

Division of Administration



Strategic Plan FY 2026-2027 to FY 2030-2031

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Table of Contents

Vision, Mission, and Philosophy	4
Executive Summary	5
Agency Goals	6
Principal Clients and Users	7
External Factors	8
Duplication of Effort	9
Human Resources Policies Beneficial to Women and Families	10
GOAL I – Financial Services	
Office of Planning and Budget.....	11
Office of Finance and Support Services.....	20
Office of State Uniform Payroll	58
Office of Statewide Reporting and Accounting Policy	67
GOAL II – Property Control	
Office of State Lands.....	84
Office of State Buildings.....	110
Office of Facility Planning and Control.....	114
GOAL III – Internal Controls	
Internal Audit.....	121
Office of Human Resources	130
Office of General Counsel	138
GOAL IV – Community Development	
Office of Community Development.....	151
Disaster Recovery Unit	
Summary	208
Mission and Core Values	209
Goals.....	210
Internal and External Considerations	211
Goal I - Administration.....	213
Goal II - Housing.....	216

STATE OF LOUISIANA
DIVISION OF ADMINISTRATION

Goal III – Infrastructure219
Goal IV – Economic Development220
Goal V – Mitigation and Planning221

VISION STATEMENT

The Division of Administration envisions an effective, efficient state government, focused on improving the quality of life for all Louisiana citizens.

MISSION STATEMENT

The Division of Administration will provide innovative and effective management, financial and policy direction and services to the various departments of state government, resulting in high quality, performance-driven services to Louisiana's citizens.

PHILOSOPHY

The Division of Administration will promote integrity, quality and efficiency in the daily administration of state government and in the implementation of the policies and the initiatives of the administration by encouraging collaboration among state agencies to maximize existing resources.

Executive Summary

Unique among government departments, the Division of Administration serves the people of Louisiana mainly by providing essential services to state government as a whole. As provided through Title 39 of the Louisiana Revised Statutes, the Division is the central management and administrative support agency for the state of Louisiana. The Division of Administration is headed by the Commissioner of Administration and is composed of three programs: Executive Administration, Community Development Block Grant, and Auxiliary.

The Commissioner's Office oversees and coordinates the activities of the sections within the Division of Administration. These sections perform a wide variety of legislatively-mandated and other required functions of state government. In addition, the Division of Administration provides supervisory functions for management and budgets of all state departments. The Commissioner's overall responsibilities include, but are not limited to:

- Overseeing the general management of all state finances and financial operations.
- Preparing the Executive Budget and the Annual Comprehensive Financial Report (ACFR).
- Ensuring general fiscal accountability throughout state government.
- Making purchases for state agencies when required by executive order.
- Controlling and assigning state surplus property.
- Providing and assigning state owned and leased facilities to state agencies.
- Maintaining travel regulations for state officials and employees.
- Conducting such planning activities as are necessary to maximize the present and future effectiveness of state government.
- Administering Community Development Block Grant Disaster Recovery Funds.

The Commissioner's Office works through the various DOA sections to provide innovative leadership and coordination in the development and implementation of sound management practices, to promote state government accountability, to address the individual needs of all state agencies and employees, and to provide quality services to agencies and taxpayers in accordance with executive policy and legislative mandates.

GOALS

- I. **Financial Services:** To ensure that the financial, accounting, and budgetary information is timely, consistently fully-integrated, easily accessible and accurate.
- II. **Property Control:** To coordinate and provide quality operational services utilizing sound management practices for the maintenance of state facilities and lands.
- III. **Internal Controls:** To provide for the effective and efficient dissemination, execution, enforcement and implementation of executive policies reflecting sound management practices.
- IV. **Community Development:** To improve the quality of life of the citizens of the State of Louisiana, principally those of low to moderate income, through the effective administration of the Louisiana Community Development Block Grant Program, and to improve the quality of life of all citizens of the State through effective administration of the Local Government Assistance Program and the Community Water Enrichment Fund.

Within the Division of Administration's Office of Community Development (OCD) is the Disaster Recovery Unit (DRU) which was originally dedicated to helping Louisiana's citizens from hurricanes Katrina and Rita. As the state's central point for hurricane recovery, the OCD-DRU manages the most extensive rebuilding effort in American history, working closely with local, state and federal partners to ensure that Louisiana recovers safer, stronger and smarter than before. Due to the nature and complexity of this office, DRU's strategic plan is provided in its entirety at the end of this plan.

The Division of Administration is also comprised of Ancillary agencies. These Ancillary agencies are self-supporting enterprises, each with its own strategic goals, objectives, and performance indicators. This includes the Office of Group Benefits, Office of Risk Management, Louisiana Property Assistance Agency, Federal Property Assistance Agency, Aircraft Services, Office of State Procurement and Office of Technology Services. Their respective plans are provided separately in their entirety.

PRINCIPAL CLIENTS AND USERS

The Division of Administration has identified the principal clients and users of each program and the specific service or benefit derived by such persons. This population will benefit from or be significantly affected by each objective within the plan.

Executive Administration: The primary clients are residents of Louisiana, state agencies and boards and commissions, local governments, the Governor, the Commissioner of Administration, and the Louisiana Legislature. Additional users include surveyors, abstractors and lawyers, elected officials, corporations, landmen/landowners, bond rating agencies, bondholders and underwriters.

Community Development Block Grant: The primary clients of community development block grant programs are residents of Louisiana of low to moderate income. The principal clients of disaster recovery programs are the individuals, households, businesses, communities, non-profit organizations and local governments directly impacted by the hurricanes of 2005, 2008, and 2012 as well as the 2016 floods. As such, the OCD-DRU is responsive to these customers as well as their local elected officials. The OCD-DRU also works in close coordination with other entities, governmental and non-governmental, providing disaster assistance and community development activities in hurricane and flood-impacted areas.

Auxiliary: The principal clients are state agencies, boards and commissions, local governments, the Louisiana Legislature, and residents of Louisiana.

EXTERNAL FACTORS

The Division of Administration has identified potential external factors beyond the control of the agency that could have a significant impact on the goals and objectives.

- Demographic and societal trends drive government operations and can cause changes in agency initiatives.
- Emergency situations such as natural disasters can cause unpredictable loss and can interfere with agency operations.
- State legislation that creates new agencies, programs and/or boards and commissions can create additional workloads and significantly alter agency initiatives.
- Federal mandate changes can cause a change in the agency operations in order for DOA to maintain compliance.
- Lack of funding and/or revenue estimates can prevent and hinder agency operations as DOA is dependent upon state appropriations as well as funding from federal grants.
- Legal rulings and decisions can affect policies resulting in changes in the operations of the agency.
- Technology continues to advance due to aging resources and as technological developments occur it can create a disruption in agency operations.
- Changes in administration and legislative leadership can cause policy changes which can alter agency initiatives.
- Baseline data that is inadequate can have a negative effect on agency operations as good policy decisions are dependent upon good collection and utilization of baseline data.

DUPLICATION OF EFFORT

The Division of Administration continues to make major strides to avoid duplication of effort within the agency through continued consolidation of offices and functions, modernization of equipment, and streamlining of processes. Through these efforts, Louisiana's public sector will realize savings as well as maintain and increase investments in critical services.

As an agency, the Division of Administration has implemented a major department wide consolidation initiative to reduce duplication and save money by centralizing numerous back-office functions across administrative sections such as human resources, legal, internal audit, and fiscal services.

The annual increase of technological capacities for government services grows rapidly. With each passing year, improved means of providing government services at lower cost with greater efficiency is a challenge to all state agencies. To harness the transformational impact of technology for many state government functions, the Division of Administration began a statewide IT consolidation project in FY 14 that sought to reduce duplication among technology systems, both hardware and software, and centralize standard departmental functions. Shared processes/services, computer server, and other computer equipment combined with unified standards of practice for many of state government's processes across all state agencies will result in a cost savings to the state.

The Division's Office of State Purchasing and the Office of Contractual review as well as statewide procurement functions and personnel were centralized into the Office of State Procurement in FY 15. The continued expansion of electronic payment options for state vendors through ePayables and direct deposit has virtually eliminated paper check printing and processing costs. This initiative has also reduced fraud and expedited payments to state vendors.

HUMAN RESOURCE POLICIES BENEFICIAL TO WOMEN AND FAMILIES

The Division of Administration provides human resource policies that support women and their families. Policies include, but are not limited to, Equal Employment and Affirmative Action, Family and Medical Leave, Leave for Maternity, as well as flexible work schedules as approved by management. These policies are reviewed on a regular basis and updated as needed. Additionally, the Division of Administration's Human Resources Director monitors state and federal guidelines as well as internal feedback from management to assure compliance and initiate process improvement as needed.

STRATEGIC PLANNING PROCESS

This plan was developed using a review of the data reported to LaPAS for all performance indicators.

All documents used in the development of the strategic plan as well as the data used for the completion of quarterly performance progress reports through LaGov Performance, previously captured using the Louisiana Performance Accountability System (LaPAS), will be maintained according to the records retention laws applicable to the agency.

GOAL I: To ensure that the financial, accounting, and budgetary information is timely, consistently fully integrated, easily accessible and accurate.

Goal Authorizations: Louisiana Revised Statutes 39:21 et seq.; 39:80; 39:86

PROGRAM ACTIVITY: OFFICE OF PLANNING AND BUDGET

The Office of Planning and Budget (OPB) has the primary responsibility of implementing performance-based budgeting in the Executive Branch of Louisiana state government. This includes budget-related services such as long- and short-term financial analysis and operating budget development, monitoring and control, and policy development, planning, accountability, and other management services including the maintenance of a statewide performance database and integration of performance information into the budget development process. OPB staff represents the Governor and Commissioner of Administration on commissions, councils, boards, task forces, and consensus estimating conferences and through the State Economist, the OPB provides revenue projections to the Revenue Estimating Conference.

PROGRAM ACTIVITY MISSION:

- i. To assist the Governor, Commissioner of Administration, and other state decision makers in the development of goals, policies, and priorities for the optimal use of Louisiana's resources.
- ii. To support and assist the Governor and Commissioner of Administration in the development and presentation of the Governor's Executive Budget documents and the monitoring of the state's operating budget to promote efficiency, effectiveness, and compliance with executive and legislative intent.
- iii. To guide and assist state agencies in the implementation of performance-based budgeting and managing for results.
- iv. To maintain and disseminate financial and performance data for the benefit of state decision makers, state agency and program managers, data users, and the general public.

PROGRAM ACTIVITY GOALS:

- i. The Office of Planning and Budget will provide efficient, effective, results-oriented planning and budgeting services that will enhance the general management of the finances of the state, support the development and maintenance of balanced state budgets, and directly link expenditures to outcomes.

- ii. The Office of Planning and Budget will make financial and performance information more readily accessible to data users across Louisiana by maintaining and maximizing the resources of the office's website.

PROGRAM ACTIVITY OBJECTIVE I.1: Maintain accountability within OPB by submitting all required documents by statutory deadlines; responding to requested legislative instruments germane to the development of the budget within 2 business days and completing analysis on requested fiscal impact statements within 2 business days.

STRATEGY I.1.a: Design internal and external processes, guidelines, and calendars to ensure that all required documents are submitted by the deadlines established by the Louisiana Revised Statutes.

STRATEGY I.1.b: Communicate deadlines via email communications, published guidelines, and the OPB website.

STRATEGY I.1.c: Appoint project-specific staff who are responsible for ensuring that deadlines are met.

STRATEGY I.1.d: Institute an appropriations bill review process to reduce the number of technical errors in the drafting of the bill.

STRATEGY I.1.e: Designate a coordinator to manage the professional development/training requirements.

PROGRAM ACTIVITY PERFORMANCE INDICATORS:

1. Outcome: Percentage of required documents submitted by statutory deadlines

STATE OF LOUISIANA
DIVISION OF ADMINISTRATION

2. Efficiency: Average number of days to provide requested feedback on the legislative instruments germane to the development of the state budget

3. Efficiency: Average number of days to complete analysis on requested fiscal impact statements

Principal Clients: Principal clients consist of the Governor, the Commissioner of Administration, the Louisiana Legislature, state agencies, and the residents of Louisiana.

External Factors: External factors that could have an impact on goals and objectives are trends and isolated events in state and national economies; inflation, and investment returns; revenue estimates; trends in discretionary/nondiscretionary¹ budget; federal and state policies and mandates; a change in administration and legislative leadership; demographic and societal trends; emergencies and unpredictable loss; changes in enabling legislation; trends in government financial management methods; mandates from “authority or expectation groups” such as Governmental Accounting Standards Board (GASB); scrutiny and review by media and government watchdog groups; technological advances and developments; and quality of materials submitted from agencies.

Duplication of Effort: The Governor is required by constitution and statute to develop and present a balanced budget estimate. The Governor and Commissioner of Administration are required by statute to monitor and manage the state’s budget and finances. The Office of Planning and Budget provides the planning and budget services necessary to carry out these functions. No other branch entity carries out the same functions at this level. While individual executive branch entities carry out budget development and financial management functions individually; the overall statewide planning and budgeting functions occur only within the Division of Administration.

¹ Non-discretionary represents expenditures that must be funded because of constitutional or other mandates.

PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Office of Planning and Budget

Objective: Maintain accountability within OPB by submitting all required documents by statutory deadlines; responding to requested legislative instruments germane to the development of the budget within 2 business days and completing analysis on requested fiscal impact statements within 2 business days.

Indicator Name: Percentage of required documents submitted by statutory deadlines

Indicator PI Code: N/A

1. Type and Level:

This performance indicator is a key outcome indicator.

2. Rationale, Relevance, Reliability:

The functions of the OPB are directly related to the specific duties of the commissioner of administration as outlined in Title 39 of the Louisiana Revised Statutes, and particularly with regard to the development of the state operating budget, which is the primary purpose of the section. All aspects of the state operating budget are governed by statute, from the deadline by which forms must be made available to state agencies to the publication of the State Budget. Therefore, ensuring that required documents are submitted by statutory deadlines is imperative. This performance indicator captures whether or not the OPB actually does this.

3. Use:

A statutory deadline is the bookend by which internal and external calendars, guidelines, and processes are developed. External users are also held accountable for meeting interim deadlines that allow the OPB to achieve 100% compliance.

4. Clarity:

There are several required documents that are not specifically included in the performance indicator name. These include: forms and guidelines

for the budget requests, executive budget and supporting document, the contents of the general appropriation and other appropriation bills, state budget, fiscal status, five-year base-line budget projections, strategic plan guidelines, and expenditure limit.

5. Data Source, Collection and Reporting:

The source of the data for the performance indicator is the publication date. Data will be reported once per year, to capture all documents submitted during the state fiscal year that begins on July 1st.

6. Calculation Methodology:

In order to calculate the percentage of required documents submitted by statutory deadlines, the number submitted by the deadline is divided by the total number of required documents.

7. Scope:

This performance indicator is aggregated.

8. Caveats:

The limitation of this performance indicator is that it does not measure the quality of the required documents that are submitted. The contents of the documents are defined by statute, and must be included in order to be technically complete. While every attempt is made to submit documents that are aesthetically pleasing, these qualities are less important than the message.

9. Accuracy, Maintenance, Support:

The performance indicator and data have not been audited. The reported data may be verified in the future by examining the publication and/or transmission date of required documents. Agency records retention policy dictates that email records must be maintained for three years.

10. Responsible Person:

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PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Office of Planning and Budget

Objective: Maintain accountability within OPB by submitting all required documents by statutory deadlines; responding to requested legislative instruments germane to the development of the budget within 2 business days and completing analysis on requested fiscal impact statements within 2 business days.

Indicator Name: Average number of days to provide requested feedback on the legislative instruments germane to the development of the state budget

Indicator PI Code: N/A

1. Type and Level:

This performance indicator is a supporting efficiency indicator.

2. Rationale, Relevance, Reliability:

The OPB is frequently called upon to provide feedback on legislative bills that are germane to the development of the state budget in order to assist in policy development and implementation. Timely responses are necessary due to the nature of the legislative process.

3. Use:

The performance indicator will be used for internal management and staff evaluation purposes, as well as, to provide useful information to the Commissioner's office in a timely manner on related legislative bills

4. Clarity:

Although the number of feedback requests is not consistent from year to year, timely review on legislative instruments relative to the state budget is important prior to the instrument being discussed in the committee.

5. Data Source, Collection and Reporting:

The source of data is an internal tracker. Utilizing both the tracker and internal processes allow the turnaround for submitting the information to the DOA legislative team to be determined.

6. Calculation Methodology:

The indicator is measured based on the number of days it takes to finalize the analysis from date of receipt to the date submitted to the DOA legislative team.

7. Scope:

This performance indicator is aggregated.

8. Caveats:

The weakness of this performance indicator is that it only measures successful completion, not the quality of information provided.

9. Accuracy, Maintenance, Support:

This performance indicator has not been audited and the data has not been routinely collected. The reported data can be verified by reviewing the internal OPB tracker and/or emails.

10. Responsible Persons:

Ternisa Hutchinson
State Budget Director
Office of Planning and Budget
225-342-7005 (phone)
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PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Office of Planning and Budget

Objective: Maintain accountability within OPB by submitting all required documents by statutory deadlines; responding to requested legislative instruments germane to the development of the budget within 2 business days and completing analysis on requested fiscal impact statements within 2 business days.

Indicator Name: Average number of days to complete analysis on requested fiscal impact statements

Indicator PI Code: N/A

1. Type and Level:

This performance indicator is a supporting efficiency indicator.

2. Rationale, Relevance, Reliability:

The OPB provides essential state budget-related information for the development of legislative fiscal notes, which may influence whether a particular bill is ultimately passed into law. Timely responses are necessary and requested due to the nature of the legislative process.

3. Use:

The performance indicator will be used for internal management and staff evaluation purposes, as well as, to provide useful information to the commissioner's office in a timely manner on related legislative fiscal note requests

4. Clarity:

Although the number of fiscal note requests is not consistent from year to year, timely fiscal impacts on legislative instruments relative to the state budget is important prior to the instrument being discussed in the committee.

5. Data Source, Collection and Reporting:

The source of data is an internal tracker. Utilizing both the tracker and internal processes allow the turnaround for submitting the information to the DOA legislative team to be determined.

6. Calculation Methodology:

The indicator is measured based on the number of days it takes to finalize the fiscal impact analysis from date of receipt to the date submitted to the DOA legislative team.

7. Scope:

This performance indicator is aggregated.

8. Caveats:

The weakness of this performance indicator is that it only measures successful completion, not the quality of information provided.

9. Accuracy, Maintenance, Support:

This performance indicator has not been audited and the data has not been routinely collected. The reported data can be verified by reviewing the internal OPB tracker and/or emails.

10. Responsible Persons:

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PROGRAM ACTIVITY: OFFICE OF FINANCE AND SUPPORT SERVICES

The Office of Finance and Support Services (OFSS) provides comprehensive fiscal services to the Division of Administration, the Board of Elementary and Secondary Education, the Office of Group Benefits, the Office of Technology Services, as well as various offices and agencies within the Executive Department. The OFSS also provides services to the Louisiana Office Facilities Corporation, Louisiana Correctional Facilities Corporation and to a wide range of appropriations, programs and services funded under Schedule 20 of the General Appropriation Bill and Ancillary Appropriations. In addition, the office administers and controls the financial aspects of the Louisiana Equipment and Acquisition Fund (LEAF) and Installment Purchase Market (IPM) program.

PROGRAM ACTIVITY MISSION:

- i. To provide accurate and timely fiscal services to the various offices and agencies serviced.
- ii. To provide innovative and effective policy direction for the various offices and entities serviced.

PROGRAM ACTIVITY GOAL:

- i. The Office of Finance and Support Services will provide comprehensive fiscal and support services² to client entities through training, establishing procedures, providing technical assistance, and automating processes to enable the client to successfully administer its programs and achieve its goals and missions.

PROGRAM ACTIVITY OBJECTIVE I.1: The Office of Finance and Support Services will provide 100% of the fiscal and support services to client entities in accordance with federal/state laws and office policies and procedures while ensuring adequate internal controls over fiscal processes.

STRATEGY I.1.a: Provide management reporting, technical assistance, and training to client entities.

² Comprehensive fiscal and support services are accounting services provided to client entities which include the areas of budget, cash disbursements, cash management, and financial reporting.

STRATEGY I.1.b: Provide and maintain written operating procedures, processes, and/or guidelines.

STRATEGY I.1.c: Increase the depth of knowledge among OFSS personnel through training and mentoring.

PROGRAM ACTIVITY PERFORMANCE INDICATORS:

1. Outcome: Number of legislative audit findings.

PROGRAM ACTIVITY GOAL:

- ii. The Office of Finance and Support Services' Budget Division will provide timely, accurate, and useful information to client-agency decision makers as it relates to budget preparation, development, and control, expenditure and revenue analysis, and contract processing and compliance.

PROGRAM ACTIVITY OBJECTIVE I.2: Maintain a 100% timely submission rate of the annual budget request, and provide 100% of the monthly summaries of budget analyses within 10 business days after the close of the fiscal month to improve communication and collaboration with client entities.

STRATEGY I.2.a: Improve processes for more automation.

STRATEGY I.2.b: Foster stronger collaboration and information exchange across the various divisions within OFSS.

STRATEGY I.2.c: Increase the depth of knowledge among OFSS personnel through training and mentoring.

PROGRAM ACTIVITY PERFORMANCE INDICATORS:

1. Outcome: Percentage of budget request documents submitted by the deadline as prescribed by the Office of Planning and Budget.

2. Output: Number of business days after the fiscal month close that the budget summaries are provided to client entities.

PROGRAM ACTIVITY GOAL:

- iii. The Office of Finance and Support Services' Cash Disbursements Division will provide timely payment services to client entities.

PROGRAM ACTIVITY OBJECTIVE I.3: Process 90% of compliant vendor invoice and reimbursement payments³ within 5 business days of receipt for client entities.

STRATEGY I.3.a: Improve processes for more automation.

STRATEGY I.3.b: Provide technical assistance and training to client entities.

STRATEGY I.3.c: Increase the depth of knowledge among OFSS personnel through training and mentoring.

PROGRAM ACTIVITY PERFORMANCE INDICATORS:

1. Outcome: Percentage of compliant vendor invoice and reimbursement payments paid within five business days of receipt.
2. Outcome: Percentage of non-compliant vendor invoices and reimbursement requests received from client entities.

PROGRAM ACTIVITY GOAL:

- iv. The Office of Finance and Support Services' Cash Management Division will process customer invoices, deposit receipts, accurately classify revenues, and maintain and report delinquent, non-state accounts receivable balances to the Office of Statewide Reporting and Accounting Policy (OSRAP) for client entities in a timely manner.

³ Compliant invoice and reimbursement payments include valid vendor invoices, travel, contract, purchase order, and p-card invoices that include all required signatures, approvals, coding, and other required supporting documentation.

PROGRAM ACTIVITY OBJECTIVE I.4: Complete 90% of client entities' customer invoices by assigned due date, deposit 100% of receipts within 24 hours of collection, accurately classify 95% of revenue within 5 business days of deposit, and maintain and report 100% of delinquent, non-state accounts receivable balances to OSRAP within 45 days after the end of each quarter for client entities.

STRATEGY I.4.a: Improve processes for more automation.

STRATEGY I.4.b: Provide and maintain written operating procedures, processes, and/or guidelines.

STRATEGY I.4.c: Increase the depth of knowledge among OFSS personnel through training and mentoring

PROGRAM ACTIVITY PERFORMANCE INDICATORS:

1. Outcome: Percentage of cash, check, and money orders received and deposited within 24 hours of receipt.
2. Efficiency: Percentage of revenues classified within 5 business days of deposit.
3. Efficiency: Percentage of client entities' invoices completed by the assigned due date.
4. Output: Percentage of delinquent, non-state accounts receivable balances reported to OSRAP within 45 days after the end of each quarter for client entities.

PROGRAM ACTIVITY GOAL:

- v. The Office of Finance and Support Services' Financial Reporting Division will provide accurate, meaningful, and timely financial reporting services for client entities in accordance with industry standards and state/federal requirements by collaboratively assessing their financial reporting needs and deadlines.

PROGRAM ACTIVITY OBJECTIVE I.5: Complete 100% of client entities' monthly financial reports within 20 days after the close of the fiscal

month, submit 100% of the annual financial reports (AFRs)⁴ to the Office of Statewide Reporting and Accounting Policy (OSRAP) within the prescribed deadline, complete 100% of the quarterly reports within 30 days of the last day of the period, and complete 100% of the Cash Management Improvement Act (CMIA)⁵ reporting by the 20th of each month.

STRATEGY I.5.a: Provide management reporting, technical assistance, and training to client entities.

STRATEGY I.5.b: Foster stronger collaboration and information exchange across the various divisions within OFSS.

STRATEGY I.5.c: Improve processes for more automation.

STRATEGY I.5.d: Provide and maintain written operating procedures, processes, and/or guidelines.

STRATEGY I.5.e: Increase the depth of knowledge among OFSS personnel through training and mentoring.

PROGRAM ACTIVITY PERFORMANCE INDICATORS:

1. Outcome: Percentage of CMIA reporting completed by the 20th of each month.
2. Output: Percentage of monthly financial reports prepared and reviewed within 20 days after the close of the fiscal month.
3. Output: Percentage of quarterly reports prepared and reviewed within 30 days after the last day of the period.
4. Outcome: Percentage of annual financial reports submitted to OSRAP within the prescribed deadline.

Principal Clients: Principal clients consist of the Division of Administration and its ancillary agencies, Executive Office and various other agencies within

⁴ Annual Financial Reports (AFRs) consist of all schedules, notes, and other required supplementary reporting documentation.

⁵ CMIA governs how funds are transferred between the federal government and the state government for certain programs.

the Executive branch that we service. Services provided include vendor payment support, financial reporting, and appropriation accounting services, and budget control.

External Factors: State and Federal mandates, budgetary restrictions, technology, LaGov system, employee turnover, user agency errors, and vendors.

Duplication of Effort: The Office of Finance and Support Services is an internal operation. Although there are other accounting offices throughout the State, we are the only office that provides accounting services for our client entities.

PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Office of Finance and Support Services

Objective: The Office of Finance and Support Services will provide 100% of the fiscal and support services to client entities in accordance with federal/state laws and office policies and procedures while ensuring adequate internal controls over fiscal processes.

