

MiScorecard Performance Summary

Business Unit: Department of Treasury
Executive/Director Name: Nick Khouri
Reporting Period: Jan 2016

Green >=90% of target
Yellow >= 75% - 90% of target
Red <75% of target
 Date Approved: 2/12/2016

Metric ID	Metric	Status	Progress	Target	Current	Previous	Frequency	Metric Definition
Customer/Constituent								
C-1	Percent of taxpayers entering <24 month IA's via web 1	Red	=	50%	0%	0%	Quarterly	New metric created 9/16/2015 - The percentage of taxpayers entering into an IA under 24 months via web vs. mail.
C-3	Office of Collections - Percent of web payments received 2	Yellow	👍	65.00%	34.26%	29.85%	Monthly	New Metric 9/16/2015 - The percentage of payment received via web
C-4	Telephone Call Quality Assurance Measures - Office of Collections.	Green	=	100.0%	96.0%	96.0%	Monthly	To provide quality information and customer service on telephone calls. Staff are measured on several key criteria which helps determine where overall training may be needed to ensure a high quality of service.
C-5	Number of Material Security Breaches	Green	=	0	0	0	Monthly	Maintain and protect confidential information obtained through departmental programs.
C-7	Move distressed communities to fiscal solvency and stable self-governance	Green	👍	4	4	N/A	FY Annually	EM exit, RTAB meetings from monthly to bi-monthly to quarterly, dissolving RTAB, successful termination of consent agreements.
C-8	Average speed of answer for SUW calls.	Red	👎	7.00	16.34	15.13	Monthly	Improve overall customer satisfaction by providing timely response to customer phone calls, measured in average time in minutes spent on hold before speaking with a Treasury Customer Service Representative. New metric as of 10-7-15
C-9	Abandoned rate - number of calls on hold that choose to hang up instead of waiting for a Treasury Customer Service Representative to answer.	Red	👍	10.00%	21.80%	22.74%	Monthly	Improve customer satisfaction by providing timely responses to customer phone calls measured by the number of people not willing to wait on hold for a Treasury Customer Service Representative. New metric as of 10-7-15.
C-10	Issue 10 substantive Revenue Administrative Bulletins (RABs) annually.	Green	👍	10	12 (CY2015)	2 (CY 2014)	CY Annually	Improve communication to taxpayer/practitioner community by issuing a minimum of 10 substantive Revenue Administrative Bulletins (RABs) annually.
Internal Business Process								
P-1	Percent of Tax Exemption Certificates Processed	Green	=	100%	100%	100%	CY Annually	This metric measures the percent of tax exemption certificates that are processed each year.
P-3	Inspections of Tobacco Retailers	Green	👎	470	596	627	Quarterly	This measures the number of administrative inspections of tobacco retailers and licensees by Michigan State Police and Department of Treasury enforcement personnel each quarter.
P-4	IT Projects on Time and Within Budget	Green	👎	85%	80%	87%	Quarterly	Track IT projects with respect to budget and completion time to ensure the Department meets legal/statutory requirements.
P-5	Percentage of Discovery project letters sent YTD compared to letters sent LYTD 3	Green	👎	80%	64%	99%	Quarterly	Number of inquiry letters sent affects Discovery project results. Green is 80% or higher, yellow is 75% to 80%, and red is anything less than 75%.
P-6	Average number of days to complete audit	Red	👎	275	358	354	Monthly	Monthly rolling average of days to complete audit (amalgamated for various tax types)
P-7	Average Quality Assurance (QA) error percentage on audits	Green	=	5%	3%	3%	Monthly	Monthly - average Quality Assurance (QA) error percentage
P-8	Conduct Audit of Minimum Assessing Requirements (AMAR) reviews	Green		20.0%	20.0%		FY Annually	Ensure fair, uniform and accurate assessments statewide by conducting Audit of Minimum Assessing Requirements (AMAR) reviews in the local units within 20% of the State's 83 counties annually. Maintain a five year cycle of reviews throughout the state.
P-9	Timely Processing of Individual Income Tax filing exceptions. New Metric as of 10-7-15.	Green	👎	15000	18300	20500	Monthly	All current year Individual Income Tax filings, successfully captured into the IT computer system and "flagged" as exceptions are reviewed and processed in the calendar year received. Target will fluctuate monthly depending on volume of returns received.
P-11	Total active Dockets older than 18 months.	Green	👍	0	1	193	Quarterly	Dockets older than 18 months that need resolution. Does not include dockets in abeyance. New Metric as of October 1, 2015.
P-12	Hearings - Open Dockets less than 6 months old.	Red	👍	100%	55.6%	23.24%	Quarterly	Regularly complete informal conference requests within 6 months; make process more robust. Does not include dockets in abeyance. New metric as of October 1, 2015.
Financial								
F-1	Accurate Revenue Estimating.	Green	👍	3.0%	.8%	1.7%	CY Annually	Estimate revenues within 3% of actual. The accuracy of the metric impacts the state budget process.
F-3	State Credit Rating (Fitch)	Yellow	=	AAA	AA	AA	FY Annually	Ensure the state receives the best credit rating possible. A better credit rating allows the state to borrow money at the most competitive rates available. Ensures the financial position of the state provides a climate for business investment and citizen confidence.
F-4	MPSERS Quarterly rolling 1 year average return	Red	👎	8.0%	2.6%	6.2%	Quarterly	Actual investment rate of return on pension fund assets for the Michigan Public School Employees' Retirement System vs. Actuarial Target Rate
F-4.1	MPSERS Quarterly rolling 5 year average return	Green	👎	8.0%	10.0%	12.1%	Quarterly	Actual investment rate of return on pension fund assets for the Michigan Public School Employees' Retirement System vs. Actuarial Target Rate
F-5	School Districts Serviced Under State Aid Note (Semi-Annual August Borrowing)	Green	👍	300	251	264	FY Annually	Provides access to short term loans for school districts. This metric goal is to reduce the number of school districts who need access to short term loans. Measured by the number of borrowings. Some school districts borrow more than once a year.

