Case Study – Yorkshire Cricket Outcomes Framework

Overarching Strategic Outcomes

The Yorkshire Cricket partners will contribute to meeting the following broad community needs

- Enhanced health and wellbeing for all people in the Yorkshire community (i.e. physical, mind, social and emotional health)
- Enhanced community cohesion, social inclusion and interaction

Intermediate Outcomes

The Yorkshire Cricket partners will achieve the following in conjunction with other service providers

- IO1 Enhanced levels of physical activity
- IO2 People enjoy themselves more
- IO3 Creation of economic value
- IO4 English cricket is in a positive
- IO5 Lifelong learning & personal development
- IO6 People have increased pride in themselves & in Yorkshire and a clear identity
- IO7 People from all parts of the community are better

Service Outcomes

The Yorkshire Cricket partners will work together to achieve the following interdependent outcomes

- **SO6 Sufficient income generated to survive & thrive**
- **SO1 More people playing cricket & participating in other ways**
- **SO2 More people continually improving their skills (whether playing or involved in another way) and greater success in all competitions**
- **SO3 More members, more spectators, greater**
- **SO4 More people talking about & appreciating cricket on a**
- **SO5 More England international matches staged at**

- **Cricket provides an enjoyable experience for everyone**
- **Cricket is easy for everyone to participate in**

Establishing and Using Data

"People are entitled to their own opinions…but not their own facts!"

Environmental Protection Agency (EPA) Administrator Gina McCarthy

Introduction

One of the enduring characteristics of excellent and resilient organisations and leaders is the use of data trends to inform strategy, organisational improvement and service development (even in the 'post-truth world' that we now seem to be living in!). For organisations reliant on public funding, the correct use of data is a key component of a successful advocacy campaign. Data analysis and review also provides a *building block* for other types of service review and change programmes (see Section Four).

This subject and the related tools and techniques are often misunderstood, misrepresented and misused, especially within the public sector. Performance measurement is often perceived as unnecessary bureaucracy and part of central control systems. Many culture and heritage organisations perceive data collection merely as a time consuming way to demonstrate the value of the service. However, none of this needs to be true!

Effective data analysis and review is simply the process of measuring your progress in relation to what you want to achieve (especially your strategic outcomes – see Section Four) and using this information to help you to decide on changes to the service or to the way in which the organisation operates. At the same time, this data can be used to demonstrate the value of the service to parent bodies and other stakeholders.

This sounds easy – yet some many organisations make it much more complex and less relevant. It is also possible to use performance measurement / management techniques in a way which adversely affects performance (this is actually quite common!). **The key is to ensure that, whatever, performance measurement techniques you use, the focus is always on developing and improving the service – the results will follow!**

The techniques and guidance on the following pages will help you to collect, analyse and use data in a useful way, whilst avoiding any unintended consequences.

The TNA web site includes a performance measurement spreadsheet that you can adapt and use for your service, along with an example of how it could be used for a heritage service.

Language

The world of performance measurement / management is full of complex and misleading jargon, which is often used incorrectly. Here are some useful definitions:

Aims and *Objectives*

These terms mean something that you are working towards. The term 'aim' normally relates to something quite general at a high level (NOTE: We believe that the concept of ***outcomes*** is far more useful – see Section Four). The term 'objective' normally relates to something more specific (often a ***performance target*** – see below). Other than that they have no specific definition and are used in a number of different ways within organisations (and so possible should be avoided).

Performance measures

Criteria which enables you to measure and predict progress relating to what you are trying to achieve (e.g. your service outcomes). Data is collected relating to the performance measures to enable the organisation or partnership to understand performance and to plan improvement and service development activity.

Essentially there are three types of performance measure:

a. ***Outcome measure*** – a way of measuring how well you have performed in relation to what you want to achieve, using numbers, percentages, etc.

b. ***Stakeholder perception measure*** – a way of measuring how you have performed in relation to what you want to achieve, using the quantifiable perceptions of your customers, community, partners, funders, staff or volunteers

These two types of measure are also known as ***lagging measures***, as they show the results of a work activity usually well after the activity is completed.

c. ***Performance indicator*** (sometimes known as ***proxy measures***) – a way of predicting how well you will perform in relation to what you want to achieve, using numbers, percentages, etc., often directly linked to your service outputs or your processes

This type of measure is also known as a ***leading measure***, as the information should predict the likely outcome (often allowing performance to be adjusted in advance of the outcome). In some cases, a measure can be both leading and lagging (e.g. staff satisfaction identified through a staff survey is a lagging measure for staff morale, although usually a leading measure (predictor) of customer satisfaction).

