NEW MEXICO LEGISLATIVE FINANCE COMMITTEE

New Mexico Department *of* Finance and Administration

July 1 and 2, 2026

Performance Measure Training

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Agenda

Upcoming Deadlines and Deliverables

- Overview of the FY28 performance measure process
- Important deadlines and submission requirements

Performance Management Framework

- Brief history and purpose of the Accountability in Government Act
- Overview of the state's approach to performance management
- Characteristics of strong performance measures
- Common issues and considerations when developing or revising measures

BFM Technical Demonstration

- Step-by-step walkthrough of the performance measure change request process
- Entering and submitting requests in BFM

AGA Cycle

Due Dates

July 15:

1. **Changes to program structure (p-code structure) for FY28**
   - WHAT: Increase/Decrease # of p-codes
   - HOW: Email detailed letter to your DFA/LFC analyst (BFM not used for this process)
2. **Changes to performance measures for FY28**
   - WHAT: Add or delete performance measures; modify existing performance measures.
   - HOW: Submit all additions/deletions/modifications through BFM (4400 Form)
3. **Change subset of measures reported quarterly for *FY27***
   - WHAT: Move a performance measure from annual reporting to quarterly reporting, or vice versa
   - HOW: Complete the "Proposed Changes to Quarterly Measures" word document and email it to your DFA/LFC analyst (BFM not used for this process)

***NOTHING RELATED TO PERFORMANCE TARGETS IS DUE JULY 15th! FY27 Performance Targets have already been established. Requested performance targets for FY28 are due September 1.**

AGA Cycle

Due Dates Continued

August 17:

DFA notifies agencies of approval/denial of change requests to:

- FY28 performance measures
- FY28 program (p-code) structure
- FY27 quarterly reporting measures

September 1:

All agencies submit appropriation requests with requested **performance measure targets for FY28** along with the agency's updated **strategic plan for FY27**.

Accountability in Government Act

Chapter 6, Article3A

- The Accountability in Government Act, enacted in 1999, replaced line-item budgeting with a process focused on performance.
- Agencies have greater flexibility but face greater accountability for their performance.
- They must identify, and the Legislature evaluates, their core services, the purpose of those programs, and ways to measure whether the program is fulfilling its purpose.

General Appropriation Act Before and After AGA

1996

STATE COMMISSION OF PUBLIC RECORDS:

(a)	Personal services	854.0
(b)	Employee benefits	317.9
(c)	Travel	8.0
(d)	Maintenance and repairs	88.3
(e)	Supplies and materials	5.6
(f)	Contractual services	4.3
(g)	Operating costs	150.1
(h)	Other costs	
(i)	Capital outlay	3.0
(j)	Out-of-state travel	2.5
(k)	Other financing uses	.9

2026

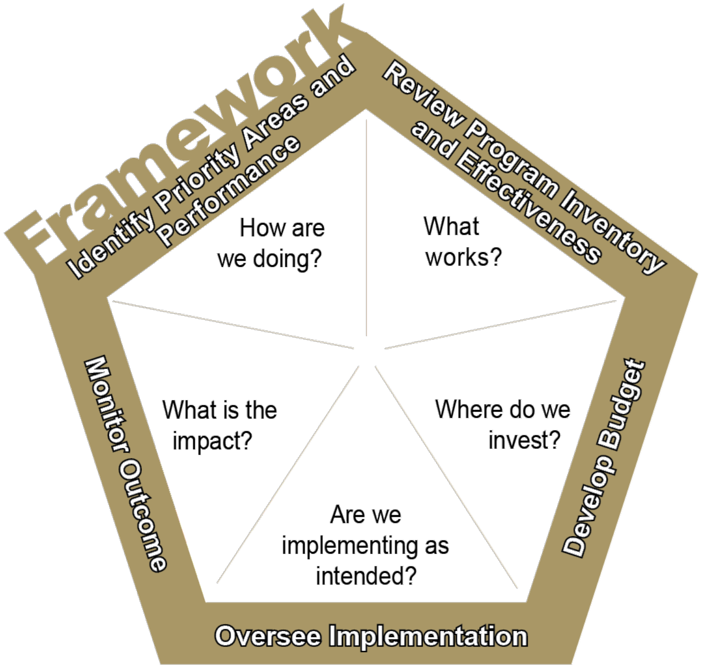
STATE COMMISSION OF PUBLIC RECORDS:

(1) Records, information and archival management: The purpose of the records, information and archival management program is to develop, implement and provide tools, methodologies and services for use by, and for the benefit of, government agencies, historical record repositories and the public so the state can effectively create, preserve, protect and properly dispose of records, facilitate their use and understanding and protect the interests of New Mexicans.

Appropriations:

(a)	Personal services and employee benefits	3,250.1
(b)	Contractual services	88.9
(c)	Other	145.2

Legislating for Results Framework



- Improve oversight of programs and policies
- Provide objective evidence on activities
- Identify successful and unsuccessful programs for potential budget cuts or increases
- Encourage long-term focus on results
- Push managers to focus on goals and outcomes

Legislating for Results Explainer

Types of Performance Measures

Outcome	Impact on those served; Results	Number of lanes miles rated fair or better
Output	Volume of work completed	Number of physician assistant licenses issued or renewed
Explanatory	Useful information (but no target)	Number of pretrial detention motions made
Efficiency	Cost or time per unit	Average call center waiting time to reach an agent
Quality	Quality of service level; timeliness, reliability	Percent of cost-over-bid amount, less gross receipts tax, on highway construction projects

Quarterly Reporting (Key) Agencies

From 6-3A-9 NMSA 1978

The division, in consultation with the committee, shall select agencies and specify performance measures for those agencies that shall be reported on a quarterly basis.

Quarterly reports shall compare actual performance for the report period with targeted performance and shall be filed with the division and committee within thirty days of the end of a reporting period.

200-280 – Judiciary (Including AOC and PDD)
333 – Taxation and Revenue Department
350 – General Services Department
419 – Economic Development Department
521 – Energy, Minerals and Natural Resources Department
550 – Office of the State Engineer
624 – Aging and Long-Term Services Department
630 – Health Care Authority
631 – Workforce Solutions Department

665 – Department of Health
667 – Environment Department
690 – Children, Youth and Families Department
770 – Corrections Department
790 – Department of Public Safety
805 – Department of Transportation
924 – Public Education Department
952-977 – Higher Education Institutions

Performance Measure Hierarchy

AGENCY INTERNAL MEASURES
(all agency measures)

AGA (BUDGET REQUEST) MEASURES
(LFC, DFA, agency collaboration)

GENERAL APPROPRIATION ACT MEASURES
(subset of budget request but can add)

KEY/QUARTERLY MEASURES
(subset of budget request but not necessarily in HB2)

REPORT CARD MEASURES

A Good Performance Measure

Results-Oriented: Focused on outcomes

Relevant: Assess the core function of the program or significant budget expenditures

Clear: Communicate in a plain and simple manner to all stakeholders (employees, policymakers, and the public)

Responsive: Reflect changes in performance levels

Valid: Capture the intended data and information

Reliable: Are accurate and consistent

Comparable: Allow direct comparison of performance at different points in time

Timely: Provide regular information to all stakeholders

Benchmarked: Use relevant and standards-based targets

Common Concerns

Measure Not Focused on Performance

Some measures offer surface-level information, providing no insight into the effectiveness of an agency or information that could help with policy decisions.

