Applying PerformanceStat to a Legislative Context:

Initial Observations From the Launch of LegisStat in New Mexico

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Introduction

PerformanceStat is a leadership strategy that uses ongoing, data-driven conversations between leadership—typically a mayor, governor, or agency head—and senior agency managers to identify and address important organizational challenges. Robert Behn of the Harvard Kennedy School coined the term "Performance Stat" to encompass the many "Stat" initiatives launched over the past several decades. A well-known example is CitiStat in Baltimore, launched by then-Mayor Martin O'Malley, who took the concept to the state level with StateStat when he became governor of Maryland.

In August 2021, the Legislative Finance Committee (LFC) of New Mexico's legislature launched what is believed to be the first adaptation of PerformanceStat to a legislative context. The LFC named the initiative LegisStat. It builds on existing efforts in New Mexico around evidence-based budgeting.[1] The LFC launched LegisStat to strengthen its collaboration with state agencies in monitoring the implementation and management of state programs. The committee was also hoping to change the dynamic of typical committee hearings, which were sometimes dominated by agency presentations. That left less time for discussion with committee members about agencies' performance challenges. In addition, the LFC wanted hearings to be more data-driven, drawing on quantitative performance metrics.

To date, four LegisStat meetings covering five state agencies have been held, with more planned for early 2022. The LFC intends to increase the number of agencies participating in the initiative over the next year, ideally with quarterly meetings for those agencies.[2] Most of those meetings will likely be carved out of, or be an addendum to, traditional budget hearings. For example, for a two-hour budget hearing, the first, say, 45 minutes might be reserved for LegisStat. Stand-alone (i.e., ad hoc) LegisStat meetings will likely be used to fill in gaps in the calendar of budget hearings, to achieve the quarterly frequency.

[1] Those efforts include the use of agency performance report cards, the development of program inventories in high-priority policy areas that (among other things) detail the level of evidence behind programs, and the use of cost-benefit analyses to inform budget decisions.
[2] A total of 20 state agencies meet with the LFC during the year, so that is the maximum number of agencies that could be part of the LegisStat initiative. It has not yet been decided how many of those agencies will participate in the initiative in 2022.

LegisStat in New Mexico is a new and still-evolving initiative, but the approach—if replicated by other states—has the potential to influence the way that budget-related committees operate across the United States. It may be particularly useful for legislative leaders who want to strengthen a focus on priority state outcomes, better assess the root causes of agency challenges, and hold agencies accountable for addressing those challenges.

This report shares the early experience of LegisStat in New Mexico. It is based on the insights of the author, who served as a consultant to the LFC in the development and launch of the initiative and who observed the four LegisStat meetings that have been held to date: the inaugural meeting in August 2021 (which focused on the topic of state economic recovery from the pandemic) and three meetings in the fall of 2021 (covering K-12 education, higher education, and economic development). These early observations are intended to be a foundation for further analysis as the initiative expands in New Mexico and possibly to other states.

The PerformanceStat movement

The PerformanceStat approach was pioneered in New York City for policing, and then expanded into the general public-management sphere with initiatives at the local, state, and federal levels. Examples include AlexStat in the city of Alexandria, Virginia; CStat within Colorado's Department of Human Services; and HUDStat at the U.S. Department of Housing and Urban Development. New PerformanceStat initiatives have innovated with the core approach, but prior to LegisStat, those initiatives were always within an executive branch.

In terms of what's unique about PerformanceStat, it is different from the check-in meetings that leaders typically hold with their senior staff, which tend to focus on the hot-button issues of the week or month. Organizations that run PerformanceStat meetings have those check-in meetings, too, but they add PerformanceStat meetings, which have a different structure, feel, and purpose. For example, PerformanceStat focuses on the same set of priority problems from meeting to meeting until those problems are fixed. The meetings are data-driven, using performance metrics to help track problems, successes, and improvements. And they emphasize accountability, including starting each meeting with the action items assigned in the previous meeting.

