Business Analytics Forum

See The Future Of Decision Making

3 · 5Ž 2010 Gold Coast Convention and Exhibition Centre Queensland, Australia

The Use of Scorecarding to Develop Reporting Metrics

Joy Tracey
Mathew Cooper
Animal Health Board

The Animal Health Board (AHB)

Who are we?

- The Animal Health Board is an Incorporated Society and a management agency under the Biosecurity Act 1993
- The Regulatory Authority responsible for managing and implementing the National Pest Management Strategy (NPMS) for bovine tuberculosis (TB)
- Funded by The Crown, Regional Councils, and Beef, Dairy, Deer Industries
- Not for profit with any surplus funds held on behalf of the Industry funders

The Animal Health Board (AHB)

What do we do?

- The AHB carries out activities necessary for Strategy implementation including:

	$m
Vector Control wild animal pest (vector) control using toxins and traps	**$55m**
Disease Control control of the movement of cattle and deer management and testing of cattle and deer	**$20m**
funding of research	**$2m**
other activities	**$5m**

Australian View - Possum

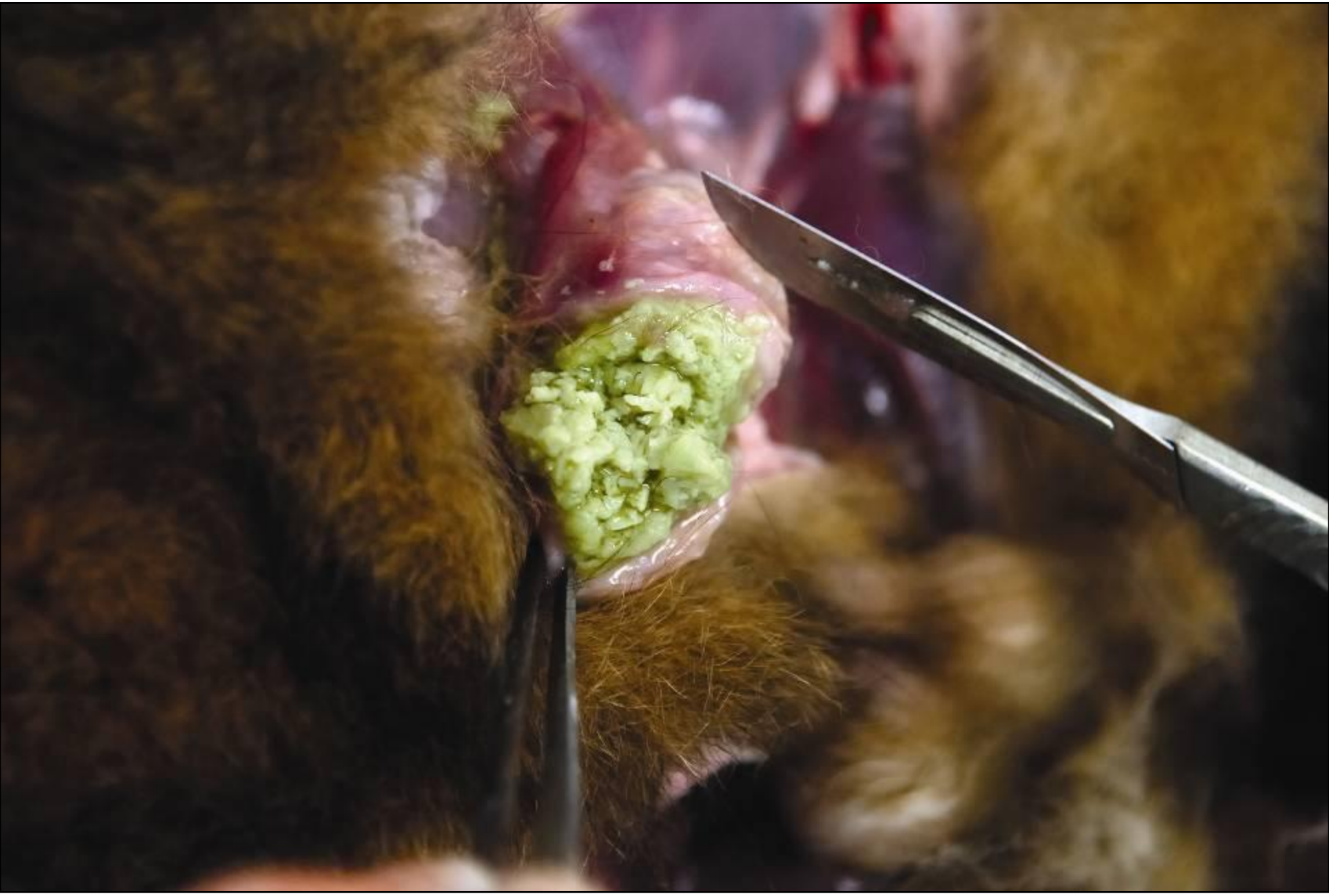
- Protected
- Cute
- Small (normal size)

New Zealand View – Possum

- No. 1 Pest
- Introduced 1837 for fur trade
- Thrive in NZ conditions
- Threat to NZ forests and birds
- Obese 8-12kg
- Non Protected
- Please come and take them home!

54
54

185



TARGET PEST

The Building Blocks

What did we have?

Technical Data
Disease dbase

Operational Data
Vector dbase

Financial data
GL

- Data rich but information poor

The need for Change

Step 1 - TM1

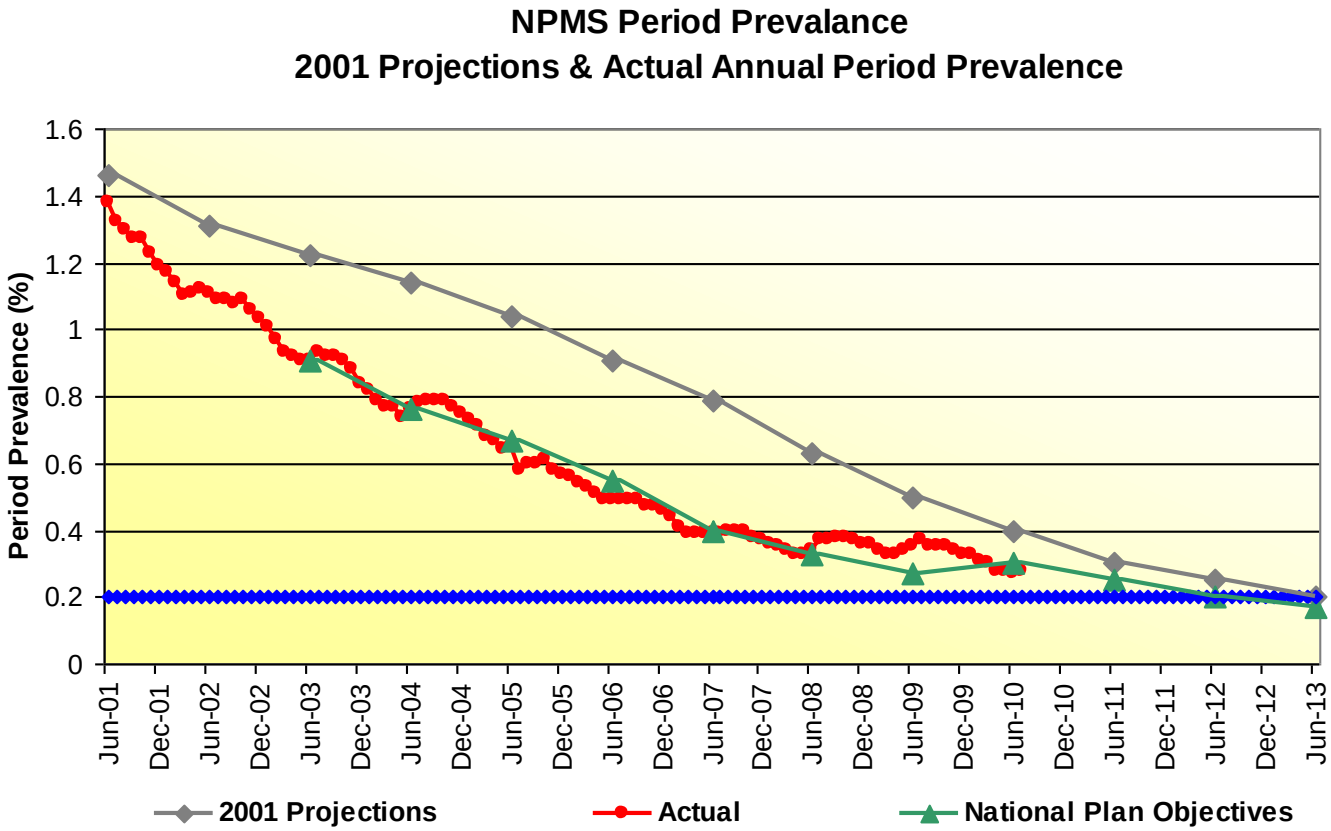
- Financial requirements driven
  - Poor reporting, static reports, data trend analysis manual, adhoc reporting difficult
- Planning and reporting efficiency
- Change in organisational structure
  - Organisation grown from 20 staff in 2004 to 100 staff 2008
- Requirement for effective non-centralised reporting
  - Head office plus 5 main regional offices, a further 4 satellite offices
- Efficient, simple budget templates and consolidation
  - Manual spreadsheet collection and consolidation frustrating and time consuming