Example 1: Public School Insurance Authority: “Number of loss control prevention seminars.”

Discussion: The measure simply demonstrated that seminars are occurring. It does not provide information on the impact of Public School Insurance Authority-led seminars on. It doesn’t even provide information on the number if people being trained.

Example 2: Board of Veterinary Medicine: “Number of veterinarian licenses issued annually.”

Discussion: This measure provides useful information but could be much better. Is the agency reviewing all license applications that it receives in a timely manner? How effective is the agency at informing licensees of the requirements they must meet to get a license renewed? How does the licensed veterinarian-to-pet ratio differ in New Mexico compared with other states?

Takeaway: Measures should provide a fuller picture of agency impact.

Common Concerns

Confusing or Vague Language

Measures with unclear language are less effective than well-written measures because legislators, the governor, the public, and even analysts may have difficulty interpreting targets and results.

Example 1: Office of Superintendent of Insurance, Patient Compensation Fund: “Audit of all uploaded transactions within twenty-four hours”

Discussion: The agency and the analysts probably know what this mean, but the citizen legislator and the public do not.

Example 2: School for the Blind and Visually Impaired: “NMSBVI will foster an atmosphere of creativity that results in innovative practices and programs.”

Discussion: This measure is vague and more of a goal than a performance measure. When this measure was in place, the school routinely reported 100 percent.

Takeaway: Performance measures should provide information to the public and anyone outside the agency on agency effectiveness. They must be easy to understand and free of jargon.

Common Concerns

No Target or a Target that is Easily Achievable

Measures that have no target because they are explanatory or have a target that is easily achievable are less effective because they lack an incentive to improve performance.

Example 1: (Explanatory) Energy, Minerals and Natural Resources Department: "Number of visitors to state parks"

Discussion: The number is readily available and easy to compare with past numbers or numbers from other states. Without a target, it is unclear what number should be the goal.

Example 2: Tourism Department: "Open email rate of NM True eNewsletters"

Discussion: The target is set at a relatively low 18 percent, and the department has greatly exceeded that rate for three years. Targets that are set too low are little different than nonexistent targets and a higher target should be considered.

Takeaway: While explanatory measures have no target by design and can provide important context to agency performance, their use should be limited. Targets provide the public and policymakers with the information needed to assess performance.

Number Use

- **Be clear on the denominator**.
- When crafting measures, keep in mind the difference between a number, a percentage, a rate, and a ratio.
  - **Number:** A raw data point that is not relative to any other number
    - Example: Number of stolen livestock reported: 500
  - **Percentage:** A data point divided by the total possible, expressed as a percentage of the total
    - Example: Percent of total livestock reported as stolen: 5% (500/10,000 = 0.5 = 5%)
  - **Rate:** A certain quantity of one thing considered in relation to a unit of another thing, often expressed with “per”
    - Example: Number of livestock reported stolen per 1,000 head: 50
  - **Ratio:** A relationship between two numbers indicating how many times the first number contains the second. The total is not included but is derived by adding the two numbers together.
    - Example: Ratio of stolen livestock to non-stolen livestock: 50:950 (=50/1,000 = 5%) Note: Ratios are seldom appropriate for measures. Craft carefully and accurately.

Standard Structure

While not all performance measures are used in House Bill 2, they should all be written in bill-drafting style for consistency. That means:

- Spell out numbers,
- Do not use abbreviations,
- Never use parentheses or slashes,
- Use capitalization sparingly:
    - Do NOT capitalize agency, division, or program names
    - Capitalize the names of acts, proper names, and municipalities and counties (e.g., city of Albuquerque, Bernalillo county)

Standard Structure

As conventions,

- End each measure without punctuation.
- Do not include New Mexico with an agency name unless it appears that way in statute.
- Start each measure with a phrase like “percent of”, “number of”, “amount of”, “value of”, “cost of”, “ratio of”, etc. (You can use an adjective before the measure, i.e., “average cost of”) This phrase should match the measure format. For example, the measure should say “percent of” if the measure format is a percentage.
- Write similar measures similarly.
- Avoid technical terms that are not easily understood by the legislators or the public.

PERFORMANCE MEASURE DATA ENTRY IN BFM

In BFM, you can:

- Request to add or inactive a measure
- Request to change wording or measure type
- Add justifications and contextual information
  REMEMBER: Justification is **KEY!** Be sure to fill out **ALL** fields
- Enter targets for the upcoming fiscal year (this is done for the September 1st Appropriation Request deadline in the ***4000 Performance Measures Form***)
  - Explanatory measures do **NOT** have targets

Before Making Changes in BFM

Make sure your agency has reviewed all measures and information

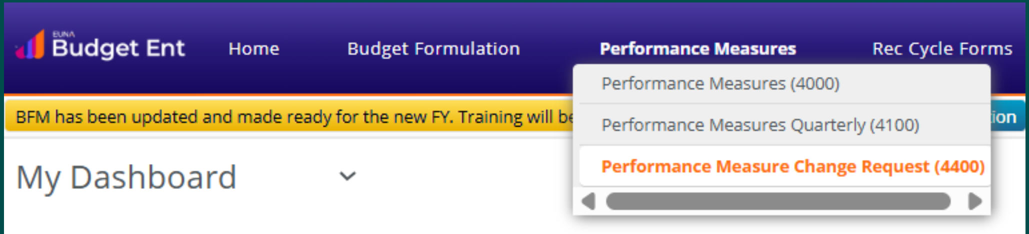
Internal approval is needed before you start to enter data into BFM to ensure reduced duplicative entries

4400 Form: Performance Measure Change Request

The 4400 form is used for requests for new measures, changes, or inactivation for **FY27 ONLY.**

Changes to key measures are done on a form outside BFM that agencies will return to SBD and LFC. SBD analysts will handle FY26 key measure changes in BFM.

If you are not requesting any sort of change, you do not need to fill out and submit the 4400 form.



