                            | <input type="checkbox"/> Other (Identify)       |
| <input type="checkbox"/> This Program/Service Cannot Fix The Problem         |                                                 |
| <input type="checkbox"/> Current Laws Are Working Against The Agency Mission |                                                 |

**Explanation:**

**Management Efforts to Address Differences/Problems** (check all that apply):

- |                                    |                                           |
|------------------------------------|-------------------------------------------|
| <input type="checkbox"/> Training  | <input type="checkbox"/> Technology       |
| <input type="checkbox"/> Personnel | <input type="checkbox"/> Other (Identify) |

**Recommendations:**

## LRPP Exhibit III: PERFORMANCE MEASURE ASSESSMENT

**Department:** Management Services  
**Program:** Enterprise Information Technology Services  
**Service/Budget Entity:** Division of Information Services  
**Measure:** First Contact Resolution Rate

**Action:**

- |                                                                                                                                                                                                                                      |                                                                                              |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|
| <input type="checkbox"/> Performance Assessment of <u>Outcome</u> Measure<br><input type="checkbox"/> Performance Assessment of <u>Output</u> Measure<br><input checked="" type="checkbox"/> Adjustment of GAA Performance Standards | <input type="checkbox"/> Revision of Measure<br><input type="checkbox"/> Deletion of Measure |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|

Approved Standard	Actual Performance Results	Difference (Over/Under)	Percentage Difference
95%	32.36%	62.64% under	66%

**Factors Accounting for the Difference:**

**Internal Factors** (check all that apply):

- |                                                                                                                                                                                                                        |                                                                                                  |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------|
| <input checked="" type="checkbox"/> Personnel Factors<br><input type="checkbox"/> Competing Priorities<br><input checked="" type="checkbox"/> Previous Estimate Incorrect<br><input type="checkbox"/> Other (Identify) | <input type="checkbox"/> Staff Capacity<br><input checked="" type="checkbox"/> Level of Training |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------|

**Explanation:**

**External Factors** (check all that apply):

- |                                                                                                                                                                                                                                                                                                                                        |                                                                                                                                           |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> Resources Unavailable<br><input checked="" type="checkbox"/> Legal/Legislative Change<br><input type="checkbox"/> Target Population Change<br><input checked="" type="checkbox"/> This Program/Service Cannot Fix The Problem<br><input type="checkbox"/> Current Laws Are Working Against The Agency Mission | <input type="checkbox"/> Technological Problems<br><input type="checkbox"/> Natural Disaster<br><input type="checkbox"/> Other (Identify) |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------|

**Explanation:**

The percentage projected for the year 0506 was for the 006 ITN. Due to that cancellation the termination of service by customers, that goal was not attainable.

**Management Efforts to Address Differences/Problems** (check all that apply):

- |                                                                                               |                                                                                             |
|-----------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|
| <input checked="" type="checkbox"/> Training<br><input checked="" type="checkbox"/> Personnel | <input checked="" type="checkbox"/> Technology<br><input type="checkbox"/> Other (Identify) |
|-----------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|

**Recommendations:**

## LRPP Exhibit III: PERFORMANCE MEASURE ASSESSMENT

**Department:** Management Services  
**Program:** Enterprise Information Technology Services  
**Service/Budget Entity:** Division of Information Services  
**Measure:** Cost per Help Desk Case

**Action:**

- |                                                                                                                                                                                                                                      |                                                                                              |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|
| <input type="checkbox"/> Performance Assessment of <u>Outcome</u> Measure<br><input type="checkbox"/> Performance Assessment of <u>Output</u> Measure<br><input checked="" type="checkbox"/> Adjustment of GAA Performance Standards | <input type="checkbox"/> Revision of Measure<br><input type="checkbox"/> Deletion of Measure |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|

Approved Standard	Actual Performance Results	Difference (Over/Under)	Percentage Difference
\$8.00	\$14.89	\$6.89 over	0.86125%

**Factors Accounting for the Difference:**

**Internal Factors** (check all that apply):

- |                                                                                                                                                                                                                        |                                                                                       |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| <input checked="" type="checkbox"/> Personnel Factors<br><input type="checkbox"/> Competing Priorities<br><input type="checkbox"/> Previous Estimate Incorrect<br><input checked="" type="checkbox"/> Other (Identify) | <input type="checkbox"/> Staff Capacity<br><input type="checkbox"/> Level of Training |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|

**Explanation:** Contract Termination

**External Factors** (check all that apply):

- |                                                                                                                                                                                                                                                                                                                  |                                                                                                                                           |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> Resources Unavailable<br><input type="checkbox"/> Legal/Legislative Change<br><input type="checkbox"/> Target Population Change<br><input type="checkbox"/> This Program/Service Cannot Fix The Problem<br><input type="checkbox"/> Current Laws Are Working Against The Agency Mission | <input type="checkbox"/> Technological Problems<br><input type="checkbox"/> Natural Disaster<br><input type="checkbox"/> Other (Identify) |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------|

**Explanation:**

**Management Efforts to Address Differences/Problems** (check all that apply):

- |                                                                         |                                                                                             |
|-------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|
| <input type="checkbox"/> Training<br><input type="checkbox"/> Personnel | <input type="checkbox"/> Technology<br><input checked="" type="checkbox"/> Other (Identify) |
|-------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|

**Recommendations:** Contract Termination



## LRPP Exhibit III: PERFORMANCE MEASURE ASSESSMENT

**Department:** Management Services

**Program:** Enterprise Information Technology Services

**Service/Budget Entity:** Division of Information Services

**Measure:** Scheduled hours computer and network is available

**Action:**

- |                                                                                      |                                              |
|--------------------------------------------------------------------------------------|----------------------------------------------|
| <input checked="" type="checkbox"/> Performance Assessment of <u>Outcome</u> Measure | <input type="checkbox"/> Revision of Measure |
| <input type="checkbox"/> Performance Assessment of <u>Output</u> Measure             | <input type="checkbox"/> Deletion of Measure |
| <input type="checkbox"/> Adjustment of GAA Performance Standards                     |                                              |

Approved Standard	Actual Performance Results	Difference (Over/Under)	Percentage Difference
8,064	8,052	12 under	0.148%

**Factors Accounting for the Difference:**

**Internal Factors** (check all that apply):

- |                                                      |                                            |
|------------------------------------------------------|--------------------------------------------|
| <input type="checkbox"/> Personnel Factors           | <input type="checkbox"/> Staff Capacity    |
| <input type="checkbox"/> Competing Priorities        | <input type="checkbox"/> Level of Training |
| <input type="checkbox"/> Previous Estimate Incorrect |                                            |
| <input type="checkbox"/> Other (Identify)            |                                            |

**Explanation:**

**External Factors** (check all that apply):

- |                                                                              |                                                      |
|------------------------------------------------------------------------------|------------------------------------------------------|
| <input type="checkbox"/> Resources Unavailable                               | <input type="checkbox"/> Technological Problems      |
| <input type="checkbox"/> Legal/Legislative Change                            | <input type="checkbox"/> Natural Disaster            |
| <input type="checkbox"/> Target Population Change                            | <input checked="" type="checkbox"/> Other (Identify) |
| <input type="checkbox"/> This Program/Service Cannot Fix The Problem         |                                                      |
| <input type="checkbox"/> Current Laws Are Working Against The Agency Mission |                                                      |

**Explanation:**

Difference is not statistically significant

**Management Efforts to Address Differences/Problems** (check all that apply):

- |                                    |                                           |
|------------------------------------|-------------------------------------------|
| <input type="checkbox"/> Training  | <input type="checkbox"/> Technology       |
| <input type="checkbox"/> Personnel | <input type="checkbox"/> Other (Identify) |

**Recommendations:**

## LRPP Exhibit III: PERFORMANCE MEASURE ASSESSMENT

**Department:** Department of Management Services  
**Program:** Business Operations Support  
**Service/Budget Entity:** Division of Fleet Management  
**Measure:** Cost Per Flight Hour – State vs. Private Sector

**Action:**

- |                                                                                     |                                              |
|-------------------------------------------------------------------------------------|----------------------------------------------|
| <input type="checkbox"/> Performance Assessment of <u>Outcome</u> Measure           | <input type="checkbox"/> Revision of Measure |
| <input checked="" type="checkbox"/> Performance Assessment of <u>Output</u> Measure | <input type="checkbox"/> Deletion of Measure |
| <input type="checkbox"/> Adjustment of GAA Performance Standards                    |                                              |

Approved Standard	Actual Performance Results	Difference (Over/Under)	Percentage Difference
\$1,750/\$1,800	\$2,606/\$2,418	\$856/\$618	49%/34%

**Factors Accounting for the Difference:**

**Internal Factors** (check all that apply):

- |                                                      |                                            |
|------------------------------------------------------|--------------------------------------------|
| <input type="checkbox"/> Personnel Factors           | <input type="checkbox"/> Staff Capacity    |
| <input type="checkbox"/> Competing Priorities        | <input type="checkbox"/> Level of Training |
| <input type="checkbox"/> Previous Estimate Incorrect |                                            |
| <input checked="" type="checkbox"/> Other (Identify) |                                            |

**Explanation:** Operated with one less aircraft, prior to replacing two oldest aircraft.

**External Factors** (check all that apply):

- |                                                                    |                                                      |
|--------------------------------------------------------------------|------------------------------------------------------|
| <input checked="" type="checkbox"/> Resources Unavailable Problems | <input type="checkbox"/> Technological               |
| <input type="checkbox"/> Legal/Legislative Change                  | <input type="checkbox"/> Natural Disaster            |
| <input type="checkbox"/> Target Population Change                  | <input checked="" type="checkbox"/> Other (Identify) |

**Fuel/Aircraft**

- This Program/Service Cannot Fix The Problem  
 Current Laws Are Working Against The Agency Mission

**Explanation:** Fuel costs and necessity of replacing two oldest aircraft which would be cost prohibitive to upgrade for safety.

