2014 PASBO Annual Conference
Benchmarking Project

A Report of the Performance Measurement
and Benchmarking Project

2012-13 Survey
03/05/2014

ActPoint® KPI
PERFORMANCE MANAGEMENT SYSTEM

Council of the
Great City Schools

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in partnership with TransACT.*

Notes:

To PASBO Chief Business Officers –

We are pleased to present the results of the 2013 PASBO KPI benchmarking demonstration project as part of the PASBO Annual Conference March 11-14, 2014.

For this project, four Key Performance Indicators (KPIs) were used to demonstrate the value of statewide performance benchmarking in Pennsylvania. The KPIs are:

- Custodial Workload
- Average Age of Fleet
- Workers' Compensation Cost Per Employee
- Accounts Payable Cost Per $100k Revenue

The four KPIs are part of the ActPoint® KPI Performance Management System, which includes a library of more than 500 KPIs developed by the Council of the Great City Schools and a fully automated online business intelligence system developed by TransACT Communications, Inc.

Designed to improve non-instructional school district operations, the KPIs focus on finance (accounts payable, cash management, compensation, financial management, grants management, procurement and risk management); business operations (food services, maintenance and facilities, safety and security, and transportation); human resources; and information technology.

The goal of this demonstration project is to show that Pennsylvania school districts can improve operational performance by using performance benchmarking to influence strategic goals based on data. **When a district measures its performance and compares itself to others, it can better identify where it is successful, where it needs to improve, and how to do so strategically.**

Pennsylvania school systems which are subscribers have come to rely on the ActPoint KPI system as an essential strategic management tool. They have found that once they bring data and performance measurement into the governing and management process it lays the foundation for a more results-oriented school system.

We thank both the Council of the Great City Schools and TransACT Communications, Inc. for allowing us to use the ActPoint KPI system without cost for this demonstration project. For more information on the service, go to www.actpoint.com/pa.

Jay Himes, CAE
PASBO Executive Director

Jim Buckheit
PASA Executive Officer

Custodial Workload
Operations - Maintenance and Operations

Description
Total square footage of non-vacant buildings that are managed by the district, divided by total number of district custodial field staff. This measure only applies to district-operated sites.

Factors that influence
- Assigned duties for custodians
- Management effectiveness
- Labor agreements
- District budget

Importance of Measure
This is a staffing-level measure. It represents the average square footage that each custodian would be responsible for if all district facilities were divided evenly. A lower value could indicate that custodians may have additional assigned duties, or that there are opportunities for increased efficiency. A higher value could indicate a well-managed custodial program or that some housekeeping operations are assigned to other employee classifications.
It is important for a district to examine what drives the ratio to determine the most effective workload.

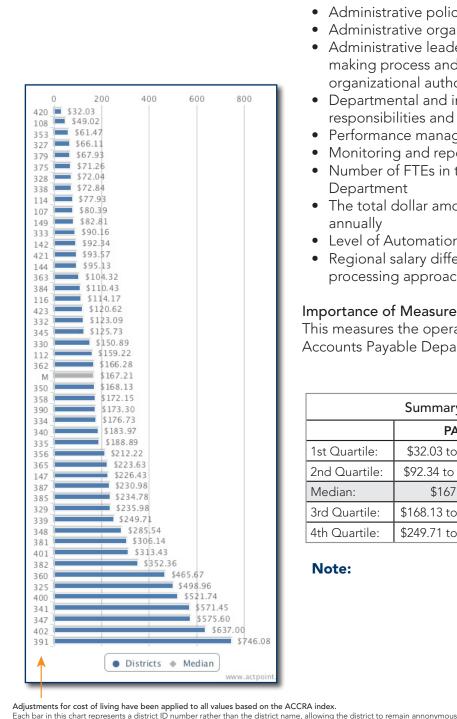| Summary of Results		
	PA	**National**
1st Quartile:	51,426 to 25,523	92,824 to 28,245
2nd Quartile:	24,746 to 20,934	28,179 to 24,059
Median:	20,589	23,961
3rd Quartile:	20,244 to 18,002	23,961 to 18,611
4th Quartile:	17,689 to 10,843	18,526 to 9,710

Note:

Accounts Payable Cost Per $100k Revenue
Finance - Accounts Payable

Description
Total Accounts Payable department personnel costs plus AP department non-personnel costs, divided by total district operating revenue over $100,000.