Changing Existing Measures in BFM

Existing measures will pre-populate

1. To change an existing measure, click on the Header link for the measure in question
2. Update the "Proposed Measure" and "Explanation of Change" data fields on the left
3. Inactive Year: select next FY (FY27 in this case) if requesting to inactivate a current measure
4. Measure Type: Outcome, Output, Quality, Efficiency, Explanatory
5. Measure Format: How should the measure data be displayed (integer, date, percent, etc.)
6. Good Direction: "Over" if the target is met if the result is higher, "Under" if the target is met if the result is lower
7. Can update methodology, reliability, validity, etc. on the Narrative Changes tab
8. Some fields are for SBD analyst use – **do not complete these fields**

Performance Measure Change Request (4400)

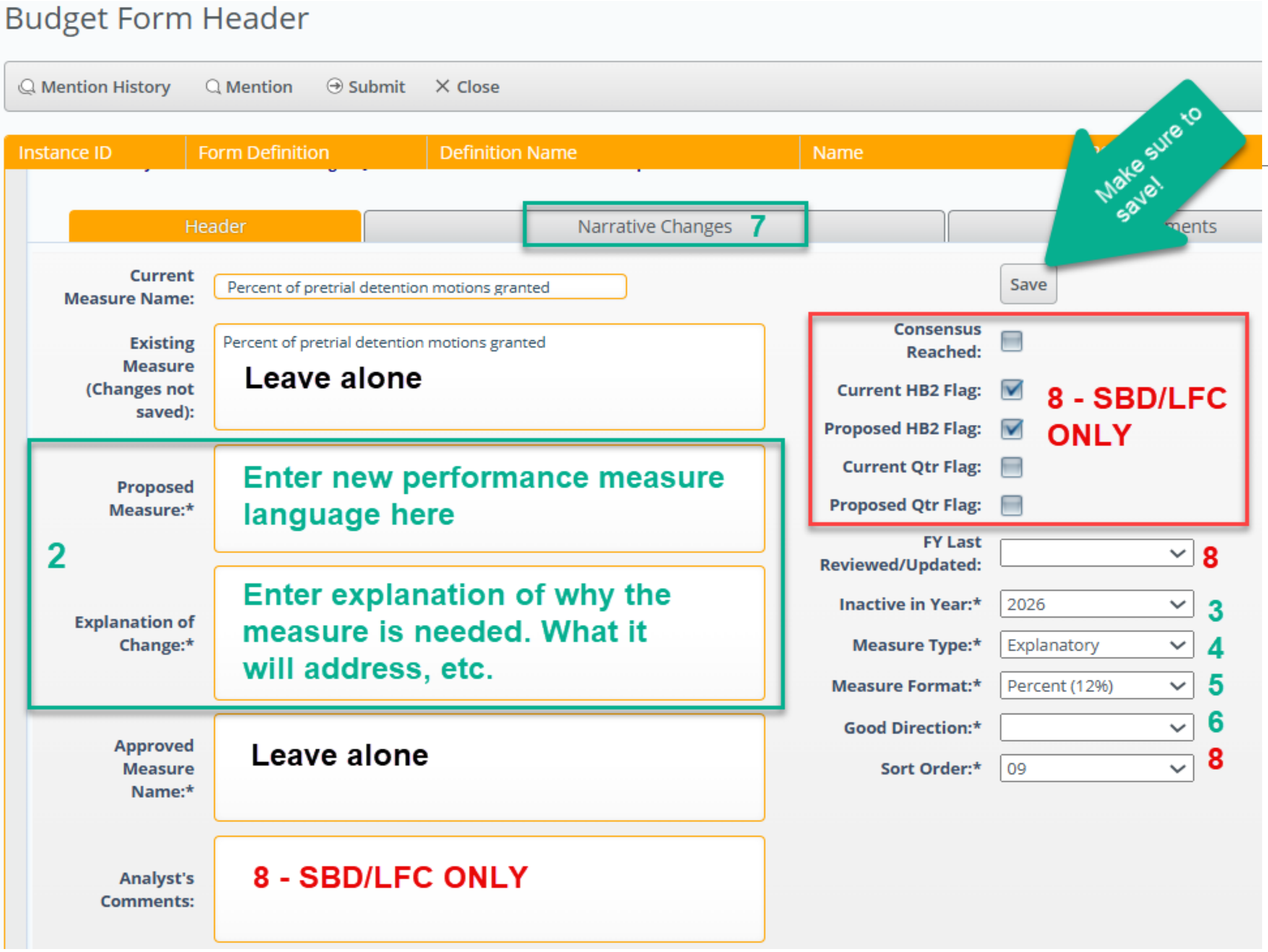
+ Add New

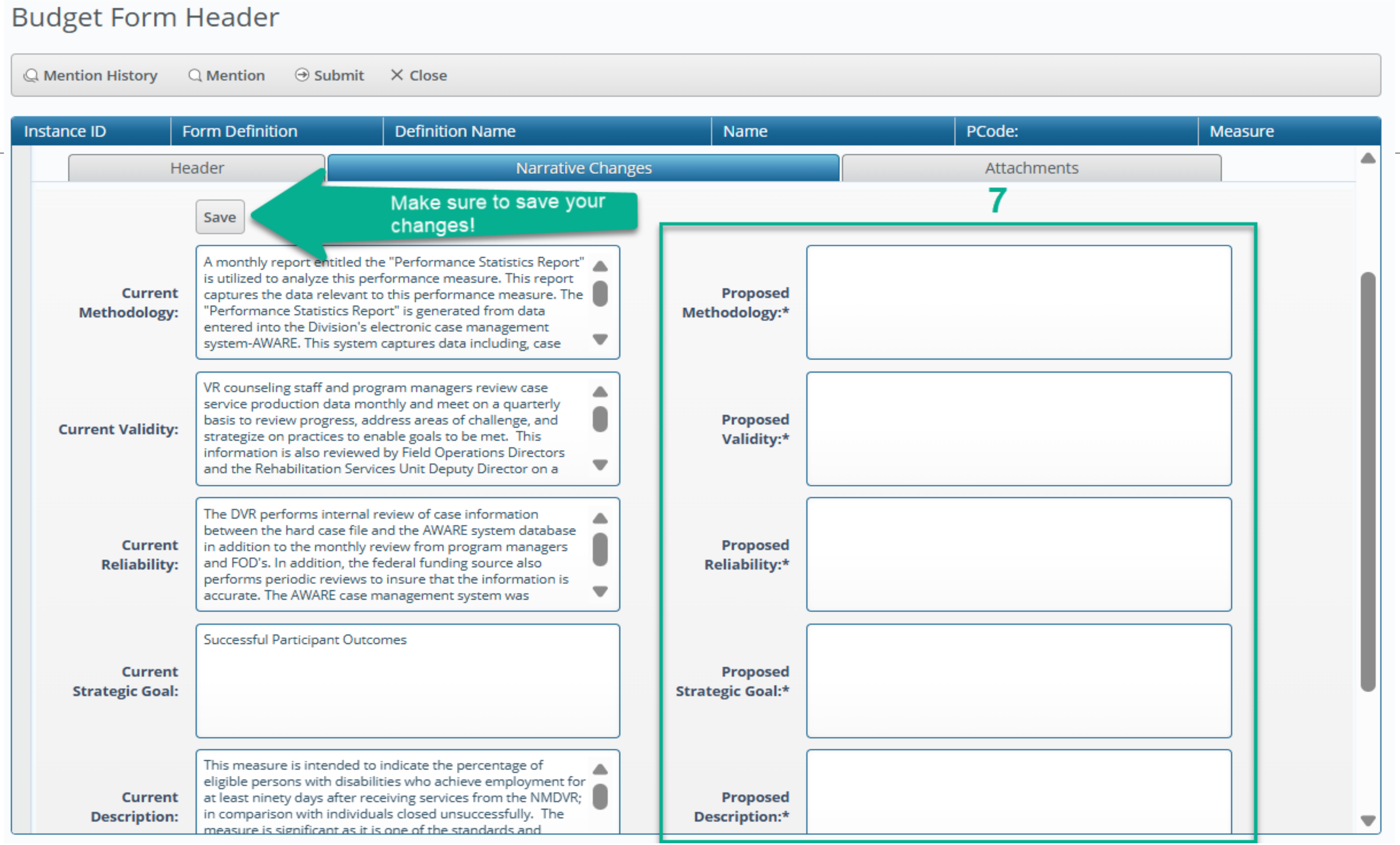
Search

ID	Name (First 120 Characters)	Stage	PCode	Measure	Rows	Last Update	Last User	Workflow	Actions
61395	Average attorney caseload	4401	P258	25800P258018	0	9/3/2024	PSISNEROS1	Submit	Header
61396	Number of cases referred for screening	4401	P258	25800P258001	0	9/3/2024	PSISNEROS1	Submit	Header
61393	Number of pretrial detention motions made	4401	P258	25800P258008	0	9/3/2024	PSISNEROS1	Submit	Header
61394	Percent of pretrial detention motions granted	4401	P258	25800P258009	0	9/3/2024	PSISNEROS1	Submit	Header
60070	Number of clients achieving suitable employment for a minimum of ninety days	4406	P508	64400P508001	0	8/15/2024	LORI.SCIACCA	Submit	Header
60073	Percent of clients achieving suitable employment outcomes of all cases closed after receiving planned services	4406	P508	64400P508002	0	8/15/2024	LORI.SCIACCA	Submit	Header
60656	Number of agencies supported by the Marketing Center of Excellence	4406	P548	NEW	0	8/15/2024	monica.tapia	Submit	Header
60655	Number of campaigns supported by the Marketing Center of Excellence	4406	P548	NEW	0	8/15/2024	monica.tapia	Submit	Header
60653	Number of entities awarded funding through the Clean and Beautiful program	4404	P548	NEW	0	8/15/2024	monica.tapia	Submit	Header
60654	Number of entities awarded funding through the Destination Forward program	4406	P548	NEW	0	8/15/2024	monica.tapia	Submit	Header

1

Records per page: 50 Advanced Search Records: 21 - Page: 1


Budget Form Header
Mention History
Mention
Submit
Close
Instance ID
Form Definition
Definition Name
Name
Make sure to save!
Header
Narrative Changes
7
ments
Save
Current Measure Name:
Percent of pretrial detention motions granted
Existing Measure (Changes not saved):
Percent of pretrial detention motions granted
Leave alone
Proposed Measure:*
Enter new performance measure language here
2
Explanation of Change:*