Indicator Name: Number of major legislative audit findings

Indicator LaPAS PI Code: 22621

1. Type and Level:

This performance indicator is a key outcome indicator.

2. Rationale, Relevance, Reliability:

The Office of Finance and Support Services (OFSS) provides comprehensive fiscal services to the Division of Administration, the Board of Elementary and Secondary Education, the Office of Group Benefits, the Office of Technology Services, as well as various offices and agencies within the Executive Department. The OFSS also provides services to the Louisiana Office Facilities Corporation, Louisiana Correctional Facilities Corporation and to a wide range of appropriations, programs and services funded under Schedule 20 of the General Appropriation Bill and Ancillary Appropriations. In addition, the office administers and controls the financial aspects of the Louisiana Equipment and Acquisition Fund (LEAF) and Installment Purchase Market (IPM) program. OFSS is audited each year by the Legislative Auditor and is subject to review by various federal agency auditors to ensure compliance and that transactions are properly classified, recorded, and reported. These audits assist in identifying if changes may need to occur in our processes so that these comprehensive services are acceptable and effective.

3. Use:

The performance indicator will be used for internal management and staff evaluating purposes. This indicator will be used to reflect the effectiveness of OFSS in providing reliable comprehensive financial services to its client entities.

4. Clarity:

Upon completion of the audits, an official audit report is issued by the Auditor, identifying any weaknesses in internal controls, compliance, and financial misstatements relative to operations and financial reporting. Some weaknesses are identified as a finding in the official audit report.

5. Data Source, Collection and Reporting:

The source of the data for the performance indicator is the official audit report published by the Auditor. An official audit report is generally published annually, and reflects the period of a fiscal year.

6. Calculation Methodology:

No calculation is required for this indicator. It is a count of the number of major audit findings included in the published audit report.

7. Scope:

While this indicator does not provide a measure for all agencies statewide, the OFSS clients are not just Division of Administration entities; therefore, this indicator is an aggregate of all of the clients that we currently serve.

8. Caveats:

The success of this indicator can be dependent upon various external and internal factors. Because each client entity is unique in their operations, they each utilize dissimilar software that supports their needs. This requires specialized knowledge of each client entities' complex operating environment, mission, and distinct software programs. Additionally, the various divisions within OFSS rely on each other and client entities to collect the data utilized in performing services, and inaccurate or incomplete data may result in a weakness that impacts audit results.

9. Accuracy, Maintenance, Support:

This performance indicator has not been audited by the Legislative Auditor; however, the data is retrieved from the Legislative Auditor reports.

10. Responsible Person(s):

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PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Office of Finance and Support Services

Objective: Maintain a 100% timely submission rate of the annual budget request, and provide 100% of the monthly summaries of budget analyses within 10 business days after the close of the fiscal month to improve communication and collaboration with client entities.

Indicator Name: Percentage of budget request documents submitted by the deadline as prescribed by the Office of Planning and Budget.

Indicator LaPAS PI Code: N/A

1. Type and Level:

This performance indicator is a key outcome indicator.

2. Rationale, Relevance, Reliability:

The OFSS Budget Division is responsible for completing budget requests for all sections and agencies under the umbrella of the Division of Administration, including the Ancillary agencies, Governor's Office, Governor's Conferences and Interstate Compacts, and the District Attorneys and Assistant District Attorneys. It is imperative that these budget requests are completed accurately and submitted timely to the Office of Planning and Budget (OPB) and the Legislature by the statutory deadline per R.S. 39:33.

3. Use:

The performance indicator will be used for internal management and staff evaluating purposes. This indicator will reflect the effectiveness and efficiency of the budget staff.

4. Clarity:

R.S. 39:33 states that the budget requests are to be submitted "*...on a date specified by the commissioner of administration which date shall not be late that the fifteenth day of November in each year*". However this date is determined by the OPB and can be due as early as October dependent upon differing factors. OPB sends out a memo once a date is determined.

5. Data Source, Collection and Reporting:

The sources of data for the performance indicator are internal delivery sheets that are signed when delivered to the appropriate office and a date/time stamp and external excel log kept by OPB. Since the budget request is submitted annually, the reporting frequency is once a year and is reported on a fiscal year.

6. Calculation Methodology:

In order to calculate the percentage of budget requested submitted by the deadline, the number of budget requests submitted by the OPB deadline is divided by the total number of budget requests that OFSS is responsible for.

7. Scope:

While this indicator does not provide a measure for all agencies statewide, the OFSS Budget clients are not just Division of Administration entities; therefore, this indicator is an aggregate of all of the clients that we currently serve.

8. Caveats:

None.

9. Accuracy, Maintenance, Support:

This performance indicator has not been audited by the Legislative Auditor; however, the data is maintained in the logs and verified by the date stamped from OPB.

10. Responsible Person:

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PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Office of Finance and Support Services

Objective: Maintain a 100% timely submission rate of the annual budget request, and provide 100% of the monthly summaries of budget analyses within 10 business days after the close of the fiscal month to improve communication and collaboration with client entities.

Indicator Name: Number of business days after the fiscal month close that the budget summaries are provided to client entities.

Indicator LaPAS PI Code: N/A

1. Type and Level:

This performance indicator is a supporting output indicator.

2. Rationale, Relevance, Reliability:

The OFSS Budget Section is responsible for completing budget projections (forecasting) for all sections and agencies under the umbrella of the Division of Administration, including the Ancillary agencies. Budgeting provides a financial framework for the decision making process. Forecasting is done to inform and assist in decision making and proper reporting to executive level management. It also ensures that the budget staff and agency/section heads are working together collaboratively. Also, the budget projections allows for the budget staff to work through any errors that may result from work performed by other units within OFSS.

3. Use:

The performance indicator will be used for internal management and staff evaluating purposes. This indicator will reflect the effectiveness and efficiency of the budget staff.

4. Clarity:

The budget summary (Management Budget Review document) is a summary of the budget projections, from a larger file, that are completed by the budget analysts on a monthly basis. Once the documents are completed and checked by management, the budget summaries are then finalized and sent out to our clients.

5. Data Source, Collection and Reporting:

The sources of data for the performance indicator are internal logs and email records. The goal is to provide this information on a monthly basis but some external and internal factors may not allow this to always be done. For instance, at the beginning of the fiscal year, projections are not completed due to the fiscal year end close, the budget not being uploaded into LAGOV, and insufficient data to complete a useful and meaningful projection.

6. Calculation Methodology:

In order to calculate the number of days to send out budget summaries, a count is performed on the number of business days following the close of the fiscal month up until the day that the emails are sent out to the respective agencies.

7. Scope:

While this indicator does not provide a measure for all agencies statewide, the OFSS Budget clients are not just Division of Administration entities; therefore, this indicator is an aggregate of all of the clients that we currently serve.

8. Caveats:

The success of this indicator is dependent upon various external and internal factors. Because of the small size of staffing and the institutional knowledge that is required, staffing shortage may affect this indicator. Another factor would be special projects that require priority. Also, because the work product of the other sections within OFSS feeds into the budget, inaccuracy of this work typically slows down the budget staff. This is due to the amount of time it takes to research and understand the error and then communicate and wait for a resolution from other units.

9. Accuracy, Maintenance, Support:

This performance indicator has not been audited by the Legislative Auditor; however, the data is maintained and verified through logs and outgoing email records.

10. Responsible Person:

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PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Office of Finance and Support Services

Objective: Process 90% of compliant vendor invoice and reimbursement payments within 5 business days of receipt for client entities.

Indicator Name: Percentage of compliant vendor invoice and reimbursement payments processed within five business days of receipt

Indicator LaPAS PI Code: N/A

1. Type and Level:

This performance indicator is a key outcome indicator.

2. Rationale, Relevance, Reliability:

The OFSS Cash Disbursements Division is responsible for properly processing payments for its client entities in a timely manner. The objective is to process 90% of compliant payments within five days of receipt. This is a reliable measure to determine if prompt payment of services has been provided to client entities.

3. Use:

The performance indicator will be used for internal management and staff evaluating purposes. This indicator will reflect the effectiveness and efficiency of the cash disbursements staff, as well as identify areas of improvement in processes to ensure compliance and effective financial support is provided to clients.

4. Clarity:

Compliant invoice and reimbursement payments include valid vendor invoices, travel reimbursement requests, contract payments, purchase order payments, and p-card invoices that include all required signatures, approvals, coding, and other required supporting documentation.

5. Data Source, Collection and Reporting:

The sources of data will be the receipt date of the documents received by OFSS staff through email or placed on the shared transmittal document by the client and the approval date of the document. The internal reporting period is monthly.

6. Calculation Methodology:

The percentage of compliant payments processed within 5 days of receipt is calculated by dividing the number of compliant payments processed within 5 days of receipt by the total number of compliant payments received for the measurement period.

7. Scope:

While this indicator does not provide a measure for all agencies statewide, the OFSS Cash Disbursements clients are not just Division of Administration entities; therefore, this indicator is an aggregate of all of the clients that we currently serve.

8. Caveats:

All payments received are considered compliant until they are reviewed and found not to have all required elements necessary for processing. The 10% margin of service allows for the process of reviewing non-compliant invoices and forwarding those back to the client. There are internal and external factors that could limit the success of this indicator, such as staff shortages, the addition of new client entities, computer or network outages, or the addition of manual processes.

9. Accuracy, Maintenance, Support:

This performance indicator has not been audited by the Legislative Auditor; however, the data is maintained on the transmittal logs and verified in the LaGov system. This data will be maintained in spreadsheets or email.

10. Responsible Person:

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PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Office of Finance and Support Services

Objective: Process 90% of compliant vendor invoice and reimbursement payments within 5 business days of receipt for client entities.

Indicator Name: Percentage of non-compliant vendor invoices and reimbursement payments received from client entities.

Indicator LaPAS PI Code: N/A

1. Type and Level:

This performance indicator is a supporting outcome indicator.

2. Rationale, Relevance, Reliability:

The OFSS Cash Disbursements Division is responsible for properly processing payments for its client entities in a timely manner. The receipt and review of non-compliant invoices and reimbursements slows the payment turnaround time for all invoices and decreases OFSS productivity. The objective is to eliminate and/or significantly reduce the number of non-compliant invoices and reimbursements received for processing. This is a reliable measure to determine the type of goods/services that may require clarification for coding and/or which clients may need technical training or guidance on preparing its payment documents.

3. Use:

The performance indicator will be used for internal management and staff evaluating purposes. This indicator will reflect the effectiveness and efficiency of the cash disbursements staff, as well as identify clients that may require technical assistance.

4. Clarity:

Non-compliant invoice and reimbursement payments exclude applicable valid vendor invoices to support charges, coding, appropriate signatures, travel authorization forms, and other required supporting documentation.

5. Data Source, Collection and Reporting:

The sources of data for this performance indicator include the log of invoices and payment documents returned to the client due to non-compliance. The internal reporting period is monthly.

6. Calculation Methodology:

The percentage of non-compliant payments received by clients is calculated by dividing the number of non-compliant payments received by the total number of payments received for the measurement period.

7. Scope:

While this indicator does not provide a measure for all agencies statewide, the OFSS Cash Disbursements clients are not just Division of Administration entities; therefore, this indicator is an aggregate of all of the clients that we currently serve.

8. Caveats:

None.

9. Accuracy, Maintenance, Support:

This performance indicator has not been audited by the Legislative Auditor; however, the data is compiled and maintained in spreadsheets.

10. Responsible Person:

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PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Office of Finance and Support Services

Objective: Complete 90% of client entities' customer invoices by assigned due date, deposit 100% of receipts within 24 hours of collection, accurately classify 95% of revenue within 5 business days of deposit, and maintain and report 100% of delinquent, non-state accounts receivable balances to OSRAP within 45 days after the end of each quarter for client entities.

Indicator Name: Percentage of cash, checks, and money orders received and deposited within 24 hours of receipt.

Indicator LaPAS PI Code: N/A

1. Type and Level:

This performance indicator is a key outcome indicator.

2. Rationale, Relevance, Reliability:

The OFSS Cash Management Division is responsible for receiving, depositing, and classifying receipts and revenue for its client entities. Article VII, §9 of the Louisiana Constitution requires that *"all monies received by the State or by any state board, agency or commission shall be deposited in the state treasury immediately upon receipt"*.

3. Use:

The performance indicator will be used for internal management and staff evaluating purposes. This indicator will reflect the effectiveness and efficiency of the Cash Management staff, and identify processes that require review and modification to ensure compliance with State law and prompt and effective client service.

4. Clarity:

The Control Agencies Policies and Procedures Manual §4.2.1 states that *"immediately"*, as used in the Louisiana Constitution, Article VII §9, is generally defined as within 24 hours of receipt.

5. Data Source, Collection and Reporting:

The sources of data for the performance indicator are internal logs maintained by OFSS staff on a daily basis that record the date each receipt is received within OFSS. Additionally, a copy of each deposit is maintained and logged by OFSS and the treasury; and the actual deposit date is recorded by the treasury in LAGOV. The internal reporting period is monthly.

6. Calculation Methodology:

In order to calculate the percentage of receipts deposited into treasury within 24 hours of receipt, the total number of receipts deposited within 24 hours is divided by the total number of receipts received for the measurement period.

7. Scope:

While this indicator does not provide a measure for all agencies statewide, the OFSS Cash Management clients are not just Division of Administration entities; therefore, this indicator is an aggregate of all of the clients that we currently serve.

8. Caveats:

If a receipt is received after the treasury deadline on the last business day of the week, the receipt cannot be deposited until the next business day, which will be 48 hours at a minimum.

9. Accuracy, Maintenance, Support:

This performance indicator has not been audited by the Legislative Auditor; however, the data is maintained in the logs at OFSS and treasury; and is verified by the date of deposit entered in LAGOV by the treasury.

10. Responsible Person:

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PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Office of Finance and Support Services

Objective: Complete 90% of client entities' customer invoices by assigned due date, deposit 100% of receipts within 24 hours of collection, accurately classify 95% of revenue within 5 business days of deposit, and maintain and report 100% of delinquent, non-state accounts receivable balances to OSRAP within 45 days after the end of each quarter for client entities.

Indicator Name: Percentage of revenues accurately classified within 5 business days of deposit.

Indicator LaPAS PI Code: N/A

1. Type and Level:

This performance indicator is a general performance information efficiency indicator.

2. Rationale, Relevance, Reliability:

The OFSS client entities depend on monies collected for the funding of their operations. Monies deposited are not available to warrant for agency use until the classifications for the deposits are entered and approved in LAGOV.

3. Use:

The performance indicator will be used for internal management and staff evaluating purposes. This indicator will reflect the effectiveness and efficiency of the Cash Management staff, and identify processes that require review and modification to ensure effective cash management services to client entities.

4. Clarity:

Classification of revenues occur after the deposit is made. The classification process moves the monies from a suspense status into the client entities' specific means of financing, making the monies available for use.

5. Data Source, Collection and Reporting:

The source of data for the performance indicator are internal logs maintained by OFSS staff on a daily basis that record the date each receipt

is received and the date each associated deposit is classified in LaGOV. The date of last activity for each deposit is internally recorded in LaGOV identifying the last date any portion of the deposit was classified, whether there remains any unclassified balance or not. The internal reporting period is monthly.

6. Calculation Methodology:

In order to calculate the percentage of deposits classified within 5 business days of deposit, the number of deposits that are fully classified within 5 business days are divided by the total number of deposits for the measurement period.

7. Scope:

While this indicator does not provide a measure for all agencies statewide, the OFSS Cash Management clients are not just Division of Administration entities; therefore, this indicator is an aggregate of all of the clients that we currently serve.

8. Caveats:

Since the measurement period is a calendar month, there is a limitation to this indicator as it includes in the measurement, 5 days beyond the last day of each month. Therefore, the last 5 days of each month must be excluded from the current month measurement period and added to the following month. There are internal and external factors that could limit the success of this indicator, such as staff shortages, the addition of new client entities, computer or network outages, or the addition of manual processes.

9. Accuracy, Maintenance, Support:

This performance indicator has not been audited by the Legislative Auditor; however, the data is maintained in the logs at OFSS and internally recorded in LaGOV.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Office of Finance and Support Services

Objective: Complete 90% of client entities' customer invoices by assigned due date, deposit 100% of receipts within 24 hours of collection, accurately classify 95% of revenue within 5 business days of deposit, and maintain and report 100% of delinquent, non-state accounts receivable balances to OSRAP within 45 days after the end of each quarter for client entities.

Indicator Name: Percentage of client customer entities' invoices completed by the assigned due date.

Indicator LaPAS PI Code: N/A

1. Type and Level:

This performance indicator is a general performance information efficiency indicator.

2. Rationale, Relevance, Reliability:

The OFSS client entities must receive timely revenue from their customers to be able to fulfill their mission and goals. The first necessary step to achieve this is in the billing of invoices to customers. The OFSS Cash Management Division prepares and processes these client invoices.

3. Use:

The performance indicator will be used for internal management and staff evaluating purposes. This indicator will reflect the effectiveness and efficiency of the Cash Management staff, and identify processes that require review and modification to ensure effective cash management services to client entities.

4. Clarity:

The term "due date" is not specific to a specific date. Each of the OFSS client entities has unique operating environments, providing a very distinctive service to its customers. Therefore, all invoices are not consistent in appearance, frequency, or software system utilized for preparation. Additionally, the timing of when the invoices must be prepared and completed will vary among each client, and the due date of

each annual, quarterly, and monthly invoice may vary from one period to another.

5. Data Source, Collection and Reporting:

The sources of data for the performance indicator are internal logs maintained by OFSS, as well as the various software systems utilized for preparing and generating the invoices and client emails establishing due dates. The software systems utilized include LaGov, Office of Group Benefits (OGB) Impact System and QuickBooks. The internal reporting period is monthly.

6. Calculation Methodology:

In order to calculate the percentage of client customer invoices prepared by the due date, the number of customer invoices processed by the due date is divided by the total number of customer invoices to be prepared for the measurement period.

7. Scope:

While this indicator does not provide a measure for all agencies statewide, the OFSS Cash Management clients are not just Division of Administration entities. This indicator will be tracked by client then aggregated into a total for the measurement period; therefore, this indicator is an aggregate of all of the clients that we currently serve.

8. Caveats:

One limitation for this indicator is that the “due date” is not specific or static among each client and each measurement period. There are internal and external factors that could limit the success of this indicator, such as staff shortages, increased customer base for each client, the addition of new client entities, computer or network outages, or the addition of manual processes.

9. Accuracy, Maintenance, Support:

This performance indicator has not been audited by the Legislative Auditor; however, the system data and logs are maintained in the logs at OFSS, data files are maintained in the Impact system that support the posting date for the OGB invoices, and logs are maintained for other agencies of invoicing dates.

10. Responsible Person:

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PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Office of Finance and Support Services

Objective: Complete 90% of client entities' customer invoices by assigned due date, deposit 100% of receipts within 24 hours of collection, accurately classify 95% of revenue within 5 business days of deposit, and maintain and report 100% of delinquent, non-state accounts receivable balances to OSRAP within 45 days after the end of each quarter for client entities.

Indicator Name: Percentage of delinquent, non-state accounts receivable balances reported to OSRAP within 45 days after the end of each quarter for client entities.

Indicator LaPAS PI Code: N/A

1. Type and Level:

This performance indicator is a key output indicator.

2. Rationale, Relevance, Reliability:

Act 745 of the 1995 Regular Legislative Session requires all state agencies and component reporting units report on a quarterly basis, information on accounts receivable and debt owed the state. The OFSS prepares and submits this quarterly report of delinquent, non-state accounts receivables and debt owed to client entities.

3. Use:

The performance indicator will be used for internal management and staff evaluating purposes. This indicator will reflect the effectiveness and efficiency of the Cash Management staff, and identify processes that require review and modification to ensure effective cash management services to client entities.

4. Clarity:

With the creation of the Office of Debt Recovery (ODR) pursuant to Act 399 of the 2013 Regular Legislative Session, state agencies are required to submit delinquent accounts receivables and debt owed to the state for aggressive collection, either to this new agency or the Office of Attorney General if a prior agreement with them exists. OSRAP collects and

compiles delinquent receivables from all agencies and submits a summary report to the Joint Legislative Committee on the Budget (JLCB).

5. Data Source, Collection and Reporting:

The source of data for the performance indicator are LaGov and internal logs maintained by OFSS staff on a daily basis that record the date and amount of each invoice and revenue by customer entered into LaGov for each client entity and the date and amount for each corresponding receipt collected and deposited. The internal reporting period is monthly.

6. Calculation Methodology:

In order to calculate the percentage of delinquent, non-state receivable balances and debts owed to client entities, the number of receivables and debts owed reported are divided by the total number of delinquent, non-state receivable balances for the measurement period.

7. Scope:

While this indicator does not provide a measure for all agencies statewide, the OFSS Cash Management clients are not just Division of Administration entities; therefore, this indicator is an aggregate of all of the clients that we currently serve.

8. Caveats:

OFSS maintains receivable balances by customer for all client entities, regardless of whether the customer is a state entity or non-state entity. However, this indicator applies only to non-state customers with a delinquent receivable balance.

9. Accuracy, Maintenance, Support:

This performance indicator has not been audited by the Legislative Auditor; however, the data is maintained in the logs at OFSS and internally recorded in LAGOV.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Office of Finance and Support Services

Objective: Complete 100% of client entities' monthly financial reports within 20 days after the close of the fiscal month, submit 100% of the annual financial reports (AFRs) to the Office of Statewide Reporting and Accounting Policy (OSRAP) within the prescribed deadline, complete 100% of the quarterly reports within 30 days of the last day of the period, and complete 100% of the Cash Management Improvement Act (CMIA) reporting by the 20th of each month.

Indicator Name: Percentage of CMIA reporting completed by the 20th of each month.

Indicator LaPAS PI Code: N/A

1. Type and Level:

This performance indicator is a key outcome indicator.

2. Rationale, Relevance, Reliability:

In accordance with the Cash Management Improvement Act, the timing of drawing federal funds in relation to the timing of the actual expenditures are outlined and the specified clearance pattern must be adhered to. Additionally, the federal government requires that a monthly report of the funds drawn, etc. must be submitted. OFSS prepares and submits this report for the client entities that receive federal funds. This indicator ensures fiscal accountability and compliance with mandated federal and state regulations related to the reporting requirements of the Cash Management Improvement Act regarding the receipt of federal funds.

3. Use:

The performance indicator will be used for internal management and staff evaluating purposes. This indicator will reflect the effectiveness and efficiency of the Financial Reporting staff, and identify processes that require review and modification to ensure effective and compliant reporting services to client entities.

4. Clarity:

CMIA – Cash Management Improvement Act – provides the general rules and procedures for the efficient transfer of funds for federal financial assistance programs between the federal government and the states.

5. Data Source, Collection and Reporting:

CMIA reporting is the accounting system for the state and the federal funds tracking system. The data for completing the CMIA reporting is collected daily and reported monthly. The data is reported within 20 days following the end of the calendar month, and compliance can be monitored monthly by the date the report is identified as completed. The internal reporting period and submission of reporting the data is annually.

6. Calculation Methodology:

In order to calculate the percentage of CMIA reports completed by the 20th of each month is the number of monthly CMIA reports completed by the 20th of the month divided by the total number of monthly CMIA reports completed for the annual measurement period.

7. Scope:

While this indicator does not provide a measure for all agencies statewide, the OFSS Financial Reporting clients are not just Division of Administration entities; therefore, this indicator is an aggregate of all of the clients that we currently serve.

8. Caveats:

None.

9. Accuracy, Maintenance, Support:

This performance indicator has not been audited by the Legislative Auditor; however, the accuracy of the data is the accounting system for the state and the federal funds tracking system that supports items disclosed on the CMIA reports. The reported data is maintained through the states' Office of Technology Services policies and procedures regarding routine system back-up and data integrity that will ensure the data is verifiable in the future.

10. Responsible Person:

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PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Office of Finance and Support Services

Objective: Complete 100% of client entities' monthly financial reports within 20 days after the close of the fiscal month, submit 100% of the annual financial reports (AFRs) to the Office of Statewide Reporting and Accounting Policy (OSRAP) within the prescribed deadline, complete 100% of the quarterly reports within 30 days of the last day of the period, and complete 100% of the Cash Management Improvement Act (CMIA) reporting by the 20th of each month.

Indicator Name: Percentage of monthly financial reports prepared and reviewed within 20 days after the close of the fiscal month.

Indicator LaPAS PI Code: N/A

1. Type and Level:

This performance indicator is a supporting output indicator.

2. Rationale, Relevance, Reliability:

Upon the close of each fiscal month, executive management of the OFSS client entities rely on the monthly financial reports to make business decisions to ensure they meet their mission and goals in an efficient manner. This indicator ensures efficient and effective financial services to client entities.

3. Use:

The performance indicator will be used for internal management and staff evaluating purposes. This indicator will reflect the effectiveness and efficiency of the Financial Reporting staff, and identify processes that require review and modification to ensure effective financial and support services to client entities.

4. Clarity:

Monthly financial reports capture various financial data for each fiscal month in a format agreed upon by the client entity. The close of the fiscal month for all months, except June, is the third business day after the last day of the previous month.

5. Data Source, Collection and Reporting:

The source of the data for completing the monthly financial reports varies by client entity. All clients' financial data is captured in LAGOV, the state's accounting system; however, much of the data for some of the clients is also collected in side systems that interface with LAGOV or must be manually uploaded or entered into LAGOV. All data can be verified within LAGOV. Internal logs are maintained to verify the date of completion and the report date and email date verifies the date of report issuance. The reports are issued electronically via email. The internal reporting period is monthly.

6. Calculation Methodology:

In order to calculate the percentage of monthly financial reports prepared and reviewed within 20 days after the close of the fiscal month, the number of client monthly financial reports completed and reviewed within 20 days after the close of the fiscal month is divided by the total number of client monthly financial reports prepared and reviewed.

7. Scope:

While this indicator does not provide a measure for all agencies statewide, the OFSS Financial Reporting clients are not just Division of Administration entities; therefore, this indicator is an aggregate of all of the clients that we currently serve.

8. Caveats:

There are internal and external factors that could limit the success of this indicator, such as staff shortages, the addition of new client entities, computer or network outages, the addition of manual processes, or not receiving required information needed from client entities.

9. Accuracy, Maintenance, Support:

This performance indicator has not been audited by the Legislative Auditor; however, the accuracy of the data is the accounting system for the state. The reported data is maintained through the states' Office of Technology Services policies and procedures regarding routine system back-up and data integrity that will ensure the data is verifiable in the future.