Factors that influence
- Administrative policies and procedures
- Administrative organizational structure
- Administrative leadership style, decision making process and distribution of organizational authority
- Departmental and individual employee responsibilities and competencies
- Performance management systems
- Monitoring and reporting systems
- Number of FTEs in the Accounts Payable Department
- The total dollar amount of invoices paid annually
- Level of Automation
- Regional salary differentials and different processing approaches

Importance of Measure
This measures the operational efficiency of an Accounts Payable Department.

Summary of Results		
	PA	**National**
1st Quartile:	$32.03 to $90.16	$22.87 to $66.02
2nd Quartile:	$92.34 to $166.28	$66.07 to $122.30
Median:	$167.21	$122.69
3rd Quartile:	$168.13 to $235.98	$122.69 to $212.22
4th Quartile:	$249.71 to $746.08	$213.82 to $746.08

Note:

Average Age of Fleet
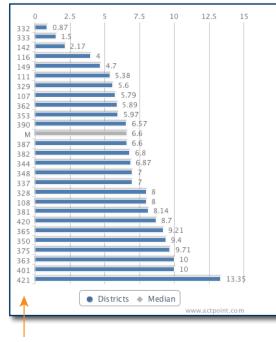### *Operations - Transportation*

Description
Average age of bus fleet. This should represent all district-operated buses including spares, but not including decommissioned and/or "mothballed" buses. Average age should be calculated using a weighted average method, e.g., with a fleet of 33 buses, if 20 buses are each five years old and 13 buses are each six years old, then the weighted average is ((20 x 5) + (13 x 6)) ÷ 33 = 5.39.

Factors that influence
- Formal district-wide capital replacement budgets and standards
- Some districts may operate climates that reduce bus longevity
- Some districts may be required to purchase cleaner burning or expensive alternative-fueled buses
- Availability of state or local bond funding for school bus replacement

Importance of Measure
Younger fleets require greater capital expenditures but reduced maintenance costs. A younger fleet will also result in greater reliability and service levels. Conversely, an older fleet requires more maintenance expenditure, even though it reduces capital expenses.

Summary of Results		
	PA	**National**
1st Quartile:	0.87 to 4.7	0.87 to 6.6
2nd Quartile:	5.38 to 6.57	6.74 to 10.0
Median:	6.6	10.14
3rd Quartile:	6.6 to 7	10.14 to 13.08
4th Quartile:	8 to 13.35	13.25 to 21.0

Note:

Adjustments for cost of living have been applied to all values based on the ACCRA index.
Each bar in this chart represents a district ID number rather than the district name, allowing the district to remain anonymous.

Workers' Compensation Cost Per Employee
Finance - Risk Management

Description
Total workers' compensation premium costs plus workers' compensation claims costs incurred plus total workers' compensation claims administration costs for the fiscal year, divided by total number of district of district employees (number of W-2's issued).

Factors that influence
- Medical management programs
- Quality of medical care
- Litigation
- Timely provision of benefits

Importance of Measure
This metric can be used to measure success of programs and initiatives. It can also be a way to measure trends over time or to benchmark against other employers.

Summary of Results		
	PA	**National**
1st Quartile:	$93.12 to $181.39	$4.10 to $246.52
2nd Quartile:	$187.14 to $284.76	$249.09 to $349.81
Median:	$287.19	$350.81
3rd Quartile:	$289.61 to $320.32	$350.81 to $606.48
4th Quartile:	$350.81 to $565.88	$607.98 to $1,506.21

Note:

Adjustments for cost of living have been applied to all values based on the ACCRA index.
Each bar in this chart represents a district ID number rather than the district name, allowing the district to remain anonymous.