The need for Change

Step 2 – Executive Viewer

- Organisational internal reporting driven
  - A living tool for active display of key data
- Need for simple key measure capture
  - **THE CHALLENGE**
- Effective means of combining financial and operational data
  - Ability to combine data from operational and financial sources
- Method to repeatedly / reliably update complex multi source information
  - A means to rapidly refresh data for time period comparison

Traditional Performance Measure



Next Steps

- Expand the historic single measure focus
- Identify OTHER key drivers
- Clearly establish current position

- Link data sources to gather required information
  - Not all information held in required formats
  - Related data held in separate systems
  - Establish reproducibility of data

- Plan revised NPMS key reporting measures

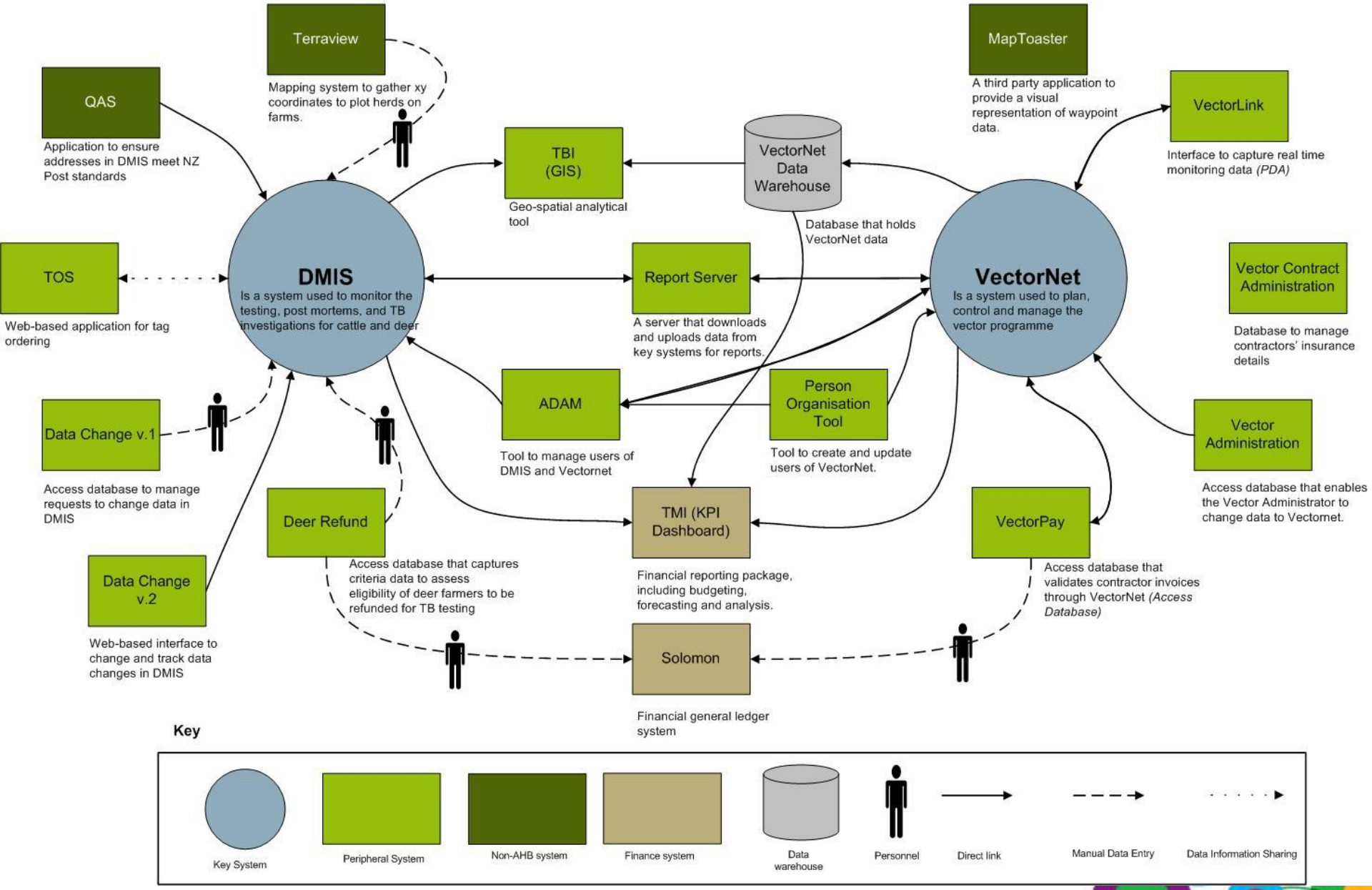
New HARDCOPY Summary Performance Report

			Value	Trend	Target	Stakeholder & public support	Operational excellence	Innovation & improvement	Anticipate & Act
Monthly KPI list	**KPI measure**								
NPMS Objective	% prevalence		0.27%	⇩	Tracking against 0.2 % by 2013	●	●		
Disease Operations	Incidents of contractor non-compliance	●	0	⇩	0 Incidents of Non-Compliance	●	●		
	% of Beef herd tests completed on time	●	97%	⇧	95 % of herd Tests completed on time	●	●		
	% of Dairy herd tests completed on time	●	92%	⇨	95 % of herd Tests completed on time	●	●		
	% of Deer herd tests completed on time	●	91%	⇧	95 % of herd Tests completed on time	●	●		
Vector Operations	% On Time	●	89%	⇧	95% of activities completed on time		●	●	
Contact Centre service delivery to farmers	% call answered within 15 seconds	●	94%	⇧	90% of calls answered within 15 Seconds	●	●		
	% of scored evaluation meeting quality standards of 75 %	●	100%	⇨	95 % of calls evaluated meet the measure	●	●		
Complaints	# of complaints resolved within required time	●	100%	⇨	100% of complaints resolved within timeframe	●	●		

AHB IT Systems

Illustration of the core IT systems that enables the AHB to achieve their strategy objectives, along with how the systems inter-relate.

For AHB Internal Use Only – 1 July 2010



AHB KPI Dashboard

IBM Cognos TM1 Executive Viewer

TBfree NEW ZEALAND

Animal Health Board
Our mission is to eradicate bovine tuberculosis from New Zealand

Management Reporting | AHB Profit and Loss

Year >> 2010/11 Quarter >> Q1 Month >> Aug Strategic Theme >> All KPIs

MONTHLY KPIs

KPI List	KPI Measure		Value	Trend	Target	S	O	I	A
NPMS Objective	% prevalence		0.27%	▼	Tracking against 0.2 % by 2013	●	●		
Disease Operation	Incidents of contractor non-compliance	●		▼	0 Incidents of Non-Compliance	●	●		
	% of herd test completed on time Cattle	●	97%	▲	95 % of herd Tests completed on time	●	●		
Vector Operation	% On Time	●	79%	▼	95 % of activities completed on time		●	●	
Service delivery to farmers	% call answered within 15 seconds	●	94%	▲	90% of Calls answered within 15 Seconds	●	●		
	% of Complaints Resolved within required timeframe	●	100%	▶	100% Customer complaints resolved on time	●	●		
	% of scored evaluation meeting quality standards of 75%	●	100%	▶	95% of calls evaluated meet the quality standards	●	●		

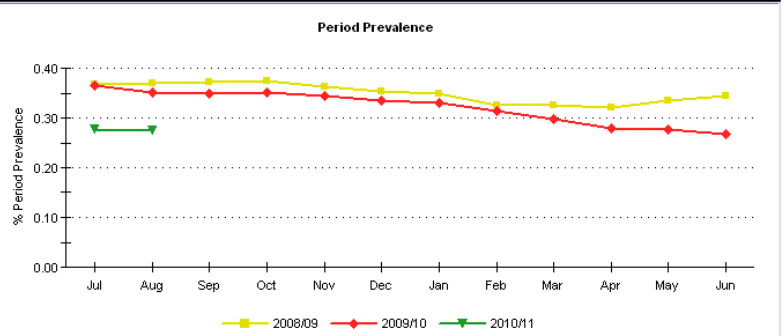
QUARTERLY KPIs

KPI List	KPI Measure		Value	Trend	Target	S	O	I	A
# breakdown - vector related	Management area (VRA, VFA) trends		8	▼	Tracking against rolling 12 month trends	●		●	
# breakdown - non-vector related	Management area (VRA, VFA) trends		4	▼	Tracking against rolling 12 month trends	●		●	
# clearance	Management area (VRA, VFA) trends		7	▼	Tracking against rolling 12 month trends	●		●	
Significant Innovation/improvement projects	# on-going	●	3	▼	3 Significant innovation/improvement projects	●		●	
Research project	% milestone met by research providers	●	90%	▼	95% of Milestones met by Research Providers		●	●	
Sector/Government partnership projects	# on-going project	●	3	▶	3 sector/government partnership projects	●	●		●