LegisStat in New Mexico adapts the PerformanceStat approach to a legislative setting for the first time. Instead of conversations between an executive team and agencies, led by (for example) a mayor or governor, it involves conversation between a legislative committee and agencies, led by the committee chair. The dynamic of the meetings is somewhat different, too, since the committee has oversight over agencies but is not "the boss." Even with these differences, LegisStat aims to create the same type of data-driven, results-focused conversations that have characterized other PerformanceStat initiatives.

Motivations for launching LegisStat in New Mexico

LegisStat was developed in summer 2021 by the LFC staff and then presented to the LFC chair, Representative Patricia A. Lundstrom, for her input and approval. The motivations for developing and launching LegisStat can be grouped into five categories.

- **Changing the format of agency hearings.** LFC members wanted more time for discussion with agency leaders during budget hearings held throughout the year. Those hearings typically kicked off with a presentation by the agency, sometimes leaving little time for Q&A between the committee and agency leaders. That, in turn, made committee members feel like "potted plants," as the chair noted, sitting and listening to agency leaders present rather than engaging in active dialogue. LegisStat was designed to flip the script by keeping agencies' opening remarks brief (5 or 10 minutes, and no presentations), followed by a short LFC staff presentation on data trends and key updates. The rest of the meeting is reserved for members' questions.[3]

- **Strengthening a focus on key agency performance challenges.** In traditional LFC hearings, questions by members often jumped from one topic to another, driven by particular legislators' interests. That format generally did not allow for robust discussions on the most pressing agency performance challenges. LegisStat changes that by having the committee and staff determine ahead of time a small set (e.g., three) focal issues to be discussed and then structuring the agenda to focus on those topics.[4]

- **Better tracking priority policies and programs.** The committee also wanted to find new ways to track the implementation of priority state policies and programs to ensure they were producing their intended outcomes. LegisStat does that by helping the committee spotlight implementation challenges that arise, brainstorm with agencies about what action to take, and then track their progress in doing so.

- **Making discussions more data-driven.** The committee wanted data, in the form of performance trends, to be a stronger foundation of hearings with agencies. To do that, LegisStat meetings include handouts created by the LFC staff that show key metrics for the agency, including those related to broader outcomes as well as more specific issues and challenges. The LFC staff provides an overview of those handouts at the start of each meeting.[5]

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[3] In most cases, agency leaders are still able to give longer presentations, but they are done after the LegisStat session concludes, when the hearing goes into a more standard format. LegisStat, in other words, is a supplement to traditional hearings with agencies, not a replacement.

[4] Member questions on other topics can come at the end of the LegisStat meeting or be saved for the more traditional part of budget hearings that typically follows the LegisStat session. As a reminder, LegisStat in New Mexico supplements traditional budget hearings (it is carved out of or added on to them); it does not replace them.

[5] Sometimes this process also helps identify metrics that would be useful for the committee to review but are not currently available, which can be teed up as a topic to discuss with the agency during the LegisStat meeting.

- **Sustaining a focus on key challenges over time.** Finally, the LFC wanted to strengthen a culture of accountability in which specific agency performance challenges—and agencies' actions to address them—would be revisited over time, in each hearing, to track progress and monitor follow-up on agreed-to action items.

LegisStat meetings to date

As noted in the introduction, the LFC had held four LegisStat meetings at the time of this report. The first, in August 2021, focused on the theme of promoting economic recovery from the COVID-19 pandemic. It included three state agencies: the Economic Development Department, the Department of Workforce Solutions, and the Tourism Department. It was seen as a pilot LegisStat meeting (to help committee members assess whether they liked the approach) and lasted 90 minutes. It started with brief opening remarks by the agency secretaries—without presentations—and an overview of key trends by the LFC staff. The rest of the meeting focused on Q&A with the committee and included the identification of specific action items.

Although committee members expressed appreciation afterward for the meeting's multiagency format, given the topic, the chair decided to focus future LegisStat meetings on individual agencies to more easily integrate LegisStat into the budget-hearing process. That is, she decided that future LegisStat sessions would carve out time from (or in some cases, add time to) traditional budget hearings. For instance, if a budget hearing with an agency was scheduled to take two hours, the first 45 minutes might be dedicated to a LegisStat session.

