

MiScorecard Performance Summary

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

Green >=90% of target
Yellow >= 75% - 90% of target
Red <75% of target
 Date Approved: 5/13/2016

| 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 | Percent of web payments received 2 | Yellow | 👍 | 65.00% | 31.49% | 29.47% | 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 | Red | 👎 | 0 | 1 | 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. | Yellow | 👎 | 7.00 | 8.53 | 2.31 | 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% | 14.00% | 3.92% | 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 | 804 | 596 | 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% | 84% | 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% | 113% | 64% | 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 | Yellow | 👍 | 275 | 338 | 345 | 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% | 0.0% | 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 | 👍 | 30000 | 34675 | 27538 | 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 | Resolve all Hearings Dockets older than 12 months. | Yellow | | 100% | 83% | n/a | Quarterly | Resolve all dockets older than 12 months. Does not include dockets in abeyance. (Changed metric from 18 months to 12 months beginning March 2016 reporting period.) |
| P-12 | Open Hearings dockets less than 6 months old. | Red | 👍 | 100% | 59.5% | 55.6% | Quarterly | Regularly complete informal conference requests within 6 months; make process more robust. Does not include dockets in abeyance. |
| 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% | 2.8% | 2.6% | 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% | 9.2% | 10.0% | 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. |

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|----------------------------|--|-------|---|------|-----------------------|------|-------------|--|
| F-6 | Tax Audits Completed | Green |  | 550 | 637 | 536 | 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 | 2659 | 4454 | 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.