ANNUAL KPIs (LY)

KPI List	KPI Measure		Value	Trend	Target	S	O	I	A
Research output contributing to NPMS	% total projects	●	58%	▼	>50% of total projects contribute to NPMS	●	●	●	●
Recognised leadership in pest management	# of info requests from overseas agencies	●	5	▲	8 or more information requests from overseas	●			●
AHB Staff Performance Reviews	% of staff completed performance dev plans	●	100%	▲	100% of Staff complete development plan		●		●
Vector Operation Effectiveness	% operation conforming design	●	100%	▶	100% of operations conform to design		●		
Survey	% of staff satisfaction	●		▼	90% Staff satisfaction	●			
Value for money operations	% of contracts with 2 credible tenders	●	60%	▲	>75% of contracts with 2 or more tenders		●		
Management strategic plan objectives met	various				Annual Report	●	●		

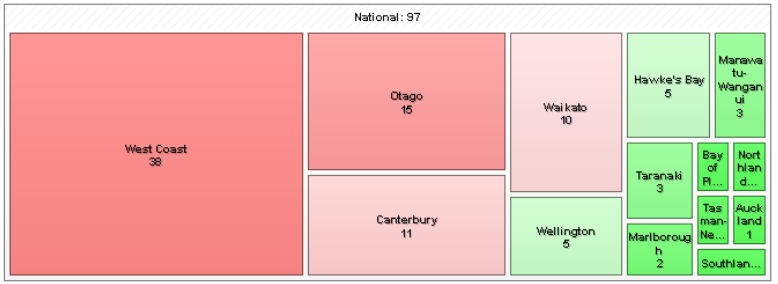
DETAILED



Disease Region : **National** Herd Type : **All Herds**

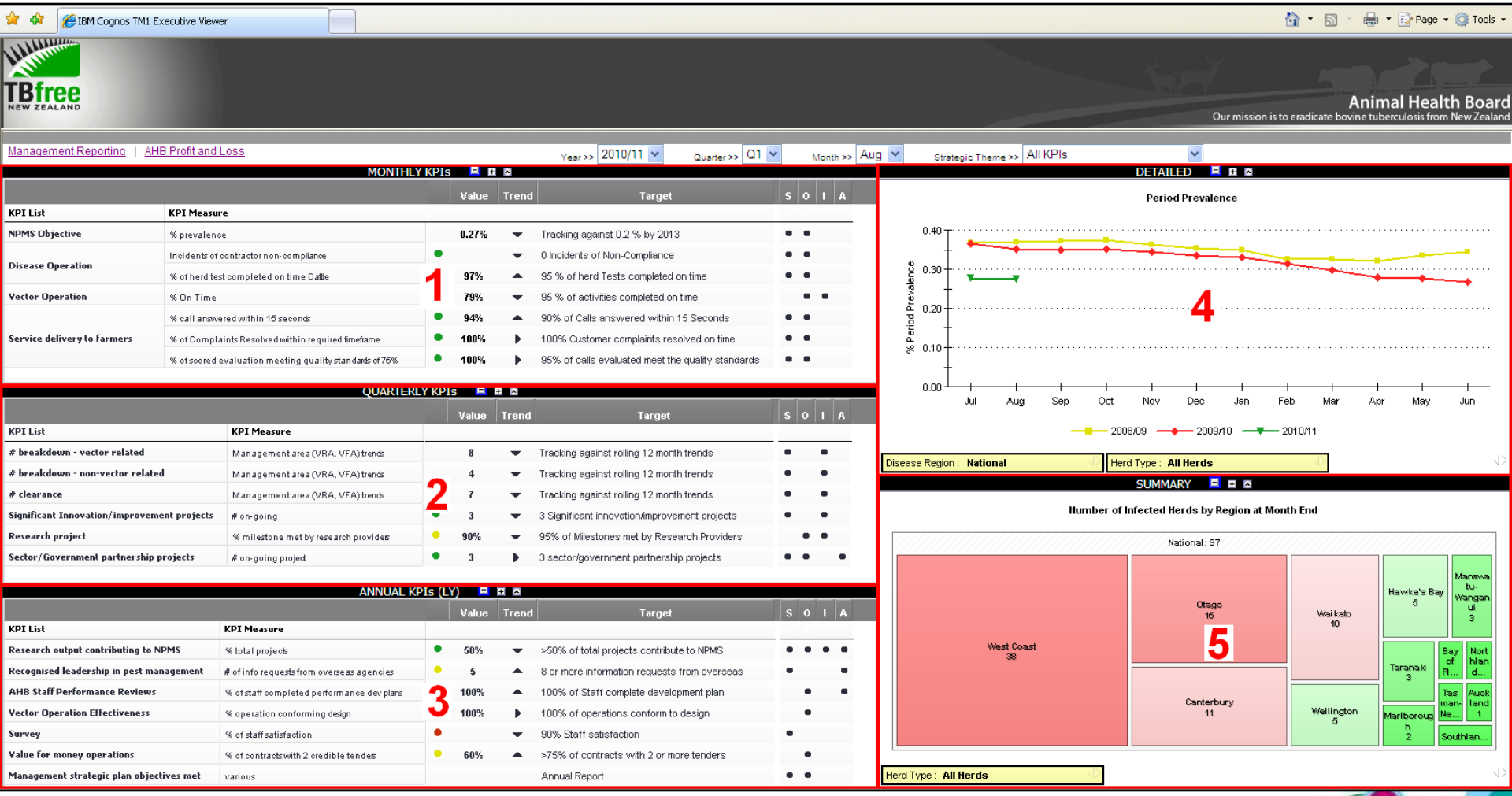
SUMMARY

Number of Infected Herds by Region at Month End