That plan played out in October and November 2021, with three additional LegisStat meetings that were part of longer agency budget hearings for the Higher Education Department, the Public Education Department, and the Department of Workforce Solutions. The last of the three sessions marked the first time that a LegisStat meeting was a follow-up to a previous LegisStat meeting (Workforce Solutions was part of the pilot in August). This allowed the committee to ask for readouts to previously agreed-upon action items, including an analysis of the location of child care "deserts," meaning areas where affordable child care is less available.

Anecdotally, feedback from LFC members about the first four meetings—conveyed after the meetings to the author and/or the LFC staff—was positive, with members feeling more empowered to press agency leaders for specific information about trends and improvement plans. That early positive feedback is an important foundation for LegisStat's further development and expansion in 2022.

The first four LegisStat meetings had a collaborative and respectful tone between committee members and agency leaders. While there is only limited information about agency leaders' views of LegisStat, one agency secretary noted that he went into the first LegisStat meeting feeling like it was "a setup" (a gotcha exercise) but understood afterward that it focused on substantive issues.

The extent to which LegisStat has been able to successfully address the motivations for its launch will take more time to fully assess. That said, the first set of meetings show progress. An example is how the initiative has been able to "flip the script" of traditional agency hearings, with LegisStat reserving most of the meeting time for a Q&A with agencies.

An advantage of adapting PerformanceStat to a legislative context

Before discussing the challenges of adapting PerformanceStat to a legislative context, it is useful to note one *advantage*: the potential for LegisStat to be more sustainable over time. That is because traditional PerformanceStat initiatives are typically seen as signature initiatives of the political leaders who launch them—think Martin O'Malley with CitiStat or StateStat. When a new leader from a different political party takes over, those PerformanceStat initiatives are likely to end, as was the case with StateStat in Maryland, for example.

Since LegisStat is rooted in a legislative committee, it is likely to be seen as above any one person or party. In the LFC's case, this joint House-Senate committee is created in statute, has bipartisan representation from across the state, and has a full-time professional staff. Hopefully, that will help make it more sustainable. Of course, legislative committee chairs change over time and that could affect a committee's longevity, at least until a LegisStat process is deeply engrained in how a committee does its work. Of note, LFC Chair Lundstrom's strong support for LegisStat has been crucial to its development so far.

Challenges and recommendations around adapting PerformanceStat to a legislative context

Adapting PerformanceStat to a legislative context creates specific challenges that need to be addressed as part of any LegisStat approach. Five of those challenges are discussed next, along with suggestions for addressing them.

The challenge of having a committee rather than a chief executive

With traditional PerformanceStat, a governor, mayor, or agency head (or in some cases, their appointed designee) leads the questioning of agency leaders. Having one leader in charge allows the discussion to stay focused on particular topics until the leader is satisfied with the answers. This process is sometimes called the "Five Whys," meaning asking enough "why?" questions until one gets to root causes. With LegisStat, on the other hand, there is a committee rather than a single executive. Of course, there is a committee chair who guides the discussion, but the committee format naturally makes it more difficult to keep the discussion focused on a specific topic long enough to get to root causes and specific action items.

One suggestion for dealing with this challenge is to create a LegisStat meeting agenda that has distinct sections for each priority issue being discussed. For example, if there are three main topics to discuss with an agency, the agenda would have separate sections for each, followed by a fourth section that could be designated as "Questions on other topics."[6] Moreover, within each section of the agenda (at least in the version given to legislators), there could be a list of suggested questions for members to ask agency representatives.

The need for an agenda that clearly demarcates priority topics was evident from the initial LegisStat sessions in New Mexico, which used agendas that were more informal. The conversation in those meetings tended up jump from topic to topic in a way that made getting deeper into issues more challenging. A more clearly defined agenda is planned for future meetings.