10. Responsible Person:

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PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Office of Finance and Support Services

Objective: Complete 100% of client entities' monthly financial reports within 20 days after the close of the fiscal month, submit 100% of the annual financial reports (AFRs) to the Office of Statewide Reporting and Accounting Policy (OSRAP) within the prescribed deadline, complete 100% of the quarterly reports within 30 days of the last day of the period, and complete 100% of the Cash Management Improvement Act (CMIA) reporting by the 20th of each month.

Indicator Name: Percentage of quarterly reports prepared and reviewed within 30 days after the last day of the period.

Indicator LaPAS PI Code: N/A

1. Type and Level:

This performance indicator is a key output indicator.

2. Rationale, Relevance, Reliability:

Upon the close of each fiscal month, executive management of the OFSS client entities rely on the quarterly reports to ensure compliance with federal and state regulations. This indicator ensures fiscal accountability with providing efficient and effective support services to client entities.

3. Use:

The performance indicator will be used for internal management and staff evaluating purposes. This indicator will reflect the effectiveness and efficiency of the Financial Reporting staff, and identify processes that require review and modification to ensure effective financial and support services to client entities.

4. Clarity:

The 1st quarter begins with the calendar month of July.

5. Data Source, Collection and Reporting:

The source of the data for completing the quarterly reports is LAGOV, the state's accounting system, and the federal funds tracking system. The data is collected daily and reported quarterly. All data can be verified within LAGOV and the federal funds tracking system. Internal logs are

maintained to verify the date of completion and the report date and email date verifies the date of report issuance. The reports are issued electronically via email. The internal reporting period is annually.

6. Calculation Methodology:

In order to calculate the percentage of quarterly reports prepared and reviewed within 30 days after the last day of the period, the number of quarterly reports completed and reviewed within 30 days after the last day of the period is divided by the total number of required quarterly reports prepared and reviewed.

7. Scope:

While this indicator does not provide a measure for all agencies statewide, the OFSS Financial Reporting clients are not just Division of Administration entities; therefore, this indicator is an aggregate of all of the clients that we currently serve.

8. Caveats:

There are internal and external factors that could limit the success of this indicator, such as staff shortages or computer or network outages.

9. Accuracy, Maintenance, Support:

This performance indicator has not been audited by the Legislative Auditor; however, the accuracy of the data is the accounting system for the state and the federal funds tracking system. The reported data is maintained through the states' Office of Technology Services policies and procedures regarding routine system back-up and data integrity that will ensure the data is verifiable in the future.

10. Responsible Person:

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PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Office of Finance and Support Services

Objective: Complete 100% of client entities' monthly financial reports within 20 days after the close of the fiscal month, submit 100% of the annual financial reports (AFRs) to the Office of Statewide Reporting and Accounting Policy (OSRAP) within the prescribed deadline, complete 100% of the quarterly reports within 30 days of the last day of the period, and complete 100% of the Cash Management Improvement Act (CMIA) reporting by the 20th of each month.

Indicator Name: Percentage of annual financial reports submitted to OSRAP within the prescribed deadline.

Indicator LaPAS PI Code: N/A

1. Type and Level:

This performance indicator is a key outcome indicator.

2. Rationale, Relevance, Reliability:

Upon the close of each fiscal year, an annual financial report for each client entity must be prepared in accordance Generally Accepted Accounting Principles (GAAP) and standards set by the Governmental Accounting Standards Board (GASB), and submitted to the Office of Statewide Reporting and Accounting Policy (OSRAP) by a prescribed deadline. This indicator ensures fiscal accountability with providing efficient and effective financial services to client entities.

3. Use:

The performance indicator will be used for internal management and staff evaluating purposes. This indicator will reflect the effectiveness and efficiency of the Financial Reporting staff, and identify processes that require review and modification to ensure effective financial and support services to client entities.

4. Clarity:

The fiscal year encompasses the period beginning July 1st through June 30th of each year. The Office of Statewide Reporting and Accounting Policy (OSRAP) is a control agency established within the Division of Administration to establish accounting policy for the state, prepare and

publish the Annual Comprehensive Financial Report (ACFR) of the State of Louisiana, the Popular Annual Financial Report (PAFR), Statewide Indirect Cost Allocation Plan (SWICAP) and other statewide reports, interim reports to the Federal government, and other reporting as mandated by the Commissioner of Administration.

5. Data Source, Collection and Reporting:

The source of the data for completing the annual financial reports is LAGOV, the state’s accounting system. The data is collected daily as accounting entries are recorded in the system, and reported annually on a state fiscal year basis. All data can be verified within LAGOV and supplemental schedules. The source for tracking this indicator will include the date that the reports are due as defined by OSRAP, the date the report is submitted to OSRAP and the number of major legislative audit findings, which is collected in another performance indicator for OFSS. Each of these fragmented dates is tracked separately through an internal log. The internal reporting period is annually.

6. Calculation Methodology:

In order to calculate the percentage of annual financial reports submitted to OSRAP within the prescribed deadline, the number of annual financial reports submitted to OSRAP within the prescribed deadline is divided by the total number of annual financial reports submitted to OSRAP for the fiscal year. This calculation cannot be completed until after the annual audit is complete and the ACFR is issued.

7. Scope:

While this indicator does not provide a measure for all agencies statewide, the OFSS Financial Reporting clients are not just Division of Administration entities; therefore, this indicator is an aggregate of all of the clients that we currently serve.

8. Caveats:

There are internal and external factors that could limit the success of this indicator, such as staff shortages, computer or network outages, erroneous data within LAGOV, or erroneous data provided by client entities.

9. Accuracy, Maintenance, Support:

This performance indicator has not been audited by the Legislative Auditor; however, the accuracy of the data is dependent upon the accounting system for the state and maintained in an internal log. OSRAP tracks the date the annual financial reports are received and the annual audit of the client entities and OFSS supports the number of audit findings reported.

10. Responsible Person:

Jovan Haynes, MBA
Director of Financial Reporting
Office of Finance and Support Services
225-342-7732 (phone)
225-342-2606 (fax)
Jovan.Haynes@la.gov

PROGRAM ACTIVITY: OFFICE OF STATE UNIFORM PAYROLL

The Office of State Uniform Payroll (OSUP) has the primary responsibility of implementing and maintaining requirements for the centralized, statewide payroll system (LaGov HCM) and provides payroll services to Executive branch agencies paid through this payroll system. The OSUP staff coordinates efforts to ensure accurate and timely payments to employees and vendors, expedite payroll payable liquidation, establish, maintain and monitor all statewide actions associated with garnished wages, and assist agency personnel with all phases of the payroll process. The OSUP keeps agencies apprised of information pertaining to payroll processing and issues directives and policies via OSUP Memoranda and Promulgation of Rules in Title 4 of the Louisiana Administrative Code.

PROGRAM ACTIVITY MISSION:

- i. To administer and facilitate payroll services in a timely, accurate and professional manner.
- ii. To give quality service to agencies and vendors on the LaGov HCM system in accordance with executive policy and federal and state mandates.

PROGRAM ACTIVITY GOAL:

- i. The Office of State Uniform Payroll will provide effective centralized payroll processing services that affect transparent and accountable payroll practices.

PROGRAM ACTIVITY OBJECTIVE I.1: The Office of State Uniform Payroll will provide 100% of key production services⁶ to employees and vendors serviced through the LaGov Human Capital Management (HCM) Payroll System on time and in accordance with federal/state laws and office policies and procedures.

⁶ Key production services are payroll payable services provided to OSUP clientele which include the areas of employee and benefit compensation and reporting, wage and tax reporting and payments, and garnishment processing and payments.

STRATEGY I.1.a: Benefits and Financial Administration Unit (BFA) will complete the key production services related to Financial Services and Payment Processing.

STRATEGY I.1.b: Benefits and Financial Administration Unit (BFA) will complete the key production services related to Employee Payroll Benefits Administration.

STRATEGY I.1.c: Garnishment Administration Unit (GA) will complete the key production services related to Garnishment Processing/Payments.

STRATEGY I.1.d: Garnishment Administration Unit (GA) will complete the key production services related to Wage Recoupment Processing.

STRATEGY I.1.e: Wage and Tax Administration Unit (WTA) will complete the key production services related to Wage, Tax, and Retirement Reporting.

STRATEGY I.1.f: Wage and Tax Administration Unit (WTA) will complete the key production services related to Statutory Wage and Tax Vendor Payments.

STRATEGY I.1.g: OSUP will complete the key production services related to Advisory Services

PROGRAM ACTIVITY PERFORMANCE INDICATORS:

1. Input: Number of key production services to be provided on time annually (includes payroll payments, garnishment documents, garnishment calls, federal/state tax and retirement reporting documents)

2. Output: Number of key production services provided on time (includes payroll payments, garnishment documents, garnishment calls, federal/state tax and retirement reporting documents)

3. Outcome: Percentage of key production services provided on time (includes payroll payments, garnishment documents, garnishment calls, federal/state tax and retirement reporting documents)

Principal Clients: All Louisiana departments, agencies, boards and commissions which use the LaGov HCM system for processing. External clients include any vendors servicing user agencies and their employees for payroll withholdings and garnishment vendors and/or plaintiffs.

External Factors: State and Federal mandates, technology, LaGov HCM system, employee turnover, user agency personnel, user requirements and vendors.

Duplication of Effort: While “payroll” is a function of every entity within state government, the utilization of the LaGov HCM system by executive branch agencies distinguishes this office’s function from all other offices which provide payroll services. As our office name, Office of State Uniform Payroll, suggests, we provide statewide, “uniform” payroll services for executive branch agencies that are paid through the LaGov HCM system. We are a central control office responsible for processing payroll payables, payroll accounting functions, centralized garnishment processing, and centralized tax reporting/payments. We also provide policy directives to user agencies.

PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Office of State Uniform Payroll - Centralized Payroll Services

Objective: OSUP will provide key production services to employees and vendors serviced through the LaGov Human Capital Management (HCM) Payroll System on time and in accordance with federal/state laws and office policies/procedures.

Indicator Name: Number of key production services to be provided on time annually

Indicator LaPAS PI Code: N/A

1. Type and Level:

This is a general performance information input indicator.

2. Rationale, Relevance, Reliability:

This indicator provides the total key production services provided for clientele as well as processing mandated by federal/state laws. It reflects the volume of activity required from OSUP, and it is reliable.

3. Use:

Management will use the indicator, internally only, to assess the strengths and weaknesses of meeting the current and future needs and expectations of clientele; to determine the need for system enhancements and staffing requirements; and to identify potential problems.

4. Clarity:

Key production services are payroll payable services provided to OSUP clientele which include the areas of employee and benefit compensation and reporting, wage and tax reporting and payments, and garnishment processing and payments.

5. Data Source, Collection and Reporting:

The source is the documentation for each production service at the time provided which is collected from the LaGov HCM System. The source is dependent upon the accuracy of the data obtained from the LaGov HCM

system. The frequency is each cycle for which a key production service is provided. This cycle could be daily, weekly, biweekly, monthly, quarterly or yearly depending on the key production service being provided. The data can be obtained from the system at any time, and is reported real time at the time of collection.

6. Calculation Methodology:

Input is determined by the number of times a process is provided depending on the key production service (e.g. the number of times a payment is made to a particular vendor). This is a standard calculation.

7. Scope:

The indicator is an aggregate figure based on the total number of key production services.

8. Caveats:

Yes. Limitations include processing application downtime, printers, LaGov HCM system, dedicated transmission lines, OSUP employee turnover, OTS programming staff and natural disasters.

9. Accuracy, Maintenance, Support:

Neither the indicator nor the performance data have been audited by the LLA. The evidence is supported by data obtained from the LaGov HCM system reports, federal/state laws, and internal policies. OSUP continually monitors changes to processing deadlines as federal/state laws change. Internal policies and procedures are updated accordingly.

10. Responsible Person:

Each program unit within OSUP is responsible. Each manager can be contacted as follows:

- Tracy Smith, Wage and Tax Administration Manager, 225-219-0338, tracy.smith@la.gov
- Paula Rotolo, Benefits and Financial Administration Manager, 225-342-5337, paula.rotolo@la.gov
- Karondia Harold, Garnishment Administration Manager, 225-219-9466, karondia.harold@la.gov

PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Office of State Uniform Payroll - Centralized Payroll Services

Objective: OSUP will provide key production services to employees and vendors serviced through the LaGov Human Capital Management (HCM) Payroll System on time and in accordance with federal/state laws and office policies/procedures.

Indicator Name: Number of key production services provided on time

Indicator LaPAS PI Code: N/A

1. Type and Level:

This is a general performance information output indicator.

2. Rationale, Relevance, Reliability:

This indicator provides the total number of key production services that were actually provided to clientele timely. It reflects the effectiveness and efficiency of OSUP processing according to state/federal laws, and it is reliable.

3. Use:

Management will use the indicator, internally only, to assess the strengths and weaknesses of meeting the current and future needs and expectations of clientele; to determine the need for system enhancements and staffing requirements; and to identify potential problems.

4. Clarity:

Key production services are payroll payable services provided to OSUP clientele which include the areas of employee and benefit compensation and reporting, wage and tax reporting and payments, and garnishment processing and payments.

5. Data Source, Collection and Reporting:

The source is the documentation for each production service at the time provided which is collected from the LaGov HCM System. The source is dependent upon the accuracy of the data obtained from the LaGov HCM

system. The frequency is each cycle for which a key production service is provided. This cycle could be daily, weekly, biweekly, monthly, quarterly or yearly depending on the key production service being provided. The data can be obtained from the system at any time, and is reported real time at the time of collection. Outliers are manually documented by each program unit (e.g. production services not provided timely).

6. Calculation Methodology:

Output is determined by counting the number of key production services (e.g. the number of times a payment is made to a particular vendor) actually provided timely. This is a standard calculation.

7. Scope:

The indicator is an aggregate figure based on the total number of key production services provided timely.

8. Caveats:

Yes. Limitations include processing application downtime, printers, LaGov HCM system, dedicated transmission lines, OSUP employee turnover, OTS programming staff and natural disasters.

9. Accuracy, Maintenance, Support:

Neither the indicator nor the performance data have been audited by the LLA. The evidence is supported by data obtained from the LaGov HCM system reports, federal/state laws, and internal policies. OSUP continually monitors changes to processing deadlines as federal/state laws change. Internal policies and procedures are updated accordingly.

10. Responsible Person:

Each program unit within OSUP is responsible. Each manager can be contacted as follows:

- Tracy Smith, Wage and Tax Administration Manager, 225-219-0338, tracy.smith@la.gov
- Paula Rotolo, Benefits and Financial Administration Manager, 225-342-5337, paula.rotolo@la.gov
- Karondia Harold, Garnishment Administration Manager, 225-219-9466, karondia.harold@la.gov

PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Office of State Uniform Payroll - Centralized Payroll Services

Objective: OSUP will provide key production services to employees and vendors serviced through the LaGov Human Capital Management (HCM) Payroll System on time and in accordance with federal/state laws and office policies/procedures.

Indicator Name: Percentage of key production services provided on time

Indicator LaPAS PI Code: N/A

1. Type and Level:

This is a key outcome indicator.

2. Rationale, Relevance, Reliability:

This indicator provides the percentage of key production services that were actually provided to clientele timely. It reflects the effectiveness and efficiency of OSUP processing according to state/federal laws, and it is reliable.

3. Use:

Management will use the indicator, internally only, to assess the strengths and weaknesses of meeting the current and future needs and expectations of clientele; to determine the need for system enhancements and staffing requirements; and to identify potential problems.

4. Clarity:

Key production services are payroll payable services provided to OSUP clientele which include the areas of employee and benefit compensation and reporting, wage and tax reporting and payments, and garnishment processing and payments.

5. Data Source, Collection and Reporting:

The source is the documentation for each production service at the time provided which is collected from the LaGov HCM System. The source is dependent upon the accuracy of the data obtained from the LaGov HCM

system. The frequency is each cycle for which a key production service is provided. This cycle could be daily, weekly, biweekly, monthly, quarterly or yearly depending on the key production service being provided. The data can be obtained from the system at any time, and is reported real time at the time of collection. Outliers are manually documented by each program unit (e.g. production services not provided timely).

6. Calculation Methodology:

Outcome is the percentage of key production services to be provided (input) compared to the number of key production services actually provided (output). This is the standard calculation.

7. Scope:

The indicator is an aggregate figure based on the total number of key production services provided timely.

8. Caveats:

Yes. Limitations include processing application downtime, printers, LaGov HCM system, dedicated transmission lines, OSUP employee turnover, OTS programming staff and natural disasters.

9. Accuracy, Maintenance, Support:

Neither the indicator nor the performance data have been audited by the LLA. The evidence is supported by data obtained from the LaGov HCM system reports, federal/state laws, and internal policies. OSUP continually monitors changes to processing deadlines as federal/state laws change. Internal policies and procedures are updated accordingly.

10. Responsible Person:

Each program unit within OSUP is responsible. Each manager can be contacted as follows:

- Tracy Smith, Wage and Tax Administration Manager, 225-219-0338, tracy.smith@la.gov
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- Karondia Harold, Garnishment Administration Manager, 225-219-9466, karondia.harold@la.gov

PROGRAM ACTIVITY: OFFICE OF STATEWIDE REPORTING AND ACCOUNTING POLICY

The Office of Statewide Reporting and Accounting Policy (OSRAP) is both a service entity and a statewide control entity within the Division of Administration that sets accounting policy for state agencies within the state reporting entity. The office has two sections: the Financial Management Reporting Section and the Financial Systems Section. The Financial Management and Reporting Section has primary responsibility for financial reporting services including preparation of the State's Annual Comprehensive Financial Report (ACFR)⁷ in accordance with Generally Accepted Accounting Principles (GAAP) and the Popular Annual Financial Report (PAFR), preparation of interim financial reports as required, and the negotiation of the Statewide Cost Allocation Plan. The Financial Systems Section has responsibility for statewide accounting services and control functions including maintaining data structure in the uniform state accounting system; processing/approving transfers, payments, and budgetary transactions in the uniform state accounting system; maintaining the statewide vendor file; and maintaining the Cash Management Improvement Act (CMIA) agreement with the federal government. Because OSRAP serves numerous state agencies and reports on information submitted by these agencies, accurate financial reporting requires the development, establishment and continuous communication of statewide accounting policies and procedures.

PROGRAM ACTIVITY MISSION:

- i. The mission of the Office of Statewide Reporting and Accounting Policy is to ensure general fiscal accountability of state government by maintaining a uniform system of accounting that demonstrates compliance with the legally adopted budget and other finance-related legal and contractual provisions and by providing useful, timely, and reliable financial information to Louisiana's citizenry, government officials, and other stakeholders. OSRAP also provides critical services that support the fiscal operations of state department and agencies including transaction and payment processing; vendor control and reporting; and the preparation and negotiation of the Statewide Indirect Cost Allocation Plan.

⁷ The ACFR is the state's official annual report of all financial activity.

PROGRAM ACTIVITY GOAL:

- i. The Office of Statewide Reporting and Accounting Policy will provide accurate and timely financial information through the ACFR to the legislature, the State’s investors, and the citizens of Louisiana.

PROGRAM ACTIVITY OBJECTIVE I.1: The Office of Statewide Reporting and Accounting Policy will report critical financial information in a timely manner.

STRATEGY I.1: Maximize the use of automation in compiling the ACFR.

PROGRAM ACTIVITY PERFORMANCE INDICATOR:

1. Output: Number of days the ACFR is published prior to the statutory deadline (December 31) provided in R.S 39:80

PROGRAM ACTIVITY OBJECTIVE I.2: The Office of Statewide Reporting and Accounting Policy will accurately report critical financial information.

STRATEGY I.2.a: Maximize the use of automation through an on-line reporting portal for use by agencies in submitting financial information to OSRAP for use in compiling the ACFR, the Schedule of Expenditures of Federal Awards (SEFA), and the Quarterly Accounts Receivable Report to reduce the risk of error associated with manual compilation processes.

STRATEGY I.2.b: Maintain a continuous and robust line of communication with the agencies reporting in the ACFR to ensure accurate submissions of financial information and compliance with established accounting policy.

PROGRAM ACTIVITY PERFORMANCE INDICATOR:

1. Outcome: Receipt of an unmodified audit opinion.

- ii. The Office of Statewide Reporting and Accounting Policy will maintain a uniform system of accounting for all state agencies to ensure compliance with the legally adopted budget and other legal covenants and to prevent the fraudulent expenditure of public funds.

PROGRAM ACTIVITY OBJECTIVE I.2: The Office of Statewide Reporting and Accounting Policy will timely process/approve transactions in the uniform state accounting system.

STRATEGY I.2.a: Increase efforts to communicate to user agencies OSRAP's policies and procedures for transaction approvals.

STRATEGY I.2.b: Develop, implement, and monitor an internal training program to communicate OSRAP's 3-day turnaround policy for transaction approvals.

PROGRAM ACTIVITY PERFORMANCE INDICATOR:

- 1. Outcome: Percentage of transactions processed within 3 days

PROGRAM ACTIVITY OBJECTIVE I.3: The Office of Statewide Reporting and Accounting Policy will efficiently and effectively validate requested changes (i.e., add/modify/delete) to vendor records in the uniform state accounting system.

STRATEGY I.3: Develop, implement, and monitor an internal training program to communicate OSRAP's policy for efficient and effective validation of vendor file modifications.

PROGRAM ACTIVITY PERFORMANCE INDICATOR:

- 1. Outcome: Percentage of vendor file modifications in compliance with OSRAP validation procedures

PROGRAM ACTIVITY OBJECTIVE I.4: The Office of Statewide Reporting and Accounting Policy will timely process system structure modifications.

STRATEGY I.4.a: Increase efforts to communicate to user agencies OSRAP's policies and procedures for requesting structure modifications.

STRATEGY I.4.b: Develop, implement, and monitor an internal training program to communicate OSRAP's policy for timely modifications to structure.

PROGRAM ACTIVITY PERFORMANCE INDICATOR:

1. Percentage of structure modifications processed within 2 days
- iii. The Office of Statewide Reporting and Accounting Policy will develop, establish, and communicate statewide accounting policies and procedures.

PROGRAM ACTIVITY OBJECTIVE I.5: The Office of Statewide Reporting and Accounting Policy will timely resolve complex accounting research issues and questions on the application and implementation of established statewide accounting policies.

STRATEGY I.5.a: Implement an internal training program to ensure that OSRAP staff is knowledgeable and competent with regard to statewide accounting policies.

STRATEGY I.5.b: Implement an outreach program to stay abreast of changing needs and operations of user agencies and to proactively address emerging issues.

PROGRAM ACTIVITY PERFORMANCE INDICATOR:

1. Outcome: The number of policy research assistance issues resolved.

Principal Clients: Principal clients consist of any entity that meets the requirements for inclusion in the reporting entity by generally accepted accounting principles promulgated by Governmental Accounting Standards

STATE OF LOUISIANA
DIVISION OF ADMINISTRATION

Board (GASB), the commissioner of administration, the legislature, bond rating agencies⁸, bond holders, and underwriters⁹.

External Factors: External factors that could have an impact are additional legislative or administrative mandates without the provision of adequate resources, lack of funding, additional governmental accounting standards established by the GASB, and untimely receipt of reports from agencies.

Duplication of Effort: No other state agency or department performs the tasks or exercises the control on a statewide basis that the Office of Statewide Reporting and Accounting Policy does. For this reason, there is no duplication of effort.

⁸ A bond rating agency is a company that rates the ability of the state/local government to repay bonds, long-term loans. The rating of a rating agency is important because it determines the interest rate that is charged on the bonds. This is because interest rates on state/local government bonds are not the same for all state/local governments, but instead are based on the ability of the state/local government to pay bondholders.

⁹ The underwriter is the holder of bonds issued by a government or corporation.

PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Office of Statewide Reporting and Accountability Policy

Objective: The Office of Statewide Reporting and Accounting Policy will report critical financial information in a timely manner.

Indicator Name: Days late with publication of the Annual Comprehensive Financial Report (ACFR) as provided in R.S 39:80

Indicator LaPAS PI Code: 22627

1. Type and Level:

This is a key output indicator.

2. Rationale, Relevance, Reliability:

Financial reports should be provided to users in a timely manner.

3. Use:

The indicator is predominately for outside use for the stakeholders; however, it will be used to drive our effort in achieving the outcome.

4. Clarity:

The metric clearly identifies what's being measured and is easily understandable.

5. Data Source, Collection and Reporting:

The data source for this performance indicator will be the date the ACFR was published on OSRAP's website.

6. Calculation Methodology:

There is no calculation methodology.

7. Scope:

This performance indicator is aggregated.

8. Caveats:

The weakness of this performance indicator is that the detailed data must be received from the state agencies and other state reporting units timely in order to complete the ACFR by the statutory deadline.

9. Accuracy, Maintenance, Support:

The published date for the ACFR will be logged from the audit log that shows updates to OSRAP's website.

10. Responsible Person:

The Director of OSRAP will be the contact for questions and can be reached at (225) 342-1091.

PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Office of Statewide Reporting and Accountability Policy

Objective: The Office of Statewide Reporting and Accounting Policy will accurately report critical financial information.

Indicator Name: Receipt of an unmodified audit opinion

Indicator LaPAS PI Code: N/A

1. Type and Level:

This is a key outcome indicator.

2. Rationale, Relevance, Reliability:

The ACFR must be completed accurately.

3. Use:

The indicator is predominately for outside use for the stakeholders; however, it will be used to drive our effort in achieving the outcome.

4. Clarity:

The metric clearly identifies what's being measured and is easily understandable.

5. Data Source, Collection and Reporting:

The data source for this performance indicator is the opinion paragraph in the Louisiana Legislative Auditor's report.

6. Calculation Methodology:

There is no calculation methodology.

7. Scope:

This performance indicator is aggregated.

8. Caveats:

The weakness of this performance indicator is that the accuracy of the ACFR is dependent on the accuracy of the detailed data submitted by the state agencies.

9. Accuracy, Maintenance, Support:

Not applicable.

10. Responsible Person:

The Director of OSRAP will be the contact for questions and can be reached at (225) 342-1091.

PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Office of Statewide Reporting and Accountability Policy

Objective: The Office of Statewide Reporting and Accounting Policy will timely process/approve transactions in the uniform state accounting system.