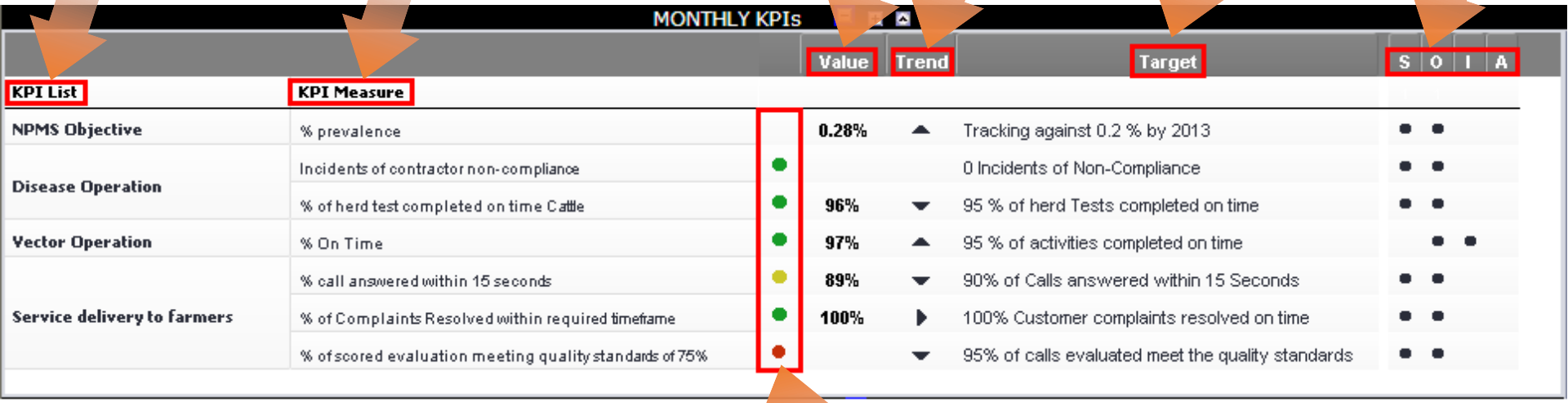


Herd Type : **All Herds**

Layout AHB KPI Dashboard



Layout Key

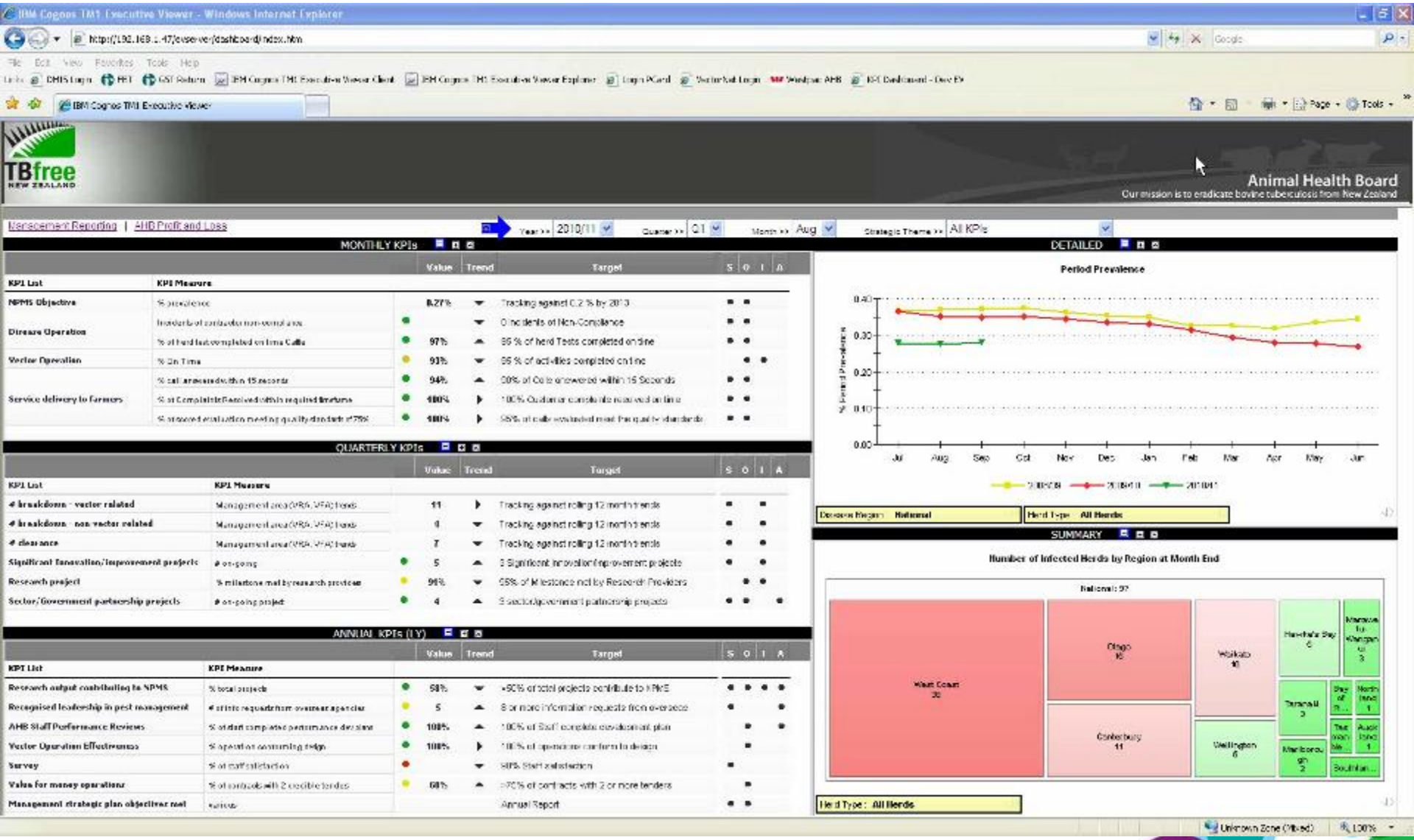


MONTHLY KPIs

KPI List	KPI Measure		Value	Trend	Target	S	O	I	A
NPMS Objective	% prevalence		0.28%	▲	Tracking against 0.2 % by 2013	●	●		
Disease Operation	Incidents of contractor non-compliance	●			0 Incidents of Non-Compliance	●	●		
	% of herd test completed on time Cattle	●	96%	▼	95 % of herd Tests completed on time	●	●		
Vector Operation	% On Time	●	97%	▲	95 % of activities completed on time		●	●	
Service delivery to farmers	% call answered within 15 seconds	●	89%	▼	90% of Calls answered within 15 Seconds	●	●		
	% of Complaints Resolved within required timeframe	●	100%	▶	100% Customer complaints resolved on time	●	●		
	% of scored evaluation meeting quality standards of 75%	●		▼	95% of calls evaluated meet the quality standards	●	●		

Control Panel

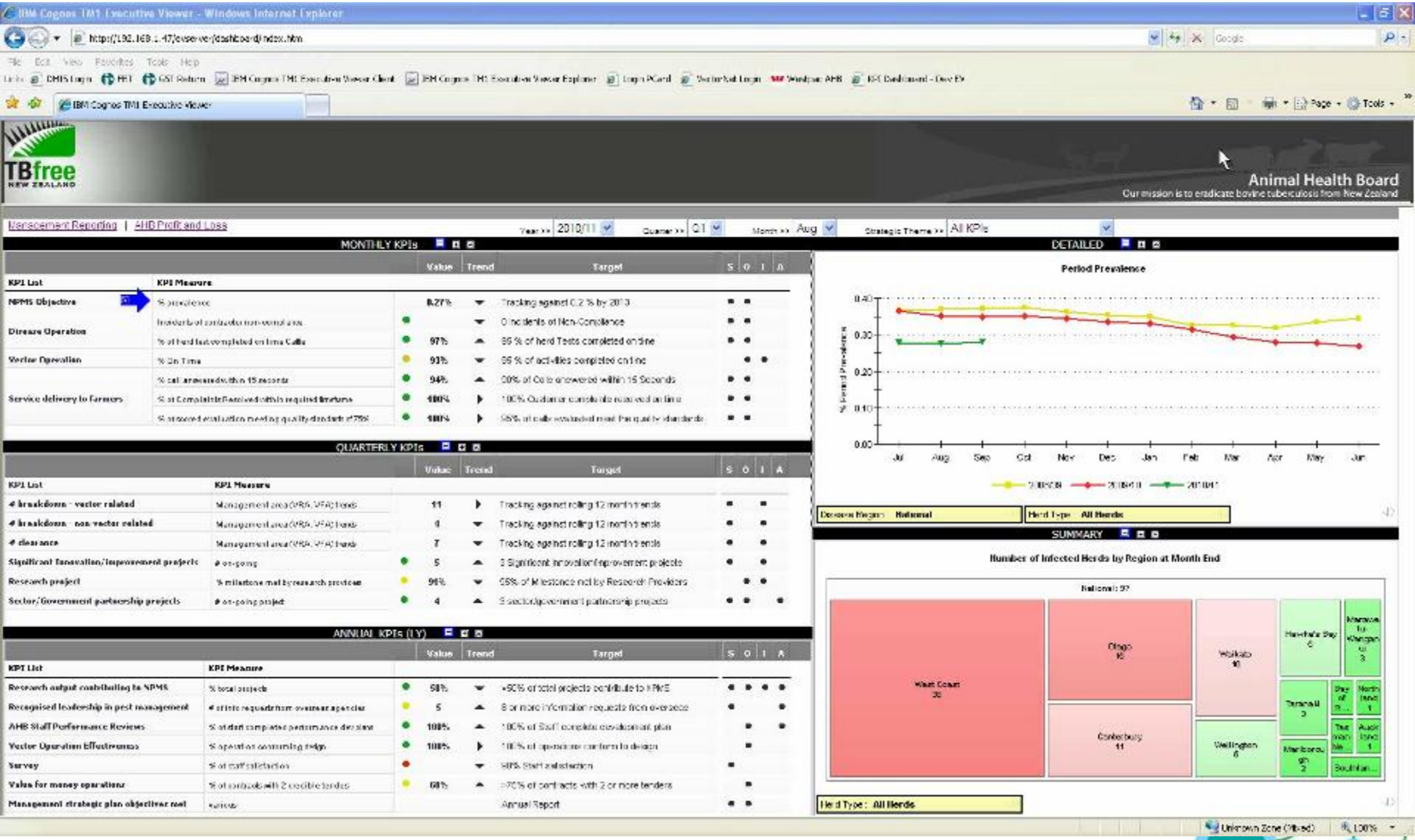
Key parameters for selection of current and historical data