The challenge that the legislature is not the boss

In typical PerformanceStat meetings, the person leading the discussion is often the boss of everyone in the room, so the chain of command is clear. That helps make the meetings action oriented, since the leader can give directives to participants to address problems or conduct further analyses. In LegisStat, the committee's oversight authority and (as in LFC's case) budget authority help ensure that agencies will strongly consider the committee's requests for follow-up actions. Even so, the committee is not "the boss" of the agency, so the dynamics are different than in a typical PerformanceStat meeting: It has a more collaborative feel, since it involves separate branches of state government that require each other's cooperation to make progress.

A related recommendation is to aim for a collaborative tone with LegisStat, but also to ensure that meetings start with a readout of action items agreed to by the agency in the previous meeting. That will help underscore expectations of the agency around accountability and responsiveness. LegisStat in New Mexico is too new to have a consistent approach to action items and readouts, but is developing one.

The challenge of room layout

Most PerformanceStat initiatives are held in rooms specifically designed for the purpose, including projection screens that display agency data trends. Displaying the data in this way underscores the data-driven emphasis of PerformanceStat, with the expectation that discussions will be grounded in numbers and facts. With LegisStat, however, meetings may occur in legislative hearing rooms that may not have that capability. Based on New Mexico's experience, using handouts that show performance trends is a useful substitute for projecting the data.

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[6] This catchall section would also signal to committee members that questions not related to the focal topics should be held until the end.

The challenge of making legislative meetings action-oriented

PerformanceStat has been valued by public leaders across the country in part because it is action-oriented. In fact, a large part of the value of PerformanceStat occurs *between* meetings, as agencies work on their action items from the previous meeting, such as doing further analysis or making programmatic adjustments, etc. A challenge with LegisStat, however, is that most legislative committees (as well as the agency leaders who appear before to them) are not used to expecting that level of accountability for specific actions within a budget hearing context. For example, a legislator might say, "Madame Secretary, I'd like to ask you to focus more on such-and-such issue." The secretary will respond, "Madame Chair, we plan to do exactly that." And the discussion moves on, without an expectation of follow-up in the future.

To change that dynamic, a suggestion mentioned above is also useful on this topic: starting meetings with a discussion of the action items agreed to by the agency in the last meeting. In addition, meetings should end with a recap of agreed-to action items and/or the understanding that a memo listing those items will be shared with all participants following the meeting.

The principles of LegisStat

Before turning to a suggested list of principles that are at the core of LegisStat, it is useful to note some brief history. CompStat, the first version of PerformanceStat, was developed in the 1990s by the New York City Police Department and focused on crime reduction. It was based on four core principles: (1) Timely and accurate information or intelligence; (2) Rapid deployment of resources; (3) Effective tactics; and (4) Relentless follow-up. Other PerformanceStat initiatives that followed sometimes cite these principles as well.

A modified, longer list suggesting the core principles of LegisStat appears below. This can be useful when briefing legislative leaders about LegisStat. Appendix A includes this list and can be used as a handout.

LegisStat principles:

- **Focused:** LegisStat meetings focus on the most important policy, programmatic or operational challenges facing agencies, identified ahead of time by the committee and its staff.

- **Committee-driven:** LegisStat meetings are driven by the committee chair and by members' questions, with only short agency presentations.

- **Emphasizing deeper dives:** LegisStat meetings use follow-up questions by members to ask agencies to be more specific and get to the root causes of problems. Meeting agendas tackle one issue at a time for sustained focus on a topic.

- **Action-oriented:** LegisStat meetings are designed to push agencies to commit to specific actions by the next meeting, since even long-term challenges require near-term actions to generate progress.

- **Strong on accountability:** LegisStat meetings start with agency updates on action items from the previous meeting. After a LegisStat meeting, a summary of action items committed to by the agency is distributed.

- **Collaborative:** LegisStat meetings require ongoing collaboration between legislators and agency leaders so that meetings have a spirit of respect and collegiality, even as agencies are pushed to achieve better outcomes.

- **Aiming for impact:** LegisStat meetings are the most visible part of any LegisStat initiative, yet an important part of the initiative's impact occurs *between* meetings, when agencies work to achieve action items committed to during the meetings. It is why identifying specific action items is so important.