Indicator Name: Percentage of transactions processed within 3 days

Indicator LaPAS PI Code: N/A

1. Type and Level:

This is a key outcome indicator.

2. Rationale, Relevance, Reliability:

To best serve user agencies, transactions should be processed and approved timely.

3. Use:

The indicator is strictly for the use of management internally to assess productivity of the section and to make improvements where needed.

4. Clarity:

The metric clearly identifies what's being measured and is easily understandable.

5. Data Source, Collection and Reporting:

Data will be obtained from the ZFI2236 Z9 Dashboard and FB03 Document List in LaGov.

6. Calculation Methodology:

Each month, the total number transactions that were processed within 3 business days or less will be divided by the total transactions during the month.

7. Scope:

This performance indicator is aggregated.

8. Caveats:

None.

9. Accuracy, Maintenance, Support:

The ZFI2236 Z9 Dashboard and FB03 Document List provides a list of posted documents in LaGov and can be generated for a specified period and/or specified LaGov users. OSRAP does not have the ability to change this data.

10. Responsible Person:

The Director of OSRAP will be the contact for questions and can be reached at (225) 342-1091.

PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Office of Statewide Reporting and Accountability Policy

Objective: The Office of Statewide Reporting and Accounting Policy will efficiently and effectively validate requested changes (i.e., add/modify/delete) to vendor records in the uniform state accounting system.

Indicator Name: Percentage of vendor file modifications in compliance with OSRAP validation procedures

To preserve the integrity of the vendor database and reduce the risk of fraud, vendor file changes should be properly validated.

3. Use:

The indicator is strictly for the use of management internally to assess the effectiveness and productivity of the section and to make improvements where needed.

4. Clarity:

The metric clearly identifies what's being measured and is easily understandable.

5. Data Source, Collection and Reporting:

The LaGov Vendor Change Report will be compared to the supporting documentation in Electronic Document Management System (EDMS).

6. Calculation Methodology:

Each month, a sample of vendor changes will be audited by management for compliance with OSRAP validation procedures. The number of vendor changes properly validated will be divided by the number of vendor changes audited for the month.

7. Scope:

This performance indicator is aggregated.

8. Caveats:

None.

9. Accuracy, Maintenance, Support:

The LaGov Vendor Change report logs all changes to vendor records including the user that made the changes. Supporting documentation for all vendor changes should be uploaded to EDMS. The vendor changes selected for audit by management each month will be documented on a spreadsheet to support the calculation of the performance metric.

10. Responsible Person:

The Director of OSRAP will be the contact for questions and can be reached at (225) 342-1091.

PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Office of Statewide Reporting and Accountability Policy

Objective: The Office of Statewide Reporting and Accounting Policy will timely process system structure modifications.

Indicator Name: Percentage of structure modifications processed within 2 days

Indicator LaPAS PI Code: N/A

1. Type and Level:

This is a key outcome indicator.

2. Rationale, Relevance, Reliability:

To best serve user agencies, structure modifications should be processed and approved timely.

3. Use:

The indicator is strictly for the use of management internally to assess productivity of the section and to make improvements where needed.

4. Clarity:

The metric clearly identifies what's being measured and is easily understandable.

5. Data Source, Collection and Reporting:

The timeliness of structure changes will be maintained in LaGov. Structure request forms and the related agency emails will be attached to the LaGov structure record to document when the request was received. The LaGov structure record logs the date it was created or changed and by whom.

6. Calculation Methodology:

Each month, the number of system structure changes processed within 2 days of the request will be divided by the total structure change requests during the month.

7. Scope:

This performance indicator is aggregated.

8. Caveats:

None.

9. Accuracy, Maintenance, Support:

The LaGov Index of Funds and Funds Centers can be used to generate a list of structure created or changed during a specified period. The reports will be run for each month, and the LaGov structure records will be reviewed to calculate the performance metric.

10. Responsible Person:

The Director of OSRAP will be the contact for questions and can be reached at (225) 342-1091.

PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Office of Statewide Reporting and Accountability Policy

Objective: The Office of Statewide Reporting and Accounting Policy will timely resolve complex accounting research issues and questions on the application and implementation of established statewide accounting policies.

Indicator Name: The number of policy research assistance issues resolved.

Indicator LaPAS PI Code: N/A

1. Type and Level:

This is a key outcome indicator.

2. Rationale, Relevance, Reliability:

To best serve user agencies, questions and issues on statewide accounting policies and procedures should be resolved.

3. Use:

The indicator is strictly for the use of management internally to assess productivity of the section and to make improvements where needed.

4. Clarity:

The metric clearly identifies what's being measured and is easily understandable.

5. Data Source, Collection and Reporting:

The number of policy research concerning statewide accounting policies and procedures will be maintained by management through Outlook.

6. Calculation Methodology:

Count the number of resolutions through Outlook.

7. Scope:

This performance indicator is aggregated.

8. Caveats:

None.

9. Accuracy, Maintenance, Support:

The accuracy of the data relies on the individuals in charge of resolving the policy/procedure issues and questions to accurately communicate the resolution in writing via email.

10. Responsible Person:

The Director of OSRAP will be the contact for questions and can be reached at (225) 342-1091.

GOAL II: To coordinate and provide quality operational services utilizing sound management practices for the maintenance and administration of state lands and water bottoms and state facilities.

Goal Authorizations: Louisiana Revised Statutes 39:11 et seq.; 39:113 et seq.; 41:1701 et seq.; and 49:141 et seq.

PROGRAM ACTIVITY: OFFICE OF STATE LANDS

The Office of State Lands (OSL) strives to ensure the highest possible economic return from state lands and water bottoms while encouraging their maximum public utilization. The Office's responsibilities include: identifying, mapping, inventorying, and coordinating agency management of public lands and water bottoms; and selling or otherwise disposing of all properties no longer useful to the state, in accordance with state law. In fostering multiple utilizations of the state's natural resources, the OSL must balance individual agency usage with public recreation and enjoyment, land and timber management, surface and mineral leasing, rights-of-way, and subsurface agreements.

PROGRAM ACTIVITY MISSION:

- i. To maximize revenues while ensuring continued public utilization of State public lands and water bottoms.
- ii. To protect the State's proprietary interests in its lands and water bottoms through the permitting process.

PROGRAM ACTIVITY GOAL:

- i. The Office of State Lands will ensure the highest economic return and the maximum public utilization possible of our State public lands and water bottoms.

PROGRAM ACTIVITY OBJECTIVE II.1: The Office of State Lands will continue to identify and map 100% of the fixed assets claimed by the State while providing a current, centralized inventory and maintaining a central repository of the associated historical records.

STRATEGY II.1.a: Integrate the LaGov and Geographical Information System (GIS) databases¹⁰.

PROGRAM ACTIVITY PERFORMANCE INDICATORS:

1. Input: Number of fixed asset documents received
2. Output: Number of fixed asset documents processed
3. Efficiency: Percentage of fixed asset documents received that are processed

PROGRAM ACTIVITY OBJECTIVE II.2: The Office of State Lands will monitor and maintain the established State Claimed Water Bodies database in order to add or delete any water bodies, or portions thereof, to or from those claimed by the State as naturally navigable water bottoms.

STRATEGY II.2.a: Maintain and enhance a GIS database that is consistently useful to all state and local government agencies and individuals.

PROGRAM ACTIVITY PERFORMANCE INDICATORS:

1. Output: Number of necessary water bottom edits identified
2. Outcome: Number of necessary water bottom edits mapped

PROGRAM ACTIVITY OBJECTIVE II.3: The Office of State Lands will continue administering leases, rights of way and permits on state lands and water bottoms, ensuring proper encroachment management through physical patrols of state lands and water bottoms, inspections of permitted and leased sites, boundary investigations and title investigations.

¹⁰ The GIS is a central database for immovable property in which the state has an interest including all lands, water bottoms, and facilities both owned and leased. It is intended to be used as an initial reference tool for research and cannot be presumed to constitute evidence of legal title.

STRATEGY II.3.a: Actively engage with primary clientele in office and in the field to administer active leases, rights of way and permits, process requests for new leases, rights of way and permits, and undertake title and boundary investigations to resolve title disputes and boundary disputes.

PROGRAM ACTIVITY PERFORMANCE INDICATORS:

1. Input: Number of leases, rights of way and permits (and associated renewals or extensions) applied for
2. Input: Number of title questions or disputes arisen
3. Input: Number of boundary questions or disputes arisen
4. Outcome: Number of leases, rights of way and permits (and associated renewals or extensions) issued
5. Outcome: Number of title questions or disputes resolved
6. Outcome: Number of boundary questions or disputes resolved

Principal Clients: Principal clients consist of state agencies, other governmental entities, the public, surveyors, abstractors, landmen, lawyers, elected officials, corporations, and landowners.

External Factors: External factors that could have an impact on the goals and objectives are agencies not sending in proper documentation, surveyors' heavy workloads preventing them from gathering field information necessary for entry into GIS, number of field crew available for investigations and enforcement, special projects that require survey crew to be pulled from regular projects, and lack of clarity in laws governing water bottom leasing, permitting and ownership. Also, changes in law during the 2024 and 2025 legislative sessions may result in functions associated with energy-related rights of way and leases, as well as Class A through E permits, being absorbed by the Department of Energy and Natural Resources (to become Department of Energy and Conservation after 2025 Regular Session).

Duplication of Effort: In accordance with Louisiana Revised Statute 39:11 et seq. and 41:1701 et seq., the Office of State Lands is the central repository for the state’s statewide inventory of state lands and water bottoms and the identification and mapping of state lands and water bottoms. No other agency serves this purpose, which ensures no duplication of effort.

PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Office of State Lands

Objective: The Office of State Lands will continue to map 100% of the fixed assets claimed by the State while providing a current, centralized inventory and maintaining a central repository of the associated records.

Indicator Name: Number of fixed asset documents received

Indicator LaPAS PI Code: N/A

1. Type and Level: Input

This indicator is a general input indicator.

2. Rationale, Relevance, Reliability:

Louisiana Revised Statutes 39:11 et seq. requires that OSL administer and supervise lands and water bottoms owned or leased by the State. A central database for all immovable property in which the state has an interest including all lands and water bottoms, both owned and leased shall be maintained. An inventory of all such property should be kept as current and comprehensive as practicable.

3. Use:

The performance indicator will be used by internal management and staff to determine whether the inventory is complete. Incomplete inventory may result in incorrect land management decisions and incomplete insurance coverage by the Office of Risk Management (ORM).

4. Clarity:

The indicator clearly identifies what is being measured.

5. Data Source, Collection and Reporting:

The source of data is real estate ownership records provided by inventories agencies. The information is collected and reported on a continuous basis with emphasis on an annual reconciliation.

6. Calculation Methodology:

All fixed asset documents received are physically counted.

7. Scope:

This performance indicator is aggregated and can be disaggregated by parish/region and by agency.

8. Caveats:

Weaknesses would be non-responsive agencies and/or insufficiencies in documents received.

9. Accuracy, Maintenance, Support:

This performance indicator has not been audited by the Louisiana Legislative Auditor. OSL maintains extensive files demonstrating data receipt which is easily validated against asset inventories.

10. Responsible Person:

Cheston Hill
Public Lands Administrator
(225)219-9454
Cheston.Hill@la.gov

PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Office of State Lands

Objective: The Office of State Lands will continue to map 100% of the fixed assets claimed by the State while providing a current, centralized inventory and the associated records.

Indicator Name: Number of fixed asset documents processed

Indicator LaPAS PI Code: N/A

1. Type and Level:

This indicator is a general output indicator.

2. Rationale, Relevance, Reliability:

Louisiana Revised Statutes 39:11 et seq. requires that OSL administer and supervise lands, water bottoms, and facilities owned or leased by the State. A central database for all immovable property in which the state has an interest including all lands, water bottoms, and facilities both owned and leased shall be maintained. An inventory of all such property should be kept as current and comprehensive as possible.

3. Use:

This indicator is used by internal management. Incomplete inventory may result in incorrect land management decisions and incomplete insurance coverage by ORM.

4. Clarity:

The indicator clearly identifies what is being measured.

5. Data Source, Collection and Reporting:

The source of data is Asset Management Reports – descriptions of properties and list of inventoried fixed asset documents. The information is collected and reported on a continuous basis.

6. Calculation Methodology:

A physical count is performed for those asset documents that have been processed.

7. Scope:

This performance indicator is aggregated and can be disaggregated by parish/region and by agency.

8. Caveats:

Weaknesses would be title and ownership issues, and legal property boundary description issues.

9. Accuracy, Maintenance, Support:

This performance indicator has not been audited by the Louisiana Legislative Auditor. OSL maintains extensive files demonstrating data receipt which is easily validated against asset inventories.

10. Responsible Person:

Cheston Hill
Public Lands Administrator
(225)219-9454
Cheston.Hill@la.gov

PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Office of State Lands

Objective: The Office of State Lands will continue to map 100% of the fixed assets claimed by the State while providing a current, centralized inventory and the associated records.

Indicator Name: Percentage of fixed asset documents received that are processed

Indicator LaPAS PI Code: N/A

1. Type and Level:

This performance indicator is a general efficiency indicator.

2. Rationale, Relevance, Reliability:

Louisiana Revised Statutes 39:11 et seq. requires that OSL administer and supervise lands, water bottoms, and facilities owned or leased by the State. A central database for all immovable property in which the state has an interest including all lands, water bottoms, and facilities both owned and leased shall be maintained. An inventory of all such property should be kept as current and comprehensive as possible.

3. Use:

This indicator is used by internal management to ensure efficiency of staff operations and completeness of inventory. Incomplete inventory may result in incorrect land management decisions and incomplete insurance coverage by ORM.

4. Clarity:

The indicator clearly identifies what is being measured.

5. Data Source, Collection and Reporting:

The source of data is Asset Management Reports – descriptions of properties and list of inventoried fixed asset documents. The information is collected and reported on a continuous basis.

6. Calculation Methodology:

The total number of all fixed asset documents received is divided by the total number of fixed asset documents processed.

7. Scope:

This performance indicator is aggregated and can be disaggregated by parish/region and by agency.

8. Caveats:

Weaknesses would be title and ownership issues, and legal property boundary description issues.

9. Accuracy, Maintenance, Support:

This performance indicator has not been audited by the Louisiana Legislative Auditor. OSL maintains extensive files demonstrating data receipt which is easily validated against asset inventories.

10. Responsible Person:

Cheston Hill
Public Lands Administrator
(225)219-9454
Cheston.Hill@la.gov

PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Office of State Lands

Objective: The Office of State Lands will monitor and maintain the established State Claim Water Bodies database in order to add or delete any water bodies, or portion thereof, to or from those claimed by the State as historically navigable water bottoms.

Indicator Name: Number of necessary water bottom edits identified

Indicator LaPAS PI Code: N/A

1. Type and Level:

This performance indicator is a general output indicator.

2. Rationale, Relevance, Reliability:

Louisiana Revised Statutes 39:11 et seq. requires that OSL administer and supervise lands, water bottoms, and facilities owned or leased by the State. A central database for all immovable property in which the state has an interest including all lands, water bottoms, and facilities both owned and leased shall be maintained. An inventory of all such property should be kept as current and comprehensive as possible.

3. Use:

This indicator is used by internal management. Incomplete or incorrect inventory may result in incorrect land management decisions and title disputes.

4. Clarity:

The indicator clearly identifies what is being measured.

5. Data Source, Collection and Reporting:

The source of data is existing title files, updated aerial imagery, investigative title researchers, surveyors, field crew personnel, adverse claimants, and individuals. Data reporting is continuous and updated monthly.

6. Calculation Methodology:

A physical count of the total number of necessary water bottom edits identified (via receipt or discovery of new information regarding reclamations, erosion, accretion, reliction, or other geomorphical or lawful ownership information).

7. Scope:

This performance indicator is aggregated and can be disaggregated by parish/region.

8. Caveats:

Weaknesses would be title and ownership issues/disputes.

9. Accuracy, Maintenance, Support:

This performance indicator has not been audited by the Louisiana Legislative Auditor. OSL maintains extensive files demonstrating data receipt which is easily validated against indicator values.

10. Responsible Person:

Cheston Hill
Public Lands Administrator
(225)219-9454
Cheston.Hill@la.gov

PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Office of State Lands

Objective: The Office of State Lands will monitor and maintain the established State Claim Water Bodies database in order to add or delete any water bodies, or portion thereof, from those claimed by the State as historically navigable water bottoms.

Indicator Name: Number of necessary water bottom edits mapped

Indicator LaPAS PI Code: N/A

1. Type and Level:

This performance indicator is a general outcome indicator.

2. Rationale, Relevance, Reliability:

Louisiana Revised Statutes 39:11 et seq. requires that OSL administer and supervise lands, water bottoms, and facilities owned or leased by the State. A central database for all immovable property in which the state has an interest including all lands, water bottoms, and facilities both owned and leased shall be maintained. An inventory of all such property should be kept as current and comprehensive as possible.

3. Use:

This indicator is used by internal management. Incomplete inventory may result in incorrect land management decisions and title disputes.

4. Clarity:

The indicator clearly identifies what is being measured.

5. Data Source, Collection and Reporting:

The source of data is OSL GIS Section staff and the OSL GIS database. Data reporting is continuous and updated monthly.

6. Calculation Methodology:

The calculation is a physical count of the total number of water bottom edits mapped.

7. Scope:

This performance indicator is aggregated and can be disaggregated by parish/region.

8. Caveats:

Weaknesses would be title and ownership issues/disputes.

9. Accuracy, Maintenance, Support:

This performance indicator has not been audited by the Louisiana Legislative Auditor. OSL maintains extensive files demonstrating data receipt which is easily validated against indicator values.

10. Responsible Person:

Cheston Hill
Public Lands Administrator
(225)219-9454
Cheston.Hill@la.gov

PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Office of State Lands

Objective: The Office of State Lands will continue administering leases, rights of way and permits on state lands and water bottoms, ensuring proper encroachment management through physical patrols of state lands and water bottoms, inspections of permitted and leased sites, boundary investigations and title investigations.

Indicator Name: Number of leases, rights of way and permits (and associated renewals or extensions) applied for

Indicator LaPAS PI Code: N/A

1. Type and Level:

This performance indicator is a general input indicator.

2. Rationale, Relevance, Reliability:

Louisiana Revised Statutes 41:1701, et seq. requires that OSL manage and administer as landowner certain lands and water bottoms owned by the State to maximize revenues and public utilization for recreation through the leasing and permitting process, the issuance of rights of way, and the resolution of title and boundary disputes.

3. Use:

This indicator is used by internal management to monitor the number of land rights contracts applied for.

4. Clarity:

The indicator clearly identifies what is being measured.

5. Data Source, Collection and Reporting:

The source of data is existing lease files, right of way files, permit files, and applications submitted by primary clientele for new leases, permits and rights of way.

6. Calculation Methodology:

The calculation is a physical count.

7. Scope:

This performance indicator is aggregated and can be disaggregated by parish/region.

8. Caveats:

Weaknesses would be title and ownership issues/disputes and boundary issues/disputes.

9. Accuracy, Maintenance, Support:

This performance indicator has not been audited by the Louisiana Legislative Auditor. OSL maintains extensive files demonstrating data receipt which is easily validated against indicator values.

10. Responsible Person:

Cheston Hill
Public Lands Administrator
(225)219-9454
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PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Office of State Lands

Objective: The Office of State Lands will continue administering leases, rights of way and permits on state lands and water bottoms, ensuring proper encroachment management through physical patrols of state lands and water bottoms, inspections of permitted and leased sites, boundary investigations and title investigations.

Indicator Name: Number of title questions or disputes arisen

Indicator LaPAS PI Code: N/A

1. Type and Level:

This performance indicator is a general input indicator.

2. Rationale, Relevance, Reliability:

Louisiana Revised Statutes 41:1701, et seq. requires that OSL manage and administer as landowner certain lands and water bottoms owned by the State to maximize revenues and public utilization for recreation through the leasing and permitting process, the issuance of rights of way, and the resolution of title and boundary disputes.

3. Use:

This indicator is used by internal management to monitor the number of title questions or disputes that have arisen.

4. Clarity:

The indicator clearly identifies what is being measured.

5. Data Source, Collection and Reporting:

The source of data is existing and newly created title files, requests for title investigations received from primary clientele, updated aerial imagery, investigative title researchers on staff within OSL, OSL surveyors, OSL field crew personnel, adverse claimants, and individuals. This information is collected and reported on a continuous basis.

6. Calculation Methodology:

The calculation is a physical count.

7. Scope:

This performance indicator is aggregated and can be disaggregated by parish/region.

8. Caveats:

Weaknesses would be unknown title and ownership issues/disputes that are only discoverable when brought to our attention or discovered by analysis of aerial photography or field patrol.

9. Accuracy, Maintenance, Support:

This performance indicator has not been audited by the Louisiana Legislative Auditor. OSL maintains extensive files demonstrating data receipt which is easily validated against indicator values.

10. Responsible Person:

Cheston Hill
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(225)219-9454
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PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Office of State Lands

Objective: The Office of State Lands will continue administering leases, rights of way and permits on state lands and water bottoms, ensuring proper encroachment management through physical patrols of state lands and water bottoms, inspections of permitted and leased sites, boundary investigations and title investigations.

Indicator Name: Number of boundary questions or disputes arisen

Indicator LaPAS PI Code: N/A

1. Type and Level:

This performance indicator is a general input indicator.

2. Rationale, Relevance, Reliability:

Louisiana Revised Statutes 41:1701, et seq. requires that OSL manage and administer as landowner certain lands and water bottoms owned by the State to maximize revenues and public utilization for recreation through the leasing and permitting process, the issuance of rights of way, and the resolution of title and boundary disputes.

3. Use:

This indicator is used by internal management to monitor the number of boundary questions or disputes that have arisen.

4. Clarity:

The indicator clearly identifies what is being measured.

5. Data Source, Collection and Reporting:

The source of data is existing and newly created title files, requests for title investigations received from primary clientele, updated aerial imagery, investigative title researchers on staff within OSL, OSL surveyors, OSL field crew personnel, adverse claimants, and individuals. This information is collected and reported on a continuous basis.

6. Calculation Methodology:

The calculation is a physical count.

7. Scope:

This performance indicator is aggregated and can be disaggregated by parish/region.

8. Caveats:

Weaknesses would be unknown title and ownership issues/disputes that are only discoverable when brought to our attention or discovered by analysis of aerial photography or field patrol.

9. Accuracy, Maintenance, Support:

This performance indicator has not been audited by the Louisiana Legislative Auditor. OSL maintains extensive files demonstrating data receipt which is easily validated against indicator values.

10. Responsible Person:

Cheston Hill
Public Lands Administrator
(225)219-9454
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PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Office of State Lands

Objective: The Office of State Lands will continue administering leases, rights of way and permits on state lands and water bottoms, ensuring proper encroachment management through physical patrols of state lands and water bottoms, inspections of permitted and leased sites, boundary investigations and title investigations.

Indicator Name: Number of leases, rights of way and permits (and associated renewals or extensions) issued

Indicator LaPAS PI Code: N/A

1. Type and Level:

This performance indicator is a general outcome indicator.

2. Rationale, Relevance, Reliability:

Louisiana Revised Statutes 41:1701, et seq. requires that OSL manage and administer as landowner certain lands and water bottoms owned by the State to maximize revenues and public utilization for recreation through the leasing and permitting process, the issuance of rights of way, and the resolution of title and boundary disputes.

3. Use:

This indicator is used by internal management to monitor the number of land rights contracts (and associated renewals or extensions) issued.

4. Clarity:

The indicator clearly identifies what is being measured.

5. Data Source, Collection and Reporting:

The source of data is existing and newly created title files, lease files, right of way files, permit files, and OSL staff. This information is collected and reported on a continuous basis.

6. Calculation Methodology:

The calculation is a physical count.

7. Scope:

This performance indicator is aggregated and can be disaggregated by parish/region.

8. Caveats:

Weaknesses would be title and ownership issues/disputes and boundary issues/disputes.

9. Accuracy, Maintenance, Support:

This performance indicator has not been audited by the Louisiana Legislative Auditor. OSL maintains extensive files demonstrating data receipt which is easily validated against indicator values.

10. Responsible Person:

Cheston Hill
Public Lands Administrator
(225)219-9454
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PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Office of State Lands

Objective: The Office of State Lands will continue administering leases, rights of way and permits on state lands and water bottoms, ensuring proper encroachment management through physical patrols of state lands and water bottoms, inspections of permitted and leased sites, boundary investigations and title investigations.

Indicator Name: Number of title questions or disputes resolved

Indicator LaPAS PI Code: N/A

1. Type and Level:

This performance indicator is a general outcome indicator.

2. Rationale, Relevance, Reliability:

Louisiana Revised Statutes 41:1701, et seq. requires that OSL manage and administer as landowner certain lands and water bottoms owned by the State to maximize revenues and public utilization for recreation through the leasing and permitting process, the issuance of rights of way, and the resolution of title and boundary disputes.

3. Use:

This indicator is used by internal management to monitor the number of title questions or disputes that have been resolved.

4. Clarity:

The indicator clearly identifies what is being measured.

5. Data Source, Collection and Reporting:

The source of data is existing title files, notifications of amicable resolutions received from primary clientele, investigative title researchers, OSL field crew personnel, adverse claimants, attorneys, courts, and individuals. This information is collected and reported on a continuous basis.

6. Calculation Methodology:

The calculation is a physical count.

7. Scope:

This performance indicator is aggregated and can be disaggregated by parish/region.

8. Caveats:

Weaknesses would be title and ownership issues/disputes that are only resolvable through litigation.

9. Accuracy, Maintenance, Support:

This performance indicator has not been audited by the Louisiana Legislative Auditor. OSL maintains extensive files demonstrating data receipt which is easily validated against indicator values.

10. Responsible Person:

Cheston Hill
Public Lands Administrator
(225)219-9454
Cheston.Hill@la.gov

PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Office of State Lands

Objective: The Office of State Lands will continue administering leases, rights of way and permits on state lands and water bottoms, ensuring proper encroachment management through physical patrols of state lands and water bottoms, inspections of permitted and leased sites, boundary investigations and title investigations.

Indicator Name: Number of boundary questions or disputes resolved

Indicator LaPAS PI Code: N/A

1. Type and Level:

This performance indicator is a general outcome indicator.