**Management Efforts to Address Differences/Problems** (check all that apply):

- |                                    |                                           |
|------------------------------------|-------------------------------------------|
| <input type="checkbox"/> Training  | <input type="checkbox"/> Technology       |
| <input type="checkbox"/> Personnel | <input checked="" type="checkbox"/> Other |
| (Identify)Standard Revision        |                                           |

**Recommendations:** Revise standard to include rising fuel costs, salary equitability and life cycling of aircraft.

## LRPP Exhibit III: PERFORMANCE MEASURE ASSESSMENT

**Department:** Department of Management Services  
**Program:** Business Operations Support  
**Service/Budget Entity:** Division of Fleet Management  
**Measure:** Number of Federal Property Orders Processed

**Action:**

- |                                                                             |                                                         |
|-----------------------------------------------------------------------------|---------------------------------------------------------|
| <input type="checkbox"/> Performance Assessment of <u>Outcome</u> Measure   | <input checked="" type="checkbox"/> Revision of Measure |
| <input type="checkbox"/> Performance Assessment of <u>Output</u> Measure    | <input type="checkbox"/> Deletion of Measure            |
| <input checked="" type="checkbox"/> Adjustment of GAA Performance Standards |                                                         |

Approved Standard	Actual Performance Results	Difference (Over/Under)	Percentage Difference
1,850	1,760	(90)	.5%

**Factors Accounting for the Difference:**

**Internal Factors** (check all that apply):

- |                                                      |                                            |
|------------------------------------------------------|--------------------------------------------|
| <input type="checkbox"/> Personnel Factors           | <input type="checkbox"/> Staff Capacity    |
| <input type="checkbox"/> Competing Priorities        | <input type="checkbox"/> Level of Training |
| <input type="checkbox"/> Previous Estimate Incorrect |                                            |
| <input type="checkbox"/> Other (Identify)            |                                            |

**Explanation:**

**External Factors** (check all that apply):

- |                                                                                         |                                                      |
|-----------------------------------------------------------------------------------------|------------------------------------------------------|
| <input checked="" type="checkbox"/> Resources Unavailable Problems                      | <input type="checkbox"/> Technological               |
| <input checked="" type="checkbox"/> Legal/Legislative Change                            | <input type="checkbox"/> Natural Disaster            |
| <input type="checkbox"/> Target Population Change                                       | <input checked="" type="checkbox"/> Other (Identify) |
| <input checked="" type="checkbox"/> This Program/Service Cannot Fix The Problem         |                                                      |
| <input checked="" type="checkbox"/> Current Laws Are Working Against The Agency Mission |                                                      |

**Explanation:** Due to the war on terrorism, property has not been turned in; military activities are screening heavily due to budget cuts; Laws being implemented allowing additional agencies priority access; State/Counties/Cities/etc. budget cuts. Possible base closures.

**Management Efforts to Address Differences/Problems** (check all that apply):

- Training  
  Technology  
  Personnel  
  Other (Identify)
- Waiting it out to see how much equipment the federal government will make available this fiscal year. If it continues to be lower, standard should be adjusted. Standard for 2005-2006, 1,350 Orders.

**Recommendations:** Adjustments will be made if federal government does not release more equipment. Standard for 2005-2006, 1,350 Orders.

## LRPP Exhibit III: PERFORMANCE MEASURE ASSESSMENT

**Department:** Management Services  
**Program:** Business Operations Support  
**Service/Budget Entity:** Division of Fleet Management  
**Measure:** Miles of Commercial Rental Vehicle Contract Service Provided  
**Action:**

- |                                                                                     |                                              |
|-------------------------------------------------------------------------------------|----------------------------------------------|
| <input type="checkbox"/> Performance Assessment of <u>Outcome</u> Measure           | <input type="checkbox"/> Revision of Measure |
| <input checked="" type="checkbox"/> Performance Assessment of <u>Output</u> Measure | <input type="checkbox"/> Deletion of Measure |
| <input type="checkbox"/> Adjustment of GAA Performance Standards                    |                                              |

Approved Standard	Actual Performance Results	Difference (Over/Under)	Percentage Difference
38,275,000	37,385,837	(889,163)	2%

**Factors Accounting for the Difference:**

**Internal Factors** (check all that apply):

- |                                                      |                                            |
|------------------------------------------------------|--------------------------------------------|
| <input type="checkbox"/> Personnel Factors           | <input type="checkbox"/> Staff Capacity    |
| <input type="checkbox"/> Competing Priorities        | <input type="checkbox"/> Level of Training |
| <input type="checkbox"/> Previous Estimate Incorrect |                                            |
| <input type="checkbox"/> Other (Identify)            |                                            |

**Explanation:**

**External Factors** (check all that apply):

- |                                                                                         |                                                                                         |
|-----------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|
| <input type="checkbox"/> Resources Unavailable Problems                                 | <input type="checkbox"/> Technological                                                  |
| <input type="checkbox"/> Legal/Legislative Change                                       | <input type="checkbox"/> Natural Disaster                                               |
| <input type="checkbox"/> Target Population Change                                       | <input checked="" type="checkbox"/> Other (Identify) Slight variables in travel amounts |
| <input type="checkbox"/> This Program/Service Cannot Fix The Problem                    |                                                                                         |
| <input type="checkbox"/> Current Laws Are Working Against The Agency Mission statewide. |                                                                                         |

**Explanation:**

This percentage change is just two percent. There are no discernable contributing factors, just a slight variance in travel amount.

**Management Efforts to Address Differences/Problems** (check all that apply):

- |                                    |                                               |
|------------------------------------|-----------------------------------------------|
| <input type="checkbox"/> Training  | <input type="checkbox"/> Technology           |
| <input type="checkbox"/> Personnel | <input type="checkbox"/> Other (Identify) N/A |

**Recommendations:**

None

## LRPP Exhibit III: PERFORMANCE MEASURE ASSESSMENT

**Department:** Department of Management Services  
**Program:** Business Operations Support  
**Service/Budget Entity:** Division of State Purchasing  
**Measure:** Number of state contracts and agreements executed  
**Action:**

- |                                                                                     |                                                         |
|-------------------------------------------------------------------------------------|---------------------------------------------------------|
| <input type="checkbox"/> Performance Assessment of <u>Outcome</u> Measure           | <input type="checkbox"/> Revision of Measure            |
| <input checked="" type="checkbox"/> Performance Assessment of <u>Output</u> Measure | <input checked="" type="checkbox"/> Deletion of Measure |
| <input type="checkbox"/> Adjustment of GAA Performance Standards                    |                                                         |

Approved Standard	Actual Performance Results	Difference (Over/Under)	Percentage Difference
1,085	212	Under 873	80%

**Factors Accounting for the Difference:**

**Internal Factors** (check all that apply):

- |                                                      |                                            |
|------------------------------------------------------|--------------------------------------------|
| <input type="checkbox"/> Personnel Factors           | <input type="checkbox"/> Staff Capacity    |
| <input type="checkbox"/> Competing Priorities        | <input type="checkbox"/> Level of Training |
| <input type="checkbox"/> Previous Estimate Incorrect |                                            |
| <input type="checkbox"/> Other (Identify)            |                                            |

**Explanation:**

When contracts or agreements expire, they are only renewed if they meet required sales volume. In addition contracts that are of similar properties are now combined for more efficient contract management

**External Factors** (check all that apply):

- |                                                                              |                                                      |
|------------------------------------------------------------------------------|------------------------------------------------------|
| <input type="checkbox"/> Resources Unavailable                               | <input type="checkbox"/> Technological               |
| <input type="checkbox"/> Legal/Legislative Change                            | <input type="checkbox"/> Natural Disaster            |
| <input type="checkbox"/> Target Population Change                            | <input checked="" type="checkbox"/> Other (Identify) |
| <input type="checkbox"/> This Program/Service Cannot Fix The Problem         |                                                      |
| <input type="checkbox"/> Current Laws Are Working Against The Agency Mission |                                                      |

**Explanation:**

Same as internal factors

**Management Efforts to Address Differences/Problems** (check all that apply):

- |                                    |                                           |
|------------------------------------|-------------------------------------------|
| <input type="checkbox"/> Training  | <input type="checkbox"/> Technology       |
| <input type="checkbox"/> Personnel | <input type="checkbox"/> Other (Identify) |

**Recommendations:**

This unit cost output identifies the number of state term contract and agreements executed. Management would like to replace this performance measure with another unit cost output measure more meaningful to the cost efficiency provided by the Activity. The unit cost output measure would be State dollars spent on state term contract captured in SPURS and MyFloridaMarketPlace. Actual for FY 03-04: \$432,145,935 Actual for FY 04-05: \$473,525,560 Standard for FY 05-06: \$ \$432,145,935

## LRPP Exhibit III: PERFORMANCE MEASURE ASSESSMENT

**Department:** Department of Management Services  
**Program:** Office of Supplier Diversity  
**Service/Budget Entity:** Office of Supplier Diversity  
**Measure:** Average Minority Certification Process Time(in days)

**Action:**

- |                                                                                      |                                              |
|--------------------------------------------------------------------------------------|----------------------------------------------|
| <input checked="" type="checkbox"/> Performance Assessment of <u>Outcome</u> Measure | <input type="checkbox"/> Revision of Measure |
| <input type="checkbox"/> Performance Assessment of <u>Output</u> Measure             | <input type="checkbox"/> Deletion of Measure |
| <input type="checkbox"/> Adjustment of GAA Performance Standards                     |                                              |

Approved Standard	Actual Performance Results	Difference (Over/Under)	Percentage Difference
15	18	-3	16%

**Factors Accounting for the Difference:**

**Internal Factors** (check all that apply):

- |                                                      |                                                    |
|------------------------------------------------------|----------------------------------------------------|
| <input type="checkbox"/> Personnel Factors           | <input checked="" type="checkbox"/> Staff Capacity |
| <input type="checkbox"/> Competing Priorities        | <input type="checkbox"/> Level of Training         |
| <input type="checkbox"/> Previous Estimate Incorrect |                                                    |
| <input checked="" type="checkbox"/> Other (Identify) |                                                    |

**Explanation:** The OSD continued to experience and increase in the number of applicants, who were not familiar with the new system put into place with the advent of MyFloridaMarketPlace Registration. Many of the applications received were not properly offered, many failing to provide adequate supporting documents to validate their eligibility status; many applicants also failed to respond to request for additional information in a timely manner. Additionally, the OSD staffs five(5) people, who handle over 6,000 applications for certification and recertification annually. This measure will be difficult to meet.