KPIs and Performance Management
Why is it Important?

The four key performance indicators (KPIs) highlighted in this report are just the beginning of your journey with KPIs. Use the business intelligence and analytical tools in ActPoint® KPI to pinpoint opportunities to improve operational performance in your district.

Finance	**Operations**
Accounts Payable	**Food Services**
Cash Management	**Maintenance**
Compensation	**Facilities**
Financial Management	**Safety**
Grants Management	**Security**
Procurement	**Transportation**
Risk Management	**Information Technology**
Human Resources	

MEASURE - COMPARE - MANAGE
When a district measures its performance and compares itself to others, it can better identify where it is successful, where it needs to improve, and how to do so strategically. Use the ActPoint KPI "Data Modeling" tool to predict how strategic changes will affect benchmarking results.

EVIDENCE-BASED DECISION MAKING
Performance management is an ongoing, systematic approach to improve results through evidence-based decision making, continuous organizational learning, and a focus on accountability for performance. Apply objective, outcome-based information to management and policy making in order to improve results.

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ActPoint KPI 20

FINANCE - 5 Measures
- Fund Balance Ratio (A) Unassigned
- Fund Balance Ratio (B) Uncommitted
- Fund Balance Ratio (C) Unrestricted
- Grant Funds As Percent Of Total Budget
- Workers' Compensation Cost Per Employee

INFORMATION TECHNOLOGY - 3 Measures
- IT Spending Per Student
- IT Spending Percent Of District Budget
- Network - Bandwidth Per Student

HUMAN RESOURCES - 2 Measures
- Teacher Retention - Average For 1-5 Years
- Teacher Vacancies On First Day of School

OPERATIONS - 10 Measures
- Food Services: Cost per Meal
- Food Services: Meals Per Labor Hour
- Transportation: Cost Per Mile Operated
- M&O: Custodial Work - Cost Per Square Foot
- M&O: Custodial Workload
- M&O: Cost Per Student
- M&O: Costs Percent Of District Budget
- M&O: Routine Maintenance - Cost Per Square Foot
- M&O: Utility Costs - Cost Per Square Foot
- M&O: Work Order Completion Time (Days)

ActPoint KPI Standard: 50

FINANCE - 20 Measures

Accounts Payable
- AP Cost Per $100K Revenue
- AP Cost Per Invoice

Cash Management
- Cash Flow - Short-Term Loans Per $100K Revenue
- Investment Earnings Per $100K Revenue

Compensation
- Payroll Cost Per Pay Check

Financial Management
- Debt Servicing Costs Ratio To District Revenue
- Expenditures Efficiency - Final Budget As Percent Of Actual
- Fund Balance Ratio (A) Unassigned
- Fund Balance Ratio (B) Uncommitted
- Fund Balance Ratio (C) Unrestricted
- Revenues Efficiency - Final Budget As Percent Of Actual

Grants Management
- Grant Funds As Percent Of Total Budget
- Grant-Funded Staff As Percent Of District FTEs

Procurement
- Competitive Procurements Ratio
- Procurement Cost Per $100K Spend
- Procurement Cost Per Purchase Order
- Procurement Savings Ratio
- Strategic Sourcing Ratio

Risk Management
- Cost Of Risk per Student
- Workers' Compensation Cost Per Employee

INFORMATION TECHNOLOGY - 7 Measures
- Devices - Average Age Of Computers
- Devices - Computers Per Employee
- Devices Per Student
- IT Spending Per Student
- IT Spending Percent Of District Budget
- IT Spending Per District FTE
- Network - Bandwidth Per Student