2. Rationale, Relevance, Reliability:

Louisiana Revised Statutes 41:1701, et seq. requires that OSL manage and administer as landowner certain lands and water bottoms owned by the State to maximize revenues and public utilization for recreation through the leasing and permitting process, the issuance of rights of way, and the resolution of title and boundary disputes.

3. Use:

This indicator is used by internal management to monitor the number of boundary disputes that have been resolved.

4. Clarity:

The indicator clearly identifies what is being measured.

5. Data Source, Collection and Reporting:

The source of data is existing and newly created title files, lease files, right of way files, permit files, and OSL staff. This information is collected and reported on a continuous basis. The source of data is existing title files, notifications of amicable resolutions received from primary clientele, investigative title researchers, OSL field crew personnel, adverse claimants, attorneys, courts, and individuals. This information is collected and reported on a continuous basis.

6. Calculation Methodology:

The calculation is a physical count.

7. Scope:

This performance indicator is aggregated and can be disaggregated by parish/region.

8. Caveats:

Weaknesses would be boundary issues/disputes that are only resolvable through litigation.

9. Accuracy, Maintenance, Support:

This performance indicator has not been audited by the Louisiana Legislative Auditor. OSL maintains extensive files demonstrating data receipt which is easily validated against indicator values.

10. Responsible Person:

Cheston Hill
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(225)219-9454
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PROGRAM ACTIVITY: OFFICE OF STATE BUILDINGS

The Office of State Buildings (OSB) has the primary responsibility of managing, operating, and maintaining thirty-nine (39) public state buildings and the grounds that surround them. These responsibilities include ensuring that all buildings are safe, energy-efficient, comfortably cooled and heated, attractive, and properly maintained. This office provides custodial services, waste management, and repairs and renovations to facilities under its jurisdiction. This office is also responsible for ensuring the timely and proper maintenance of elevators.

PROGRAM ACTIVITY MISSION:

- i. To provide for the operations, maintenance, and safety within and around all building facilities under the Division of Administration's jurisdiction.

PROGRAM ACTIVITY GOAL:

- i. The Office of State Buildings will maintain and operate all facilities under the jurisdiction of the Division of Administration. This currently includes thirty-nine (39) buildings totaling over six million square feet.

PROGRAM ACTIVITY OBJECTIVE II.1: The Office of State Buildings will maintain current kilowatt-hours (kWh) per square foot in statewide facilities not to exceed 14.5 kWh/sq. ft.

STRATEGY II.1.a: Maintain building schedules for HVAC and building lighting using the various building automation systems.

STRATEGY II.1.b: Maintain LED lighting in statewide facilities.

STRATEGY II.1.c: Ensure equipment and controls preventative maintenance is completed as scheduled so consumption rates are not negatively impacted.

STRATEGY II.1.d: Monitor and adjust cooling/heating equipment parameters to increase efficiency (i.e. set points, sequence of operations and etc.)

STRATEGY II.1.e: Complete bi-annual inspection of facilities exterior to ensure windows and doors are properly sealed against outside elements.

STRATEGY II.1.f: Investigate new energy efficient equipment and technology that may further decrease kWh/sq. ft. in statewide facilities.

PROGRAM ACTIVITY PERFORMANCE INDICATOR:

1. Efficiency: Current kilowatt hours/sq. ft.

Principal Clients: Principal clients consist of state agencies, OSB and Building Automation Services Contract employees.

External Factors: External factors beyond the control of the department that could significantly affect the achievement of the goal and objective are weather, mechanical/electrical failures and increased facility occupied hours and/or capacity.

Duplication of Effort: Duplication of effort is avoided by the sole responsibility of statewide HVAC, building automation, and lighting systems monitored and maintained by the Office of State Buildings.

PERFORMANCE INDICATOR DOCUMENTATION

Program: Division of Administration

Activity: Office of State Buildings

Objective: The Office of State Buildings will maintain current kilowatt-hours (kWh) per square foot in statewide facilities not to exceed 14.5 kWh/sq. ft.

Indicator Name: Current kilowatt hours/sq. ft.

LaPAS PI Code: N/A

1. Type and Level:

This performance indicator is a general efficiency indicator.

2. Rationale, Relevance, Reliability:

OSB presently has an Energy Management Group who's responsibility is to manage the efficiency of the facilities owned by DOA and it was the most significant, measureable, and maintainable indicator. It is a relevant and meaningful measure of performance for this objective because OSB can show an increase and/or decrease based on the consumption throughout the statewide facilities. It is extremely reliable and based on actual facts. The indicator can show OSB's performance by providing the decrease in energy consumption in the past years and the continued decrease in the monthly utility bills.

3. Use:

The indicator will be used to show where additional changes are necessary and if we may have problems within certain facilities. The indicator will be used only for internal management purposes.

4. Clarity:

The indicator name clearly identifies what is being measured.

5. Data Source, Collection and Reporting:

The source of data is internal and is collected and reported monthly based on a state fiscal year.

6. Calculation Methodology:

The total square footage is divided by the total kWh to get the kWh per square foot. It is a standard calculation.

7. Scope:

This indicator is aggregated but can also be disaggregated if needed.

8. Caveats:

Past strategic plans included a decrease in annual consumption. Since that time, OSB has replaced all interior/exterior lighting with LED, completed retro-commissioning of all building control systems and replaced some mechanical equipment to increase building efficiencies. OSB is now at a point where we have to maintain current consumption levels instead of decreasing them. Doing so will be a challenge due to unexpected weather, equipment failures and facility usage changes. Additional funding to update older facilities and equipment will have to occur in order to obtain additional savings.

9. Accuracy, Maintenance, Support:

This performance indicator has not been audited by the Legislative Auditor. Reports and spreadsheets are prepared by OSB that includes actual meter readings from the facilities. The spreadsheets are maintained on the computer.

10. Responsible Person:

Jason Guidroz
Electrical Division Manager
(225) 219-4800
jason.guidroz@la.gov

PROGRAM ACTIVITY: OFFICE OF FACILITY PLANNING AND CONTROL

The Office of Facility Planning and Control has the responsibility to be responsive to the needs of user groups and the general public, capitalizing on technological advancements to ensure the optimum utilization of resources and to encourage evaluation of processes and functions to improve efficiency and effectiveness, provide for low operation and maintenance costs to best meet the needs of the state (safe, secure and accessible) by providing the optimum facility for the dollars available, operate in an ethical and legal manner, facilitate and manage a comprehensive team effort and effectively manage the time between funding authorization and project completion.

PROGRAM ACTIVITY MISSION:

- i. The mission of the Division of Administration, Office of Facility Planning and Control is to assist in management of the state's finances and fixed assets by administration of the comprehensive capital outlay budget process and implementation of a comprehensive centralized facility management program to provide appropriate owned or leased facilities to house the operations of state government and meet the space and functional needs of each user agency.

PROGRAM ACTIVITY GOAL:

- i. The Office of Facility Planning and Control will assure the effective and efficient use of resources to provide owned or leased space to house the operations of state government in accordance with R.S. 39:127.2.

PROGRAM ACTIVITY OBJECTIVE II.1: The Office of Facility Planning and Control will use pre-planning to facilitate buy-build-lease decisions and continue to review those functions now housed in leased facilities that may be better served housed in state owned space.

STRATEGY II.1.a: Continue to inventory available vacant or underutilized state owned space.

STRATEGY II.1.b: Determine space requirements of agencies and match to available state space.

STRATEGY II.1.c: In the event state space is not available, seek commercial lease space.

STRATEGY II.1.d: Work with agencies to determine if capital outlay is a viable option to decrease or eliminate the use of commercial leases.

PROGRAM ACTIVITY PERFORMANCE INDICATOR:

1. Efficiency: Percent reduction in commercial lease space

PROGRAM ACTIVITY OBJECTIVE II.2: The Office of Facility Planning and Control will assure efficient and effective use of resources to create a responsive customer experience through consistent project management and administration of the capital outlay program.

STRATEGY II.2.a: Determine feasibility of capital outlay requests prior to recommending inclusion in House Bill 2.

STRATEGY II.2.b: Monitor cash flow requirements throughout the year in order to provide funds when funds are needed.

STRATEGY II.2.c: Administer design and construction contracts in a consistent manner across all projects.

STRATEGY II.2.d: Process change orders in a timely manner to avoid delays in completion of the work.

STRATEGY II.2.e: Process invoices in a timely manner to avoid delays in completion of individual projects.

STRATEGY II.2.f: Develop a system for measuring the team member's effectiveness in completing a task or activity.

PROGRAM ACTIVITY PERFORMANCE INDICATOR:

1. Efficiency: Percent reduction in time for completion of projects from funding through project closeout

Principal Clients: Principal clients consist of state agencies, political subdivisions of the state, boards and commissions, and non-state entities.

External Factors: External factors beyond the control of the department that could significantly affect the achievement of the goal and objectives include functional requirements of various agencies that dictate space requirements, adequate capital outlay funding, changes in programmatic requirements by user agencies, construction change orders requiring legislative approval, low bid contracting requirements, etc.

Duplication of Effort: Duplication of effort is avoided by extensive collaboration between the Office of Facility Planning and Control, the Office of State Buildings and the Office of State Lands. Additionally, duplication of effort is avoided by the specific workload assignment of project management duties among project managers and consistent training of project managers in policies and procedures for capital outlay projects.

PERFORMANCE INDICATOR DOCUMENTATION

Program: Division of Administration

Activity: Office of Facility Planning and Control

Objective: The Office of Facility Planning and Control will use pre-planning to facilitate buy-build-lease decisions and continue to review those functions now housed in leased facilities that may be better served housed in state owned space.

Indicator Name: Percent reduction in commercial lease space

LaPAS PI Code: N/A

1. Type and Level:

This performance indicator is a general efficiency indicator.

2. Rationale, Relevance, Reliability:

Facility Planning and Control is required to provide adequate space to house state government. A database of leased space is maintained and records are kept on each commercial lease.

3. Use:

The performance indicator will be used by internal management and staff to determine whether the inventory is complete. Incomplete inventory may result in incorrect reporting and management decisions concerning unnecessary leasing of commercial space.

4. Clarity:

The indicator name clearly identifies what is being measured.

5. Data Source, Collection and Reporting:

The source of the data is Facility Planning and Control Real Estate Leasing section along with information provided by user agencies with space requirements or underutilized or vacant space. A database of space utilization is required with semi-annual reporting.

6. Calculation Methodology:

The total commercial lease square footage is divided by the total state square footage. It is a standard calculation

7. Scope:

This indicator is aggregated.

8. Caveats:

Weaknesses would be the timeliness of other agencies providing accurate and complete space utilization data to the Office of State Buildings and Office of Facility Planning and Control.

9. Accuracy, Maintenance, Support:

This performance indicator has not been audited by the Louisiana Legislative Auditor. FPC maintains extensive files demonstrating data which is easily validated against inventories.

10. Responsible Person:

Allison Lang
State Leasing Analyst
(225) 342-4028
Allison.lang@la.gov

PERFORMANCE INDICATOR DOCUMENTATION

Program: Division of Administration

Activity: Office of Facility Planning and Control

Objective: The Office of Facility Planning and Control will assure efficient and effective use of resources to create a responsive customer experience through consistent project management and administration of the capital outlay program.

Indicator Name: Percent reduction in time for completion of projects from funding through project acceptance

LaPAS PI Code: N/A

1. Type and Level:

This performance indicator is a general efficiency indicator.

2. Rationale, Relevance, Reliability:

Facility Planning and Control is required to provide consistent project management and administration of the capital outlay program. A database of project information is maintained and records are kept on each project.

3. Use:

The performance indicator will be used by internal management and staff to determine whether the projects are completed in a timely manner.

4. Clarity:

The indicator name clearly identifies what is being measured.

5. Data Source, Collection and Reporting:

The source of the data is Facility Planning and Control Design and Construction Section, Capital Outlay Section, and Fiscal Section. Several databases of project information are required with quarterly reporting.

6. Calculation Methodology:

The average time for completion of typical projects divided by the average time of completion of typical projects beginning in FY 2008. It is a standard calculation.

7. Scope:

This indicator is aggregated.

8. Caveats:

Weaknesses would be the delay of funding by the State Bond Commission, changes in User Agency personnel resulting in revised scopes of work and litigation.

9. Accuracy, Maintenance, Support:

This performance indicator has not been audited by the Louisiana Legislative Auditor. FPC maintains extensive files demonstrating data which is easily validated.

10. Responsible Person:

Roger E. Husser, Jr.

Director

(225) 342-0849

Roger.Husser@la.gov

GOAL III: To provide for the effective and efficient dissemination, execution, enforcement and implementation of executive policies reflecting sound management practices.

Goal Authorizations: Louisiana Revised Statute 36:8

PROGRAM ACTIVITY: INTERNAL AUDIT

Internal Audit (IA) is an independent, objective assurance and consulting activity designed to add value and improve the Division of Administration's (DOA's) organizational operations. This section helps DOA accomplish its objectives by bringing a systematic, disciplined approach to evaluate and improve the effectiveness of risk management, control, and governance processes. The scope of the internal audit function covers all programs within DOA.

PROGRAM ACTIVITY MISSION:

- 1.** To conduct objective and independent audits and examinations within the Division of Administration to determine adequacy of internal controls; reliability and integrity of information; security of the State's assets; and compliance with state laws, rules, and regulations as well as internal policies and procedures.

PROGRAM ACTIVITY GOAL:

- i. Internal Audit will improve and add value to the Division of Administration's organizational operations.

PROGRAM ACTIVITY OBJECTIVE III.1: Internal Audit will initiate audits on 100% of agencies and sections under the oversight of the Division of Administration that are identified as high risk.

STRATEGY III.1.a: Identify high-risk areas within DOA.

STRATEGY III.1.b: Develop an audit plan based on high-risk areas identified within DOA.

STRATEGY III.1.c: Conduct audit projects that are division-wide or specific to individual sections or agencies within the DOA according to the audit plan.

STRATEGY III.1.d: Issue audit reports of the results of audit projects conducted.

PROGRAM ACTIVITY PERFORMANCE INDICATOR:

1. Outcome: Audit coverage of DOA agencies and sections identified as high risk during annual risk assessment

PROGRAM ACTIVITY OBJECTIVE III.2: Internal Audit will track and consult on issues and findings reported on DOA by both Internal Audit and External Auditors.

STRATEGY III.2.a: Develop an audit matrix that presents audit issues reported on DOA by Internal Audit and External Auditors including Louisiana Legislative Auditor and Federal auditors.

STRATEGY III.2.b: Engage in frequent dialogue, as well as formal meetings when necessary, with DOA management in order to track the progress of corrective action plans.

PROGRAM ACTIVITY PERFORMANCE INDICATORS:

1. Outcome: Percentage of resolved internal audit findings on DOA agencies and sections
2. Outcome: Percentage of resolved external audit findings on DOA agencies and sections

Principal Clients: Principal clients consist of agencies and sections under the oversight of the Division of Administration.

External Factors: External factors that could have an impact include issues reported as a result of external audits, changes in administration, significant changes in operations within DOA, and other issues that cause areas within DOA to become high risk.

Duplication of Effort: DOA's Internal Audit section provides the internal audit function for the operations within DOA. While there are numerous external audits done on the operations of DOA, these external audits are conducted for purposes required by external factors, such as statutory requirements and federal agency oversight. No other audit group provides an internal audit function within DOA.

PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Internal Audit

Objective: Internal Audit will initiate audits on 100% of agencies and sections under the oversight of the Division of Administration that are identified as high risk.

Indicator Name: Audit coverage of DOA agencies and sections identified as high risk during annual risk assessment

Indicator LaPAS PI Code: N/A

1. Type and Level:

This performance indicator is a general outcome indicator.

2. Rationale, Relevance, Reliability:

This indicator is an indication that an adequate and effective internal audit function exists for DOA as measured by audit coverage of high-risk agencies and sections within DOA.

3. Use:

This indicator will assure management that the internal audit function is effective.

4. Clarity:

The indicator clearly identifies what is being measured.

5. Data Source, Collection and Reporting:

The source of data for this indicator will be the annual risk assessment, audit projects initiated during the fiscal year, audit work plan/schedule, and the audit tracking schedule maintained by the Internal Audit Administrator.

6. Calculation Methodology:

A comparison of internal audit projects initiated and conducted to the agencies and sections within DOA that have been identified as high risk during the annual risk assessment of DOA.

7. Scope:

This performance indicator is aggregated.

8. Caveats:

None.

9. Accuracy, Maintenance, Support:

The performance indicator is a result of internal audits conducted by DOA's Internal Audit Section on DOA agencies and sections for a fiscal year.

10. Responsible Person:

Erin M. Sindelar
Internal Audit Administrator
(225) 342-2900
Erin.Sindelar@la.gov

PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Internal Audit

Objective: Internal Audit will track and consult on issues and findings reported on DOA by both Internal Audit and External Auditors.

Indicator Name: Percentage of resolved internal audit findings on DOA agencies and sections

Indicator LaPAS PI Code: N/A

1. Type and Level:

This performance indicator is a general outcome indicator.

2. Rationale, Relevance, Reliability:

This indicator is an indication that an adequate internal audit function is in place within DOA as measured by the percentage of resolved internal audit issues that are reported.

3. Use:

This indicator provides assurance that DOA's Internal Audit function is effective by DOA management implementing recommendations made during internal audit projects resolving the issues that are reported.

4. Clarity:

The indicator clearly identifies what is being measured.

5. Data Source, Collection and Reporting:

The source of data for this indicator will be follow-up audits conducted that report the status of audit issues and recommendations reported in previous internal audit projects issued along with the audit matrix that is updated quarterly with the status of corrective action plans to resolve audit issues reported on DOA agencies and sections.

6. Calculation Methodology:

The calculation will be the accumulation of audit issues reported by DOA's Internal Audit Section that are considered resolved.

7. Scope:

This performance indicator is aggregated.

8. Caveats:

None.

9. Accuracy, Maintenance, Support:

The supporting information related to this performance indicator is monitored and reviewed by DOA's Internal Audit Section as well as senior management within DOA.

10. Responsible Person:

Erin M. Sindelar
Internal Audit Administrator
225-342-2900 (phone)
Erin.Sindelar@la.gov

PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Internal Audit

Objective: Internal Audit will track and consult on issues and findings reported on DOA by both Internal Audit and External Auditors.

Indicator Name: Percentage of resolved external audit findings on DOA agencies and sections

Indicator LaPAS PI Code: N/A

1. Type and Level:

This performance indicator is a general outcome indicator.

2. Rationale, Relevance, Reliability:

This indicator is an indication that an adequate internal audit function is in place within DOA as measured by the percentage of resolved external audit issues that are reported.

3. Use:

This indicator provides assurance that DOA's Internal Audit function is effective by DOA management implementing recommendations made by external auditors that conduct audits of DOA agencies and sections.

4. Clarity:

The indicator clearly identifies what is being measured.

5. Data Source, Collection and Reporting:

The source of data for this indicator will be audit reports issued by external auditors along with the audit matrix that is updated quarterly with the status of corrective action plans to resolve external audit issues reported on DOA agencies and sections.

6. Calculation Methodology:

The calculation will be the accumulation of resolved audit issues reported by external auditors on DOA agencies and sections.

7. Scope:

This performance indicator is aggregated.

8. Caveats:

None.

9. Accuracy, Maintenance, Support:

The supporting information related to this performance indicator is monitored and reviewed by DOA's Internal Audit Section as well as senior management within DOA.

10. Responsible Person:

Erin M. Sindelar
Internal Audit Administrator
225-342-2900 (phone)
Erin.Sindelar@la.gov

PROGRAM ACTIVITY: OFFICE OF HUMAN RESOURCES

The Office of Human Resources is responsible for all Human Resources functions for the Division of Administration, Office of the Governor, the Board of Elementary and Secondary Education, and a variety of independent agencies within the Executive Department.

PROGRAM ACTIVITY GOAL:

- i. The Office of Human Resources will coordinate and provide oversight for human resources within the Division of Administration and client agencies.

PROGRAM ACTIVITY OBJECTIVE III.1: The Office of Human Resources will maintain customer satisfaction with human resources services at or above the baseline satisfaction level rating of 4 (based on a 5-point scale).

STRATEGY III.1.a: Identify and mitigate barriers in the personnel action request (PAR) process within the Division of Administration and client agencies.

STRATEGY III.1.b: Identify and mitigate barriers in the new hire process within the Division Administration and client agencies.

STRATEGY III.1.c: Survey recipients of human resources services within the Division of Administration and client agencies on an ongoing basis.

PROGRAM ACTIVITY PERFORMANCE INDICATORS:

1. Outcome: Operations/Benefits Processing Accuracy
2. Outcome: Job Posting Activation Cycle Time
3. Quality: Average customer satisfaction rating (score on a 5-point scale)

Principal Clients: Principal clients consist of agencies and sections under the oversight of the Division of Administration. This primarily consists of the Division of Administration, Office of the Governor, the Board of Elementary and

Secondary Education, and a variety of independent agencies within the Executive Department.

External Factors: External factors that could have an impact include technology problems, employee turnover, and changes in policies.

Duplication of Effort: There is no duplication of effort as the Office of Human Resources is responsible for all human resource functions for the Division of Administration, Office of the Governor, the Board of Elementary and Secondary Education, and a variety of independent agencies within the Executive Department.

PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Office of Human Resources

Objective: The Office of Human Resources will maintain customer satisfaction with human resources services at or above the baseline satisfaction level rating of 4 (based on a 5-point scale).

Indicator Name: Operations/Benefits Processing Accuracy

Indicator LaPAS PI Code: New

1. Type and Level:

This performance indicator is a general outcome indicator.

2. Rationale, Relevance, Reliability:

The indicator chosen is a major driver of customer service between the agency and its clients. Specifically, the indicator measures how well the office is meeting the needs of its clients in the area of operations and benefits.

3. Use:

This indicator is used for internal management purposes.

4. Clarity :

The indicator clearly identifies what is being measured.

5. Data Source, Collection and Reporting:

The source of data is LaGov HCM, eEnrollment and Civil Service. Collection and reporting is conducted consistently on a quarterly basis during the state fiscal year.

6. Calculation Methodology:

The standard calculation of the average number of benefits/operations/payroll processing errors for the Division of Administration. A target of 97.5% data integrity accuracy and less than 4 benefit administrative error is established by the office.

7. Scope:

This performance indicator is aggregated.

8. Caveats:

None.

9. Accuracy, Maintenance, Support:

This performance indicator has not been audited by LLA. Consistent use of the E-PAR Workflow information system will ensure the accuracy of the data.

10. Responsible Person:

Cheryl Schilling, PHR
Human Resources Director
(225) 342-6060
Cheryl.Schilling@la.gov

PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Office of Human Resources

Objective: The Office of Human Resources will maintain customer satisfaction with human resources services at or above the baseline satisfaction level rating of 4 (based on a 5-point scale).

Indicator Name: Job posting activation cycle time

Indicator LaPAS PI Code: New

1. Type and Level:

This performance indicator is a general outcome indicator.

2. Rationale, Relevance, Reliability:

The indicator chosen is a major driver of customer service between the agency and its clients. Specifically, the indicator measures how well the office is meeting the needs of its clients in the area of compensation and staffing.

3. Use:

This indicator will be used for internal management purposes.

4. Clarity:

The indicator clearly identifies what is being measured.

5. Data Source, Collection and Reporting:

The source of data is the NeoGov applicant tracking system. Collection and reporting is conducted consistently on a quarterly basis during the state fiscal year.

6. Calculation Methodology:

A standard calculation of the average number of days to activate a job posting for the Division of Administration and client agencies. A target of 3 business days is established by the office. Measurement includes timeframe from final NeoGov requisition approval through activation of posting by Civil Service.

7. Scope:

This performance indicator is aggregated.

8. Caveats:

None.

9. Accuracy, Maintenance, Support:

This performance indicator has not been audited by LLA. Consistent use of the NeoGov applicant tracking system will ensure the accuracy of the data.

10. Responsible Person:

Cheryl Schilling, PHR
Human Resources Director
(225) 342-6060
Cheryl.Schilling@la.gov

PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Office of Human Resources

Objective: The Office of Human Resources will maintain customer satisfaction with human resources services at or above the baseline satisfaction level rating of 4 (based on a 5-point scale).

Indicator Name: Average customer satisfaction rating (score on a 5-point scale)

Indicator LaPAS PI Code: 22632

1. Type and Level:

This performance indicator is a key quality indicator.

2. Rationale, Relevance, Reliability:

The indicator chosen is a reliable measure of customer satisfaction from each client agency served by the Office of Human Resources. Specifically, the indicator measures how well the office is meeting the needs of new and existing client agencies in the areas of operations and benefits, compensation and staffing, organizational learning and development and employee relations.

3. Use:

This indicator will be used for internal management purposes.

4. Clarity:

The indicator clearly identifies what is being measured.

5. Data Source, Collection and Reporting:

The data source is the electronic surveys sent via Survey Monkey to agency directors by the Division of Administration Office of Technology Services. Annual collection and reporting is conducted consistently after fourth quarter of state fiscal year by the Division of Administration Office of Technology Services.

6. Calculation Methodology:

The average customer satisfaction rating score is on a 5-point scale of responding agency directors.

7. Scope:

This performance indicator is aggregated.

8. Caveats:

None.

9. Accuracy, Maintenance, Support:

This performance indicator has not been audited by LLA. Consistent use of data collected from Survey Monkey will ensure the accuracy of the data.

10. Responsible Person:

Cheryl Schilling, PHR
Human Resources Director
(225) 342-6060
Cheryl.Schilling@la.gov

PROGRAM ACTIVITY: OFFICE OF GENERAL COUNSEL

The Office of General Counsel (OGC) provides legal services to the Division of Administration (DOA).

PROGRAM ACTIVITY MISSION:

The mission of the Office of General Counsel is to provide timely, thorough, and professional and competent legal advice, counsel, defense and representation of the various offices within the Division of Administration, as well as, to provide guidance and assistance to legal representatives of other agencies, particularly in service areas provided by and through the Division of Administration.

PROGRAM ACTIVITY GOALS:

- i. To provide accurate, timely, and professional legal services to the Division of Administration.
- ii. To improve legal services to the Division of Administration by effective training and development of Office of General Counsel staff and procedures.

PROGRAM ACTIVITY OBJECTIVE III.1: OGC will manage all legal issues and files through a comprehensive procedure from receipt to completion with a focus on communication and early intervention in the legal needs of the DOA sections.