**External Factors** (check all that apply):

- |                                                                                         |                                                 |
|-----------------------------------------------------------------------------------------|-------------------------------------------------|
| <input checked="" type="checkbox"/> Resources Unavailable                               | <input type="checkbox"/> Technological Problems |
| <input checked="" type="checkbox"/> Legal/Legislative Change                            | <input type="checkbox"/> Natural Disaster       |
| <input type="checkbox"/> Target Population Change                                       | <input type="checkbox"/> Other (Identify)       |
| <input type="checkbox"/> This Program/Service Cannot Fix The Problem                    |                                                 |
| <input checked="" type="checkbox"/> Current Laws Are Working Against The Agency Mission |                                                 |

**Explanation:** The OSD ended "Inter-local Reciprocal Agreements" during February of 2003. The termination of these partnership agreements contributed to a significant number of applicants dropping from the recertification process because they were directed to the local entity that provided the initial certification. Also, many of the applicants who continued to utilize the state certification procedure were unfamiliar with or did not register in MFMP as needed in order to continue their certification. The interface between the CMBE certification

process and registration in MyFloridaMarketPlace continues to adversely affect the smooth and timely processing of applications for certification.

**Management Efforts to Address Differences/Problems** (check all that apply):

Training

Technology

Personnel

Other (Identify)

**Recommendations:** The OSD is working to implement a document imaging system that will create less paper and provide an electronic means of receiving applications and of managing the cumbersome amount of paper received during the application process. Better training for staff is also included in the annual budget, including database management and recordkeeping and file maintenance computer applications.



## LRPP Exhibit III: PERFORMANCE MEASURE ASSESSMENT

**Department:** Department of Management Services  
**Program:** Office of Supplier Diversity  
**Service/Budget Entity:** Office of Supplier Diversity  
**Measure:** Number of Businesses Certified and Registered

**Action:**

- |                                                                                     |                                              |
|-------------------------------------------------------------------------------------|----------------------------------------------|
| <input type="checkbox"/> Performance Assessment of <u>Outcome</u> Measure           | <input type="checkbox"/> Revision of Measure |
| <input checked="" type="checkbox"/> Performance Assessment of <u>Output</u> Measure | <input type="checkbox"/> Deletion of Measure |
| <input type="checkbox"/> Adjustment of GAA Performance Standards                    |                                              |

Approved Standard	Actual Performance Results	Difference (Over/Under)	Percentage Difference
1,800	1,159	-641	64%

**Factors Accounting for the Difference:**

**Internal Factors** (check all that apply):

- |                                                      |                                                    |
|------------------------------------------------------|----------------------------------------------------|
| <input type="checkbox"/> Personnel Factors           | <input checked="" type="checkbox"/> Staff Capacity |
| <input type="checkbox"/> Competing Priorities        | <input type="checkbox"/> Level of Training         |
| <input type="checkbox"/> Previous Estimate Incorrect |                                                    |
| <input checked="" type="checkbox"/> Other (Identify) |                                                    |

**Explanation:** The OSD continues to lack the staffing capacity to adequately process the number of applications given the heavy influx of paper required and the amount of scrutiny and review necessary to analyze these documents

**External Factors** (check all that apply):

- |                                                                                         |                                                 |
|-----------------------------------------------------------------------------------------|-------------------------------------------------|
| <input checked="" type="checkbox"/> Resources Unavailable                               | <input type="checkbox"/> Technological Problems |
| <input checked="" type="checkbox"/> Legal/Legislative Change                            | <input type="checkbox"/> Natural Disaster       |
| <input type="checkbox"/> Target Population Change                                       | <input type="checkbox"/> Other (Identify)       |
| <input type="checkbox"/> This Program/Service Cannot Fix The Problem                    |                                                 |
| <input checked="" type="checkbox"/> Current Laws Are Working Against The Agency Mission |                                                 |

**Explanation:** . The OSD was also adversely impacted by the termination of the Inter-local Reciprocal Agreements with many certifying bodies around the state. Many applicants were siphoned off to local jurisdictions to compete their minority business certifications. Additionally, many applicants were turned away from state certification when changes in the law removed some of the incentives that have traditionally attracted businesses to gain certification. Some of the fall off in applications results from the perception that in the absence of set-asides, price preferences and quotas, the benefit of becoming certified is lessened.

**Management Efforts to Address Differences/Problems** (check all that apply):

Training

Technology

Personnel

Other (Identify)

**Recommendations:** The OSD is working to implement a document imaging system that will create less paper and provide an electronic means of receiving applications and of managing the cumbersome amount of paper received during the application process. Better training for staff is also included in the annual budget, including database management and recordkeeping and file maintenance computer applications. Also, the OSD places particular emphasis on the recruitment of new businesses in each of the accelerated outreach and matchmaking events scheduled for the upcoming fiscal year. Finally, The OSD is working to facilitate the migration of Registered Non-certified vendors located in MFMP, into the certified vendor category.

## LRPP Exhibit III: PERFORMANCE MEASURE ASSESSMENT

**Department:** Management Services

**Program:** Workforce

**Service/Budget Entity:** Human Resource Management

**Measure:** Number of State Agencies with Established Training Plans

**Action:**

- |                                                                                      |                                              |
|--------------------------------------------------------------------------------------|----------------------------------------------|
| <input checked="" type="checkbox"/> Performance Assessment of <u>Outcome</u> Measure | <input type="checkbox"/> Revision of Measure |
| <input type="checkbox"/> Performance Assessment of <u>Output</u> Measure             | <input type="checkbox"/> Deletion of Measure |
| <input checked="" type="checkbox"/> Adjustment of GAA Performance Standards          |                                              |

Approved Standard	Actual Performance Results	Difference (Over/Under)	Percentage Difference
27**	21	(6)	(22%)

**Factors Accounting for the Difference:**

**Internal Factors** (check all that apply):

- |                                                      |                                            |
|------------------------------------------------------|--------------------------------------------|
| <input type="checkbox"/> Personnel Factors           | <input type="checkbox"/> Staff Capacity    |
| <input type="checkbox"/> Competing Priorities        | <input type="checkbox"/> Level of Training |
| <input type="checkbox"/> Previous Estimate Incorrect |                                            |
| <input type="checkbox"/> Other (Identify)            |                                            |

**Explanation:**

**External Factors** (check all that apply):

- |                                                                                 |                                                 |
|---------------------------------------------------------------------------------|-------------------------------------------------|
| <input type="checkbox"/> Resources Unavailable                                  | <input type="checkbox"/> Technological Problems |
| <input type="checkbox"/> Legal/Legislative Change                               | <input type="checkbox"/> Natural Disaster       |
| <input checked="" type="checkbox"/> Target Population Change                    | <input type="checkbox"/> Other (Identify)       |
| <input checked="" type="checkbox"/> This Program/Service Cannot Fix The Problem |                                                 |
| <input type="checkbox"/> Current Laws Are Working Against The Agency Mission    |                                                 |

**Explanation:**

Section 110.235, Florida Statutes, requires state agencies to establish training programs that provide a framework to develop human resources through empowerment, training and rewards for productivity enhancements; to continuously improve the quality of services; and to satisfy the expectations of the public. Each year, agencies are required to provide to the Division of Human Resource Management an evaluation of the implemented training and the progress made in the area of training. Through its review of the information provided, the Division is able to assess whether the agency training programs encompass the elements to support legislative intent of the Governor's Service First Initiative. Only 21 out of 29 agencies reported having an established training plan for fiscal year 2004 – 2005.

**\*\*The Division is also requesting an adjustment to the FY 04/05 and FY 05/06 approved performance standard. This standard is based upon the number of state agencies in the State Personnel System (17 Governor's agencies, 4 Governor and Cabinet agencies, 3 Cabinet agencies, the Public Service Commission, the Fish & Wildlife Conservation Commission, the Parole Commission, the Division of Administrative Hearings, and the Florida School for the Deaf and the Blind). For fiscal year 2004-2005, there were 29 agencies in the State Personnel System. However, effective July 2005, there are now 30 agencies with the addition of the Agency for Persons with Disabilities. As a result, the approved standard needs to be adjusted accordingly.\*\***

**Management Efforts to Address Differences/Problems (check all that apply):**

- Training
- Personnel

- Technology
- Other (Identify)

**Recommendations:**

## LRPP Exhibit III: PERFORMANCE MEASURE ASSESSMENT

**Department:** Management Services

**Program:** Workforce

**Service/Budget Entity:** Human Resource Management

**Measure:** Percent of All Contracted Performance Standards Met

**Action:**

- |                                                                                                                                                                                                                                      |                                                                                              |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|
| <input checked="" type="checkbox"/> Performance Assessment of <u>Outcome</u> Measure<br><input type="checkbox"/> Performance Assessment of <u>Output</u> Measure<br><input type="checkbox"/> Adjustment of GAA Performance Standards | <input type="checkbox"/> Revision of Measure<br><input type="checkbox"/> Deletion of Measure |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|

Approved Standard	Actual Performance Results	Difference (Over/Under)	Percentage Difference
100%	N/A	N/A	

**Factors Accounting for the Difference:**

**Internal Factors** (check all that apply):

- |                                                                                                                                                                                                             |                                                                                       |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| <input type="checkbox"/> Personnel Factors<br><input type="checkbox"/> Competing Priorities<br><input type="checkbox"/> Previous Estimate Incorrect<br><input checked="" type="checkbox"/> Other (Identify) | <input type="checkbox"/> Staff Capacity<br><input type="checkbox"/> Level of Training |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|

**Explanation:**

In support of the People First project, the Department of Management Services contracted with Convergys Customer Management Group, Inc. (Convergys/service provider) on August 21, 2002. This contract provides the State Personnel System with a personnel information system (HR automated system) and an enterprise-wide suite of human resource services including payroll preparation, benefits, staffing and human resource administration. This performance measure provides an assessment of the service provider's performance. The service provider contract stipulates acceptable performance standards and minimum service levels. Examples of the critical performance metrics included in the contract between Convergys and the Department are: customer satisfaction surveys, payroll and time and attendance accuracy, self-service availability, call and case quality and data and input quality. As the contract administrator, the Division of Human Resource Management manages the contract and oversees the performance of the service provider to ensure compliance with the provisions, including agreed-upon performance standards and delivery of services to the users of the system.

