

# Performance Measurements

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# History

- Computers systems were built in the 80's and 90's
- Employees developed databases to do work around
- In 2004 consultant hired to review business practices.
- Cost \$57,800
- Reviewed policies, business practices & computer systems

# Recommendations

- Increase audit and review capacity
- Increase visibility with accounting firms, taxpayer groups and large taxpayers
- To increase employee efficiencies set clear performance goals

# Process

- Review Department Mission
- Developed strategic goals
- For each goal we developed performance measures to help achieve that goal
- Helps us determine & communicate the desired results
- Determine the information systems required to meet the objectives

# Process

- Do our actions create a positive or negative effect?
- Technology failures are usually the result of unclear objectives
- Quality stems from steady focus on the organizations goals
- Statistical measurement of process

# PM - Criteria

- Responsive
  - Reflect changes in performance
- Valid
  - Captures pertinent info
- Cost effective
  - Justifies cost of collecting data
- Comprehensive coverage
  - Incorporates agency operations
- Relevant
  - Relates to agency goals

# PM - Elements

- Workload
  - Audit or review inventory
- Target
  - Percentage completed
- Taxpayer impact
  - Outcome
- Employee input
- Estimated tax gap
- Education
- Process efficiencies

# Outcome

- Increase in compliance
- Increase in taxpayer education
- Increase in employee productivity

# Designing PM's

- Outcome
  - What do we want to accomplish?
- Action Plan
  - What actions can we take to achieve the target?
- Production Outcome
  - What is our measures or counts to calculate target?
- Target
  - What is our number?

# PM's completed

- Must be specific
  - Need to be clear about what will be counted
- Measurable
  - Has to be numeric or quantifiable
- Accountability
  - Who is responsible
- Results orientated
  - Have to be orientated towards results
- Time bound
  - Specify time frame

# Handouts

- Strategic Goals
- Performance measurements

# Questions?

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