STRATEGY III.1.a: Improve tracking of ongoing legal matters. OGC will continue to develop and use GCWorks as the primary tracking tool for work being conducted in OGC. All attorneys are expected to substantively update their active matters no less than every 30 days and no later than the last day of the month in order to facilitate timely budget reporting on OGC performance metrics.

STRATEGY III.1.b: Build a stronger staff, with specialized training geared toward DOA needs. DOA is the center for a number of important business operations of state government, including

contracting, procurement, technology services, property management, employee benefits, and human resource management. OGC management and staff will work together to develop an individualized continuing legal education program for attorneys, as well as for the department as a whole. OGC attorneys will attend CLE programs specifically geared toward state and national issues on procurement law and government contracting, technology contracting, employment law and health benefits law, and other programs that may be identified to improve the general skills and intellectual discipline of the OGC staff.

STRATEGY III.1.c: Build stronger Client relationships. OGC is actively working with Section Heads and Asst. Commissioners to strengthen their relationships with OGC staff. Frequent and open communication, with timely follow-up and reporting to clients, is imperative in building stronger client services within DOA. Toward that end, OGC staff are aligned with DOA section heads so that each section has a direct point of contact with a specifically identified attorney and deputy. Although multiple attorneys may work for a section on a variety of matters, each Client Section has a direct contact to facilitate the efficient intake and timely involvement of legal staff.

PROGRAM ACTIVITY PERFORMANCE INDICATORS:

1. Outcome: Percentage of public records requests responded to within statutory deadlines
2. Outcome: Percentage of cases successfully litigated
3. Output: Number of hours of legal support each attorney and paralegal provide to sections within DOA
4. Outcome: Percentage of procurement protests and appeals processed timely
5. Outcome: Percentage of attorneys receiving required Continuing Legal Education credits annually

Principal Clients: Principal clients consist of agencies and sections under the oversight of the Division of Administration.

External Factors: External factors that could have an impact include technology problems, employee turnover, and changes in policies.

Duplication of Effort: There is no duplication of effort as the Office of General Counsel is the DOA section responsible for legal advice, representation in lawsuits and other disputes as well as drafting of state contracts and other legal documents for the Division of Administration.

PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Office of General Counsel

Objective: OGC will manage all legal issues and files through a comprehensive procedure from receipt to completion with an increased focus on communication and early intervention in the legal needs of the sections of the DOA.

Indicator Name: Percentage of public records requests responded to within statutory deadlines

Indicator LaPAS PI Code: N/A

1. Type and Level:

This performance indicator is a key outcome indicator.

2. Rationale, Relevance, Reliability:

The Office of General Counsel aids DOA's custodian of public records—the Commissioner of Administration—in processing public records requests. Tracking the percentage of public records requests timely processed ensures compliance with the Louisiana Public Records Law.

3. Use:

The performance indicator will be used for internal management and staffing purposes. This indicator will reflect the sufficiency of OGC's staffing allocations to timely handle these public records requests.

4. Clarity:

The percentage of public records requests timely processed will be analyzed to ensure the requests are being processed in compliance with the Louisiana Public Records Law.

5. Data Source, Collection and Reporting:

The data for this performance indicator is maintained in the internal GCWorks workflow management system. GCWorks generates reports of various types including the timeliness of handling a request based on when a request is received, when the statutorily-required five-day notice is sent, when the statutorily-required five-day final determination is sent,

the expected date for the final delivery of records (“EDD”), and when the final responsive records are delivered (“DD”).

6. Calculation Methodology:

In order to calculate the percentage of public records requests responded to within statutory deadlines, the number of completed requests within statutory deadlines will be divided by the total number of requests completed by the custodian of records. The following requests will be considered as meeting the statutory deadlines: requests that receive a statutorily-required notice by the fifth business day after receipt of the request by the custodian of records; requests that receive a statutorily-required final determination by the fifth business day after receipt of the request by the custodian of records; and, requests that have the DD on or before the EDD. Requests that do not require a five-day notice or five-day final determination (e.g. a request not sent to the custodian, requests for which DOA is not the proper custodian, etc.) will not be counted towards the total number of requests received.

7. Scope:

This indicator is for all public records requests received by the DOA custodian of records.

8. Caveats:

None.

9. Accuracy, Maintenance, Support:

This performance indicator has not been audited by the Legislative Auditor; however, the data is maintained in GCWorks.

1. Responsible Person:

The General Counsel is responsible for this data. Bridget Denicola (email: Bridget.Denicola@la.gov)

PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Office of General Counsel

Objective: OGC will manage all legal issues and files through a comprehensive procedure from receipt to completion with a focus on communication and early intervention in the legal needs of the sections of the DOA.

Indicator Name: Percentage of cases successfully litigated

Indicator LaPAS PI Code: N/A

1. Type and Level:

This performance indicator is a key outcome indicator.

2. Rationale, Relevance, Reliability:

The Office of General Counsel provides timely, thorough, and professional legal representation to the Division of Administration, its sections, and management. Successfully litigating cases is an essential function of OGC.

3. Use:

The performance indicator will be used for internal management and staffing purposes. This indicator will reflect the effectiveness and efficiency of DOA's legal resources for both inside and outside counsel.

4. Clarity:

The percentage of completed cases successfully litigated will be analyzed to ensure high-quality and cost-effective legal representation.

5. Data Source, Collection and Reporting:

The sources of data for this performance indicator is maintained in the internal GCWorks workflow management system. GCWorks generates reports showing the overall performance rating of the legal representation for all completed litigated cases.

6. Calculation Methodology:

In order to calculate the percentage of completed cases successfully litigated, the number of completed cases successfully litigated, as determined by OGC with input from the client, is divided by the total

number of completed litigated cases. A litigated case with an overall performance rating of excellent or satisfactory is considered a successfully litigated case.

7. Scope:

This indicator is for each litigation matter handled by OGC.

8. Caveats:

None.

9. Accuracy, Maintenance, Support:

This performance indicator has not been audited by the Legislative Auditor; however, the client's satisfaction will be discussed at the conclusion of each litigated matter and entered into GCWorks.

10. Responsible Person:

The General Counsel is responsible for this data. Bridget Denicola (email: Bridget.Denicola@la.gov)

PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Office of General Counsel

Objective: OGC will manage all legal issues and files through a comprehensive procedure from receipt to completion with a focus on communication and early intervention in the legal needs of the sections of the DOA.

Indicator Name: Number of hours of legal assistance each attorney and paralegal provides to sections within DOA

Indicator LaPAS PI Code: N/A

1. Type and Level:

This performance indicator is a key outcome indicator.

2. Rationale, Relevance, Reliability:

The mission of the Office of General Counsel is to provide timely, thorough, and professional legal advice, counsel, and general legal representation of the Division of Administration, its sections, and management. Tracking the number of attorney and paralegal hours and the types of services provided to each section allows for the proper allocation of legal resources.

3. Use:

The performance indicator will be used for internal management and staffing purposes. This indicator will reflect the effectiveness and efficiency of DOA's legal resources.

4. Clarity:

The number of hours of legal resources utilized by each section of DOA will be analyzed and the legal resources will be reallocated as necessary to ensure high-quality, timely, and cost-effective legal representation.

5. Data Source, Collection and Reporting:

The data for this performance indicator is maintained in the internal GCWorks workflow management system. Data has been entered into the system. GCWorks generates various reports including reports detailing

the types of rendered services and the total number of hours dedicated to each section.

6. Calculation Methodology:

In order to calculate the hours per section, the number of hours entered into GCWorks by each attorney and paralegal is added to reach the total number of hours devoted to that section of DOA.

7. Scope:

This indicator is for each DOA section.

8. Caveats:

None.

9. Accuracy, Maintenance, Support:

This performance indicator has not been audited by the Legislative Auditor; however, the data is maintained in GCWorks.

10. Responsible Person:

The General Counsel is responsible for this data. Bridget Denicola (email: Bridget.Denicola@la.gov)

PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Office of General Counsel

Objective: OGC will manage all legal issues and files through a comprehensive procedure from receipt to completion with a focus on communication and early intervention in the legal needs of the sections of the DOA.

Indicator Name: Percentage of procurement protests and appeals processed timely

Indicator LaPAS PI Code: N/A

1. Type and Level:

This performance indicator is a key outcome indicator.

2. Rationale, Relevance, Reliability:

The mission of the Office of General Counsel is to provide legal counsel to the Chief Procurement Officer and the Commissioner of Administration for procurement protests and appeals. The timely processing of procurement protests and appeals ensures the agencies of the State of Louisiana can obtain their goods and services without delay.

3. Use:

The performance indicator will be used for internal staffing purposes. This indicator will reflect the sufficiency of OGC's staffing allocations to timely handle these protests and appeals.

4. Clarity:

The percentage of procurement protests and appeal decisions timely issued will be analyzed to allow OGC to reallocate staff to ensure timely handling of these protests and appeals.

5. Data Source, Collection and Reporting:

The sources of data for this performance indicator is maintained in the internal GCWorks workflow management system. Data has been entered into the system. GCWorks generates reports of various types including the number of protests and appeal decisions timely issued and the total number of protests and appeals processed.

6. Calculation Methodology:

The protestor's/appellant's reply due date, the decision due date, and the decision issue date are used to determine the timeliness of the decisions. Then, the number of protest and appeal decisions timely issued is divided by the total number issued. If the decision issue date is on or before the decision due date, then the decision is considered timely issued.

7. Scope:

This indicator is for all procurement protests to the Chief Procurement Officer and all appeals to the Commissioner of Administration.

8. Caveats:

None.

9. Accuracy, Maintenance, Support:

This performance indicator has not been audited by the Legislative Auditor; however, the data is maintained in GCWorks.

10. Responsible Person:

The General Counsel is responsible for this data. Bridget Denicola (email: Bridget.Denicola@la.gov)

PERFORMANCE INDICATOR DOCUMENTATION

Program: Executive Administration

Activity: Office of General Counsel

Objective: OGC will manage all legal issues and files through a comprehensive procedure from receipt to completion with a focus on communication and early intervention in the legal needs of the sections of the DOA.

Indicator Name: Percentage of attorneys receiving required Continuing Legal Education credits annually

Indicator LaPAS PI Code: N/A

1. Type and Level:

This performance indicator is a key outcome indicator.

2. Rationale, Relevance, Reliability:

In order to provide quality legal support to OGC's clients, OGC attorneys must keep their legal knowledge current. Continuing Legal Education is also mandated by the Louisiana Supreme Court as a condition of maintaining an attorney's law license.

3. Use:

The performance indicator will be used to ensure all OGC attorneys are licensed to practice law.

4. Clarity:

The percentage of attorneys receiving their required CLE credits annually will be analyzed to ensure OGC attorneys comply with licensing requirements and to ensure OGC attorneys' legal knowledge is current.

5. Data Source, Collection and Reporting:

The data for this performance indicator is obtained from the Louisiana Supreme Court's Committee on Mandatory Continuing Legal Education reports which show each attorney's compliance.

6. Calculation Methodology:

In order to calculate the percentage of attorneys receiving the required CLE credits, the number of attorneys receiving required CLE credits is divided by the total number of attorneys.

7. Scope:

This indicator is for all attorneys in OGC.

8. Caveats:

The requirements for newly-admitted attorneys and attorneys over age 65 differ from the standard requirement.

9. Accuracy, Maintenance, Support:

This performance indicator has not been audited by the Legislative Auditor; however, the data is maintained by the Louisiana Supreme Court's Committee on Mandatory Continuing Legal Education.

10. Responsible Person:

The General Counsel is responsible for this data. Bridget Denicola (email: Bridget.Denicola@la.gov)

The goal of the Office of Community Development is to improve the quality of life of the residents of Louisiana by administering state and federal grants. Programs administered in OCD include the Community Development Block Grant Program, Recovery Housing Program, Water Sector Program – Phase 2, Local Government Assistance Program, and the Community Water Enrichment Fund.

- The Community Development Block Grant Program helps communities provide a suitable living environment and expand economic opportunities for their residents, particularly in low- to moderate-income areas.
- The Recovery Housing Program (RHP) allows states and the District of Columbia to provide stable, transitional housing for individuals in recovery from a substance-use disorder. The assistance is limited, per individual, to a period of not more than two years or until the individual secures permanent housing, whichever is earlier. The RHP funding will not go directly to individuals.
- [Act 497 of the 2024 Regular Session](#) created a Phase 2 subfund for the deposit, distribution, and administration of new grants within the Water Sector Program, which was created with State and Local Fiscal Recovery Funds from the American to provide grant funding for repairs, improvements and consolidation of community water and sewer systems around the state. All funds in Phase 1 of the WSP must be expended by December of 2026. Phase 2 will continue as long as funds are appropriated through the legislature.
- The Louisiana Government Assistance Program is designed to fill the gaps where there are no federal or other state funds available to assist local governments with an identified high priority need.
- The Community Water Enrichment Fund provides funding to aid units of local government in rehabilitating, improving and constructing projects for community water systems to provide safe, clean drinking water.

GOAL IV: To improve the quality of life of the citizens of the State of Louisiana, principally those of low to moderate income, through the effective administration of the Louisiana Community Development Block Grant Program, and to improve the quality of life of all citizens of the State through effective administration of the Local Government Assistance

**Program, Recovery Housing Program, Water Sector Program,
and the Community Water Enrichment Fund.**

Goal Authorizations: Louisiana Revised Statute 49.663.1 et seq.

**PROGRAM ACTIVITY: OFFICE OF COMMUNITY DEVELOPMENT (OCD) –
PLANNING AND GRANT ADMINISTRATION OF THE LOUISIANA
COMMUNITY DEVELOPMENT BLOCK GRANT PROGRAM**

Principal Clients: Principal clients consist of units of local government and citizens of the state of Louisiana, principally those of low and moderate income.

External Factors: External factors that could have an impact are reduced and/or delayed funding by Congress and/or State Legislature and slow performance at the local level which affect beneficiaries.

Duplication of Effort: Louisiana Revised Statute 49:663.1 et seq. gives the Division of Administration authority to administer the LCDBG Program as authorized under Title I of the Housing and Community Development Act of 1974. The Office of Community Development coordinates with various departments within the executive branch to ensure there is no duplication of effort in achieving the goals and objectives of the office.

PROGRAM ACTIVITY GOAL:

- i. The Office of Community Development will provide overall administration, planning, monitoring, and technical assistance to grantees of the Louisiana Community Development Block Grant (LCDBG) Program to ensure funds are spent within the criteria established by the U.S. Department of Housing and Urban Development (HUD).

PROGRAM ACTIVITY OBJECTIVE IV.1: The Office of Community Development will improve the quality of life for the citizens of Louisiana by administering the LCDBG Program in an effective manner.

STRATEGY IV.1.a: Conduct citizen participation requirements.

STRATEGY VI.1.b: Prepare application document and accept applications.

STRATEGY IV.1.c: Rate and rank applications according to the Consolidated Annual Action Plan.

STRATEGY IV.1.d: Fund grants according to ranking list and implement projects with local government grantees.

STRATEGY IV.1.e: Monitor and close out grants in accordance with regulations.

PROGRAM ACTIVITY PERFORMANCE INDICATORS:

1. Output: Percentage of annual LCDBG allocation obligated within twelve months of receipt
2. Input: Ratio of expenditures for last 12 months to last award amount
3. Input: Ratio of unexpended funds to last award amount
4. Efficiency: Average number of OCD days for payment processing
5. Outcome: Average number of findings per grantee

PROGRAM ACTIVITY OBJECTIVE IV.2: The Office of Community Development will provide resources to improve or construct community infrastructure systems that principally benefit persons of low to moderate income through the Community Development Block Grant Program.

STRATEGY IV.2.a: Assist local governments with improving existing and providing new infrastructure and connections on private properties.

STRATEGY VI.2.b: Provide technical assistance by mail-outs, posting website information, conducting workshops, participating in conferences, and by on-site and telephone assistance to local

governments during the application and grant implementation process.

PROGRAM ACTIVITY PERFORMANCE INDICATORS:

1. Input: Funds requested for infrastructure projects
2. Outcome: Funds awarded for infrastructure projects
3. Output: Number of technical assistance trainings completed quarterly

PROGRAM ACTIVITY OBJECTIVE IV.3: The Office of Community Development will provide resources to strengthen community economic development through the creation and/or retention of jobs for new and existing businesses.

STRATEGY IV.3.a: Assist local governments with improving existing and providing new infrastructure in order to create or retain jobs or area benefits.

STRATEGY VI.3.b: Provide technical assistance by mail-outs, posting website information, conducting workshops, participating in conferences for the Louisiana Municipal Association and the Police Jury Association, and by on-site and telephone assistance to local governments during the application and grant implementation process.

PROGRAM ACTIVITY PERFORMANCE INDICATORS:

1. Input: Funds requested for economic development projects
2. Outcome: Funds awarded for economic development projects
3. Output: Number of regional workshops conducted regarding economic development

PERFORMANCE INDICATOR DOCUMENTATION

Program: Community Development Grant Program

Activity: Office of Community Development

Objective: The Office of Community Development will improve the quality of life for the citizens of Louisiana by administering the LCDBG Program in an effective manner.

Indicator Name: Percentage of annual LCDBG allocation obligated within twelve months of receipt

Indicator LaPAS PI Code: 148

1. Type and Level:

This performance indicator is a key output indicator.

2. Rationale, Relevance, Reliability:

This is monitored for compliance with HUD policy.

3. Use:

The performance indicator will be used for management purposes and to report to HUD.

4. Clarity:

The indicator clearly identifies what is being measured.

5. Data Source, Collection and Reporting:

The sources of data for the performance indicator are internal logs and database. This is reported to HUD at end of State's program year.

6. Calculation Methodology:

A standard calculation of the total amount funded divided by state allocation minus state administrative costs.

7. Scope:

This indicator is aggregated.

8. Caveats:

The HUD requirement is to allocate 95% of funds within twelve months of receipt.

9. Accuracy, Maintenance, Support:

This performance indicator is monitored annually by HUD. State of LA has always met this requirement.

10. Responsible Persons:

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PERFORMANCE INDICATOR DOCUMENTATION

Program: Community Development Grant Program

Activity: Office of Community Development

Objective: The Office of Community Development will improve the quality of life for the citizens of Louisiana by administering the LCDBG Program in an effective manner.

Indicator Name: Ratio of expenditures for last 12 months to last award amount

Indicator LaPAS PI Code: N/A

1. Type and Level:

This performance indicator is a general input indicator.

2. Rationale, Relevance, Reliability:

HUD monitors and publishes this information monthly, comparing all states' data.

3. Use:

The performance indicator will be used for management purposes.

4. Clarity:

The indicator clearly identifies what is being measured.

5. Data Source, Collection and Reporting:

The sources of data for the performance indicator is HUD. HUD publishes this data monthly.

6. Calculation Methodology:

A standard calculation of grant expenditures for last 12 months divided by latest grant award amount.

7. Scope:

This indicator is aggregated but can be disaggregates.

8. Caveats:

The established goal for HUD is at least 1 or greater.

9. Accuracy, Maintenance, Support:

Actual HUD expenditures data is used.

10. Responsible Persons:

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PERFORMANCE INDICATOR DOCUMENTATION

Program: Community Development Grant Program

Activity: Office of Community Development

Objective: The Office of Community Development will improve the quality of life for the citizens of Louisiana by administering the LCDBG Program in an effective manner.

Indicator Name: Ratio of unexpended funds to last award amount

Indicator LaPAS PI Code: N/A

1. Type and Level:

This performance indicator is a general input indicator.

2. Rationale, Relevance, Reliability:

HUD monitors and publishes this information monthly, comparing all states' data.

3. Use:

The performance indicator will be used for management purposes.

4. Clarity:

The indicator clearly identifies what is being measured.

5. Data Source, Collection and Reporting:

The source of data for the performance indicator is HUD. HUD publishes this data monthly.

6. Calculation Methodology:

This is a standard calculation of the total unexpended grant funds divided by latest grant award amount.

7. Scope:

This indicator is aggregated but can be disaggregated.

8. Caveats:

The established goal for HUD is at less than 2.5.

9. Accuracy, Maintenance, Support:

Actual HUD expenditures data is used.

10. Responsible Persons:

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PERFORMANCE INDICATOR DOCUMENTATION

Program: Community Development Grant Program

Activity: Office of Community Development

Objective: The Office of Community Development will improve the quality of life for the citizens of Louisiana by administering the LCDBG Program in an effective manner.

Indicator Name: Average number of OCD days for payment processing

Indicator LaPAS PI Code: N/A

1. Type and Level:

This performance indicator is a key efficiency indicator.

2. Rationale, Relevance, Reliability:

This indicator affects the expenditure rate and measures productivity.

3. Use:

The performance indicator will be used for internal management purposes.

4. Clarity:

The indicator clearly identifies what is being measured.

5. Data Source, Collection and Reporting:

The source of data for the performance indicator is internal logs and is calculated monthly.

6. Calculation Methodology:

A standard calculation of the total number of processing days is divided by number of payments processed.

7. Scope:

This indicator is aggregated.

8. Caveats:

The target goal is 3 days or less per payment. Processing can be delayed by missing documentation or program requirements.

9. Accuracy, Maintenance, Support:

The data is maintained by internal logs while the OCD is also working with OTS to create a web-based implementation system. Once the system is functioning, grantees will make payment requests in the system and OCD will process the payments in the system, which will also provide reports on the data.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: Community Development Grant Program

Activity: Office of Community Development

Objective: The Office of Community Development will improve the quality of life for the citizens of Louisiana by administering the LCDBG Program in an effective manner.

Indicator Name: Average number of findings per grantee

Indicator LaPAS PI Code: N/A

1. Type and Level:

This performance indicator is a key outcome indicator.

2. Rationale, Relevance, Reliability:

This indicator measures success of technical assistance provided to grantees.

3. Use:

The performance indicator will be used for internal management purposes.

4. Clarity:

The indicator clearly identifies what is being measured.

5. Data Source, Collection and Reporting:

The source of data for the performance indicator is internal logs and is calculated monthly.

6. Calculation Methodology:

A standard calculation of the total number of findings made divided by the number of monitoring visits.

7. Scope:

This indicator is aggregated.

8. Caveats:

The target goal is 5 findings or less.

9. Accuracy, Maintenance, Support:

The data is maintained by internal logs.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: Community Development Grant Program

Activity: Office of Community Development

Objective: The Office of Community Development will provide resources to improve or construct community infrastructure systems that principally benefit persons of low to moderate income through the Community Development Block Grant Program.

Indicator Name: Funds requested for infrastructure projects

Indicator LaPAS PI Code: 12404, 12405, 12406

1. Type and Level:

This performance indicator is a general input indicator.

2. Rationale, Relevance, Reliability:

This indicator provides a basis for funds disbursement amongst funding categories.

3. Use:

The performance indicator is used in future management decisions regarding funding needs.

4. Clarity:

The indicator clearly identifies what is being measured.

5. Data Source, Collection and Reporting:

The source of data for the performance indicator is internal database. The data is reported when grants close out on both internal and HUD databases.

6. Calculation Methodology:

The information is entered on and counted by the database when applications are received.

7. Scope:

This indicator is aggregated but can be disaggregated.

8. Caveats:

The number depends on the total dollar allocation by HUD/federal government.

9. Accuracy, Maintenance, Support:

The information is entered and calculated on the internal database.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: Community Development Grant Program

Activity: Office of Community Development

Objective: The Office of Community Development will provide resources to improve or construct community infrastructure systems that principally benefit persons of low to moderate income through the Community Development Block Grant Program.

Indicator Name: Funds awarded for infrastructure projects

Indicator LaPAS PI Code: 12418, 12419, 12422

1. Type and Level:

This performance indicator is a general outcome indicator.

2. Rationale, Relevance, Reliability:

This indicator shows the results of funds disbursement.

3. Use:

The performance indicator is used in future management decisions regarding funding needs.

4. Clarity:

The indicator clearly identifies what is being measured.

5. Data Source, Collection and Reporting:

The source of data for the performance indicator is internal database. The data is reported when grants close out on both internal and HUD databases.

6. Calculation Methodology:

The information is entered on and counted by the database when applications are received.

7. Scope:

This indicator is aggregated but can be disaggregated.

8. Caveats:

The number depends on the total dollar allocation by HUD/federal government.

9. Accuracy, Maintenance, Support:

The information is entered and calculated on the internal database.

10. Responsible Persons:

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PERFORMANCE INDICATOR DOCUMENTATION

Program: Community Development Grant Program

Activity: Office of Community Development

Objective: The Office of Community Development will provide resources to improve or construct community infrastructure systems that principally benefit persons of low to moderate income through the Community Development Block Grant Program.

Indicator Name: Number of technical assistance trainings completed quarterly

Indicator LaPAS PI Code: N/A

1. Type and Level:

This performance indicator is a general output indicator.

2. Rationale, Relevance, Reliability:

Technical assistance trainings should increase capacity of local governments.

3. Use:

The performance indicator is used in management purposes.

4. Clarity:

The indicator clearly identifies what is being measured.

5. Data Source, Collection and Reporting:

The source of data for the performance indicator is an internal log identifying time, place and subject of training.

6. Calculation Methodology:

This information is entered into a log and counted.

7. Scope:

This indicator is aggregated but can be disaggregated.

8. Caveats:

The Office of Community Development has one quarterly training as a goal.

9. Accuracy, Maintenance, Support:

This information is maintained on internal logs.

10. Responsible Persons:

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PERFORMANCE INDICATOR DOCUMENTATION

Program: Community Development Grant Program

Activity: Office of Community Development

Objective: The Office of Community Development will provide resources to strengthen community economic development through the creation and/or retention of jobs for new and existing businesses.

Indicator Name: Funds requested for economic development projects

Indicator LaPAS PI Code: 12406

1. Type and Level:

This performance indicator is a general input indicator.

2. Rationale, Relevance, Reliability:

This indicator justifies the need for the program.

3. Use:

The performance indicator is used in future management decisions regarding funding needs.

4. Clarity:

The indicator clearly identifies what is being measured.

5. Data Source, Collection and Reporting:

The source of data for the performance indicator is internal database. The data is reported when grants close out on both internal and HUD databases.

6. Calculation Methodology:

The information is entered on and counted by the database when applications are received.

7. Scope:

This indicator is aggregated but can be disaggregated.

8. Caveats:

The number depends on the total dollar allocation by HUD/federal government.

9. Accuracy, Maintenance, Support:

The information is entered and calculated in the internal database.