The first phase of the *People First* implementation was in May 2003 with the introduction of new staffing services. To ensure all state agencies and employees were comfortable with the remaining new services before they were fully implemented on a statewide basis, additional time was built into the process to allow for the parallel

operation of both the new and old systems. This allowed the State to implement system functionality based on input from the first phase; to continue to work with all state agencies to ensure that the new services were effective; and to devote additional time to testing the system, ensuring the end users were comfortable with the system interface. As a result, actual performance data is not available for fiscal year 2004 – 2005 at this time since calendar year 2004 was the actual year of implementation for the agencies. A phased-implementation schedule was used to implement the People First system with the last agencies starting in November 2004.

**External Factors** (check all that apply):

- |                                                                              |                                                 |
|------------------------------------------------------------------------------|-------------------------------------------------|
| <input type="checkbox"/> Resources Unavailable                               | <input type="checkbox"/> Technological Problems |
| <input type="checkbox"/> Legal/Legislative Change                            | <input type="checkbox"/> Natural Disaster       |
| <input type="checkbox"/> Target Population Change                            | <input type="checkbox"/> Other (Identify)       |
| <input type="checkbox"/> This Program/Service Cannot Fix The Problem         |                                                 |
| <input type="checkbox"/> Current Laws Are Working Against The Agency Mission |                                                 |

**Explanation:**

**Management Efforts to Address Differences/Problems** (check all that apply):

- |                                    |                                           |
|------------------------------------|-------------------------------------------|
| <input type="checkbox"/> Training  | <input type="checkbox"/> Technology       |
| <input type="checkbox"/> Personnel | <input type="checkbox"/> Other (Identify) |

**Recommendations:**

## LRPP Exhibit III: PERFORMANCE MEASURE ASSESSMENT

**Department:** Management Services

**Program:** Workforce

**Service/Budget Entity:** Human Resource Management

**Measure:** Overall Customer Satisfaction Rating

**Action:**

- |                                                                                                                                                                                                                                      |                                                                                              |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|
| <input checked="" type="checkbox"/> Performance Assessment of <u>Outcome</u> Measure<br><input type="checkbox"/> Performance Assessment of <u>Output</u> Measure<br><input type="checkbox"/> Adjustment of GAA Performance Standards | <input type="checkbox"/> Revision of Measure<br><input type="checkbox"/> Deletion of Measure |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|

Approved Standard	Actual Performance Results	Difference (Over/Under)	Percentage Difference
96%	78%	(18)	(18.75%)

**Factors Accounting for the Difference:**

**Internal Factors** (check all that apply):

- |                                                                                                                                                     |                                                                                                                                               |
|-----------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> Personnel Factors<br><input type="checkbox"/> Competing Priorities<br><input type="checkbox"/> Previous Estimate Incorrect | <input type="checkbox"/> Staff Capacity<br><input type="checkbox"/> Level of Training<br><input checked="" type="checkbox"/> Other (Identify) |
|-----------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------|

**Explanation:** The Division of Human Resource Management surveyed 29 agencies of the Executive Branch of government to assess their overall level of satisfaction with the services provided by the Division (which included the 17 Governor’s agencies, 4 Governor and Cabinet agencies, 3 Cabinet agencies, the Public Service Commission, the Fish & Wildlife Conservation Commission, the Parole Commission, the Division of Administrative Hearings and the Florida School for the Deaf and the Blind). Responses to the survey resulted in a 78% customer satisfaction rating. Agencies indicated that the level of services provided was hindered due to the Division’s focus on implementing the People First project. The Division is diligently working with the agencies to provide a greater level of service regarding human resource issues.

**External Factors** (check all that apply):

- |                                                                                                                                                                                                                                                                                                                  |                                                                                                                                           |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> Resources Unavailable<br><input type="checkbox"/> Legal/Legislative Change<br><input type="checkbox"/> Target Population Change<br><input type="checkbox"/> This Program/Service Cannot Fix The Problem<br><input type="checkbox"/> Current Laws Are Working Against The Agency Mission | <input type="checkbox"/> Technological Problems<br><input type="checkbox"/> Natural Disaster<br><input type="checkbox"/> Other (Identify) |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------|

**Explanation:**

**Management Efforts to Address Differences/Problems** (check all that apply):

- |                                                                         |                                                                                  |
|-------------------------------------------------------------------------|----------------------------------------------------------------------------------|
| <input type="checkbox"/> Training<br><input type="checkbox"/> Personnel | <input type="checkbox"/> Technology<br><input type="checkbox"/> Other (Identify) |
|-------------------------------------------------------------------------|----------------------------------------------------------------------------------|

**Recommendations:**

## LRPP Exhibit III: PERFORMANCE MEASURE ASSESSMENT

**Department:** Management Services

**Program:** Workforce

**Service/Budget Entity:** Human Resource Management

**Measure:** Percent of Agencies at or above EEO Gender Parity with Available Labor Market

**Action:**

- |                                                                                      |                                              |
|--------------------------------------------------------------------------------------|----------------------------------------------|
| <input checked="" type="checkbox"/> Performance Assessment of <u>Outcome</u> Measure | <input type="checkbox"/> Revision of Measure |
| <input type="checkbox"/> Performance Assessment of <u>Output</u> Measure             | <input type="checkbox"/> Deletion of Measure |
| <input type="checkbox"/> Adjustment of GAA Performance Standards                     |                                              |

Approved Standard	Actual Performance Results	Difference (Over/Under)	Percentage Difference
87%	80%	(7%)	(7%)

**Factors Accounting for the Difference:**

**Internal Factors** (check all that apply):

- |                                                      |                                            |
|------------------------------------------------------|--------------------------------------------|
| <input type="checkbox"/> Personnel Factors           | <input type="checkbox"/> Staff Capacity    |
| <input type="checkbox"/> Competing Priorities        | <input type="checkbox"/> Level of Training |
| <input type="checkbox"/> Previous Estimate Incorrect |                                            |
| <input type="checkbox"/> Other (Identify)            |                                            |

**Explanation:**

**External Factors** (check all that apply):

- |                                                                              |                                                      |
|------------------------------------------------------------------------------|------------------------------------------------------|
| <input type="checkbox"/> Resources Unavailable                               | <input type="checkbox"/> Technological Problems      |
| <input type="checkbox"/> Legal/Legislative Change                            | <input type="checkbox"/> Natural Disaster            |
| <input type="checkbox"/> Target Population Change                            | <input checked="" type="checkbox"/> Other (Identify) |
| <input type="checkbox"/> This Program/Service Cannot Fix The Problem         |                                                      |
| <input type="checkbox"/> Current Laws Are Working Against The Agency Mission |                                                      |

**Explanation:** This measure provides information on gender representation in the executive branch agencies as compared to the available labor market. The Division of Human Resource Management provides agencies with a fair and equitable employment infrastructure that includes core human resource policies, strategies and practices for agencies to follow in recruiting, selecting, and managing their human resources. However, the Division does not have the authority to make hiring decisions within the state agencies. For fiscal year 2004-2005, 24 out of 30 agencies are at or above EEO gender parity with the available labor market.

**Management Efforts to Address Differences/Problems** (check all that apply):

- |                                    |                                           |
|------------------------------------|-------------------------------------------|
| <input type="checkbox"/> Training  | <input type="checkbox"/> Technology       |
| <input type="checkbox"/> Personnel | <input type="checkbox"/> Other (Identify) |

**Recommendations:**



## LRPP Exhibit III: PERFORMANCE MEASURE ASSESSMENT

**Department:** Management Services

**Program:** Workforce

**Service/Budget Entity:** Human Resource Management

**Measure:** Percent of Agencies at or above EEO Minority Parity with Available Labor Market

**Action:**

- |                                                                                      |                                              |
|--------------------------------------------------------------------------------------|----------------------------------------------|
| <input checked="" type="checkbox"/> Performance Assessment of <u>Outcome</u> Measure | <input type="checkbox"/> Revision of Measure |
| <input type="checkbox"/> Performance Assessment of <u>Output</u> Measure             | <input type="checkbox"/> Deletion of Measure |
| <input type="checkbox"/> Adjustment of GAA Performance Standards                     |                                              |

Approved Standard	Actual Performance Results	Difference (Over/Under)	Percentage Difference
77%	60%	(17%)	(17%)

**Factors Accounting for the Difference:**

**Internal Factors** (check all that apply):

- |                                                      |                                            |
|------------------------------------------------------|--------------------------------------------|
| <input type="checkbox"/> Personnel Factors           | <input type="checkbox"/> Staff Capacity    |
| <input type="checkbox"/> Competing Priorities        | <input type="checkbox"/> Level of Training |
| <input type="checkbox"/> Previous Estimate Incorrect |                                            |
| <input type="checkbox"/> Other (Identify)            |                                            |

**Explanation:**

**External Factors** (check all that apply):

- |                                                                              |                                                      |
|------------------------------------------------------------------------------|------------------------------------------------------|
| <input type="checkbox"/> Resources Unavailable                               | <input type="checkbox"/> Technological Problems      |
| <input type="checkbox"/> Legal/Legislative Change                            | <input type="checkbox"/> Natural Disaster            |
| <input type="checkbox"/> Target Population Change                            | <input checked="" type="checkbox"/> Other (Identify) |
| <input type="checkbox"/> This Program/Service Cannot Fix The Problem         |                                                      |
| <input type="checkbox"/> Current Laws Are Working Against The Agency Mission |                                                      |

**Explanation:** This measure provides information on minority representation in the executive branch agencies as compared to the available labor market. The Division of Human Resource Management provides agencies with a fair and equitable employment infrastructure that includes core human resource policies, strategies and practices for agencies to follow in recruiting, selecting, and managing their human resources. However, the Division does not have the authority to make hiring decisions within the state agencies. For fiscal year 2004-2005, 18 out of 30 agencies are at or above EEO minority parity with the available labor market.