IBM Cognos TM1 Executive Viewer - Windows Internet Explorer
IBM Cognos TM1 Executive Viewer
TBfree NEW ZEALAND
Animal Health Board
Our mission is to eradicate bovine tuberculosis from New Zealand
Management Reporting | AHB Profit and Loss
Year >> 2010/11
Quarter >> Q1
Month >> Aug
Strategic Theme >> All KPIs
MONTHLY KPIs
Value
Trend
Target
KPI List
KPI Measure
NPMS Objective
% prevalence
8.27%
Tracking against 0.2 % by 2013
Diseare Operation
Incidents of contractor non-compliance
0 Incidents of Non-Compliance
% of herd tests completed on time Cattle
97%
96 % of herd Tests completed on time
Vector Operation
% On Time
93%
96 % of activities completed on time
Service delivery to farmers
% call answered within 15 seconds
94%
90% of Calls answered within 15 Seconds
% of Complaints Received which required Brefunds
100%
100% Customer complaints resolved on time
% of stopped evaluation meeting quality standards (75%)
100%
95% of calls evaluated met the quality standards
QUARTERLY KPIs
Value
Trend
Target
KPI List
KPI Measure
breakdown - vector related
Management area (VRA, VFA) herds
11
Tracking against rolling 12 month trends
breakdown - non vector related
Management area (VRA, VFA) herds
6
Tracking against rolling 12 month trends
clearance
Management area (VRA, VFA) herds
7
Tracking against rolling 12 month trends
Significant Innovation/Improvement projects
on-going
5
3 Significant Innovation/Improvement projects
Research project
% milestone met by research provicer
96%
95% of Milestones met by Research Providers
Sector/Government partnership projects
on-going project
4
3 Sector/Government partnership projects
ANNUAL KPIs (1 Y)
Value
Trend
Target
KPI List
KPI Measure
Research output contributing to NPMS
% local projects
58%
>50% of total projects contribute to NPMS
Recognised leadership in pest management
# of int'l research from overseas agencies
5
3 or more information requests from overseas
AHB Staff Performance Reviews
% of staff completed performance reviews
100%
100% of Staff complete development plan
Vector Operation Effectiveness
% operations performing 24hrs
100%
100% of operations conform to design
Survey
% of staff satisfaction
58%
80% Staff satisfaction
Value for money operations
% of contracts with 2 credible tenders
68%
>70% of contracts with 2 or more tenders
Management strategic plan objectives met
various
Annual Report
DETAILED
Period Prevalence
% Period Prevalence
0.40
0.30
0.20
0.10
0.00
Jul
Aug
Sep
Oct
Nov
Dec
Jan
Feb
Mar
Apr
May
Jun
Division Region: National
Herd Type: All Herds
SUMMARY
Number of Infected Herds by Region at Month End
National: 97
West Coast
Otago
Waikato
Canterbury
Wellington
Herd Type: All Herds

KPI Selection

Summary data available immediately on default view
Avoids information overload

Ability to select a specific KPI for more detailed information and trend analysis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MONTHLY KPIs
KPI List
KPI Measure
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Trend
Target
NPMS Objective
% prevalence
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Disease Operation
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Vector Operation
% On Time
93%
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% of Complaints Received which required literature
100%
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100%
95% of calls evaluated met the quality standards
QUARTERLY KPIs
breakdowns - vector related
Management area (VPA, VFA) trends
11
Tracking against rolling 12 month trends
breakdowns - non vector related
0
Tracking against rolling 12 month trends
clearance
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Significant innovation/improvement projects
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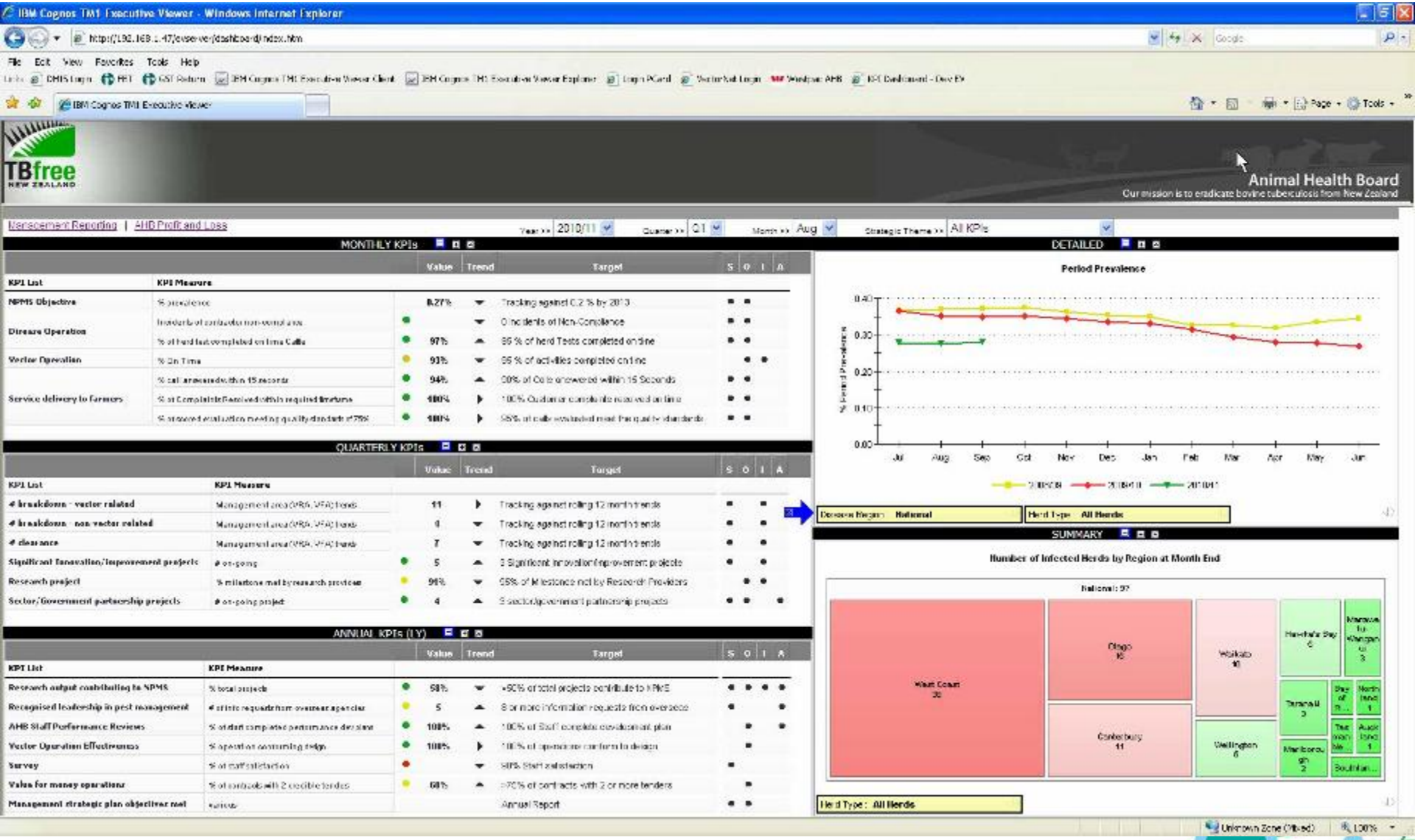
on-going project
4
3 sector/government partnership projects
ANNUAL KPIs (1 Y)
Research output contributing to NPMS
% total projects
58%
>50% of total projects contribute to NPMS
Recognised leadership in pest management
# of info requests from overseas agencies
5
3 or more information requests from overseas
AHB Staff Performance Reviews
% of staff completed performance reviews
100%
100% of Staff complete development plan
Vector Operation Effectiveness
% spent on accounting days
100%
100% of operations conform to design
Survey
% of staff satisfaction
Staff satisfaction
Value for money operations
% of contracts with 2 credible tenders
68%
>70% of contracts with 2 or more tenders
Management strategic plan objectives met
various
Annual Report
DETAILED
Period Prevalence
% Herd Prevalence
0.40
0.30
0.20
0.10
0.00
Jul
Aug
Sep
Oct
Nov
Dec
Jan
Feb
Mar
Apr
May
Jun
Division Region: National
Herd Type: All Herds
SUMMARY
Number of Infected Herds by Region at Month End
National: 97
West Coast
30
Otago
16
Waikato
10
Canterbury
11
Wellington
6
Herd Type : All Herds
Unknown Zone (Mixed)
100%