Enter explanation of why the measure is needed. What it will address, etc.
Approved Measure Name:*
Leave alone
Analyst's Comments:
8 - SBD/LFC ONLY
Consensus Reached:
Current HB2 Flag:
Proposed HB2 Flag:
Current Qtr Flag:
Proposed Qtr Flag:
8 - SBD/LFC ONLY
FY Last Reviewed/Updated:
8
Inactive in Year:*
2026
3
Measure Type:*
Explanatory
4
Measure Format:*
Percent (12%)
5
Good Direction:*
6
Sort Order:*
09
8



Budget Form Header

Mention History | Mention | Submit | Close

Instance ID	Form Definition	Definition Name	Name	PCode:	Measure

Header | Narrative Changes | Attachments

Save

Make sure to save your changes!

7

Current Methodology: A monthly report entitled the "Performance Statistics Report" is utilized to analyze this performance measure. This report captures the data relevant to this performance measure. The "Performance Statistics Report" is generated from data entered into the Division's electronic case management system-AWARE. This system captures data including, case

Proposed Methodology:*

Current Validity: VR counseling staff and program managers review case service production data monthly and meet on a quarterly basis to review progress, address areas of challenge, and strategize on practices to enable goals to be met. This information is also reviewed by Field Operations Directors and the Rehabilitation Services Unit Deputy Director on a

Proposed Validity:*

Current Reliability: The DVR performs internal review of case information between the hard case file and the AWARE system database in addition to the monthly review from program managers and FOD's. In addition, the federal funding source also performs periodic reviews to insure that the information is accurate. The AWARE case management system was

Proposed Reliability:*

Current Strategic Goal: Successful Participant Outcomes

Proposed Strategic Goal:*

Current Description: This measure is intended to indicate the percentage of eligible persons with disabilities who achieve employment for at least ninety days after receiving services from the NMDVR; in comparison with individuals closed unsuccessfully. The measure is significant as it is one of the standards and

Proposed Description:*

Creating New Measures in BFM

1. Click “Add New” in the main 4400 form screen, where current measures are listed

Performance Measure Change Request (4400)

+ Add New 1

Search

ID	Name (First 120 Characters)	Stage	PCode	Measure	Rows	Last Update	Last User	Workflow	Actions
61395	Average attorney caseload	4401	P258	25800P258018	0	9/3/2024	PSISNEROS1	Submit	Header
61396	Number of cases referred for screening	4401	P258	25800P258001	0	9/3/2024	PSISNEROS1	Submit	Header
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Records per page: 50 Advanced Search