Suggested steps for launching LegisStat

The following are recommended steps for a legislative committee to take when launching a LegisStat initiative, based on the early experience of New Mexico.[7] These steps can be developed by the committee staff, for input and approval by the chair and other committee leaders.

1. **Assess the need.** Running a LegisStat initiative takes ongoing work by the committee staff, including preparing for meetings, developing an agenda and handouts, and briefing committee chairs prior to the meeting. For that reason—not to mention the committee's time as well—it is important to have clear and compelling reasons to embark on the effort. In New Mexico's case, the LFC's motivations for launching LegisStat were described above.

2. **Decide the structure of meetings.** This step is about choosing a structure for LegisStat meetings, knowing that it may evolve over time. Options include having standalone meetings or carving out time from existing budget meetings to have a LegisStat session. Moreover, a meeting can focus on individual agencies or on cross-cutting topics that involve multiple agencies in the room. As noted, New Mexico has decided to focus on individual agencies and to carve out time for LegisStat meetings from regular budget hearings, although some ad hoc meetings may be added to achieve a quarterly cadence of meetings.

[7] It may help to frame the initial focus as launching a LegisStat *pilot*, to lower the stakes and let committee members decide whether they want to scale up the initiative.

3. **Decide the cadence of meetings.** This decision is about how often LegisStat meetings will occur. When meetings are held infrequently (say, twice a year), it may be difficult to generate a feeling of action and accountability. On the other hand, monthly or even every-other-month meetings with agencies may be unrealistic. New Mexico has a current target of quarterly meetings, but that process is just beginning to ramp up. To achieve its target, the LFC may need some ad hoc meetings, along with integrating LegisStat into the regular agency hearings schedule.

4. **Choose target agencies.** This step is about deciding which agency (or agencies) will be the focus for the first meeting (or meetings). For example, an agency might be chosen because its leadership is especially interested in data-driven performance improvement, making it a natural fit for a LegisStat process. Alternatively, or in addition, the agency might focus on a policy issue that is a priority for the committee. In New Mexico, the LFC chose three agencies for its pilot meeting since they all related to the high-priority issue of economic recovery from the pandemic. The following two meetings focused on education agencies, given the importance of education as a policy issue as well as those departments' relatively large budgets, compared with other agencies.

5. **Help committee members and agencies get familiar with LegisStat.** LegisStat is a very different way of running a hearing, so the goals, approaches, and expectations involved take time to soak in. That's why it's important to help committee members become familiar with the origins of PerformanceStat (as background to LegisStat), its unique features, and why and how the concept is being adapted to the legislature. In addition to briefing the committee, it is useful to brief agency leaders about LegisStat.[8] In New Mexico's case, the staff led a prep session with the committee prior to the pilot meeting. The staff also informally briefed agency leaders prior to their first LegisStat meetings.

6. **Identify key issues and related questions.** This step starts by identifying the most important and actionable agency challenges on which to focus the upcoming LegisStat meeting(s). In New Mexico, the staff identifies and suggests those challenges based on their knowledge of specific policy areas and by reviewing the relevant agency performance data. Those topics are then presented to the chairs of the committee or subcommittee leading the meeting for their input and approval.[9] Three issues may be the right number to choose (or fewer, if the issues are especially complex), since more than three risks having the discussion become too

[8] In the most robust examples of PerformanceStat, such as StateStat in Maryland, some agencies developed their own internal "Stat" initiative to monitor performance and help prepare agency leaders for the PerformanceStat meetings run by the chief executive. As LegisStat develops in New Mexico, it will be interesting to see if and how agencies build capacity to be responsive to the initiative.
[9] Once approved, the set of issues will remain fairly constant over time, since a feature of PerformanceStat is that the same issues remain the focus until challenges are overcome.

rushed and superficial. After the issues are identified, the staff can suggest questions for committee members to ask during the discussion.