F-6	Tax Audits Completed	Green		550	536	463	Quarterly	Tax audits ensure that tax revenues due and owing to the state are collected.
F-7	Number of liens filed <\$6,000	Green		6600	4454	3058	Quarterly	New metric 9/16/2015 - The number of liens filed under \$6,000
Learning and Growth								
L-1	Improve Internal Communication Through Web	Green	=	100%	100%	100%	Monthly	Regularly update the Treasury Intranet home page to ensure staff have access to current information. This measures the percentage of time the web is updated at least monthly.
Good Government								
GG1	Percentage improvement in customer perception			TBD	N/A	N/A	CY Annually	Agency selected target customer group. [Customer Perception is rated through existing or newly launched customer polling tools.]
GG2	The percentage of champions identified in employee survey	Green	=	53%	49% 2015 Survey	49%	CY Annually	The % of champions identified in the statewide survey of state employees measuring employee engagement .
GG3	The percentage of completed or on track department level employee engagement action plans.	Green	=	100%	100%	100%	Quarterly	Percentage of department level employee engagement action plans that are completed by managers 17 level and above. [Employee Engagement Action Plans reported in MiResults.]
GG4	Good Government coin recognition program meeting four_best practices.	Green	=	100%	100%	100%	Quarterly	Departmental coin recognition programs should meet the following 4 criteria; - 3-5 recognition actions per quarter - Awards distributed among all levels - Award events photographed/documentated - Staff made aware of recognition events
GG5	The percentage of completed of on track process improvement projects.	Green	=	100%	100%	100%	Quarterly	Percentage of process improvement projects completed or on track. [Process improvement projects may focus on enhancing value for the customer, eliminating waste, standardizing best practices and improving service delivery.]
GG6	Percentage Improvement in customer process time.			TBD	N/A	N/A	Quarterly	The metric applies to completed, OGG approved process improvement initiatives. [Process time is defined as the time the customer engages the agency to receive a final approval, service, product, or response.]

¹ The status color for this metric reflects breaking points at 20% to 75% of the established target value.

² The status color for this metric reflects breaking points at 45% to 75% of the established target value.

³ The status color for this metric reflects breaking points at 75% to 80% of the established target value.