10. Responsible Persons:

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PERFORMANCE INDICATOR DOCUMENTATION

Program: Community Development Grant Program

Activity: Office of Community Development

Objective: The Office of Community Development will provide resources to strengthen community economic development through the creation and/or retention of jobs for new and existing businesses.

Indicator Name: Funds awarded for economic development projects

Indicator LaPAS PI Code: 12420

1. Type and Level:

This performance indicator is a general outcome indicator.

2. Rationale, Relevance, Reliability:

This indicator shows the results of funds disbursement.

3. Use:

The performance indicator is required by HUD.

4. Clarity:

The indicator clearly identifies what is being measured.

5. Data Source, Collection and Reporting:

The source of data for the performance indicator is internal database. The data is reported when grants close out on both internal and HUD databases.

6. Calculation Methodology:

The information is entered on and counted by the database when applications are received.

7. Scope:

This indicator is aggregated but can be disaggregated.

8. Caveats:

The number depends on the total dollar allocation by HUD/federal government.

9. Accuracy, Maintenance, Support:

The information is entered and calculated in the internal database.

10. Responsible Persons:

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PERFORMANCE INDICATOR DOCUMENTATION

Program: Community Development Grant Program

Activity: Office of Community Development

Objective: The Office of Community Development will provide resources to strengthen community economic development through the creation and/or retention of jobs for new and existing businesses.

Indicator Name: Number of regional workshops conducted

Indicator LaPAS PI Code: N/A

1. Type and Level:

This performance indicator is a general output indicator.

2. Rationale, Relevance, Reliability:

This purpose is to increase awareness of economic development opportunities within the Office of Community Development.

3. Use:

The performance indicator will be used for management purposes.

4. Clarity:

The indicator clearly identifies what is being measured.

5. Data Source, Collection and Reporting:

The source of data for the performance indicator is an internal log identifying time, place and subject of workshops.

6. Calculation Methodology:

This information is entered into a log and counted.

7. Scope:

This indicator is aggregated but can be disaggregated.

8. Caveats:

The Office of Community Development has one quarterly workshop as a goal that will be held in conjunction with the technical assistance workshop.

9. Accuracy, Maintenance, Support:

The information is maintained on internal logs.

10. Responsible Persons:

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PERFORMANCE INDICATOR DOCUMENTATION

Program: Community Development Grant Program

Activity: Office of Community Development

Objective: The Office of Community Development will provide funds to communities to eliminate or prevent slum and blighted structures.

Indicator Name: Funds awarded for clearance projects

Indicator LaPAS PI Code: New

11. Type and Level:

This performance indicator is a general outcome indicator.

12. Rationale, Relevance, Reliability:

This indicator shows the results of funds disbursement.

13. Use:

The performance indicator is required by HUD.

14. Clarity:

The indicator clearly identifies what is being measured.

15. Data Source, Collection and Reporting:

The source of data for the performance indicator is internal database. The data is reported when grants close out on both internal and HUD databases.

16. Calculation Methodology:

The information is entered on and counted by the database when applications are received.

17. Scope:

This indicator is aggregated but can be disaggregated.

18. Caveats:

The number depends on the total dollar allocation by HUD/federal government.

19. Accuracy, Maintenance, Support:

The information is entered and calculated in the internal database.

20. Responsible Persons:

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PERFORMANCE INDICATOR DOCUMENTATION

Program: Community Development Grant Program

Activity: Office of Community Development

Objective: The Office of Community Development will provide funding to communities to complete any eligible CDBG activity that meets a CDBG national objective in an effort to have measurable impact on their community.

Indicator Name: Funds awarded for Make a Difference projects

Indicator LaPAS PI Code: New

21. Type and Level:

This performance indicator is a general outcome indicator.

22. Rationale, Relevance, Reliability:

This indicator shows the results of funds disbursement.

23. Use:

The performance indicator is required by HUD.

24. Clarity:

The indicator clearly identifies what is being measured.

25. Data Source, Collection and Reporting:

The source of data for the performance indicator is internal database. The data is reported when grants close out on both internal and HUD databases.

26. Calculation Methodology:

The information is entered on and counted by the database when applications are received.

27. Scope:

This indicator is aggregated but can be disaggregated.

28. Caveats:

The number depends on the total dollar allocation by HUD/federal government.

29. Accuracy, Maintenance, Support:

The information is entered and calculated in the internal database.

30. Responsible Persons:

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PROGRAM ACTIVITY: OCD – LOCAL GOVERNMENT ASSISTANCE PROGRAM (LGAP) and COMMUNITY WATER ENRICHMENT FUND (CWEF)

PROGRAM ACTIVITY GOAL:

- i. The Office of Community Development will provide overall administration, planning, monitoring, and technical assistance to grantees of LGAP and CWEF programs to ensure funds are spent within the criteria established by the Division of Administration.

PROGRAM ACTIVITY OBJECTIVE IV.4: Through the Local Government Assistance Program and the Community Water Enrichment Fund, the Office of Community Development will financially assist local governments in providing needed priorities by administering the LGAP and CWEF programs in an effective manner.

STRATEGY IV.4.a: Receive annual funding by Louisiana Legislature.

STRATEGY IV.4.b: Prepare application document and accept applications.

STRATEGY IV.4.c: Rate and rank applications according to program criteria.

STRATEGY IV.4.d: Fund grants according to eligible project/grantee list and legislative approvals, and implement projects with local government grantees.

STRATEGY IV.4.e: Monitor and close out grants in accordance with program criteria.

PROGRAM ACTIVITY PERFORMANCE INDICATORS:

1. Efficiency: Readiness of funding recommendations for legislative review at time of funds availability
2. Output: Process all applications within four months of receipt

3. Efficiency: Average number of OCD days for payment processing

4. Outcome: Percentage of available LGAP and CWEF funding awarded within twelve months from beginning of fiscal year

PERFORMANCE INDICATOR DOCUMENTATION

Program: Community Development Grant Program

Activity: Office of Community Development

Objective: Through the Local Government Assistance Program and the Community Water Enrichment Fund, the Office of Community Development will financially assist local governments in providing needed priorities by administering the LGAP and CWEF programs in an effective manner.

Indicator Name: Readiness of funding recommendations for legislative review at time of funds availability

Indicator LaPAS PI Code: N/A

1. Type and Level:

This performance indicator is a supporting efficiency indicator.

2. Rationale, Relevance, Reliability:

This indicator shows productivity.

3. Use:

The performance indicator is used by internal management.

4. Clarity:

The indicator clearly identifies what is being measured.

5. Data Source, Collection and Reporting:

The source of data for the performance indicator is the LGAP/CWEF portal and the reporting will be continuous.

6. Calculation Methodology:

The information comes from a LGAP/CWEF portal report.

7. Scope:

This indicator is aggregated but can be disaggregated.

8. Caveats:

This is also affected by delays from local governments submitting required documentation, however strict deadlines will be issued.

9. Accuracy, Maintenance, Support:

OTS created a new portal for LGAP and CWEF where applicants complete applications for both programs. OCD staff reviews the application in the portal and indicates when the review is complete and needs legislative concurrence

10. Responsible Persons:

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PERFORMANCE INDICATOR DOCUMENTATION

Program: Community Development Grant Program

Activity: Office of Community Development

Objective: Through the Local Government Assistance Program and the Community Water Enrichment Fund, the Office of Community Development will financially assist local governments in providing needed priorities by administering the LGAP and CWEF programs in an effective manner.

Indicator Name: Process all applications within four months of receipt

Indicator LaPAS PI Code: N/A

1. Type and Level:

This performance indicator is a supporting efficiency indicator.

2. Rationale, Relevance, Reliability:

This indicator shows productivity.

3. Use:

The performance indicator is used by internal management.

4. Clarity:

The indicator clearly identifies what is being measured.

5. Data Source, Collection and Reporting:

The source of data for the performance indicator is internal logs and the reporting will be continuous.

6. Calculation Methodology:

The information comes from a count on the internal data logs.

7. Scope:

This indicator is aggregated but can be disaggregated.

8. Caveats:

This is also affected by delays from local governments submitting required documentation, however strict deadlines will be enforced.

9. Accuracy, Maintenance, Support:

OTS created a new portal for LGAP and CWEF where applicants complete applications for both programs. OCD staff reviews the application in the portal and indicates when the review is complete and needs legislative concurrence.

10. Responsible Persons:

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PERFORMANCE INDICATOR DOCUMENTATION

Program: Community Development Grant Program

Activity: Office of Community Development

Objective: Through the Local Government Assistance Program and the Community Water Enrichment Fund, the Office of Community Development will financially assist local governments in providing needed priorities by administering the LGAP and CWEF programs in an effective manner.

Indicator Name: Average number of OCD days for payment processing

Indicator LaPAS PI Code: N/A

1. Type and Level:

This performance indicator is a key efficiency indicator.

2. Rationale, Relevance, Reliability:

This indicator measures productivity.

3. Use:

The performance indicator is used by internal management.

4. Clarity:

The indicator clearly identifies what is being measured.

5. Data Source, Collection and Reporting:

The source of data for the performance indicator is internal logs and is calculated monthly.

6. Calculation Methodology:

A standard calculation of the total number of processing days is divided by the number of payments processed.

7. Scope:

This indicator is aggregated.

8. Caveats:

The target goal is 3 days or less per payment. Processing can be delayed by missing documentation.

9. Accuracy, Maintenance, Support:

The information is maintained on internal logs.

10. Responsible Persons:

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PERFORMANCE INDICATOR DOCUMENTATION

Program: Community Development Grant Program

Activity: Office of Community Development

Objective: Through the Local Government Assistance Program and the Community Water Enrichment Fund, the Office of Community Development will financially assist local governments in providing needed priorities by administering the LGAP and CWEF programs in an effective manner.

Indicator Name: Percentage of available LGAP and CWEF funding awarded within twelve months from beginning of fiscal year

Indicator LaPAS PI Code: N/A

1. Type and Level:

This performance indicator is a key outcome indicator.

2. Rationale, Relevance, Reliability:

This indicator provides for measuring annual funding.

3. Use:

The performance indicator is used by internal management.

4. Clarity:

The indicator clearly identifies what is being measured.

5. Data Source, Collection and Reporting:

The source of data for the performance indicator is internal logs and the reporting will be continuous.

6. Calculation Methodology:

The standard calculation is the total amount funded divided by the total amount available for funding.

7. Scope:

This indicator is aggregated.

8. Caveats:

The amounts awarded are dependent upon appropriations by the legislature. Local governments are only allowed two open years at one time and cannot be on the Legislative Auditor's Non-Compliance list at the time of award. The entire parish allocation may not be requested by the local governments.

9. Accuracy, Maintenance, Support:

The information is entered onto internal logs and relies on the accuracy of the entries.

10. Responsible Persons:

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PROGRAM ACTIVITY: OFFICE OF COMMUNITY DEVELOPMENT (OCD) – PLANNING AND GRANT ADMINISTRATION OF THE RECOVERY HOUSING GRANT PROGRAM

Principal Clients: Principal clients consist of nonprofit organizations and citizens of the state of Louisiana, principally those of presumed benefit.

External Factors: External factors that could have an impact are reduced and/or delayed funding by Congress and/or State Legislature and decreased need for services by beneficiaries.

Duplication of Effort: The Office of Community Development coordinates with LDH to determine areas of greatest need. Subrecipients awarded must certify that there is no duplication of benefit and the project is also monitored throughout the duration of the program and for the five years after completion.
PROGRAM ACTIVITY GOAL:

- ii. The Office of Community Development will provide overall administration, planning, monitoring, and technical assistance to grantees of the Recovery Housing Grant Program (RHP) to ensure funds are spent within the criteria established by the U.S. Department of Housing and Urban Development (HUD).

PROGRAM ACTIVITY OBJECTIVE IV.5: The Office of Community Development will increase the number of beds available to citizens of Louisiana in need of substance abuse treatment through the Recovery Housing Program.

STRATEGY IV.5.a: Prepare Notice of Funding availability and accept letters of intent.

STRATEGY VI.5.b: Prepare application document and accept applications.

STRATEGY IV.5.c: Rate and rank applications according to the program requirements.

STRATEGY IV.5.d: Fund grants according to ranking list and implement projects with nonprofit grantees.

STRATEGY IV.5.e: Monitor and close out grants in accordance with regulations.

PROGRAM ACTIVITY PERFORMANCE INDICATORS:

1. Output: Percentage of annual RHP allocation obligated within twelve months of receipt
2. Input: Ratio of expenditures for last 12 months to last award amount
3. Input: Ratio of unexpended funds to last award amount
4. Efficiency: Average number of OCD days for payment processing
5. Outcome: Average number of findings per grantee

PROGRAM ACTIVITY OBJECTIVE IV.6: The Office of Community Development will provide resources to increase the number of beds available for substance abuse recovery programs through the Recovery Housing Grant Program.

STRATEGY IV.6.a: Assist local governments with improving existing and providing new infrastructure and connections on private properties.

STRATEGY VI.6.b: Provide technical assistance by mail-outs, posting website information, conducting workshops, participating in conferences, and by on-site and telephone assistance to nonprofit organizations during the application and grant implementation process.

PROGRAM ACTIVITY PERFORMANCE INDICATORS:

1. Input: Funds requested for RHP projects

2. Outcome: Funds awarded for RHP projects

3. Output: Number of technical assistance trainings completed quarterly

PERFORMANCE INDICATOR DOCUMENTATION

Program: Recovery Housing Grant Program

Activity: Office of Community Development

Objective: The Office of Community Development will increase the number of beds available to citizens of Louisiana in need of substance abuse treatment through the Recovery Housing Program.

Indicator Name: Average number of OCD days for payment processing

Indicator LaPAS PI Code: New

11. Type and Level:

This performance indicator is a key efficiency indicator.

12. Rationale, Relevance, Reliability:

This indicator affects the expenditure rate and measures productivity.

13. Use:

The performance indicator will be used for internal management purposes.

14. Clarity:

The indicator clearly identifies what is being measured.

15. Data Source, Collection and Reporting:

The source of data for the performance indicator is internal logs and is calculated monthly.

16. Calculation Methodology:

A standard calculation of the total number of processing days is divided by number of payments processed.

17. Scope:

This indicator is aggregated.

18. Caveats:

The target goal is 3 days or less per payment. Processing can be delayed by missing documentation or program requirements. Because these

funds can be used for purchasing property, the timing can vary depending on the closing date of the purchase.

19. Accuracy, Maintenance, Support:

The data is maintained by internal logs.

20. Responsible Persons:

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PERFORMANCE INDICATOR DOCUMENTATION

Program: Recovery Housing Grant Program

Activity: Office of Community Development

Objective: The Office of Community Development will increase the number of beds available to citizens of Louisiana in need of substance abuse treatment through the Recovery Housing Program.

Indicator Name: Average number of findings per grantee

Indicator LaPAS PI Code: New

11. Type and Level:

This performance indicator is a key outcome indicator.

12. Rationale, Relevance, Reliability:

This indicator measures success of technical assistance provided to grantees.

13. Use:

The performance indicator will be used for internal management purposes.

14. Clarity:

The indicator clearly identifies what is being measured.

15. Data Source, Collection and Reporting:

The source of data for the performance indicator is internal logs and is calculated monthly.

16. Calculation Methodology:

A standard calculation of the total number of findings made divided by the number of monitoring visits.

17. Scope:

This indicator is aggregated.

18. Caveats:

The target goal is five findings or less.

19. Accuracy, Maintenance, Support:
The data is maintained by internal logs.

20. Responsible Persons:

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PERFORMANCE INDICATOR DOCUMENTATION

Program: Recovery Housing Grant Program

Activity: Office of Community Development

Objective: The Office of Community Development will provide resources to purchase or construct units to increase the number of beds in the state of Louisiana to benefit persons recovering from substance abuse addiction through the Recovery Housing Program.

Indicator Name: Funds requested for RHP projects

Indicator LaPAS PI Code: New

11. Type and Level:

This performance indicator is a general input indicator.

12. Rationale, Relevance, Reliability:

This indicator provides a basis for funds disbursement amongst funding categories.

13. Use:

The performance indicator is used in future management decisions regarding funding needs.

14. Clarity:

The indicator clearly identifies what is being measured.

15. Data Source, Collection and Reporting:

The source of data for the performance indicator is internal database. The data is reported when grants close out on both internal and HUD databases.

16. Calculation Methodology:

The information is entered on and counted by the database when applications are received.

17. Scope:

This indicator is aggregated but can be disaggregated.

18. Caveats:

The number depends on the total dollar allocation by HUD/federal government.

19. Accuracy, Maintenance, Support:

The information is entered and calculated on the internal database.

20. Responsible Persons:

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PROGRAM ACTIVITY: Office of Community Development – Water Sector Program

PROGRAM ACTIVITY GOAL:

- ii. The Office of Community Development will provide overall administration, planning, monitoring, and technical assistance to grantees of the water sector program to ensure funds are spent within the criteria established by the Division of Administration.

PROGRAM ACTIVITY OBJECTIVE IV.7: Through the Water Sector Program, the Office of Community Development will financially assist eligible water systems.

STRATEGY IV.7.a: Receive annual funding by Louisiana Legislature.

STRATEGY IV.7.b: Prepare application portal tutorial and accept applications.

STRATEGY IV.7.c: Rate and rank applications according to program criteria.

STRATEGY IV.7.d: Fund grants according to ranking list and legislative approvals, and implement projects with eligible water and sewer systems.

STRATEGY IV.7.e: Close out grants in accordance with program criteria.

PROGRAM ACTIVITY PERFORMANCE INDICATORS:

1. Efficiency: Readiness of recommendations for funding to Commission for review within 60 days of the application portal closing.
2. Output: OCD conducts webinar to discuss guidelines and application process within 30 days of the Commission approving program guidance.

3. Efficiency: Average number of OCD days for payment processing.

PERFORMANCE INDICATOR DOCUMENTATION

Program: Water Sector Program

Activity: Office of Community Development

Objective: Through the Water Sector Program, the Office of Community Development will financially assist eligible water systems by administering the Water Sector Program in an effective manner.

Indicator Name: Readiness of ratings and recommendations for funding to Commission for review within 60 days of the application portal closing.

Indicator LaPAS PI Code: New

11. Type and Level:

This performance indicator is a supporting efficiency indicator.

12. Rationale, Relevance, Reliability:

This indicator shows productivity.

13. Use:

The performance indicator is used by internal management.

14. Clarity:

The indicator clearly identifies what is being measured.

15. Data Source, Collection and Reporting:

The source of data for the performance indicator is internal logs and the reporting will be continuous.

16. Calculation Methodology:

The information comes from the date of portal closure to the date of submission of recommendations to the WSP Commission.

17. Scope:

This indicator is aggregated but can be disaggregated.

18. Caveats:

This is also affected by delays from systems submitting required documentation, although strict deadlines will be enforced

19. Accuracy, Maintenance, Support:

OTS developed a portal for the Water Sector Phase 2 program which will be utilized for implementation for the first time in FY 25-26.

20. Responsible Persons:

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PERFORMANCE INDICATOR DOCUMENTATION

Program: Community Development Grant Program

Activity: Office of Community Development

Objective: Through the Water Sector Program, the Office of Community Development will financially assist eligible water systems by administering the Water Sector Program in an effective manner.

Indicator Name: OCD conducts webinar to discuss guidelines and application process within 30 days of the Commission approving program guidance.

Indicator LaPAS PI Code: New

11. Type and Level:

This performance indicator is a supporting efficiency indicator.

12. Rationale, Relevance, Reliability:

This indicator shows productivity.

13. Use:

The performance indicator is used by internal management.

14. Clarity:

The indicator clearly identifies what is being measured.

15. Data Source, Collection and Reporting:

The source of data for the performance indicator is internal logs and the reporting will be continuous.

16. Calculation Methodology:

The information comes from the number of days between awards and implementation webinar.

17. Scope:

This indicator is aggregated but can be disaggregated.

18. Caveats:

N/A

19. Accuracy, Maintenance, Support:

OCD will conduct and record a webinar, which will be linked to the OCD website for future viewing.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: Water Sector Program

Activity: Office of Community Development

Objective: Through the Water Sector Program, the Office of Community Development will financially assist eligible water systems by administering the Water Sector Program in an effective manner.

Indicator Name: Average number of OCD days for payment processing

Indicator LaPAS PI Code: New

11. **Type and Level:**

This performance indicator is a key efficiency indicator.

12. **Rationale, Relevance, Reliability:**

This indicator measures productivity.

13. **Use:**

The performance indicator is used by internal management.

14. **Clarity:**

The indicator clearly identifies what is being measured.

15. **Data Source, Collection and Reporting:**

The source of data for the performance indicator is internal logs and is calculated monthly.

16. **Calculation Methodology:**

A standard calculation of the total number of processing days is divided by the number of payments processed.

17. **Scope:**

This indicator is aggregated.

18. **Caveats:**

The target goal is 3 days or less per payment. Processing can be delayed by missing documentation or Vendor ID.

19. **Accuracy, Maintenance, Support:**
The information is maintained in the WSP P2 portal.

20. **Responsible Persons:**

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**DIVISION OF ADMINISTRATION
LOUISIANA OFFICE OF COMMUNITY DEVELOPMENT
DISASTER RECOVERY**

Created in 2006, the Louisiana Office of Community Development’s Disaster Recovery (LOCD-DR) administers the Community Development Block Grant – Disaster Recovery and Community Development Block Grant - Mitigation funds allocated to Louisiana by the U.S. Department of Housing and Urban Development for recovery from major disasters. CDBG-DR funds have been allocated to Louisiana after hurricanes Katrina and Rita in 2005, hurricanes Gustav and Ike in 2008, hurricane Isaac in 2012, the Great Floods of 2016, hurricanes Laura and Delta in 2020, hurricane Ida and May floods in 2021, and hurricane Francine in 2024. Additionally, OCD administers the federal resilience and mitigation funds received through the National Disaster Resilience Competition in 2016 and the CDBG-MIT funds allocated to the state in 2018 for mitigation (the Louisiana Watershed Initiative).

In total, the state has received allocations from HUD totaling approximately \$19.6 billion in CDBG-DR funds for recovery and resilience and over \$1.2 billion in CDBG-MIT funds for mitigation. LOCD-DR staff provide policy direction, management and coordination of all recovery and resilience programs that use these funds.

MISSION STATEMENT

The Louisiana Office of Community Development – Disaster Recovery leads the state’s disaster recovery and long-term resilience efforts by prioritizing the restoration and development of safe, resilient, and affordable housing. Through strategic partnerships, innovative solutions, and proven best practices we ensure housing serves as the foundation for long-term recovery while also strengthening critical infrastructure and fostering economic opportunities that support thriving and sustainable communities.

CORE VALUES

LOCD-DR embodies the following core values—both internally with colleagues and externally with subrecipients, partners and community stakeholders:

- **Integrity:** LOCD-DR will set the standard in ethics and accountability, ensuring that all applicable regulations are followed, and that all transactions related to recovery and resilience are transparent and follow appropriate accounting principles.
- **Community-Driven Recovery:** Planning, recovery and resilience will always be inclusive of citizen input and local wisdom.
- **Teamwork:** Collaboration and coordination with private, non-profit and governmental agencies at all levels will be the hallmark of recovery and resilience efforts.
- **Urgency & Efficiency:** Seeking to both expedite recovery for citizens and to leverage allocated funds and resources, LOCD-DR will pursue opportunities to recover and rebuild in ways that recognize efficiencies, capitalize on existing resources and competitive advantages, and support an agenda of rebuilding safer, stronger and smarter.
- **Adaptability:** Recognizing that each disaster brings its own set of challenges and needs, LOCD-DR strives to continuously review and modify its operations in order to be solution-oriented and meet the needs of disaster victims throughout the recovery lifecycle.

- **Knowledge Sharing:** As the agency responsible for the most extensive rebuilding effort in American history, we are committed to sharing our recovery knowledge and experiences, lessons-learned, and delivery methods with other areas of the country impacted by disasters.

GOALS

- I. **Administration:** To ensure that all resources for disaster recovery and resilience programs are effectively and efficiently administered and communicated in compliance with government regulations.
- II. **Housing:** To restore and enhance available housing stock by utilizing building practices that promote resiliency and mitigate against future losses.
- III. **Infrastructure:** To rebuild disaster-impacted communities in accordance with local priorities with a focus on resilient building methods and changing development patterns.
- IV. **Economic Development:** To support sustainable economic revitalization, business development and job opportunities in communities impacted by disasters.
- V. **Mitigation and Planning:** To develop state and local planning capacity to ensure that rebuilding takes place in a manner that is coordinated, responsive to community ideas and concerns, sustainable, and limits future damages from disasters.

INTERNAL AND EXTERNAL CONSIDERATIONS

Internal: LOCD-DR programs are primarily funded through Community Development Block Grant Disaster Recovery and Mitigation dollars and are subject to HUD funding guidelines, including limitations of disaster- and mitigation-related eligible activities and a formal action plan amendment process. Additionally, the LOCD-DR falls under the Division of Administration in the Executive Branch and is subject to any guidance or provisions as may be required by the Commissioner of Administration and/or the Governor.

External Clients: The primary customers of disaster recovery programs are the individuals, households, businesses, communities, non-profit organizations and local governments directly impacted by the disasters in Louisiana which receive funding from HUD. As such, LOCD-DR is responsive to these customers as well as their local elected officials. In particular, LOCD-DR has specific reporting requirements to both the Louisiana Joint Legislative Committee on the Budget (JLCB) and the Select Committee on Hurricane Recovery. LOCD-DR also works in close coordination with other entities, governmental and non-governmental, providing recovery assistance and community development activities in disaster-impacted areas. Additionally, LOCD-DR must conduct all activities in accordance with CDBG-DR and MIT rules and regulations and have all Action Plans and Action Plan Amendments reviewed and approved by HUD. LOCD-DR is also subject to HUD monitoring visits and audits from HUD's Office of Inspector General.

External Factors: Disaster recovery programs are affected by current economic circumstances, particularly those programs that rely on the leveraging of credit. Business recipients, non-profit organizations, households and developers are particularly vulnerable to these external economic pressures. LOCD-DR and the programs under its purview are also subject to changes in legislation, administrative rules and federal mandates. Finally, there is always the threat of additional disasters. These threats may affect projects still in progress and also make it imperative that existing projects incorporate mitigation considerations.