**Management Efforts to Address Differences/Problems** (check all that apply):

- |                                    |                                           |
|------------------------------------|-------------------------------------------|
| <input type="checkbox"/> Training  | <input type="checkbox"/> Technology       |
| <input type="checkbox"/> Personnel | <input type="checkbox"/> Other (Identify) |

**Recommendations:**

## LRPP Exhibit III: PERFORMANCE MEASURE ASSESSMENT

**Department:** Management Services

**Program:** Workforce

**Service/Budget Entity:** Human Resource Management

**Measure:** Percent of Dollars Saved by Eliminating and Reducing Expenses

**Action:**

- |                                                                                                                                                                                                                                      |                                                                                              |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|
| <input checked="" type="checkbox"/> Performance Assessment of <u>Outcome</u> Measure<br><input type="checkbox"/> Performance Assessment of <u>Output</u> Measure<br><input type="checkbox"/> Adjustment of GAA Performance Standards | <input type="checkbox"/> Revision of Measure<br><input type="checkbox"/> Deletion of Measure |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|

Approved Standard	Actual Performance Results	Difference	Percentage Difference
19.25%	9.73%	(9.52)	(49.45%)

**Factors Accounting for the Difference:**

**Internal Factors** (check all that apply):

- |                                                                                                                                                                                                  |                                                                                       |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| <input type="checkbox"/> Personnel Factors<br><input type="checkbox"/> Competing Priorities<br><input type="checkbox"/> Previous Estimate Incorrect<br><input type="checkbox"/> Other (Identify) | <input type="checkbox"/> Staff Capacity<br><input type="checkbox"/> Level of Training |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|

**Explanation:**

**External Factors** (check all that apply):

- |                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                      |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> Resources Unavailable<br><input type="checkbox"/> Legal/Legislative Change<br><input type="checkbox"/> Target Population Change<br><input checked="" type="checkbox"/> This Program/Service Cannot Fix The Problem<br><input type="checkbox"/> Current Laws Are Working Against The Agency Mission | <input type="checkbox"/> Technological Problems<br><input type="checkbox"/> Natural Disaster<br><input checked="" type="checkbox"/> Other (Identify) |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------|

**Explanation:** In support of the Savings Sharing Program, (as authorized in Section 110.1245, Florida Statutes), agencies were surveyed to ascertain the number of positions eliminated and associated cost; the number and amount of increases to base rate of pay; and the number and amount of bonuses awarded to employees from generated savings. This measure is provided to capture the savings generated by the agencies that are shared with employees as a means to retain, reward, and recognize high performing employees. Only one agency, the Department of Management Services, generated savings through the elimination of some positions. Due to limited agency participation, the percent of dollars saved from eliminating and reducing expenses fell below the approved performance standard for fiscal year 2004-2005.

**Management Efforts to Address Differences/Problems** (check all that apply):

- |                                                                         |                                                                                  |
|-------------------------------------------------------------------------|----------------------------------------------------------------------------------|
| <input type="checkbox"/> Training<br><input type="checkbox"/> Personnel | <input type="checkbox"/> Technology<br><input type="checkbox"/> Other (Identify) |
|-------------------------------------------------------------------------|----------------------------------------------------------------------------------|

**Recommendations:**

## LRPP Exhibit III: PERFORMANCE MEASURE ASSESSMENT

**Department:** Department of Management Services

**Program:** Workforce

**Service/Budget Entity:** Retirement Benefits Administration

**Measure:** Turn Around Times for Benefit Calculations - Information Request (Calendar Days)

**Action:**

- |                                                                                                                                                                                                                                                 |                                                                                              |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|
| <input checked="" type="checkbox"/> Performance Assessment of <u>Outcome</u> Measure<br><input type="checkbox"/> Performance Assessment of <u>Output</u> Measure<br><input checked="" type="checkbox"/> Adjustment of GAA Performance Standards | <input type="checkbox"/> Revision of Measure<br><input type="checkbox"/> Deletion of Measure |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|

Approved Standard	Actual Performance Results	Difference (Over/Under)	Percentage Difference
14	31.75	17.75	126.8%

**Factors Accounting for the Difference:**

**Internal Factors** (check all that apply):

- |                                                                                                                                                                                                             |                                                                                                             |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------|
| <input checked="" type="checkbox"/> Personnel Factors<br><input type="checkbox"/> Competing Priorities<br><input type="checkbox"/> Previous Estimate Incorrect<br><input type="checkbox"/> Other (Identify) | <input checked="" type="checkbox"/> Staff Capacity<br><input checked="" type="checkbox"/> Level of Training |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------|

**Explanation:** There was a dramatic turnover in personnel in the Bureau of Retirement Calculations during this period due to retirements, promotions and terminations. Over 50% of the positions that perform this work were vacant at various periods during FY 2004-05. This large turnover in personnel throughout the year resulted in positions being vacant during the hiring process and substantial time needed for the training of new employees. Additionally, the physical move to a new building impacted the timing of filling vacancies as well as some loss of productivity. The previously established standard was based on a complete and experienced staff to perform this work for the entire year.

**External Factors** (check all that apply):

- |                                                                                                                                                                                                                                                                                                                  |                                                                                                                                           |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> Resources Unavailable<br><input type="checkbox"/> Legal/Legislative Change<br><input type="checkbox"/> Target Population Change<br><input type="checkbox"/> This Program/Service Cannot Fix The Problem<br><input type="checkbox"/> Current Laws Are Working Against The Agency Mission | <input type="checkbox"/> Technological Problems<br><input type="checkbox"/> Natural Disaster<br><input type="checkbox"/> Other (Identify) |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------|

**Explanation:**

**Management Efforts to Address Differences/Problems** (check all that apply):

- |                                                                                               |                                                                                  |
|-----------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------|
| <input checked="" type="checkbox"/> Training<br><input checked="" type="checkbox"/> Personnel | <input type="checkbox"/> Technology<br><input type="checkbox"/> Other (Identify) |
|-----------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------|

**Recommendations:** Management will continue training new employees to build the expertise and efficiency needed to improve response times.

The previously established standard of 14 for FYs 2004-05 and 2005-06 was based on having a complete and experienced staff to perform this work for an entire year. The dramatic turnover in personnel (over 50% of the positions that perform this work) and the required training time to build the experience and expertise to return to that level of experienced staffing result in the need for a different standard. The Division of Retirement estimates 28 days in turn around times in benefit calculations for FY 2005-06 and requests a revision to the FY 2006-07 standard from 14 to 24 days.

## LRPP Exhibit III: PERFORMANCE MEASURE ASSESSMENT

**Department:** Department of Management Services

**Program:** Workforce

**Service/Budget Entity:** Retirement Benefits Administration

**Measure:** Number of Local Pension Plan Valuations and Impact Statements Reviewed

**Action:**

- |                                                                                                                                                                                                                                      |                                                                                              |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|
| <input type="checkbox"/> Performance Assessment of <u>Outcome</u> Measure<br><input checked="" type="checkbox"/> Performance Assessment of <u>Output</u> Measure<br><input type="checkbox"/> Adjustment of GAA Performance Standards | <input type="checkbox"/> Revision of Measure<br><input type="checkbox"/> Deletion of Measure |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|

Approved Standard	Actual Performance Results	Difference (Over/Under)	Percentage Difference
500	305	-195	-39.0%

**Factors Accounting for the Difference:**

**Internal Factors** (check all that apply):

- |                                                                                                                                                                                                             |                                                                                       |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| <input type="checkbox"/> Personnel Factors<br><input type="checkbox"/> Competing Priorities<br><input checked="" type="checkbox"/> Previous Estimate Incorrect<br><input type="checkbox"/> Other (Identify) | <input type="checkbox"/> Staff Capacity<br><input type="checkbox"/> Level of Training |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|

**Explanation:** The targeted number of Local Pension Plan Valuations and Impact Statements to be reviewed include those in arrearage. Additional recurring appropriation provided to the Division of Retirement for contracting with a third party actuary, to reduce existing arrearage and avoid future arrearage, is reflected in the lower number of actuarial valuations and impact statements that had to be reviewed in FY 2004-2005. It is difficult to accurately estimate the total number of annual valuations and impact statements that will require review, as that number is dependent on what changes Local plans make to their pension programs. It is believed that annually, between 350 and 450 actuarial valuations and impact statements will be sent to the Division of Retirement for review. With the continued support of third party actuarial services, it is believed all reviews can be kept current and future arrearages can be avoided.

**External Factors** (check all that apply):

- |                                                                                                                                                                                                                                                                                                                  |                                                                                                                                           |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> Resources Unavailable<br><input type="checkbox"/> Legal/Legislative Change<br><input type="checkbox"/> Target Population Change<br><input type="checkbox"/> This Program/Service Cannot Fix The Problem<br><input type="checkbox"/> Current Laws Are Working Against The Agency Mission | <input type="checkbox"/> Technological Problems<br><input type="checkbox"/> Natural Disaster<br><input type="checkbox"/> Other (Identify) |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------|

**Explanation:** N/A

**Management Efforts to Address Differences/Problems** (check all that apply):

- Training
- Personnel

- Technology
- Other (Identify)

**Recommendations:**

Although 500 had been the standard estimate for a long time, the Legislature approved a standard of 400 for FY 2005-06 as a result of the Bureau of Local Retirement Systems having caught-up on a long-standing arrearage in outstanding actuarial valuations and impact statements.

## LRPP EXHIBIT IV: Performance Measure Validity and Reliability

**Department:** Management Services

**Program:** Business Operations Support

**Service/Budget Entity:** State Purchasing

**Measure:** Number of contract items specifications processed

**Action** (check one):

- Requesting revision to approved performance measure.
- Change in data sources or measurement methodologies.
- Requesting new measure.
- Backup for performance measure nor previously approved or for which validity, reliability and/or methodology information has not been provided.

### **Data Sources and Methodology:**

We wish to delete this unit cost output measure, because we are requesting the deletion of the corresponding Activity (1210). This measure identifies the number of commodities/services on term contracts available to State agencies, cities, counties and other eligible users. The data source for this measure is the commodities/services identified on solicitation responses, price sheets and vendor catalogs and resulting contracts. The number of commodities/services on term contracts is counted annually. We wish to delete this measure because we are also requesting the deletion of the corresponding Activity (1210). The other Activity (1200) with a new measure requested will capture the cost efficiency of the division more accurately.

### **Validity:**

Though items can be verified by counting the number of commodities/services, the work load of this Activity can be skewed by the fluctuating item counts in the vendor's catalogs. We wish to delete this unit cost output measure, because we are requesting the deletion of the corresponding Activity (1210). The other Activity (1200) with a new measure requested will capture the cost efficiency of the division more accurately.

### **Reliability:**

The information is gathered from the Contract Administrators that handle the commodities/services count in each of their contracts. We wish to delete this unit cost output measure, because we are requesting the deletion of the corresponding Activity (1210). The other Activity (1200) with a new measure requested will capture the cost efficiency of the division more accurately.