7. **Prepare a meeting agenda and briefing memo.** In creating the agenda, it is useful to clearly demarcate the separate challenges being discussed, to ensure a focus on one issue at a time. The briefing memo, in turn, should describe key performance trends for the agency as well as suggest questions to ask agency leaders. (A version of these materials can also be sent to the agency in advance of the meeting, either with or without the questions that will be asked.) In New Mexico, the staff holds a prep session by phone with committee and subcommittee chairs before each meeting to review these materials and answer any questions the members have.[10] Appendix B provides a template for creating a meeting agenda.

8. **Hold the LegisStat meeting.** A LegisStat meeting might be as short as 30 minutes or could last longer than an hour, depending on the amount of time available and the number of issues being covered. The meeting can kick off with welcome remarks by the committee chair, followed by brief remarks by agency leadership and an overview of performance trends and issues by the staff. Then the agenda should turn to the first agency challenge and to any related action items that the agency agreed to in the last meeting. The meeting then proceeds through the other agency challenges. Attendees include the committee or subcommittee, the committee staff who cover that agency, agency leadership, and agency senior staff that leadership brings to the meeting. LegisStat meetings are also likely to be public, as they are in New Mexico, with a gallery for observers.

9. **Send out a list of action items after the meeting.** Within a few days of the meeting, it is useful for the staff to send all participants a recap of actions that an agency agreed to achieve by the next meeting or by some other specified time, in order to be clear about what is expected and by when.

10. **Conduct an after-action review.** Any LegisStat initiative will involve learning and adjustments over time to make it as useful and feasible as possible. To help that process, the staff should seek feedback from the chair, committee members, and agency leaders after the meetings and ask for their ideas for improvement. In New Mexico's case, for example, an early lesson was the need for a more formal agenda that specifies the agency challenges that will be discussed. Moreover, while the pilot involved three agencies, LegisStat has shifted to individual meetings with agencies integrated into the budget hearing schedule.

[10] A standard procedure for briefing agencies ahead of time has not been established yet in New Mexico, but is expected soon. It likely will include determining which versions of the materials get sent to agencies ahead of time. The process has been ad hoc so far.

Resources needed for starting LegisStat

It is worth noting that a LegisStat process can be launched without any significant new resources or additional data. For example, New Mexico developed and launched LegisStat without any new funding, aside from a foundation grant to support a consultant to advise the process. The LFC uses existing staff analysts, under the leadership of the deputy director who oversees the LegisStat process, to prepare for LegisStat meetings and participate in them. Moreover, the performance data used to create LegisStat briefings and monitor progress is data from agencies or other sources that the LFC was already collecting. So, while running a LegisStat initiative takes effort and (most importantly) leadership commitment, it can be done almost solely with existing resources.

Judging success: How to measure LegisStat's impact

"Stat" initiatives, including PerformanceStat and LegisStat, use quantitative measures of performance to ground the discussions, so it seems appropriate in this concluding section to focus that lens on LegisStat itself. In other words, how might a legislative committee or other stakeholders measure the success and impact of a LegisStat initiative? At least five metrics may be useful:

- **Metric #1: Number of agencies involved.** A high-level but important way to track progress over time is the number of agencies involved in a LegisStat process per quarter. For example, during the first quarter of the initiative, there might be five agencies having LegisStat meetings, while by the second or third quarter that might expand to 10, and so on.

- **Metric #2: Number of LegisStat meetings.** Whether meetings are standalone or integrated into existing budget hearings, the number of LegisStat sessions undertaken per quarter is another metric to measure its scope.[11]

- **Metric #3: Committee support of LegisStat.** An important factor for the sustainability of LegisStat is the degree to which committee members appreciate and support the initiative. Quick quantitative surveys could determine the value that members see in the initiative.

- **Metric #4: The accomplishment of specific action items.** This metric tracks how many action items agreed to by agencies in LegisStat meetings were undertaken, since action items are an important way that LegisStat drives progress. This metric could be a simple count or a set of qualitative descriptions of what the action items were and how the agency responded.

[11] Note that if all agencies involved in a LegisStat initiative have quarterly meetings, then this metric will duplicate Metric #1 and can be ignored. If, instead, some meetings occur more or less frequently than quarterly, this metric will provide useful added information.