Dynamic Reporting

Provides the means to move away from static reports

Ability to filter data by KPI specific categories
eg. regional and herd information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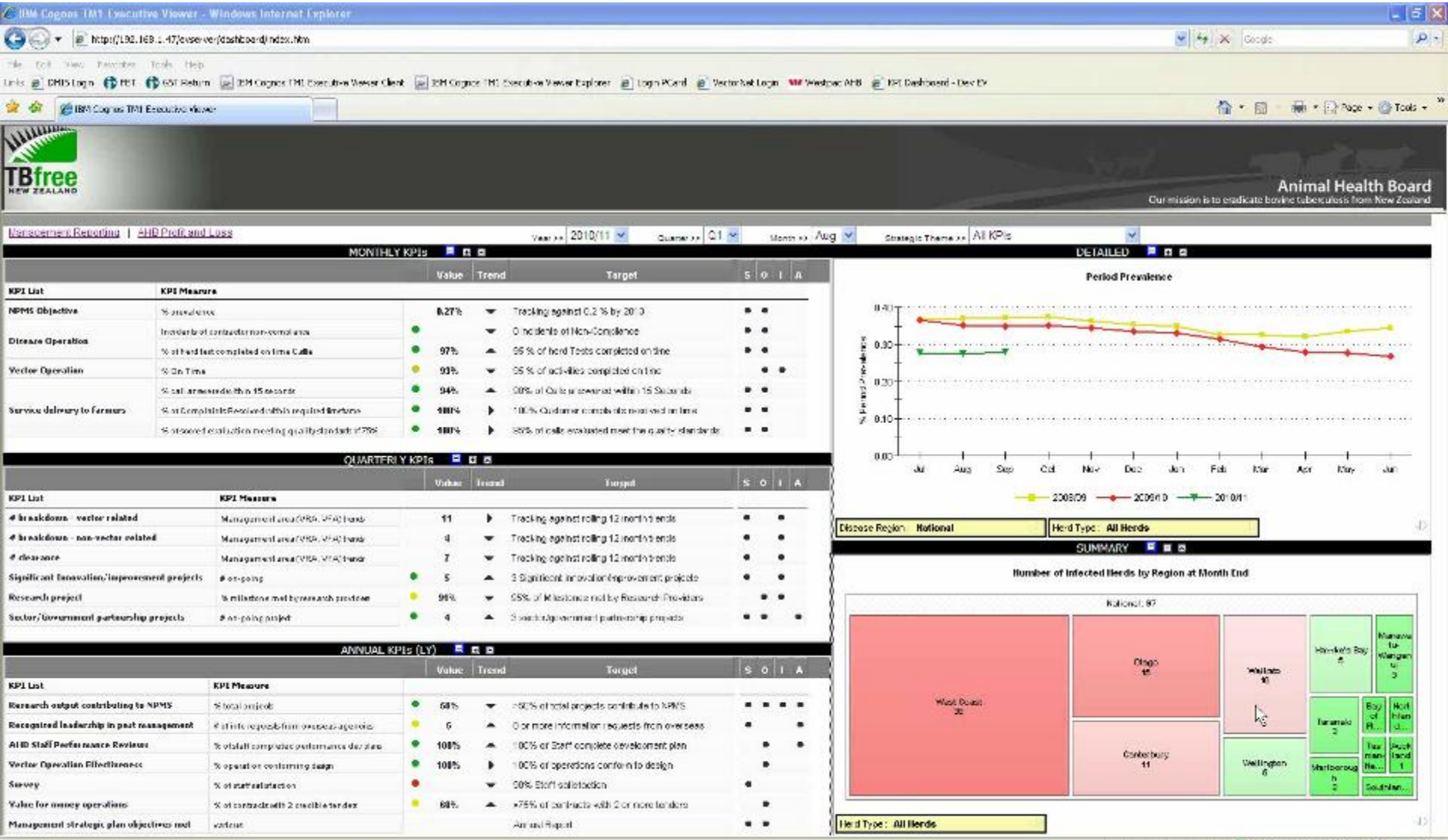
MONTHLY KPIs
QUARTERLY KPIs
ANNUAL KPIs (1Y)
DETAILED
Period Prevalence
SUMMARY
Number of Infected Herds by Region at Month End
Herd Type : All Herds

Expanding and Saving Views

The user has the ability to:

- **to view source data**
- **export to other systems**
- **create and save personal views**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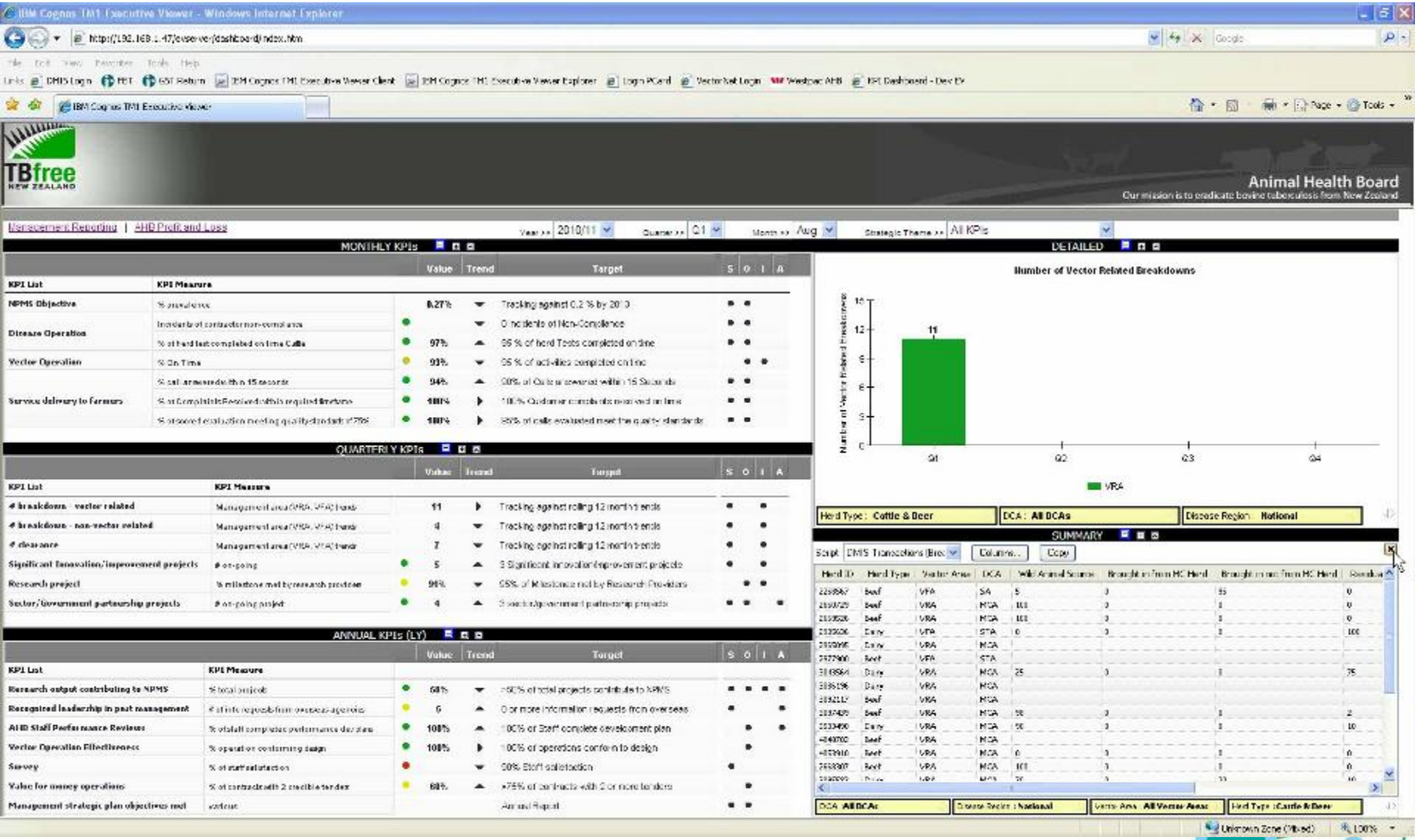
Quarter >> Q1
Month >> Aug
Strategic Theme >> All KPIs
MONTHLY KPIs
KPI List
KPI Measure
Value
Trend
Target
NPMS Objective
Disease Operation
Vector Operation
Service delivery to farmers
QUARTERLY KPIs
breakdown - vector related
breakdown - non-vector related
clearance
Significant Innovation/improvement projects
Research project
Sector/Government partnership projects
ANNUAL KPIs (LY)
Research output contributing to NPMS
Recognized leadership in past management
AHB Staff Performance Reviews
Vector Operation Effectiveness
Survey
Value for money operations
Management strategic plan objectives met
DETAILED
Period Prevalence
% Period Prevalence
Jul
Aug
Sep
Oct
Nov
Dec
Jan
Feb
Mar
Apr
May
Jun
2008/09
2009/10
2010/11
Disease Region : National
Herd Type : All Herds
SUMMARY
Number of Infected Herds by Region at Month End
National: 87
West Coast
Otago
Canterbury
Wellington
Hawke's Bay
Taranaki
Marlborough
Herd Type : All Herds
Unknown Zone (Mixed)
100%