## LRPP EXHIBIT IV: Performance Measure Validity and Reliability

**Department:** Management Services

**Program:** Business Operations Support

**Service/Budget Entity:** State Purchasing

**Measure:** Number of state term contracts and negotiated agreements

**Action** (check one):

- Requesting revision to approved performance measure.
- Change in data sources or measurement methodologies.
- Requesting new measure.
- Backup for performance measure nor previously approved or for which validity, reliability and/or methodology information has not been provided.

### **Data Sources and Methodology:**

We wish to delete and replace this measure because we have determined that counting contracts has less relevance, due to the combination of smaller contracts into fewer larger contracts as part of our strategic sourcing initiative to reduce costs. This measure identifies the number of contracts and agreements established for commodities and services available for use by state agencies, cities, counties and other eligible users. Data is based on contracts and agreements established and posted on the State Purchasing Direct web site. Data is updated upon addition of new contracts or agreements or upon completion of the term of a contract or agreement cycle. The number of contracts and agreements are counted annually. We wish to replace this measure because we have determined that counting contracts has less relevance, due to the combination of smaller contracts into fewer larger contracts as part of our strategic sourcing initiative to reduce costs. The number of documents does not indicate the efficiency of the Activity. We have a unit output measure that now measures instead the productivity of the contracts by measuring "Dollars expended by state agencies using state term contracts and negotiated agreements."

### **Validity:**

This measure is valid because it can be verified by counting the number of contracts and agreements established within the fiscal year. This measure is appropriate because the contracts and agreements established leverage the purchasing power of state and local government by gaining discounts from volume purchases. But, as we move in a direction of more efficient contract management, contracts will be merged and this contract count will consistently be reduced. The replacing measure, "Dollars expended by state agencies using state term contracts and negotiated agreements" is appropriate because dollars expended through state term contracts and agreements are a measure of the contracts' importance to state agencies, and the state budget overall, and allow comparisons of purchasing operating costs to value of the awarded contracts.



**Reliability:**

The count of contracts and agreements are made using on-line documents that identify individual contracts and agreements. This information comes from one source and is compiled annually in a consistent manner. We, however, would like to measure how productive these contract are and measure instead the “Dollars expended by state agencies using state term contracts and negotiated agreements.”

## LRPP EXHIBIT IV: Performance Measure Validity and Reliability

**Department:** Department of Management Services

**Program:** Human Resource Support

**Service/Budget Entity:** Division of Human Resource Management

**Measure:** Total State Cost per Position in the State Agencies

**Action** (check one):

- Requesting revision to approved performance measure.
- Change in data sources or measurement methodologies.
- Requesting new measure.
- Backup for performance measure nor previously approved or for which validity, reliability and/or methodology information has not been provided.

Summary: In support of the People First project, the Department of Management Services contracted with Convergys Customer Management Group, Inc. (Convergys/service provider) on August 21, 2002. This contract provides the State Personnel System with a personnel information system (HR automated system) and an enterprise-wide suite of human resource services including payroll preparation, benefits, staffing and human resource administration. This measure seeks to provide the Legislature with information on the savings realized through the People First project. By calculating the current cost of personnel services being provided to employees as the baseline measure and comparing it to the cost of services provided after the implementation of the People First project, the Legislature can be kept apprised of whether the outsourcing initiative is cost effective and of the amount of savings that were redirected to other State priorities.

NOTE: The methodology for this measure was changed when the Legislature assigned the per FTE cost per position as reflected in proviso language. This measure no longer includes the residual agency personnel office costs or the OPS costs. This measure only captures the per FTE cost that is calculated by the Office of Policy and Budget and Legislative staff at the end of legislative session since the final FTE count is available at that time. Therefore, the Division is proposing to change the title of this measure to "Cost Per FTE in the State Agencies"

### **Data Sources and Methodology:**

The Division of Human Resource Management is proposing to change the title of this performance measure to more accurately reflect legislative intent. The current measure, *Total State Cost Per Position in the State Agencies*, was previously intended to provide the Legislature with information on the savings realized through the People First project. This methodology included calculating the estimated cost of personnel services (as provided in the September 2001

Business Plan for the Human Resources Outsourcing Initiative), as a baseline measure, and comparing it to the cost of services provided after the implementation of the project. The methodology for this measure included the total cost of human resource services as provided by the Division of Human Resource Management, agency residual personnel office staff and the personnel information system service provider for the People First Project. However, the methodology for this measure was changed when the Legislature assigned the cost per FTE. The Legislature and the Governor's Office of Policy and Budget calculate this cost and include it in proviso language in the General Appropriations Act.

Changing the title to *Cost Per FTE in the State Agencies* aligns the title with the amount per FTE that each agency will contribute toward the contract and for services provided by the Division of Human Resource Management. The new methodology and title is more accurate and reliable since it meets the intent of the Legislature and because the Division would not be able to obtain accurate and reliable data for the agency residual personnel costs.

**Validity:**

The Cost per FTE measure is a valid indicator of the State's cost for human resource services as provided by the Division of Human Resource Management and the service provider for the State Personnel System's personnel information system. The Cost per FTE is determined by the Legislature and the Governor's Office of Policy and Budget, and it is included in proviso language in the General Appropriations Act.

**Reliability:**

Data reliability is ensured since the Office of Policy and Budget and the Legislature calculate the cost per FTE and the cost per FTE is a reliable indicator of costs to provide human resource services to the agencies and employees.

## LRPP EXHIBIT IV: Performance Measure Validity and Reliability

**Department:** Department of Management Services

**Program:** Human Resource Support

**Service/Budget Entity:** Division of Human Resource Management

**Measure:** Number of state agencies with established training plans

**Action** (check one):

- Requesting revision to approved performance measure.
- Change in data sources or measurement methodologies.
- Requesting new measure.
- Backup for performance measure nor previously approved or for which validity, reliability and/or methodology information has not been provided.

Summary: Each year, agencies are required to submit information regarding their training programs to the Division. Through its review, the Division can assess whether performance enhancement strategies are incorporated into agency programs to support the legislative intent of the Service First initiative. The performance standard anticipates full reporting from all 29 agencies.

### **Data Sources and Methodology:**

Section 110.235(2), Florida Statutes, requires each State Personnel System agency (17 Governor's agencies, 4 Governor and Cabinet agencies, 3 Cabinet agencies, the Public Service Commission, the Fish & Wildlife Conservation Commission, the Parole Commission, the Division of Administrative Hearings, and the Florida School for the Deaf and the Blind) to annually evaluate and report to the department the training it has implemented and the progress it has made in the area of training. By agencies submitting their reports, the Division will be able to assess whether performance enhancement strategies are incorporated into agency programs. The Division's Contact Management System, in which all correspondence received by the Division is logged, will serve to document receipt of the training information.

### **Validity:**

The Division will be able to document agencies in compliance with this reporting requirement through the Division's internal system for tracking correspondence, Contact Management System.

### **Reliability:**

In accordance with established procedures, all correspondence received by the Division is date stamped and entered into the Contact Management System by support personnel. The Contact Management System will serve to document receipt of the agencies' reports.

## LRPP EXHIBIT IV: Performance Measure Validity and Reliability

**Department:** Department of Management Services

**Program:** Human Resource Support

**Service/Budget Entity:** Division of Human Resource Management

**Measure:** Percent of All Contracted Performance Standards Met (Outsourced HR)

**Action** (check one):

- Requesting revision to approved performance measure.
- Change in data sources or measurement methodologies.
- Requesting new measure.
- Backup for performance measure nor previously approved or for which validity, reliability and/or methodology information has not been provided.

Summary: In support of the People First project, the Department of Management Services contracted with Convergys Customer Management Group, Inc. (Convergys/service provider) on August 21, 2002. This contract provides the State Personnel System with a personnel information system (HR automated system) and an enterprise-wide suite of human resource services including payroll preparation, benefits, staffing and human resource administration. This performance measure seeks to provide the Legislature with information on the performance of the service provider.

The first phase of the *People First* implementation was in May 2003 with the introduction of new staffing services. To ensure all state agencies and employees were comfortable with the remaining new services before they were fully implemented on a statewide basis, additional time was built into the process to allow for the parallel operation of both the new and old systems. This allowed the State to implement system functionality based on input from the first phase; to continue to work with all state agencies to ensure that the new services were effective; and to devote additional time to testing the system, ensuring the end users were comfortable with the system interface. As a result, actual performance data is not available for fiscal year 2004 – 2005 at this time since calendar year 2004 was the actual year of implementation for the agencies. A phased-implementation schedule was used to implement the People First system with the last agencies starting in November 2004.

### **Data Sources and Methodology:**

The contract for the People First project stipulates acceptable performance standards and minimum service levels and requires the service provider to submit reports indicating performance on each of the contracted standards. Examples of the critical performance metrics found in the contract between Convergys and the Department are: customer satisfaction surveys, payroll and

time and attendance accuracy, self-service availability, call and case quality and data and input quality.

As the contract administrator, the Division of Human Resource Management manages the contract and oversees the performance of the service provider to ensure compliance with the provisions, including agreed-upon performance standards and delivery of services to the users of the system.

**Validity:**

The validity of the measure is ensured because the performance measures and standards are set in the contract with the service provider. The Division of Human Resource Management will be able to monitor the validity of the service provider's performance information since we will have access to their data.

**Reliability:**

Reliability of the measure is ensured because the performance standards are specified in the service provider contract and most of the performance data is system generated.

## LRPP EXHIBIT IV: Performance Measure Validity and Reliability

**Department:** Department of Management Services

**Program:** Human Resource Support

**Service/Budget Entity:** Division of Human Resource Management

**Measure:** Overall Customer Satisfaction Rating

**Action** (check one):

- Requesting revision to approved performance measure.
- Change in data sources or measurement methodologies.
- Requesting new measure.
- Backup for performance measure nor previously approved or for which validity, reliability and/or methodology information has not been provided.

Summary: Customer satisfaction surveys are conducted to ensure the Division's customers are receiving timely, accurate, and consistent services. The performance standard assumes a consistent level of satisfaction from all of the 29 agencies surveyed.

