Metrics – Annual by Calendar Year. Data monitored and reported real-time.

- Highest Priorities Fulfilled
  - A Priority is counted as fulfilled when the funds needed to accomplish the scope of work described on the priority worksheet are secured.
  - If this is accomplished with funds already included in the City's overall budget, the Priority is only "fulfilled" if ODG had a role in identifying or securing the funds.

- Net New Funds
  - Net New funds are a sub-set of Overall Funds. Net New means that this is the first year that funder (since bankruptcy) has given to a project prioritized and/or tracked by the City.
  - For a large funder, a grant or donation from a new program area counts.
  - For a funder with a local, regional and/or national focus, a grant or donation from a new division of the organization counts.

- Overall Funds Raised
  - Overall Funds raised includes both strong commitments (eg, publicly announced but agreement not yet fully counter-signed) and documented awards.
  - Commitments included are only shared publicly as an aggregate number, as there may be ongoing negotiations about terms/scope.
  - ODG reconciles annual Overall Funds totals in July and November, to ensure included commitments fully materialize.

- Grants On Track
  - All Direct and Fiscally-Sponsored Grants are monitored and scored based on:
    - File is assessed by comparing the list of documents shared with us, to the list of documents required as of today's date.
    - Spend is assessed by comparing planned spending to actual spending.
    - Performance is assessed by comparing planned performance to actual milestones achieved.

- Customer Service
  - ODG sends a biannual survey to all Department points of contact which asks Departments to rate their overall satisfaction on a scale of 1-5.
  - Anyone in the Department with whom ODG has collaborated on a priority or active grant should receive the survey. If you did not receive the survey and should have please let us know!

Portfolio Reporting – Data aggregated for set period, and formally issued.

- OCFO Monthly Report to City Council
  - The OCFO provides a report to the City Council on a monthly basis covering major financial data points, including information about the City's Grant Portfolio. The report is typically issued in the second half of the month following the period covered by the report (eg, the report issued in late May covers the City fiscal year through the end of April.)
  - ODG data submitted includes:
    - Total dollar value of the Active Grant Portfolio, which consists of:
      - All documented Grants and Fiscal Sponsorships awarded and not yet closed-out with the Funder and/or in the City's financial system.
      - All documented Donations/Other for one calendar year from the date received.
      - All documented Tracking Only projects for the length of the project period if known, or for one calendar year if unknown.
    - Net change in dollar value from the previous month
    - Overall Funds raised to date in the calendar year, by lane
    - Aligned City investment or leverage required to secure Overall Funds
    - An appendix listing all projects in the Active Grant Portfolio, including value, funding source, start and end dates.

- Citywide "On Track" Assessment
  - All Direct and Fiscally-Sponsored Grants are continuously monitored throughout their Active project period. Assessment scores are formally provided to Departments on a quarterly basis, in advance of the Quarterly Sync.
  - Assessment scores are calculated based on the following elements, which are evenly weighted:
    - File based on number of files required per the agreement by today's date which are saved in ODG's grant record.
    - Spend based on actual spend over planned.
    - Performance based on actual milestones over planned milestones achieved.

- Annual Impact Report
  - At the end of the calendar year, ODG creates and issues a report documenting final ODG metrics for the year and highlighting impact and successes of the projects in the Portfolio. This can include:
    - Key new grants
    - Impacts of completed grants
    - Accomplishments and upcoming milestones for active grants