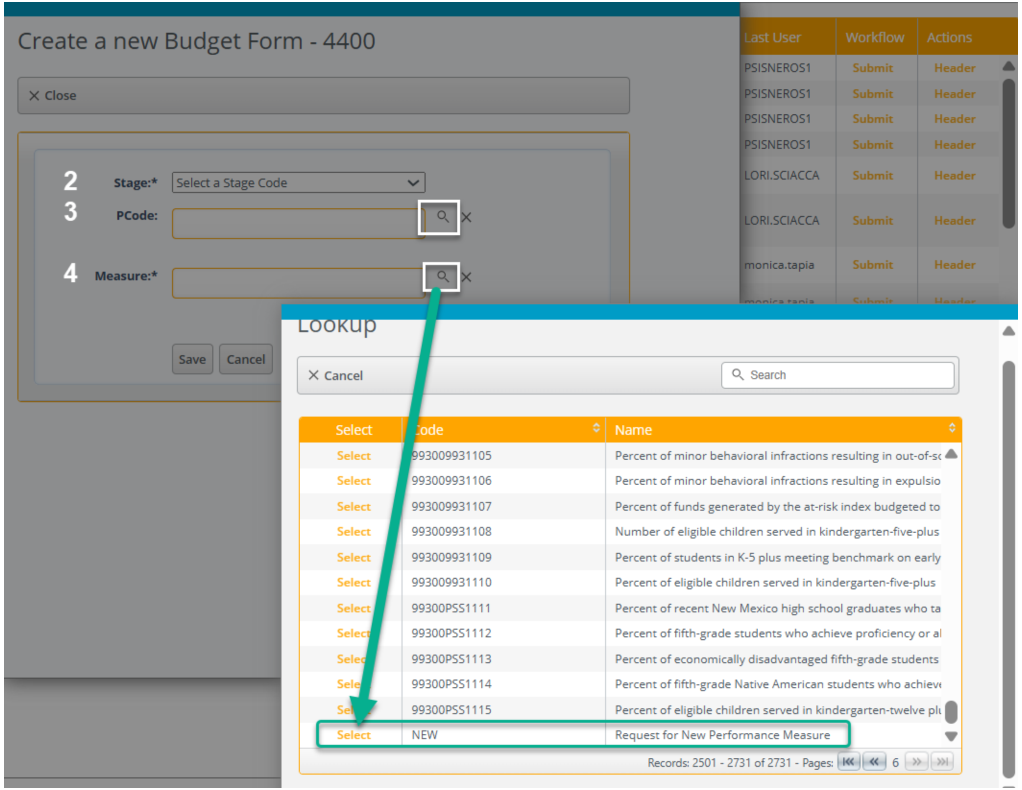
Records: 21 - Page: 1

Creating New Measures in BFM

2. Select stage 4401 – Initial Entry

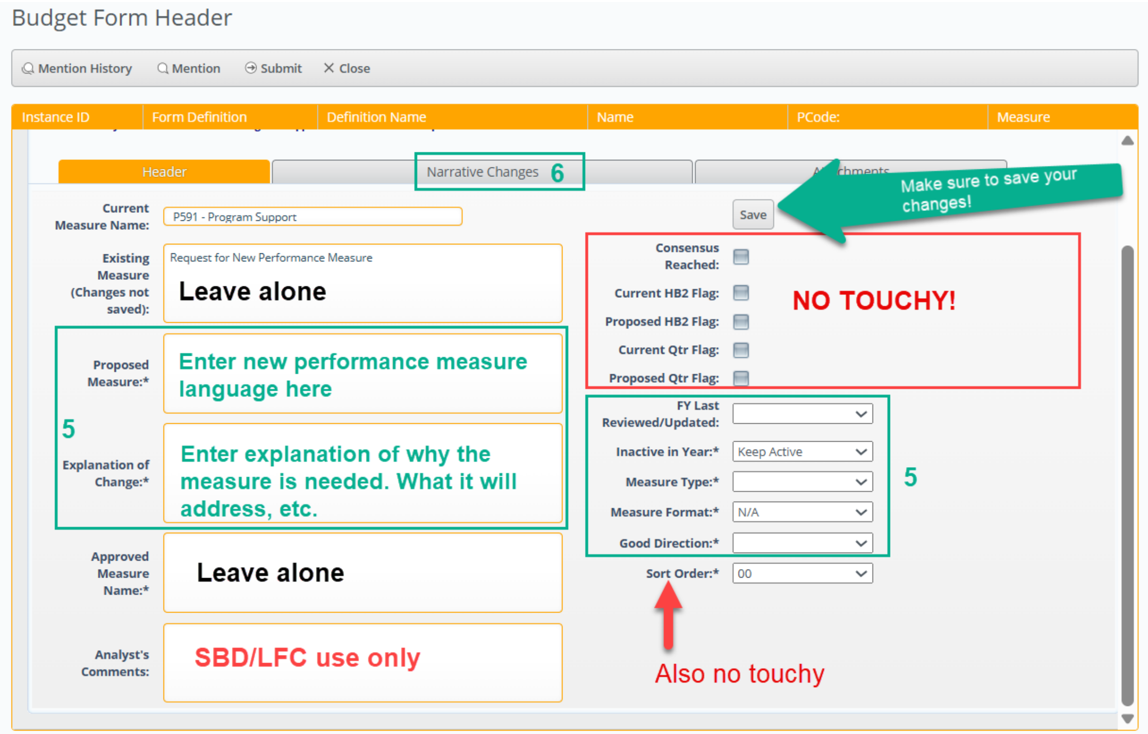
3. Use the magnifying glass to select the P-code the measure will be associated with

4. Use the magnifying glass to bring up a list of existing measures
   - ➢ Scroll to the end of the list and select “NEW”