### **Data Sources and Methodology:**

The Division of Human Resource Management (HRM) provides customer agencies with information and technical assistance on various human resource-related topics/issues to assist them in the administration of their human resource programs. Our primary customer base is the agency personnel officers in the executive branch agencies (17 Governor's agencies, 4 Governor and Cabinet agencies, 3 Cabinet agencies, the Public Service Commission, the Fish & Wildlife Conservation Commission, the Parole Commission, the Division of Administrative Hearings, and the Florida School for the Deaf and the Blind) from which we receive the human resources assessment as prescribed in the General Appropriations Act. Written surveys are sent to each agency's personnel officer to assess their overall satisfaction with the services (e.g. information and technical assistance) provided by HRM. These "services" are critical elements in ensuring agencies make more effective and efficient human resource-related decisions.

The number of responses indicating satisfaction with our services is divided by the total number of responses to the question to arrive at the percentage of satisfied customers.

### **Validity:**

The Division of Human Resource Management focuses on developing and supporting a human resource infrastructure designed to assist agencies in recruiting, retaining, rewarding and recognizing a high performance workforce for the State of Florida. The customer satisfaction measure for HRM provides a

means to evaluate the value of our services so that we can determine how well we are meeting this goal.

The Division employed procedures to ensure that the return rate from the target population was sufficient to meet the standard. These procedures include reminders at the personnel officers' meetings, follow up transmissions of the survey, emails and phone calls to customers who missed the original due date.

**Reliability:**

With the exception of some modifications, this is the fifth year that the Division has used this survey instrument to capture customer satisfaction with the services (technical assistance and information) provided. Therefore, the baseline that was established in previous years is a reliable source. This measure can be used to assess the effectiveness of Human Resource Management's performance and the ultimate results or impacts of the products and services provided. However, it should be noted that this survey is subjective due to the role of the Division.



## LRPP EXHIBIT IV: Performance Measure Validity and Reliability

**Department:** Department of Management Services

**Program:** Human Resource Support

**Service/Budget Entity:** Division of Human Resource Management

**Measure:** Percent of Agencies at or Above EEO Minority and Gender Parity with Available Labor Market

**Action** (check one):

- Requesting revision to approved performance measure.
- Change in data sources or measurement methodologies.
- Requesting new measure.
- Backup for performance measure nor previously approved or for which validity, reliability and/or methodology information has not been provided.

Summary: HRM uses this as an informational measure reflecting gender and minority representation in the executive branch agencies as compared to the available labor market. The comparison to the available labor market utilized the most current federal census data (2000 Census/Equal Employment Opportunity (EEO) Special File) and data collected for each agency from the State's personnel information system. Agencies are responsible for all hiring decisions and therefore, this measure does not reflect the Division's performance.

This measure includes information on the executive branch agencies: 17 Governor's agencies, 4 Governor and Cabinet agencies, 3 Cabinet agencies, the Public Service Commission, the Fish & Wildlife Conservation Commission, the Parole Commission, the Division of Administrative Hearings, the Florida School for the Deaf and the Blind, and the Florida Lottery.

Performance Standards:

Gender Representation: The performance standard assumes that at least 25 out of 29 agencies are going to achieve parity.

Minority Representation: The performance standard assumes that at least 22 out of 29 agencies are going to achieve parity.

### **Data Sources and Methodology:**

While the Division of Human Resource Management does not directly influence the hiring trends within the agencies, this measure provides information on minority and female representation in the agencies as compared to the available labor market. Data for this measure is queried off the State's human resource automated system by minority and gender group for each agency. The data was compared to the 2000 available labor market data (2000 Census/EEO Special File) for the State of Florida.

A labor market parity measure of the agencies is an appraisal of how successful the agencies are in employing a diverse workforce that is representative of the state's overall population. The federal courts have allowed for some variance in parity to account for other factors that influence hiring decisions. To account for those factors, it is acceptable to be within two standard deviations of parity. The two standard deviation method permits the percentage of representation of an EEO group in the workforce to be within two standard deviations of their available labor market percentage in the relevant recruiting area (minority parity =33% and female parity=47%).

To determine the percentage of agencies at parity, the Division divided the number of agencies that met the parity standard by the total number of agencies.

**Validity:**

Agencies are responsible for the actual recruitment, selection and retention of a diverse workforce representative of Florida's labor market. This measure is appropriate because it provides the Legislature with information on minority and gender hiring trends for the State as an employer.

**Reliability:**

By using the State's human resource automated system each year, it assures reliability of the data from year to year. Compatibility with the latest federal census also assures reliability of the data.

## **LRPP EXHIBIT IV: Performance Measure Validity and Reliability**

**Department:** Department of Management Services

**Program:** Human Resource Support

**Service/Budget Entity:** Division of Human Resource Management

**Measure:** : Number of Positions in the State Agencies Supported by the HR Automated System

**Action** (check one):

- Requesting revision to approved performance measure.
- Change in data sources or measurement methodologies.
- Requesting new measure.
- Backup for performance measure nor previously approved or for which validity, reliability and/or methodology information has not been provided.

Summary: In support of the People First project, the Department of Management Services contracted with Convergys Customer Management Group, Inc. (Convergys/service provider) on August 21, 2002. This contract provides the State Personnel System with a personnel information system (HR automated system) and an enterprise-wide suite of human resource services including payroll preparation, benefits, staffing and human resource administration. This measure is calculated by adding the number of authorized positions and the number of Other Personal Services employees receiving human resource services provided by Convergys. This is a valid output measure since the number of positions receiving services directly correlates to funding the cost of the People First contract. This is also a unit cost measure.

### **Data Sources and Methodology:**

For each fiscal year, data for the number of established positions and other personal services employees is obtained from automated systems. The personnel information system (HR automated system) maintains human resource data for agencies, which include all executive branch agencies (17 Governor's agencies, 4 Governor and Cabinet agencies, 3 Cabinet agencies, the Public Service Commission, the Fish & Wildlife Conservation Commission, the Parole Commission, the Division of Administrative Hearings, the Florida School for the Deaf and the Blind, and the Florida Lottery), the Justice Administrative Commission and the State Courts System. The Department of Financial Services' Florida Accounting Information Resource (FLAIR) Subsystem maintains data on other personal services employees.

The measure is calculated by adding the number of established positions and the number of other personal services employees as of June 30<sup>th</sup> of each fiscal year.

**Validity:**

This is a valid output measure since the number of positions and other personal services employees directly correlates to the services provided by the service provider.

**Reliability:**

The number of positions is reliable as it is compiled from the human resource automated system. The number of other personal services employees is also reliable as it is obtained from the Department of Financial Services' Bureau of State Payrolls.

## **LRPP EXHIBIT IV: Performance Measure Validity and Reliability**

**Department:** Department of Management Services

**Program:** Human Resource Support

**Service/Budget Entity:** Division of Human Resource Management

**Measure:** Number of Responses to Technical Assistance Requests

**Action** (check one):

- Requesting revision to approved performance measure.
- Change in data sources or measurement methodologies.
- Requesting new measure.
- Backup for performance measure nor previously approved or for which validity, reliability and/or methodology information has not been provided.

Summary: HRM uses this measure to calculate the number of requests for technical assistance provided by the Division regarding human resource policies, procedures and programs. It is measured by counting the number of requests received both verbally and in writing (requests are tracked via two automated systems). The performance standards have been exceeded due to the various human resource initiatives occurring during the fiscal years such as People First, Service First, Adoption Benefits, Broadbanding, Rules, etc. The standard also represents a leveling-off of the number of requests for services since many of the Service First initiatives have been implemented and, Service First made agencies more accountable for the management of their human resource programs. This is also a unit cost measure.

### **Data Sources and Methodology:**

The Division of Human Resource Management provides State Personnel System agencies (17 Governor's agencies, 4 Governor and Cabinet agencies, 3 Cabinet agencies, the Public Service Commission, the Fish & Wildlife Conservation Commission, the Parole Commission, the Division of Administrative Hearings, and the Florida School for the Deaf and the Blind), the Florida Lottery, the Justice Administrative Commission and the State Courts System with technical assistance in various human resource related areas in order to assist agencies administer effective and efficient human resource programs. Technical assistance is provided to the agencies both verbally and in writing. The number of responses to technical assistance requests was counted using data from two automated internal tracking systems: Contact Management System and Phone Tracking System. These systems assist the Division of Human Resource Management in maintaining a record of the requests for technical assistance; gathering information for performance-based program budgeting measures; and identifying specific trends reflecting specific agency needs.

Monthly data reports are prepared to review the number, nature and type of contacts handled by the Division. Reports are generated from each system to provide the total number of contacts by month, by agency/entity, by employees and by subject category. These reports also include year-to-date and fiscal year trends.

**Validity:**

The Division of Human Resource Management provides technical assistance pertaining to various human resource programs such as classification and compensation, employment issues, employee benefits, training, workforce transition, and reporting to help the agencies better manage their workforce. Measuring the number of responses to technical assistance requests provides management with a tool to help determine the Division's productivity, as well as, identify the type of training agencies need and the level of technical assistance requested. This will enable the Division to continue improving performance in the delivery of these services to the agencies and maintain appropriate staffing.

**Reliability:**

The Division relies on internal automated tracking systems to capture this output. The use of these automated systems is more reliable than using estimates or a manual system to maintain an accurate count of the requests for technical assistance. These systems allow the data reports to be sorted by user, dates, topic, pending contacts and response time.

A possible threat to the reliability of the measure is that employees are responsible for recording all requests for technical assistance into one of the automated tracking systems. The data for this measure depends on how accurate and consistent employees are entering the data into these systems. Monthly data reports as well as year-to-date trends are reviewed to ensure accuracy and consistency of the data.

## LRPP EXHIBIT IV: Performance Measure Validity and Reliability

**Department:** Management Services

**Program:** Human Resource Support

**Service/Budget Entity:** Division of Retirement

**Measure:** (Outcome) Turn Around Times For Benefit Calculations - Information Requests (Calendar Days)

**Action** (check one):

- Requesting revision to approved performance measure.
- Change in data sources or measurement methodologies.
- Requesting new measure.
- Backup for performance measure nor previously approved or for which validity, reliability and/or methodology information has not been provided.

**Data Sources and Methodology:** The data source for the measure is Retirement Benefits Administration's Automated Image Workflow Process. The date an information request is received, the request is entered in the workflow process. The date the request is entered in the workflow process will be matched against the archive date (the date the process is complete) and the number of work days to complete the process will be determined. The benefits of having the Division extensively automate retirement services continues to exhibit and promise added efficiencies. However, the automated system is still new and the ability to sustain the better-than-expected achievements realized is not yet assured.