- **Metric #5: Longer-term outcomes.** Hopefully over time there is evidence that a LegisStat process leads to concrete reforms or improvements that, in turn, produce better outcomes for residents, new efficiencies within government, or other positive benefits. Of course, making a causal connection between a LegisStat process and broader state outcomes can be challenging. Even so, it seems most plausible related to specific outcomes that were a particular focus of a LegisStat process.

Conclusion

New Mexico's first-in-the-nation adaption of PerformanceStat to a legislative context is still very new, but it holds the promise of being a model for other state legislatures that want to become a more effective partner with state agencies in improving the performance of their governments. The fact that LegisStat can be launched quickly, is low- or no-cost to run, and uses existing data bodes well for the replicability of the model in other states. The one essential element that LegisStat does require is legislative leaders who are passionate about creating a culture of continuous improvement in government and who are willing to devote time and commitment to a LegisStat process. The early observations from LegisStat in New Mexico described in this report, and continued learning as that initiative develops, can help leaders in other states consider and launch their own versions.

Appendix A: Example Handout for Briefings with Committee Members About LegisStat

LegisStat Overview

What is LegisStat?

- LegisStat is an **initiative of this committee** designed to help us become a more effective partner with state agencies in continually improving agency programs and policies.
- It is based on a leadership strategy known as **PerformanceStat** that uses ongoing, data-driven conversations between leadership—typically a mayor, governor, or agency head—and senior agency managers to identify and address important organizational challenges. A well-known example is CitiStat in Baltimore.
- LegisStat **adapts the PerformanceStat approach to a legislative context**. It involves ongoing meetings with agencies throughout the year, often woven into budget hearings by carving out time for LegisStat sessions.
- The goal is to ensure **focused conversations** between the committee or subcommittee and agency leaders about addressing high-priority agency performance challenges.

What are the principles of LegisStat?

1. **Focused:** LegisStat meetings focus on the most important challenges facing agencies and states, identified ahead of time by the committee and its staff.
2. **Committee-driven:** LegisStat meetings are driven by the committee chair and by members' questions, with only short agency presentations.
3. **Emphasizing deeper dives:** LegisStat meetings use follow-up questions by members to ask agencies to be more specific and get to the root causes of problems. Meeting agendas tackle one issue at a time for sustained focus on a topic.
4. **Action-oriented:** LegisStat meetings are designed to push agencies to commit to specific actions by the next meeting, since even long-term challenges require near-term actions to generate progress.
5. **Strong on accountability:** LegisStat meetings start with agency updates on action items from the previous meeting. After a LegisStat meeting, a summary of action items committed to by the agency is distributed.
6. **Collaborative:** LegisStat meetings require ongoing collaboration between legislators and agency leaders, so meetings have a spirit of respect and collegiality, even as agencies are pushed to achieve better outcomes.
7. **Aiming for impact:** LegisStat meetings are the most visible part of any LegisStat initiative, yet an important part of the initiative's impact occurs *between* meetings, when agencies work to achieve action items committed to during the meetings. It is why identifying specific action items is so important.

Appendix B: LegisStat Agenda Template

LegisStat Agenda: Hearing with Agency X
(Internal version for the committee)

Part 1: Welcome remarks

a) Welcome remarks by the chair
b) Brief opening remarks by agency leadership (5 mins.)

Part 2: Challenge #1:

a) Staff update (5 mins.)
b) Agency updates on related action items (and follow-up input from the committee)
c) Questions from the committee

Suggested questions by LFC staff:

1. [Add question #1]
2. [Add question #2]
3. [Add question #3]

Part 3: Challenge #2: [Add agency challenge here]

[Same format as Part 2]

Part 4: Challenge #3 [Add agency challenge here]

[Same format as Parts 2 and 3]

Part 5: Additional member questions (if time allows)

Notes about this agenda template:

- Using section headers for each challenge (Parts 2, 3, and 4) helps keep the discussion focused.
- This agenda template assumes that three priority challenges will be discussed, but it can be adapted for as many as needed.
- Part 5 ("Additional member questions") is designed to signal to committee members to hold their questions *not* related to the focal topics until the end of the meeting.