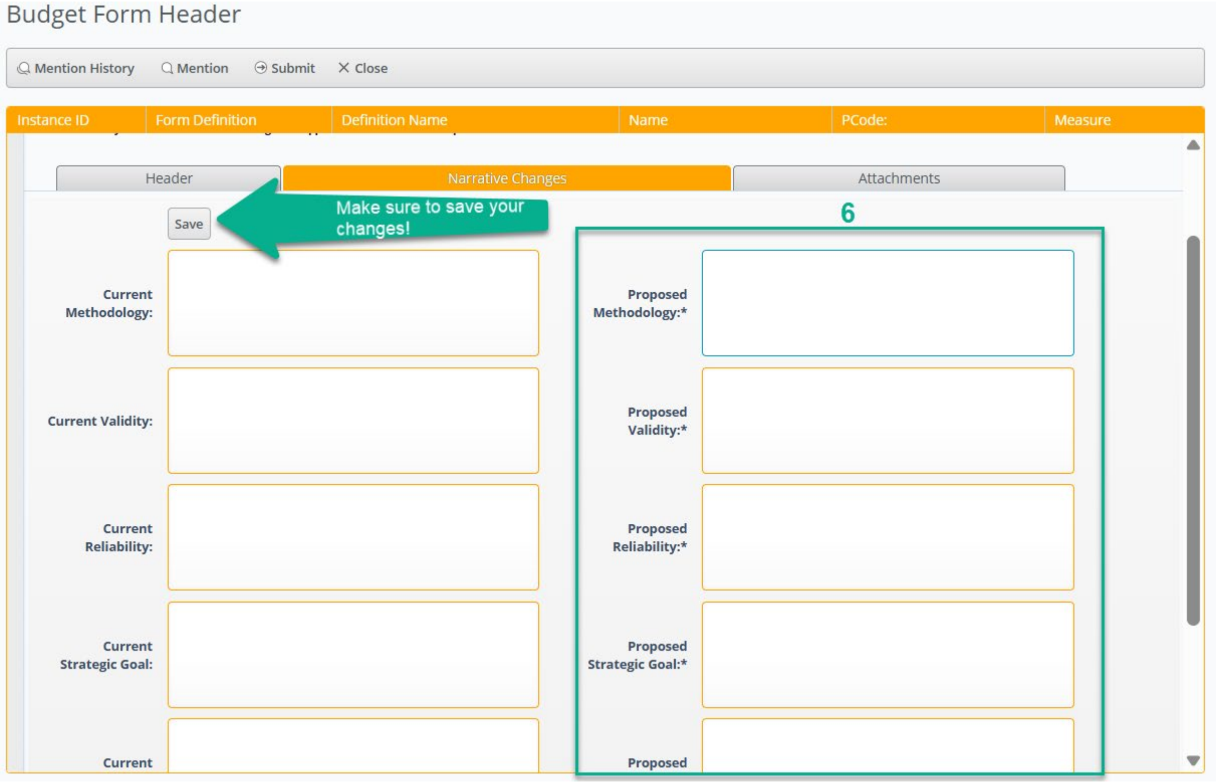


Creating New Measures in BFM

5. The process is now like changing an existing measure:
    - Complete the data fields on the left side that have an asterisk (*)
    - “Inactive in Year” should say “Keep Active”
    - Select the Measure Type, Measure Format, and Good Direction
    - Do NOT check any boxes under the Save button and do NOT touch the Sort Order
6. Click on the Narrative Changes tab and complete all asterisked (*) data fields



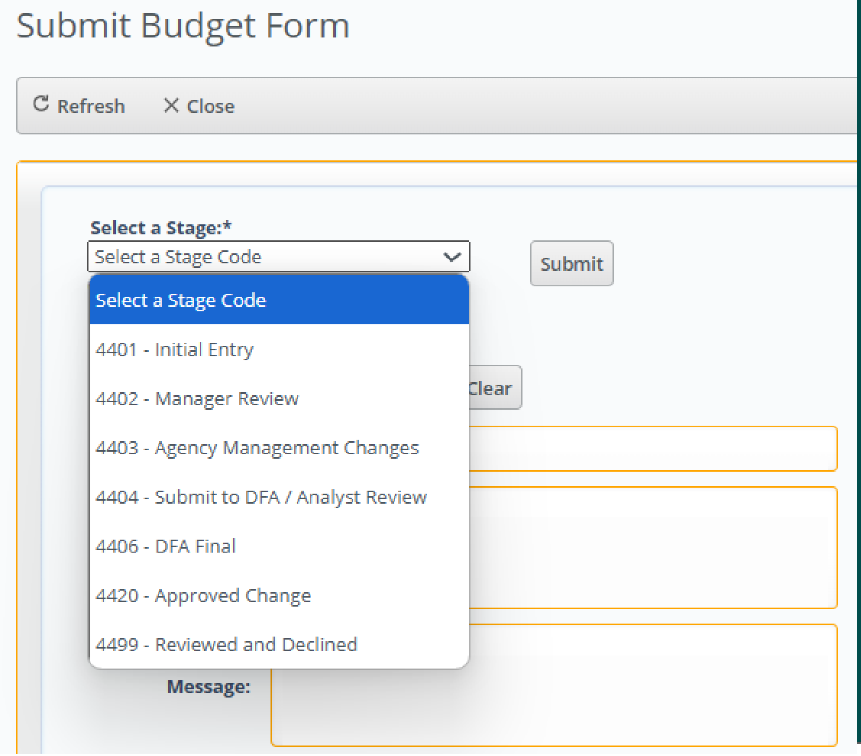
Creating New Measures in BFM



6. Click on the Narrative Changes tab and complete all asterisked (*) data fields

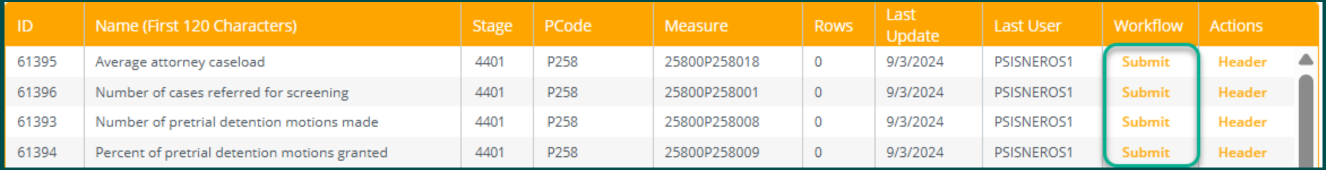
Submitting Changes in BFM

- Once your edits are complete, use the submit button to submit them to the next level within your agency for management review.
- Once they are ready for submission to DFA, the Level 3 reviewer will need to submit them to Stage 4404 – Submit to DFA/Analyst Review



The Submit button is available in two locations:

- On the main page of the 4400 form
- Within the specific measure itself



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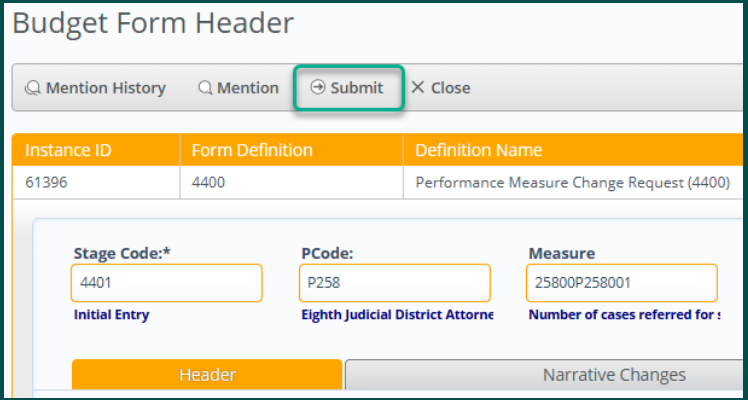