Duplication of Effort: Federal law through the Stafford Act requires LOCD-DR to coordinate activities with other federal, state and local government agencies, as well as with non-profit entities that have disaster recovery and mitigation

programs and initiatives as part of their mission. This coordination occurs at the program level to both avoid duplication of effort and to leverage other sources of recovery funding.

Evaluation

As mandated, LOCD-DR submits Quarterly Performance Reviews to HUD through the Disaster Recovery Grant Reporting System (DRGR) to track expenditures and performance down to the individual activity level. These reports, designated by grant and disaster, are available online at <https://locddr.la.gov/reports>.

Internally, LOCD-DR conducts, at a minimum, a quarterly review of all programs, with a focus on current performance and spending trends, as well as reviewing administrative costs, in order to ensure progress.

GOAL I: Ensure that all resources for disaster recovery and resilience programs are effectively and efficiently administered and communicated in compliance with government regulations.

Program Activity: ADMINISTRATION

The LOCD-DR creates, implements and monitors Louisiana’s recovery and mitigation programs funded by CDBG-DR and CDBG-MIT. Administration of these programs requires a leadership that is creative, responsive and effective in establishing performance expectations, maintaining accountability and providing clear and concise communications throughout the organization.

Primary administrative responsibilities include financial management, contracts management, state and federal reporting, human resources and compliance and monitoring. Additionally, a considerable amount of technical assistance is provided to state and local partners to ensure all recovery investments are consistent with federal guidelines. In accordance with federal regulations, these functions must be completed with funds less than or equal to 5% of the disaster allocation.

OBJECTIVE I.1: To maintain reasonable administrative costs at less than 4.5% per year for all programs combined, thereby exceeding the federal standard.

- Strategy I.1.1: Review administrative costs quarterly for cost effectiveness.
- Strategy I.1.2: Maintain appropriate staffing levels by reducing or realigning staff with current priorities.
- Strategy I.1.3: Implement enhanced management systems in order to more effectively process draw requests, maintain budgets and track programs and activities.

PERFORMANCE INDICATOR:

- Percentage of CDBG Disaster Recovery and Mitigation allocations spent on administration (measured over the fiscal year for all programs combined)

OBJECTIVE I.2: To ensure all draw requests are submitted to the Office of Finance and Support Services within twenty business days of receipt at LOCD-DR.

- Strategy I.2.1: Hire knowledgeable and experienced staff in order to promote efficiency in the processing of draw requests.
- Strategy I.2.2: Increase efficiency by providing training when changes to programmatic documents affect the review and processing of a draw request.
- Strategy I.2.3: Maintain communication between program and finance staff when documentation may be streamlined.

PERFORMANCE INDICATOR:

- Percentage of draw requests sent to the Office of Finance and Support Services within twenty business days of receipt.

OBJECTIVE I.3: To maintain a robust Monitoring Program for subrecipients and recipients through comprehensive monitoring visits and providing technical assistance.

- Strategy I.3.1: Increasing LOCD-DR's staff knowledge of CDBG rules and regulations through increased training.
- Strategy I.3.2: Maintain current level of responsiveness through outreach efforts and continuing subrecipient education.
- Strategy I.3.3: Provide guidance and technical assistance to subrecipients and perform regular monitoring based on an approved monitoring plan and identified risks.
- Strategy I.3.4: Implement a monitoring regime which evaluates risk factors across subrecipients and provides for enhanced monitoring for subrecipients identified as at a higher risk.

Strategy I.3.5: Enhance communications with subrecipients and all related stakeholders to ensure information about programs, requirements, deadlines and progress are readily available.

PERFORMANCE INDICATOR:

- Number of monitoring reviews performed over the trailing three months, number of findings and number of findings resolved.

GOAL II: Restore and enhance available housing stock by utilizing building practices that promote resilience and mitigate against future losses.

Program Activity: HOUSING

The Restore Louisiana Homeowner Assistance Program is dedicated to providing recovery assistance to homeowners affected by the disasters from 2016, 2020, 2021, and 2024. Homeowners who qualify and are eligible for assistance may choose one of three solutions based on their progress in the rebuilding process and their capacity to complete the remaining work: Solution 1 (program-managed construction), Solution 2 (homeowner-managed construction), and/or Solution 3 (reimbursement for work already completed). In addition, Restore LA offers Solution 4 for homeowners situated in a floodway, via a Buyout and Resilient Housing Incentive Program.

Additional funding has been allocated to different affordable homeowner and renter programs across the different grants. Some of these programs are managed directly by LOCD-DR and others are managed through a subrecipient agreement with the Louisiana Housing Corporation.

OBJECTIVE II.1: Closeout the Restore LA Homeowner Assistance Program from the 2016 floods with HUD.

Strategy II.1.1: Follow LOCD-DR grant recapture policies and processes. Complete all required closeout documents and route for closing in DRGR.

PERFORMANCE INDICATOR:

- Number of RestoreLA 2016 Homeowner Program individual grants completed and closed.

OBJECTIVE II.2: To complete 100% of all Restore Homeowner projects funded through the 2020/2021 disasters by 12/31/2026.

Strategy II.2.1: Enforce performance deadlines for contractors performing construction activities on Solution 1 properties.

Strategy II.2.2: Establish deadlines for Solution 2 subrecipients while providing technical assistance to ensure completion of rehabilitated or reconstructed homes.

PERFORMANCE INDICATOR:

- Number of RestoreLA 2020/2021 Homeowner Program individual grants completed and closed.

OBJECTIVE II.3: To complete 100% of all Restore Homeowner projects funded through the 2024 disaster allocation by 12/31/2028.

Strategy II.3.1: Enforce performance deadlines for contractors performing construction activities on Solution 1 properties.

Strategy II.3.2: Establish deadlines for Solution 2 subrecipients while providing technical assistance to ensure completion of rehabilitated or reconstructed homes.

PERFORMANCE INDICATOR:

- Number of Restore LA 2024 Homeowner Program individual grants completed and closed.

OBJECTIVE II.4: To increase affordable and resilient housing throughout the state.

Strategy II.4.1: Continue programs that leverage Low Income Housing Tax Credits (LIHTC) and other funding available sources in order to encourage affordable rental programs.

Strategy II.4.2: Continue to research and pilot programs focused on different housing strategies and construction methods in order to increase available housing in a manner which reflects future risk while maximizing funding and minimizing development costs.

PERFORMANCE INDICATOR:

- Percentage of CDBG-DR Housing dollars expended over dollars projected and number of housing units created

GOAL III: To rebuild and protect disaster-impacted communities in accordance with local priorities through the expeditious and efficient implementation of all infrastructure programs.

Program Activity: INFRASTRUCTURE

INFRASTRUCTURE:

When funding is available, the State invests in critical infrastructure to support disaster-impacted communities.

OBJECTIVE III.1: To complete the investment in infrastructure projects from the Great Floods of 2016 by December 31, 2026 and the 2020/2021 disasters by 12/31/2030.

Strategy III.1.1: Review and approve applications and application amendments in a timely manner.

Strategy III.1.2: Monitor project status and provide technical assistance to subrecipients during the grant process, both directly and through consultants, to ensure the project is meeting pre-established milestones.

Strategy III.1.3: Perform infrastructure desk review of draw requests and notify subrecipient of any issues within 48 hours of receipt of draw request.

Strategy III.1.4: Set and enforce performance deadlines for subrecipients relative to their infrastructure program grants.

PERFORMANCE INDICATOR:

- Percentage of dollars expended over projected dollars along with number of completed projects.

GOAL IV: To support sustainable economic revitalization, business development and job opportunities in communities impacted by disasters.

Program Activity: ECONOMIC DEVELOPMENT

LOCD-DR has designed several programs to encourage economic revitalization in hurricane-impacted areas and help impacted businesses recover from the storms.

OBJECTIVE IV.1: To complete the investment in economic development activities from the Great Floods of 2016 by December 31, 2025 and the 2020/2021 disasters by December 31, 2030.

Strategy IV.1.1: Review and approve applications and application amendments in a timely manner.

Strategy IV.1.2: Invest in small business by providing technical assistance, small business loans and workforce training through existing and future flood programs.

Strategy IV.1.3: Monitor project status and provide technical assistance to subrecipients during the grant process, both directly and through consultants, to ensure the project is moving forward to completion.

PERFORMANCE INDICATOR:

- Percentage of dollars expended over projected dollars, along with number of completed grants

GOAL V: To develop state and local planning capacity to ensure that rebuilding takes place in a manner that is coordinated, responsive to community ideas and concerns, sustainable and limits future damages from disasters..

Program Activity: Mitigation and Planning

OBJECTIVE V.1: To develop state and local planning capacity to ensure that rebuilding takes place in a manner that is coordinated, responsive to community ideas and concerns, sustainable and limits future damages from disasters.

Strategy V.1.1: Facilitate watershed-based floodplain management by working with the watershed-bounded Regional Steering Committees across the state.

Strategy V.1.2: Continue to work with state agency partners to develop policy for appropriate content, development and implementation for a statewide floodplain management plan and watershed-based floodplain management plans.

Strategy V.1.3: Through engagement and research, develop an understanding of local and regional policy objectives, as well as best practices and case studies, to guide standard setting across the state and regions.

PERFORMANCE INDICATOR:

- Number of regional watershed plans completed and adopted along with continued development of data, modeling and policy tools at the state level.

OBJECTIVE V.2: To provide a solid foundation of science and engineering that can be used to address flood issues across the state, and ensure that excellent quality and consistency across platforms is achieved.

Strategy V.2.1: Identify relevant issues and pertinent questions around data and information collection, management, and processing.

Strategy V.2.2: Continue to manage the budget for watershed monitoring, mapping and modeling by coordinating with other state agencies.

Strategy V.2.3: Encourage the use of detailed, accurate, upgradeable, accessible and consistent mapping and modeling that allows the state, regional and local governments and private industry to formulate immediate, interim and long term decisions related to development, structural and non-structural infrastructure projects.

PERFORMANCE INDICATOR:

- Completion of LWI Hydraulic and Hydrologic (H&H) modeling and mapping tool, train all potential users, and coordinate use case scenarios within regions and among state agencies.

OBJECTIVE V.3: To complete the investment in watershed based mitigation projects by December 31, 2031.

Strategy V.3.1: Review and approve applications and application amendments in a timely manner.

Strategy V.3.2: Monitor project status and provide technical assistance to subrecipients during the grant process, both directly and through consultants, to ensure the project is meeting pre-established milestones.

Strategy V.3.3: Perform desk review of draw requests and notify subrecipient of any issues within 5 business days of receipt of draw request.

Strategy V.3.4: Set and enforce performance deadlines for subrecipients relative to their mitigation program grants.

PERFORMANCE INDICATOR:

- Percentage of dollars expended over projected dollars along with completed projects.

PERFORMANCE INDICATOR DOCUMENTATION

Program: Community Development Grant Program

Activity: Disaster Recovery - Administration

Objective: I.1 – To maintain reasonable administrative costs at less than 4.5% per year for all programs combined, thereby exceeding the federal standard.

Indicator Name: Percentage of CDBG Disaster and Mitigation allocations spent on administration (measured over the fiscal year for all programs)

Indicator LaPAS PI Code: 24283

1. **Type and Level:** Efficiency

2. **Rationale, Relevance, Reliability:** Efficiency measure is required by HUD to ensure dollars go to recovery activity.

3. **Use:** Required by HUD

4. **Clarity:** Yes

5. **Data Source, Collection and Reporting:** LaGov

6. **Calculation Methodology:** $(SAAD + GIAD + TADM + NADM + FDAD + MTAD + LDAD + IDAD \text{ expended}) / (\text{Total expended})$

7. **Scope:** Aggregated

8. **Caveats:** N/A

9. **Accuracy, Maintenance, Support:** Data is pulled from state's financial system. LOCD-DR performs reconciliations of expenditures to ensure its accuracy.

10. **Responsible Person:** Edwin Legnon, Director of Finance and Reporting, 225-219-9727, Eddie.Legnon@la.gov

PERFORMANCE INDICATOR DOCUMENTATION

Program: Community Development Grant Program

Activity: Disaster Recovery - Administration

Objective: I.2 – To ensure all draw requests are submitted to the Office of Finance and Support Services within twenty business days of receipt at LOCD-DR.

Indicator Name: Percentage of draw requests sent the Office of Finance and Support Services within twenty business days of receipt

Indicator LaPAS PI Code: N/A

1. **Type and Level:** Efficiency

2. **Rationale, Relevance, Reliability:** To measure and ensure timely reimbursements to subrecipients for disaster recovery and mitigation projects.

3. **Use:** Continuous review of internal processes and procedures.

4. **Clarity:** Yes

5. **Data Source, Collection and Reporting:** Draw Request Tracker within Sharepoint, GIOS and IGX

6. **Calculation Methodology:** Calculate NETWORKDAYS between date of final submission to DRU and date of submission to OFSS on all draws sent to OFSS within a given month and determine percentage that fall within 20 or less days

7. **Scope:** Aggregated

8. **Caveats:** N/A

9. **Accuracy, Maintenance, Support:** CDBG-DR accounting and performance systems have and continue to be subject to multiple audits by the Louisiana Legislative Auditor and HUD OIG. In addition, LOCD-DR is monitored by HUD at least annually, to ensure compliance with regulations and provide technical assistance.

10. **Responsible Person:** Edwin Legnon, Director of Finance and Reporting,
225-219-9727, Eddie.Legnon@la.gov

PERFORMANCE INDICATOR DOCUMENTATION

Program: Community Development Grant Program

Activity: Disaster Recovery - Administration

Objective: I.3 – To maintain a robust Monitoring Program for subrecipients and recipients through comprehensive monitoring visits and providing technical assistance.

Indicator Name: Number of monitoring reviews performed over the trailing three months, number of findings and number of findings resolved.

Indicator LaPAS PI Code: N/A

1. **Type and Level:** Outcome
2. **Rationale, Relevance, Reliability:** To identify and track compliance with regulations by subrecipients.
3. **Use:** To determine if technical assistance by staff is effective in providing subrecipient compliance and to identify patterns where non-compliance is occurring.
4. **Clarity:** Yes
5. **Data Source, Collection and Reporting:** Tracking monitoring reviews by the compliance and monitoring staff
6. **Calculation Methodology:** Calculating the number monitoring reviews that have been performed over the three prior months
7. **Scope:** Aggregated - can be disaggregated by program and sub-recipients
8. **Caveats:** N/A
9. **Accuracy, Maintenance, Support:** CDBG-DR accounting and performance systems have and continue to be subject to multiple audits by the Louisiana Legislative Auditor and HUD OIG. In addition, LOCD-DR is monitored by HUD at least annually to ensure compliance with regulations and provide technical assistance.
10. **Responsible Person:** Tina Galloway, Director of MECCA, 225-342-1731, Tina.Galloway@la.gov

PERFORMANCE INDICATOR DOCUMENTATION

Program: Community Development Grant Program

Activity: Disaster Recovery - Housing

Objective: II.1 - Closeout the RestoreLA Homeowner Assistance Program from the 2016 floods with HUD.

Indicator Name: Number of RestoreLA 2016 Homeowner Program individual grants completed and closed.

Indicator LaPAS PI Code: N/A

1. **Type and Level:** Outcome
2. **Rationale, Relevance, Reliability:** To determine how close the program is towards being closed out.
3. **Use:** By watching growth of grants brought to final disposition compared to total population of grants.
4. **Clarity:** Yes
5. **Data Source, Collection and Reporting:** eGrants and other systems used by the RestoreLA program
6. **Calculation Methodology:** Count based upon parameters
7. **Scope:** Aggregated
8. **Caveats:** N/A
9. **Accuracy, Maintenance, Support:** CDBG-DR accounting and performance systems have and continue to be subject to multiple audits by the Louisiana Legislative Auditor and HUD OIG. In addition, LOCD-DR is monitored by HUD at least annually to ensure compliance with regulations and provide technical assistance
10. **Responsible Person:** Kelvin Hill, Housing Director, 225-219-9744, Kelvin.Hill@la.gov

PERFORMANCE INDICATOR DOCUMENTATION

Program: Community Development Grant Program

Activity: Disaster Recovery - Housing

Objective: II.2 - To complete 100% of all Restore Homeowner projects funded through the 2020/2021 disasters by 12/31/2026.

Indicator Name: Number of RestoreLA 2020/2021 Homeowner program individual grants completed and closed.

Indicator LaPAS PI Code: N/A

1. **Type and Level:** Outcome
2. **Rationale, Relevance, Reliability:** To determine how close the program is towards being closed out.
3. **Use:** By watching growth of grants brought to final disposition compared to total population of grants
4. **Clarity:** Yes
5. **Data Source, Collection and Reporting:** eGrants and other systems used by the Restore Homeowner Program
6. **Calculation Methodology:** Count based upon parameters
7. **Scope:** Aggregated
8. **Caveats:** N/A
9. **Accuracy, Maintenance, Support:** CDBG-DR accounting and performance systems have and continue to be subject to multiple audits by the Louisiana Legislative Auditor and HUD OIG. In addition, LOCD-DR is monitored by HUD at least annually to ensure compliance with regulations and provide technical assistance.
10. **Responsible Person:** Kelvin Hill, Housing Director, 225-219-9744, Kelvin.Hill@la.gov

PERFORMANCE INDICATOR DOCUMENTATION

Program: Community Development Grant Program

Activity: Disaster Recovery - Housing

Objective: II.3 – To complete 100% of all Restore Homeowner projects funded through the 2024 disaster allocation by 12/31/2028.

Indicator Name: Number of RestoreLA 2024 Homeowner Program individual grants completed and closed.

Indicator LaPAS PI Code: New

1. **Type and Level:** Outcome
2. **Rationale, Relevance, Reliability:** To determine how close the program is towards being closed out.
3. **Use:** By watching growth of grants brought to final disposition compared to total population of grants
4. **Clarity:** Yes
5. **Data Source, Collection and Reporting:** eGrants and other systems used by the Restore Homeowner Program
6. **Calculation Methodology:** Count based upon parameters
7. **Scope:** Aggregated
8. **Caveats:** N/A
9. **Accuracy, Maintenance, Support:** CDBG-DR accounting and performance systems have and continue to be subject to multiple audits by the Louisiana Legislative Auditor and HUD OIG. In addition, LOCD-DR is monitored by HUD at least annually to ensure compliance with regulations and provide technical assistance.
10. **Responsible Person:** Kelvin Hill, Housing Director, 225-219-9744, Kelvin.Hill@la.gov

PERFORMANCE INDICATOR DOCUMENTATION

Program: Community Development Grant Program

Activity: Disaster Recovery - Housing

Objective: II.4 – To increase affordable housing throughout the state.

Indicator Name: Percentage of CDBG-DR Housing dollars expended over dollars projected and number of housing units created.

Indicator LaPAS PI Code: New

1. **Type and Level:** Outcome
2. **Rationale, Relevance, Reliability:** To determine if budgeted expenditures are being expended as expected.
3. **Use:** By seeing if flow of funds is consistent with expectations.
4. **Clarity:** Yes
5. **Data Source, Collection and Reporting:** DRGR and LaGov
6. **Calculation Methodology:** Total expenditures reported in LaGov and reconciled to DRGR compared to the total expenditures budgeted.
7. **Scope:** Aggregated
8. **Caveats:** N/A
9. **Accuracy, Maintenance, Support:** DR-CDBG accounting and performance systems have and continue to be subject to multiple audits by the Louisiana Legislative Auditor and HUD OIG. In addition, LOCD-DR is monitored by HUD at least annually to ensure compliance with regulations and provide technical assistance.
10. **Responsible Person:** Edwin Legon, Director of Finance and Reporting, 225-219-9727, Eddie.Legon@la.gov

PERFORMANCE INDICATOR DOCUMENTATION

Program: Community Development Grant Program

Activity: Disaster Recovery - Infrastructure

Objective: III.1 – To complete the investment in infrastructure projects from the Great Floods of 2016 by December 31, 2026 and the 2020/2021 disasters by 12/31/2030.

Indicator Name: Percentage of dollars expended over projected dollars along with number of completed projects.

Indicator LaPAS PI Code: N/A

1. **Type and Level:** Outcome
2. **Rationale, Relevance, Reliability:** To determine amount of funding distributed during a given fiscal year.
3. **Use:** By seeing if flow of funds is consistent with expectations
4. **Clarity:** Yes
5. **Data Source, Collection and Reporting:** DRGR and LaGov
6. **Calculation Methodology:** Total expenditures reported in LaGov and reconciled to DRGR compared to the total expenditures.
7. **Scope:** Aggregated
8. **Caveats:** N/A
9. **Accuracy, Maintenance, Support:** DR-CDBG accounting and performance systems have and continue to be subject to multiple audits by the Louisiana Legislative Auditor and HUD OIG. In addition, LOCD-DR is monitored by HUD at least annually to ensure compliance with regulations and provide technical assistance.
10. **Responsible Person:** Micaela Coner, Director of Economic Development & Infrastructure, 225-219-7709, Micaela.Coner2@la.gov

PERFORMANCE INDICATOR DOCUMENTATION

Program: Community Development Grant Program

Activity: Disaster Recovery– Economic Development

Objective: IV.1 – To complete the investment in economic development activities from the Great Floods of 2016 by December 31, 2025 and the 2020/2021 disasters by December 31, 2030.

Indicator Name: Percentage of dollars expended over projected dollars along with number of completed projects.

Indicator LaPAS PI Code: New

1. **Type and Level:** Outcome
2. **Rationale, Relevance, Reliability:** To determine amount of funding distributed during a given fiscal year.
3. **Use:** By seeing if flow of funds is consistent with expectations.
4. **Clarity:** Yes
5. **Data Source, Collection and Reporting:** DRGR and LaGov
6. **Calculation Methodology:** Total expenditures reported in LaGov and reconciled to DRGR compared to the total expenditures budgeted.
7. **Scope:** Aggregated
8. **Caveats:** N/A
9. **Accuracy, Maintenance, Support:** DR-CDBG accounting and performance systems have and continue to be subject to multiple audits by the Louisiana Legislative Auditor and HUD OIG. In addition, LOCD-DR is monitored by HUD at least annually to ensure compliance with regulations and provide technical assistance.
10. **Responsible Person:** Micaela Coner, Director of Economic Development & Infrastructure, 225-219-7709, Micaela.Coner2@la.gov

PERFORMANCE INDICATOR DOCUMENTATION

Program: Community Development Grant Program

Activity: Disaster Recovery – Mitigation and Planning

Objective: V.1 – To develop state and local planning capacity to ensure that rebuilding takes place in a manner that is coordinated, responsive to community ideas and concerns, sustainable and limits future damages from disasters.

Indicator Name: Number of regional watershed plans completed and adopted along with continued development of data, modeling and policy tools at the state level.

Indicator LaPAS PI Code: N/A

1. **Type and Level:** Output
2. **Rationale, Relevance, Reliability:** This shows collaboration among local, state agencies and stakeholders.
3. **Use:** To ensure relevant information and informed decisions are planned throughout the state as well as to collect additional data necessary for the level of modeling necessary for making land-use and predictive outcome decisions.
4. **Clarity:** Yes
5. **Data Source, Collection and Reporting:** Tracking logs by LOCD-DR staff
6. **Calculation Methodology:** Counting the number of meetings held each quarter
7. **Scope:** Aggregated
8. **Caveats:** N/A
9. **Accuracy, Maintenance, Support:** CDBG-DR accounting and performance systems have and continue to be subject to multiple audits by the Louisiana Legislative Auditor and HUD OIG. In addition, LOCD-DR is monitored by HUD at least annually to ensure compliance with regulations and provide technical assistance.

10. Responsible Person: Micaela Coner, Director of Economic Development & Infrastructure, 225-219-7709, Micaela.Coner2@la.gov

PERFORMANCE INDICATOR DOCUMENTATION

Program: Community Development Grant Program

Activity: Disaster Recovery – Mitigation and Planning

Objective: V.2 – To provide a solid foundation of science and engineering that can be used to address flood issues across the state, and ensure that excellent quality and consistency across platforms is achieved.

Indicator Name: Completion of LWI Hydraulic and Hydrologic (H&H) modeling and mapping tool, train all potential users, and coordinate use case scenarios within regions and among state agencies.

Indicator LaPAS PI Code: N/A

1. **Type and Level:** Outcome
2. **Rationale, Relevance, Reliability:** To coordinate watershed management due to recent history or flood events.
3. **Use:** To ensure relevant information and informed decisions are planned throughout the state as well as to collect additional data necessary for the level of modeling necessary for making land-use and predictive outcome decisions.
4. **Clarity:** Yes
5. **Data Source, Collection and Reporting:** Tracking logs by LOCD-DR staff
6. **Calculation Methodology:** Number of watershed management modeling tools created for LWI
7. **Scope:** Aggregated
8. **Caveats:** N/A
9. **Accuracy, Maintenance, Support:** DR-CDBG accounting and performance systems have and continue to be subject to multiple audits by the Louisiana Legislative Auditor and HUD OIG. In addition, LOCD-DR is monitored by HUD at least annually to ensure compliance with regulations and provide technical assistance.
10. **Responsible Person:** Micaela Coner, Director of Economic Development & Infrastructure, 225-219-7709, Micaela.Coner2@la.gov

PERFORMANCE INDICATOR DOCUMENTATION

Program: Community Development Grant Program

Activity: Disaster Recovery – Mitigation and Planning

Objective: V.3 – To complete the investment in watershed based mitigation projects by December 31, 2031.

Indicator Name: Percentage of CDBG mitigation dollars expended over dollars projected along with completed projects.

Indicator LaPAS PI Code: New

1. **Type and Level:** Outcome
2. **Rationale, Relevance, Reliability:** To determine the amount of funding distributed during a given fiscal year.
3. **Use:** By seeing if flow of funds is consistent with expectations.
4. **Clarity:** Yes
5. **Data Source, Collection and Reporting:** DRGR and LaGov
6. **Calculation Methodology:** Total expenditures reported in LaGov and reconciled to DRGR compared to the total expenditures budgeted.
7. **Scope:** Aggregated
8. **Caveats:** N/A
9. **Accuracy, Maintenance, Support:** CDBG-DR accounting and performance systems have and continue to be subject to multiple audits by the Louisiana Legislative Auditor and HUD OIG. In addition, LOCD-DR is monitored by HUD at least annually to ensure compliance with regulations and provide technical assistance.
10. **Responsible Person:** Micaela Coner, Director of Economic Development & Infrastructure, 225-219-7709, Micaela.Coner2@la.gov

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