OPERATIONS - 19 Measures

Food Services
- Breakfast Participation Rate (Districtwide)
- Cost Per Meal
- Food Cost Per Meal
- Fund Balance As Percent Of Revenue
- Lunch Participation Rate (Districtwide)
- Supper Participation Rate (Districtwide)
- Total Costs As Percent Of Revenue

Maintenance & Operations
- Custodial Work - Cost Per Square Foot
- Custodial Workload
- Major Maintenance - Cost Per Student
- Renovations - Cost Per Student
- Routine Maintenance - Cost Per Square Foot

Safety & Security
- Incidents - People Incidents Per 1,000 Students
- S&S Expenditures Per 1,000 Students
- S&S Expenditures Percent Of District Budget
- S&S Staff Per 1,000 Students

Transportation
- Bus Fleet - Average Age Of Fleet
- Cost Per Mile Operated
- Cost Per Rider

HUMAN RESOURCES - 4 Measures
- Substitute Placement Rate
- Teacher Absences Per Teacher
- Teacher Retention - Average For 1-5 Years
- Teacher Vacancies On First Day of School

Starter Packages

Starter Package Recommendations	
Enrollment	Package
1 - 5,000	Standard (20) OR (50)
5,001-20,000	Plus (100)
20,001+	PRO (500+)

ActPoint KPI Plus: 100

100 Strategic and Managerial Key Performance Indicators

FINANCE - 39 Measures

- AP Cost Per $100K Revenue
- AP Cost Per Invoice
- Cash Flow - Months Above Liquidity Baseline
- Cash Flow - Short-Term Loans Per $100K Revenue
- Competitive Grant Funds As Percent Of Total
- Competitive Procurements Ratio
- Cooperative Purchasing Ratio
- Cost Of Risk per Student
- Debt Principal Ratio To District Revenue
- Debt Servicing Costs Ratio To District Revenue
- Expenditures Efficiency - Adopted Budget As Percent Of Actual
- Expenditures Efficiency - Final Budget As Percent Of Actual
- Fund Balance Ratio (A) Unassigned
- Fund Balance Ratio (B) Uncommitted
- Fund Balance Ratio (C) Unrestricted
- Grant Funds As Percent Of Total Budget
- Grant-Funded Staff As Percent Of District FTEs
- Investment Earnings Per $100K Revenue
- Invoices - Days To Process
- Invoices Processed Per FTE per Month
- P-Card Purchasing Ratio
- PALT For Informal Solicitations
- PALT For Invitations for Bids
- PALT For Requests for Proposals
- Pay Checks Processed Per FTE per Month
- Payroll Cost Per $100K Spend
- Payroll Cost Per Pay Check
- Procurement Cost Per $100K Spend
- Procurement Cost Per Purchase Order
- Procurement Savings Ratio
- Returned Grant Funds Per $100K Grant Revenue
- Revenues Efficiency - Adopted Budget As Percent Of Actual
- Revenues Efficiency - Final Budget As Percent Of Actual
- Strategic Sourcing Ratio
- Warehouse Operating Expense Ratio
- Warehouse Stock Turn Ratio
- Workers' Compensation Cost Per $100K Payroll Spend
- Workers' Compensation Cost Per Employee
- Workers' Compensation Lost Work Days Per 1,000 Employees

HUMAN RESOURCES - 10 Measures

- Substitute Placement Rate
- Teacher Absences Per Teacher
- Teacher Retention - Average For 1-5 Years
- Teacher Vacancies On First Day of School
- Time To Fill Vacancies - Instructional Support
- Time To Fill Vacancies - Non-School Exempt
- Time To Fill Vacancies - Non-School Non-Exempt
- Time To Fill Vacancies - School-Based Exempt
- Time To Fill Vacancies - School-Based Non-Exempt
- Time To Fill Vacancies - Teachers