Budget Form Header

Mention History | Mention | Submit | Close

Instance ID	Form Definition	Definition Name
61396	4400	Performance Measure Change Request (4400)

4000 Performance Measure Form – September 1

- This form is used for the Appropriation Request Submission due in September
  - Once in the 4400 form, you'll have several fields to complete
    - Actuals
    - Target
    - Year-End Narrative
    - How Addressing Measure Performance
- It is important to complete the Year-End Narrative and How Addressing Measure Performance fields
- If the measure is **new for FY27** type in **999999.1** in the **Actuals** column
- If the measure is **deactivated for FY27 enter 999999.4** in the **Target** column
- If the measure is an **explanatory measure** enter **999999.2**

Budget Form Lines

✕ Close ⤓ Export ↥ Import ⟳ Refresh

ID	Form	Business Unit	Form Name	999999.1 = "NEW"	999999.2 = "N/A"	999999.3 = "TBD"	.4="Discontinued"	999999.5="No Data"
59083	4000	23900 - Ninth Judicial District Court	Performance Measures (4000)	$0	$0	$0	$0	$0

+ Add New ▢ Copy Search

Row	Audit Trail	PCode	Measure	Measure Name	Type	Format	2023-24 Target	2023-24 Actuals*	2024-25 Target	2025-26 Target*	Year End Narrative*	How Addressing Measure Performance*
1		P239	23900P239001	The number of outgoing cases as a percentage of the number of incoming cases	Output	Percent (12%)	100.0000	100.6000	100.0000	100.0000		
2		P239	23900P239002	Number of active cases pending	Explanatory	Integer (1,234)	0.0000	1655.0000	0.0000	0.0000		
3		P239	23900P239003	Number of days to disposition for criminal cases	Outcome	Integer (1,234)	365.0000	198.0000	365.0000	365.0000		
4		P239	23900P239004	Number of jury trials	Explanatory	Integer (1,234)	0.0000	28.0000	0.0000	0.0000		
5		P239	23900P239005	Age of active pending civil cases, in days	Outcome	Integer (1,234)	540.0000	254.0000	540.0000	540.0000		
6		P239	23900P239006	Number of days to disposition for civil cases	Outcome	Integer (1,234)	540.0000	241.0000	540.0000	540.0000		
7		P239	23900P239007	Age of active pending criminal cases, in days	Outcome	Integer (1,234)	365.0000	187.0000	365.0000	365.0000		

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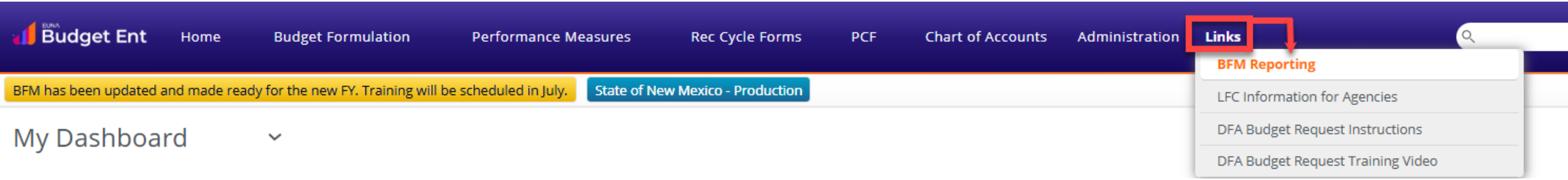
BFM Performance Measure Reports



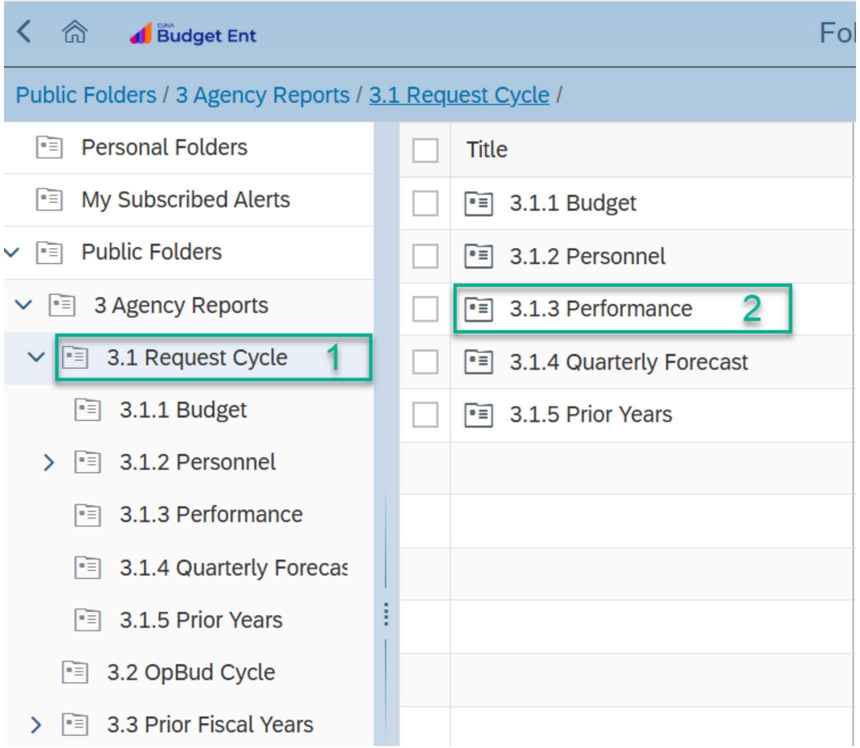
- Annual Performance Report
- Full Program and Measure Report
- Performance Measure Table 2 Summary
- Performance Monitoring Plan
- PB-1 Summary of Requested PM Changes (former Word document, also incorporates PB-2 for quarterly reporting agencies

Generating Performance Measure Reports

After you've clicked on the folder titled "**3 Agency Reports**":