Drill Through and Security

Ability to drill through to base data

Dashboard security – data sections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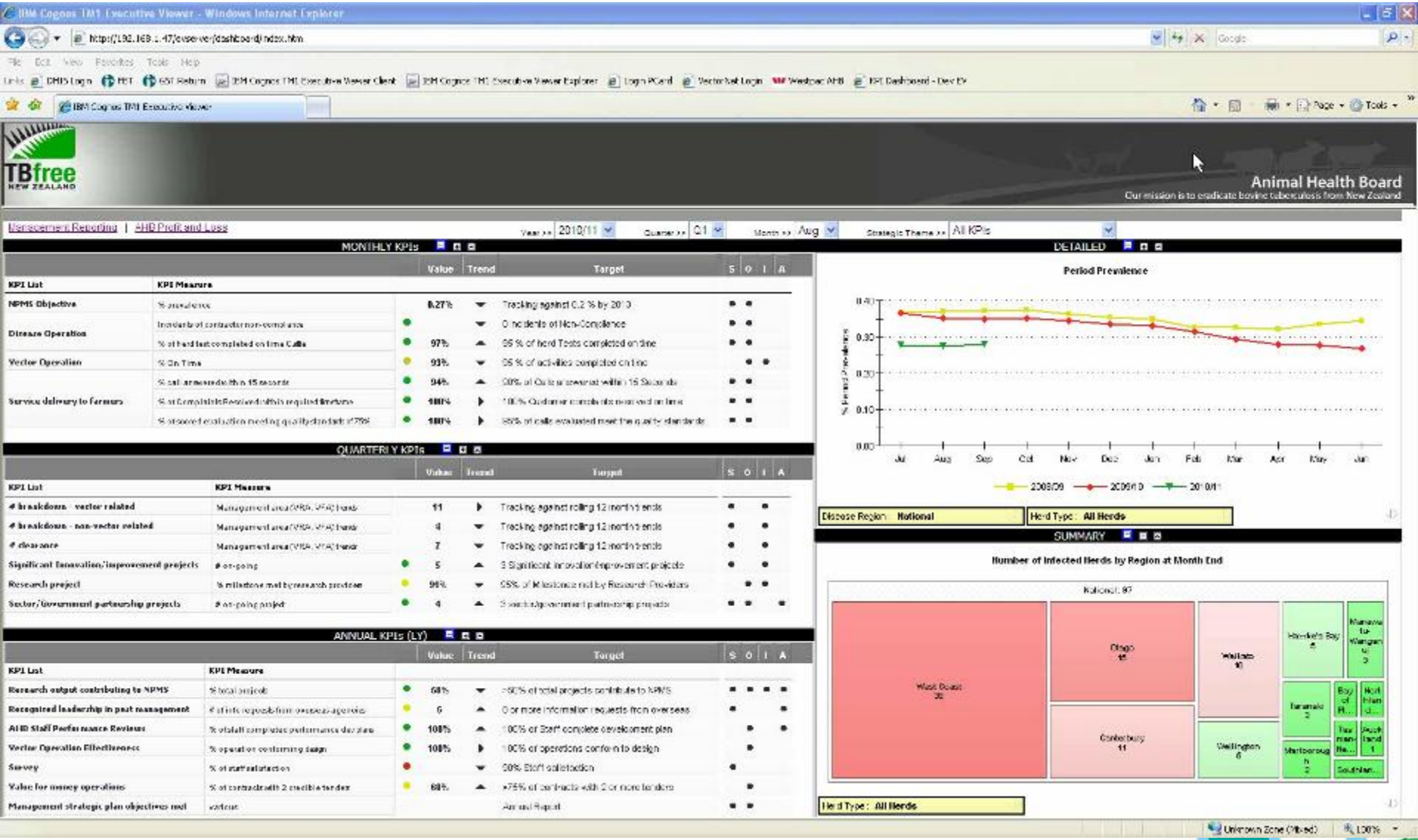
Research output contributing to NPMS
Recognised leadership in pest management
AHB Staff Performance Reviews
Vector Operation Effectiveness
Survey
Value for money operations
Management strategic plan objectives met
DETAILED
Number of Vector Related Breakdowns
Number of Vector Related Breakdowns
Q1
Q2
Q3
Q4
VRA
Herd Type : Cattle & Deer
DCA : All DCAs
Disease Region : National
SUMMARY
Script
Columns...
Copy
Herd ID
Herd Type
Vector Area
DCA
Wild Animal Source
Brought in from HC Herd
Brought in not from HC Herd
DCA: All DCAs
Disease Region : National
Vector Area : All Vector Areas
Herd Type : Cattle & Deer

KPI Dashboard as a reporting HUB

The creation of a ONE STOP SHOP for management reporting

Providing:

- **Key information visually presented**
- **Drill through analysis**
- **Rapid and effective**
- **Month end financial reports linked**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KPI List
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NPMS Objective
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Vector Operation
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QUARTERLY KPIs
ANNUAL KPIs (LY)
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National: 87
West Coast
Otago
Canterbury
Wellington
Waikato
Hawke's Bay
Taranaki
Marlborough
Herd Type: All Herds

Transfer to External Dashboard

- The TM1 Executive viewer dashboard is an internal management tool
  - A live update resource used to monitor operational performance
  - It provides monthly, quarterly and annual measures
  - Includes many different area key measures

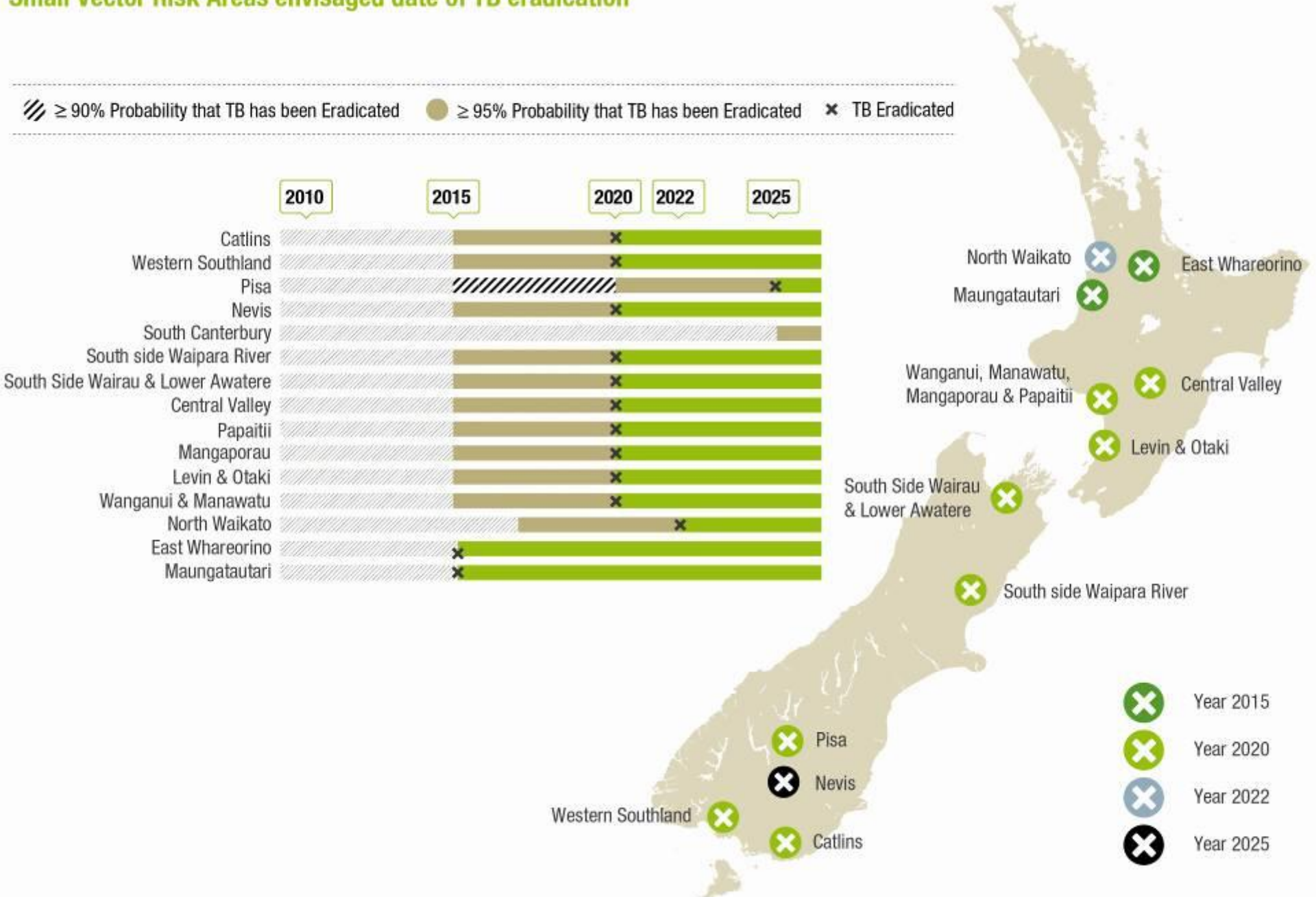
- The Annual report presentation is a single external event
  - Reports few high level key measures
  - Static annual display
  - Strategic NMPS measure