Information requests are received in the following ways:

Request for Information Form (FR-9)

Written

E-mail

Internet

Walk-in visitors to the Division

Telephone

Forms and written/printed documents, including e-mails and Internet messages are indexed, imaged, and placed in the Bureau's workflow process. Requests received via telephone are entered into the workflow by staff through a personal computer. A report will be generated, upon request, documenting each new information request received by process, social security number, and date entered in workflow. When the process is complete, the documents are archived.

The date an information request is received in the Division, the request is entered in the workflow process. The date the request is entered in the workflow process will be matched against the archive date (the date the process is completed), and the number of calendar days to complete the process will be determined. [Date archived less date entered in workflow = days to complete the process.] All information requests archived for a given period (weekly, monthly, or annually) will be totaled and an average number of calendar days will be calculated for the specified period.

In FY 2004-05, there was a dramatic turnover in personnel in the Bureau of Retirement Calculations due to retirements, promotions and terminations. Over 50% of the positions that perform this work were vacant at various periods during FY 2004-05. This large turnover in personnel throughout the year resulted in positions being vacant during the hiring process and substantial time needed for the

training of new employees. Additionally, the physical move to a new building impacted the timing of filling vacancies as well as some loss of productivity. Management will continue training new employees to build the expertise and efficiency needed to improve response times.

The previously established standard of 14 for FYs 2004-05 and 2005-06 was based on having a complete and experienced staff to perform this work for an entire year. The dramatic turnover in personnel (over 50% of the positions that perform this work) and the required training time to build the experience and expertise to return to that level of experienced staffing result in the need for a different standard. The Division of Retirement estimates 28 days in turn around times in benefit calculations for FY 2005-06 and requests a revision to the FY 2006-07 standard from 14 to 24 days.

**Validity:** In December 1999, the Division of Retirement completed development of a computerized information system that converted the Bureau's workflow from a manual intensive process involving hard copy files and microfiche documents to paperless process. Beginning January 2000 information requests have been imaged and entered in a systemic distribution process that enables staff to perform the calculation/audit functions using the imaging system and other computer processes and to archive the records when the process is complete.

Management reports were designed to capturing statistical information. From this data, a Response Time report was specifically designed to capture the turn around time it takes to complete a request for information. The Division's computerized information system captures all new information requests received, processed, and archived.

**Reliability:** The management reports generated for other purposes can be utilized to determine the accuracy of member folders (information request) entered in the process and the number of folders archived. Comparison of work performed (folders worked and folders received) by process, by employee, by section and summary by bureau will be used to determine the reliability of the turn around time of information requested.

*Office of Policy and Budget – July, 2005*



## **Glossary of Terms and Acronyms**

Activity: A set of transactions within a budget entity that translates inputs into outputs using resources in response to a business requirement. Sequences of activities in logical combinations form services. Unit cost information is determined using the outputs of activities.

Actual Expenditures: Includes prior year actual disbursements, payables and encumbrances. The payables and encumbrances are certified forward at the end of the fiscal year. They may be disbursed between July 1 and December 31 of the subsequent fiscal year. Certified forward amounts are included in the year in which the funds are committed and not shown in the year the funds are disbursed.

Appropriation Category: The lowest level line item of funding in the General Appropriations Act which represents a major expenditure classification of the budget entity. Within budget entities, these categories may include: salaries and benefits, other personal services (OPS), expenses, operating capital outlay, data processing services, fixed capital outlay, etc. These categories are defined within this glossary under individual listings. For a complete listing of all appropriation categories, please refer to the ACTR section in the LAS/PBS User's Manual for instructions on ordering a report.

Baseline Data: Indicators of a state agency's current performance level, pursuant to guidelines established by the Executive Office of the Governor in consultation with legislative appropriations and appropriate substantive committees.

Budget Entity: A unit or function at the lowest level to which funds are specifically appropriated in the appropriations act. "Budget entity" and "service" have the same meaning.

CIO: Chief information Officer

CIP: Capital Improvements Program Plan

D3-A: A legislative budget request (LBR) exhibit which presents a narrative explanation and justification for each issue for the requested years.

Demand: The number of output units which are eligible to benefit from a service or activity.

EOG: Executive Office of the Governor

Estimated Expenditures: Includes the amount estimated to be expended during the current fiscal year. These amounts will be computer generated based on the current year appropriations adjusted for vetoes and special appropriations bills.

FCO: Fixed Capital Outlay

FFMIS: Florida Financial Management Information System

Fixed Capital Outlay: Real property (land, buildings including appurtenances, fixtures and fixed equipment, structures, etc.), including additions, replacements, major repairs, and renovations to real property which materially extend its useful life or materially improve or change its functional use, and including furniture and equipment necessary to furnish and operate a new or improved facility.

FLAIR: Florida Accounting Information Resource Subsystem

F.S.: Florida Statutes

GAA: General Appropriations Act

GR: General Revenue Fund

Indicator: A single quantitative or qualitative statement that reports information about the nature of a condition, entity or activity. This term is used commonly as a synonym for the word “measure.”

Information Technology Resources: Includes data processing-related hardware, software, services, telecommunications, supplies, personnel, facility resources, maintenance, and training.

Input: See Performance Measure.

IOE: Itemization of Expenditure

IT: Information Technology

Judicial Branch: All officers, employees, and offices of the Supreme Court, district courts of appeal, circuit courts, county courts, and the Judicial Qualifications Commission.

LAN: Local Area Network

LAS/PBS: Legislative Appropriation System/Planning and Budgeting Subsystem. The statewide appropriations and budgeting system owned and maintained by the Executive Office of the Governor.

LBC: Legislative Budget Commission

Legislative Budget Commission: A standing joint committee of the Legislature. The Commission was created to: review and approve/disapprove agency requests to amend original approved budgets; review agency spending plans; issue instructions and reports concerning zero-based budgeting; and take other actions related to the fiscal matters of the state, as authorized in statute. It is composed of 14 members appointed by the President of the Senate and by the

Speaker of the House of Representatives to two-year terms, running from the organization of one Legislature to the organization of the next Legislature.

LBR: Legislative Budget Request

Legislative Budget Request: A request to the Legislature, filed pursuant to s. 216.023, Florida Statutes, or supplemental detailed requests filed with the Legislature, for the amounts of money an agency or branch of government believes will be needed to perform the functions that it is authorized, or which it is requesting authorization by law, to perform.

L.O.F.: Laws of Florida

LRPP: Long-Range Program Plan

Long-Range Program Plan: A plan developed on an annual basis by each state agency that is policy-based, priority-driven, accountable, and developed through careful examination and justification of all programs and their associated costs. Each plan is developed by examining the needs of agency customers and clients and proposing programs and associated costs to address those needs based on state priorities as established by law, the agency mission, and legislative authorization. The plan provides the framework and context for preparing the legislative budget request and includes performance indicators for evaluating the impact of programs and agency performance.

MAN: Metropolitan Area Network (Information Technology)

NASBO: National Association of State Budget Officers

Narrative: Justification for each service and activity is required at the program component detail level. Explanation, in many instances, will be required to provide a full understanding of how the dollar requirements were computed.

Nonrecurring: Expenditure or revenue which is not expected to be needed or available after the current fiscal year.

OPB: Office of Policy and Budget, Executive Office of the Governor

Outcome: See Performance Measure.

Output: See Performance Measure.

Outsourcing: Describes situations where the state retains responsibility for the service, but contracts outside of state government for its delivery. Outsourcing includes everything from contracting for minor administration tasks to contracting for major portions of activities or services which support the agency mission.

## PBPB/PB2: Performance-Based Program Budgeting

Pass Through: Dollars that flow through an agency's budget for which the agency has no discretion with respect to spending or performance. Examples of pass throughs include double budget for data centers, tax or license for local governments, WAGES contracting, etc.

Performance Ledger: The official compilation of information about state agency performance-based programs and measures, including approved programs, approved outputs and outcomes, baseline data, approved standards for each performance measure and any approved adjustments thereto, as well as actual agency performance for each measure

Performance Measure: A quantitative or qualitative indicator used to assess state agency performance.

- Input means the quantities of resources used to produce goods or services and the demand for those goods and services.
- Outcome means an indicator of the actual impact or public benefit of a service.
- Output means the actual service or product delivered by a state agency.

Policy Area: A grouping of related activities to meet the needs of customers or clients which reflects major statewide priorities. Policy areas summarize data at a statewide level by using the first two digits of the ten-digit LAS/PBS program component code. Data collection will sum across state agencies when using this statewide code.

Privatization: Occurs when the state relinquishes its responsibility or maintains some partnership type of role in the delivery of an activity or service.

Program: A set of activities undertaken in accordance with a plan of action organized to realize identifiable goals based on legislative authorization (a program can consist of single or multiple services). For purposes of budget development, programs are identified in the General Appropriations Act for FY 2001-2002 by a title that begins with the word "Program." In some instances a program consists of several services, and in other cases the program has no services delineated within it; the service is the program in these cases. The LAS/PBS code is used for purposes of both program identification and service identification. "Service" is a "budget entity" for purposes of the LRPP.

Program Purpose Statement: A brief description of approved program responsibility and policy goals. The purpose statement relates directly to the agency mission and reflects essential services of the program needed to accomplish the agency's mission.

Program Component: An aggregation of generally related objectives which, because of their special character, related workload and interrelated output, can logically be considered an entity for purposes of organization, management, accounting, reporting, and budgeting.

Reliability: The extent to which the measuring procedure yields the same results on repeated trials and data are complete and sufficiently error free for the intended use.

Service: See Budget Entity.

Standard: The level of performance of an outcome or output.

STO: State Technology Office

SWOT: Strengths, Weaknesses, Opportunities and Threats

TCS: Trends and Conditions Statement

TF: Trust Fund

TRW: Technology Review Workgroup

Unit Cost: The average total cost of producing a single unit of output – goods and services for a specific agency activity.

Validity: The appropriateness of the measuring instrument in relation to the purpose for which it is being used.

WAGES: Work and Gain Economic Stability (Agency for Workforce Innovation)

WAN: Wide Area Network (Information Technology)