OPERATIONS - 37 Measures

- Accidents - Miles Between Accidents
- Accidents - Miles Between Preventable Accidents
- Breakfast Participation Rate (Districtwide)
- Bus Equipment - GPS Tracking
- Bus Fleet - Alternatively-Fueled Buses
- Bus Fleet - Average Age Of Fleet
- Bus Fleet - Daily Buses As Percent Of Total Buses
- Bus Fleet In Service Daily
- Bus Usage - Daily Runs Per Bus
- Cost Per Bus
- Cost Per Meal
- Cost Per Mile Operated
- Cost Per Rider
- Custodial Work - Cost Per Square Foot
- Custodial Workload
- Food Cost Per Meal
- Food Cost Per Revenue
- Fund Balance As Percent Of Revenue
- Incidents - Assault/Battery Incidents Per 1,000 Students
- Incidents - People Incidents Per 1,000 Students
- Labor Costs Per Revenue
- Lunch Participation Rate (Districtwide)
- M&O Cost Per Student
- M&O Costs Percent Of District Budget
- Major Maintenance - Cost Per Student
- Meals Per Labor Hour
- On-Time Performance
- Personnel - Buses per Mechanic
- Renovations - Cost Per Student
- Routine Maintenance - Cost Per Square Foot
- S&S Expenditures Per 1,000 Students
- S&S Expenditures Percent Of District Budget
- S&S Staff Per 1,000 Students
- Supper Participation Rate (Districtwide)
- Total Costs As Percent Of Revenue
- Utility Costs - Cost Per Square Foot
- Work Order Completion Time (Days)

INFORMATION TECHNOLOGY - 14 Measures

- Devices - Advanced Presentation Devices Per Teacher
- Devices - Average Age Of Computers
- Devices - Computers Per Employee
- Devices Per Student
- IT Spending Per Student
- IT Spending Percent Of District Budget
- IT Spending Per District FTE
- Network - Bandwidth Per Student
- Network - Bandwidth Per User
- Support - Break/Fix Staffing Cost Per Ticket
- Support - First Contact Resolution Rate
- Support - Help Desk Call Abandonment Rate
- Support - Help Desk Staffing Cost Per Ticket
- Support - Mean Time To Resolve Tickets

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Annual License Fees

Enrollment	ActPoint KPI 20	ActPoint KPI Standard 50	ActPoint KPI Plus 100	ActPoint KPI PRO 500+
	20 KPI's	50 KPI's	100 KPI's	500+ KPI's
1 - 500	$750	$1,250	$1,975	$3,500
501-1,000	$1,000	$1,675	$2,650	$4,250
1,001-2,500	$1,500	$2,550	$4,000	$5,850
2,501-5,000	$2,000	$3,550	$5,700	$8,250
5,001-10,000	$2,500	$3,950	$6,700	$9,550
10,001-20,000		$4,900	$7,900	$11,850
20,001+		$5,400	$8,750	$13,750

Recommended subscription based on enrollment level highlighted in yellow.
To order online, go to **www.actpoint.com/PA**

Which one is right for my district?

ActPoint KPI:20

ActPoint KPI 20 includes 20 strategic key performance indicators (KPIs). This "starter package" is best suited for districts with enrollment less than 5,000 students. Access the catalog of KPIs for the 20 version at: **www.actpoint.com/20**

ActPoint KPI:50

ActPoint KPI Standard includes 50 strategic key performance indicators (KPIs), which is best suited for districts with enrollment less than 5,000 students. Access the catalog of KPIs for the PRO version at: **www.actpoint.com/standard50**

ActPoint KPI:100

ActPoint KPI PRO includes 100 key performance indicators (KPIs), which is best suited for districts with enrollment between 5,000-20,000 students. Access the catalog of KPIs for the PRO version at: **www.actpoint.com/plus100**

ActPoint KPI:500+

ActPoint KPI PRO includes more than 500 key performance indicators (KPIs), which is best suited for districts with enrollment more than 20,000 students. Access the catalog of KPIs for the PRO version at: **www.actpoint.com/pro500**

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