Total VRA & VFA in New Zealand

New Zealand is total of 26 millions hectares

2.5 million hectares targeted for eradication of TB by 2026

Small Vector Risk Areas envisaged date of TB eradication



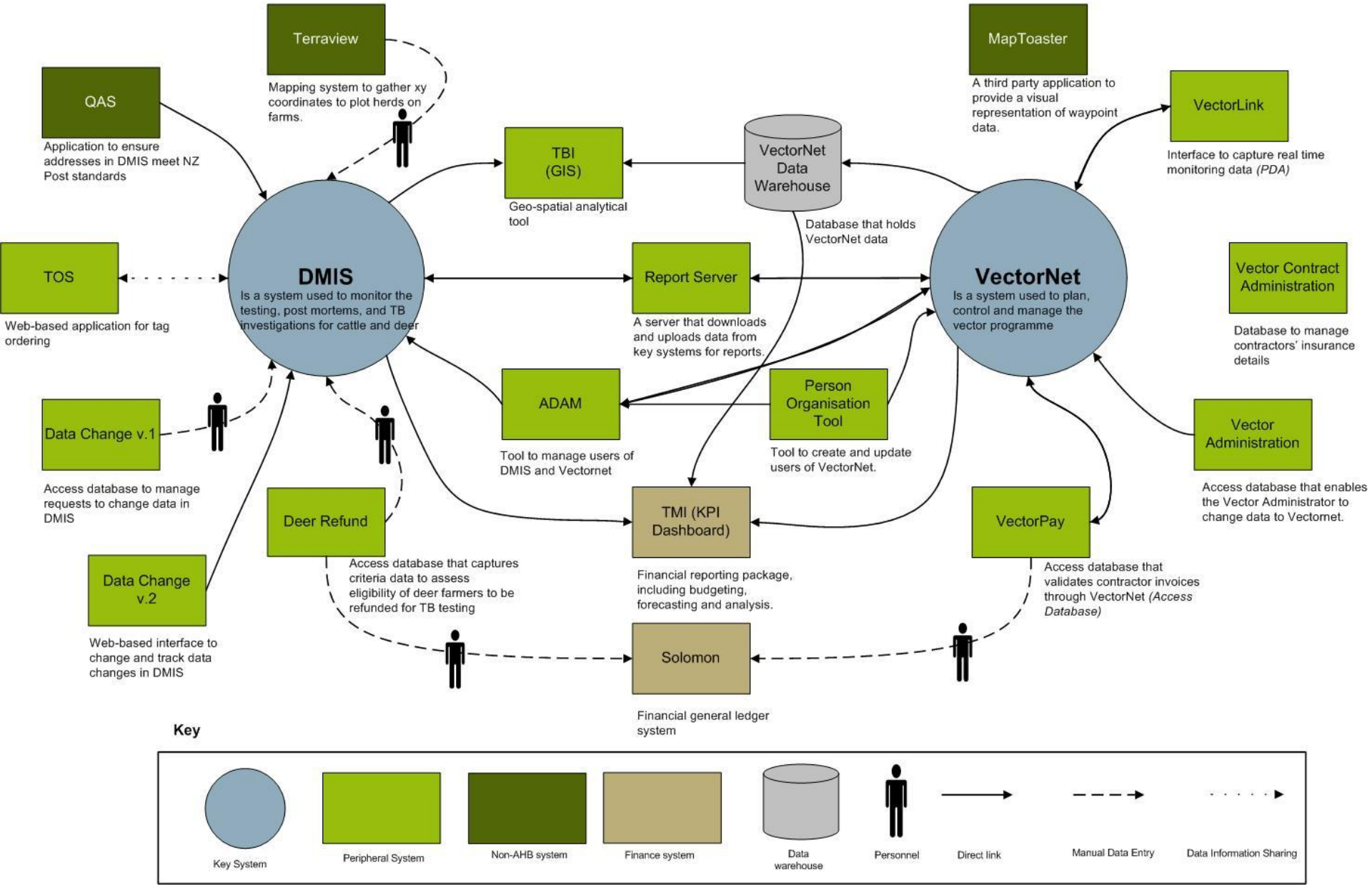
Other IBM Cognos TM1 Add-ins

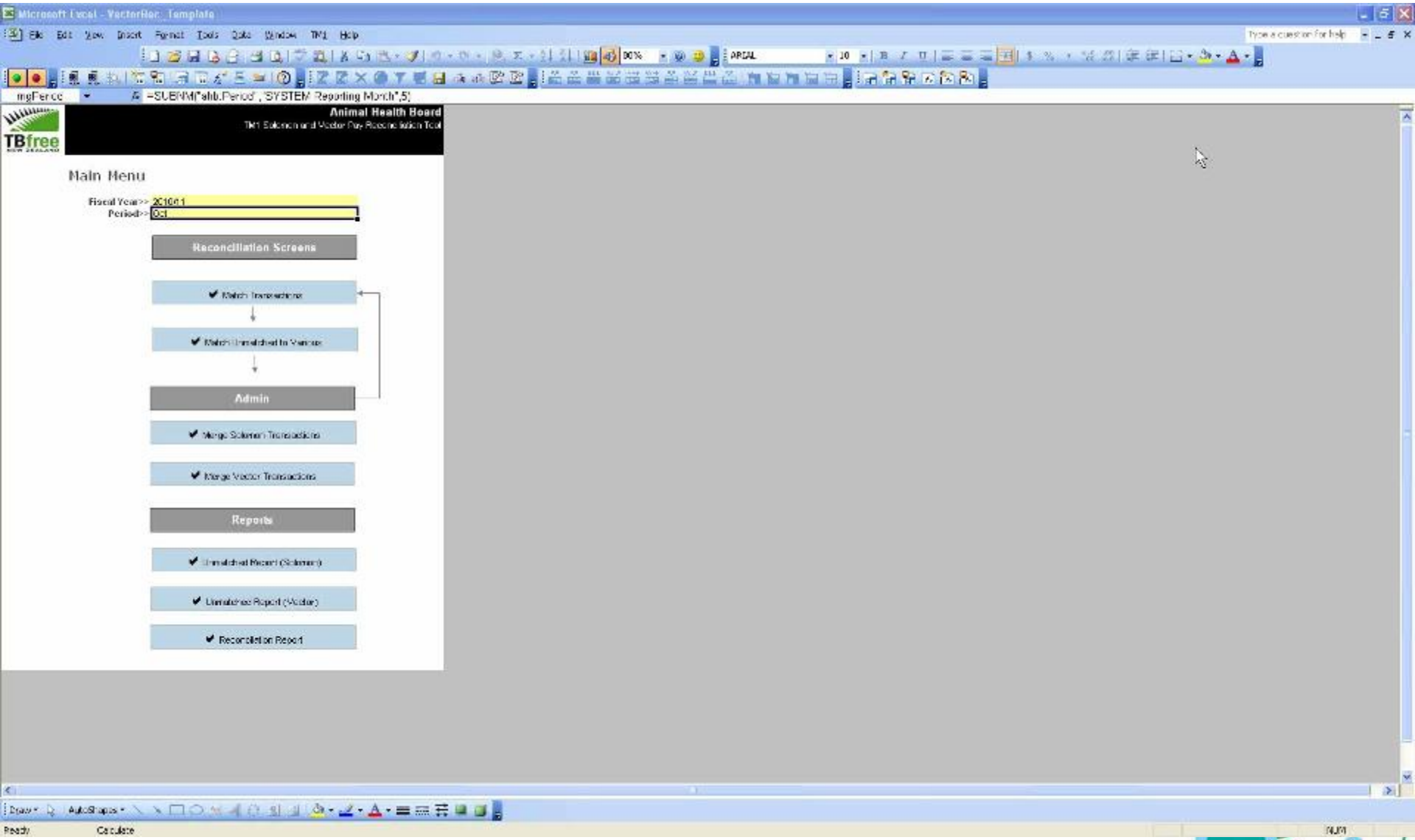
- Vector Reconciliation “Package”
  - Audit need to reconcile VectorPay system to General Ledger $55m pa
  - High Integrity – menu driven
  - Reliable performance
  - Support staff processed
  - Finance staff review

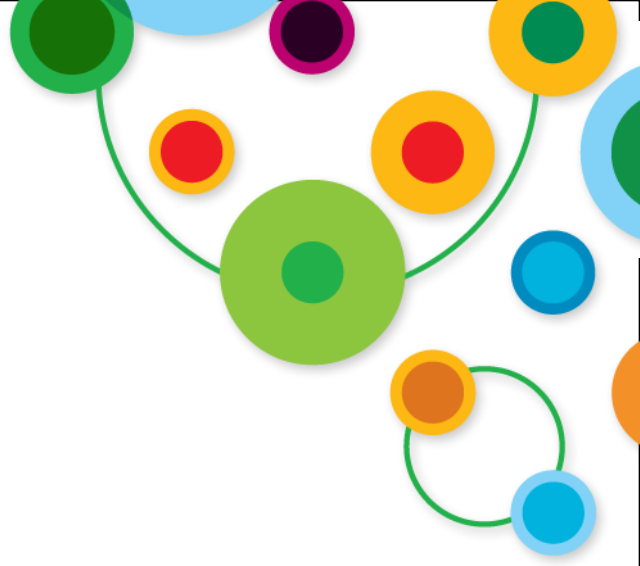
AHB IT Systems

Illustration of the core IT systems that enables the AHB to achieve their strategy objectives, along with how the systems inter-relate.

For AHB Internal Use Only – 1 July 2010




Microsoft Excel - VectorNet_Template
=SUBNM("ahb.Period","SYSTEM Reporting Month",5)
Animal Health Board
TBfree
Main Menu
Fiscal Year>> 2010-11
Period>> Oct
Reconciliation Screens
Match Transactions
Match Unmatched to Vectors
Admin
Merge Salmon Transactions
Merge Vector Transactions
Reports
Unmatched Report (Salmon)
Unmatched Report (Vector)
Reconciliation Report
Ready
Calculate



Q & A

Conclusion