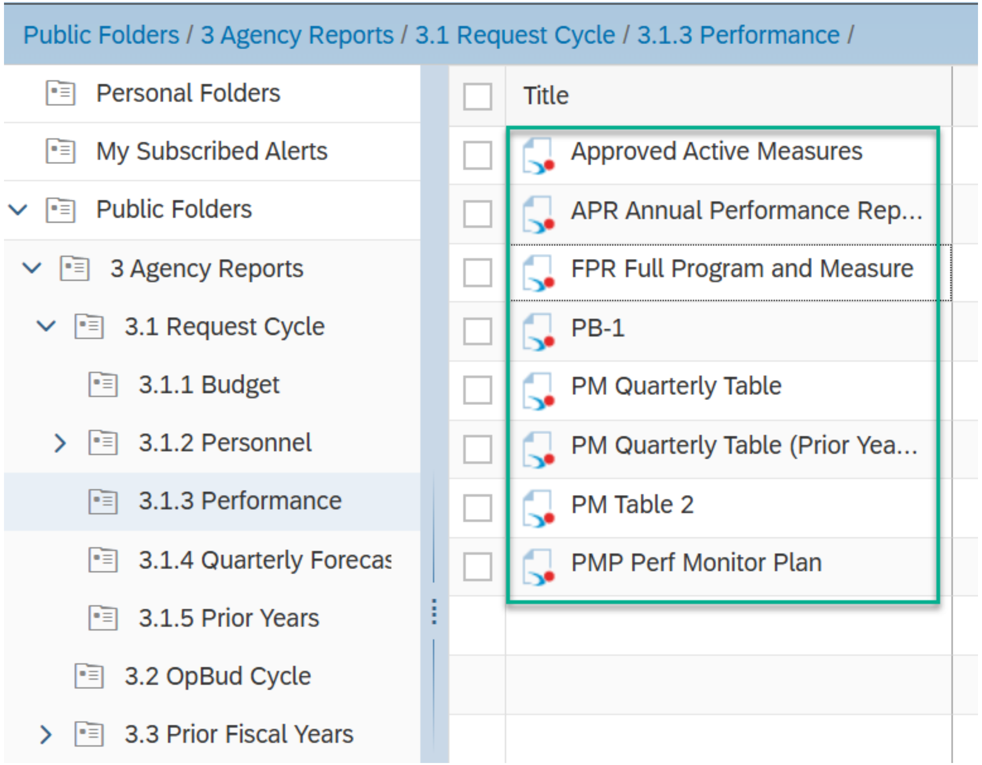
1. Double click on the folder titled "**3.1 Request Cycle**"

2. Look to the frame on the right (or in the expanded list of folders below where you clicked on the left) and double click on "**3.1.3 Performance**"



Generating Performance Measure Reports

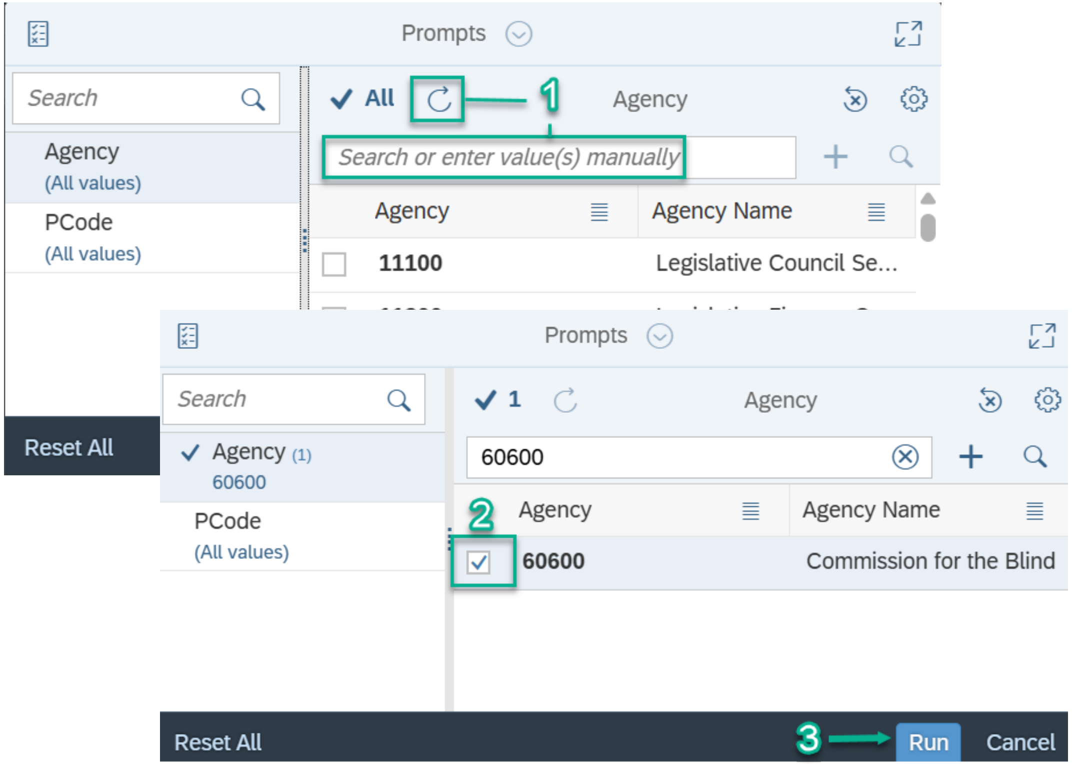
A new frame will appear on the right, providing a list of available reports for you to generate.



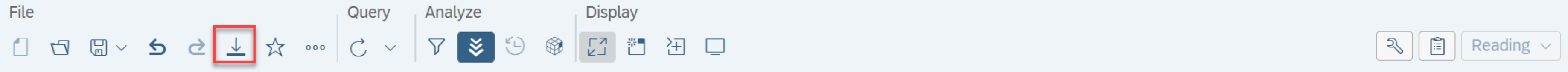
Generating Performance Measure Reports

Once you've selected the report to generate:

1. Type in your agency BU (5-digits) in the data field named "Search or enter value(s) manually" and then hit enter. Alternatively, you can click the refresh circle above that data field to see a list of all available BUs and check the box next to yours.
2. If you manually typed in your agency BU, click on the check box once your agency appears below.
3. Click "Run" to generate your report.



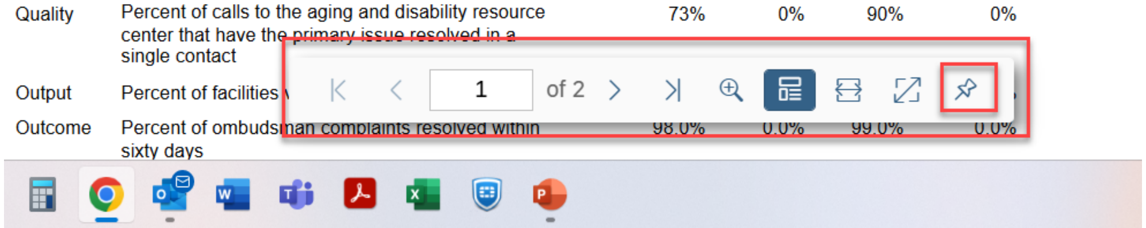
Generating Performance Measure Reports



When the report opens, you will have the ability to:

Export the report to PDF or Excel and save to your computer

Navigate between pages with the navigation bar at the bottom of the report that can be pinned to stay shown or can only appear when hovering in its general area (vanishing toolbar)



Thank You!

Questions?

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