Whereas you need a small number of *outcome measures*, excellent organisations often establish many *performance indicators* (of course they have to be of use).

Performance Targets

A performance target is a specific quantity relating to a performance measure that the organisation or partnership needs to achieve within a specific timescale (e.g. 85% customer satisfaction, 1000 new young people using the facility, 20% reduction in youth crime, 2% efficiency savings, etc.).

NOTE: In our view (and in the view of most improvement specialists), performance targets almost always create negative unintended consequences – and so should be avoided if possible.

Deliverables

There is no accepted definition of a 'Deliverable'. Clearly it has to be something that the organisation or partnership can focus on achieving. Therefore, it could be…

(a) The outputs in a plan

(b) A performance target

Balanced Scorecard

The Balanced Scorecard concept and techniques were formally created in 1994 (by Kaplan & Norton) following research into why some organisations do not succeed in the long-term. The concept requires organisations to consider strategy from various perspectives (as opposed to for example just a financial perspective). The original Balanced Scorecard perspectives were finance, customers, internal processes and staff innovation and learning. Organisations should adjust these to suit the nature of their market and the environment in which they operate. For example, the archives sector, could consider the following perspectives:

- Community outcomes
- User satisfaction
- Economy and value for money
- Workforce satisfaction and development

A Balanced Scorecard approach also requires organisations or partnerships to use both ***leading*** and ***lagging measures*** in each perspective.

Balanced Scorecard provides a technique to work out what all of the information is telling you about the overall progress of the organisation. This involves indexing and weighting the data so that the figures can be added together and arriving at an overall score or a small number of overall scores (for example, you could create an overall score for value for money).

Benchmarking

In modern organisations, there are two distinct types:

(a) ***Performance benchmarking*** **–** the process of comparing the organisation's results with other organisations' results, Industry averages or recognised best in class results

(b) ***Process (or best practice) benchmarking*** **–** the systematic and continual two-way process of learning from the practices of other organisations (of any type in any sector) to stimulate improvements

Data, Information and *Knowledge*

These terms form an important hierarchy, which helps the organisation to review and improve performance:

- ***Data*** is raw facts (e.g. user numbers)
- ***Information*** is data within a context and perspective (e.g. historical trends of user numbers with comparisons against similar authorities)
- ***Knowledge*** is information with insight relating to how to move forward (e.g. a way to improve user numbers using recognised best practice

Performance Review

Performance reviews can take place at various levels within the organisation and involves reviewing progress and planning improvements, using ***data***, ***information*** and ***knowledge*** (see above). Performance reviews often take place on a quarterly, four monthly or six monthly cycle.

To assist the process, data relating to each performance measure is often presented in a graphical format as follows:

- Historical trends (organisations should aim for at least three years of trend information)
- Comparison with performance targets (see above)
- Where possible, comparison with external organisations, Industry averages or best in class, using ***performance benchmarking*** (see above).

Performance reviews should always lead to improvement or service development action.

Data analysis and review – the steps

As mentioned in the Introduction, performance measurement is simply the answer to the following question: **"How can you measure and predict progress relating to what you want to achieve?"**

Here are the recommended steps:

Step 1:

Establish performance measures, which will enable you to measure and predict progress relating to each Service Outcome. NOTE: Unless the performance measures relate directly to your service outcomes (or other goals), they are irrelevant (you should only measure what you are trying to achieve!

Step 2:

Work out how you will collect the data relating to the performance measures (e.g. surveys) and who will collate it.

Step 3:

Find suitable performance benchmarking opportunities (if possible).

Step 4:

Develop a cyclical performance review system (see page 44).

Step 6:

Collect and collate the data.

Step 7:

Analyse historical data trends (for many performance measures, you will need at least three years of data in order to draw reasonable conclusions). NOTE: Drawing conclusions from single data points is one of the most common errors with performance measurement. Also, drawing conclusions from the data relating to just one performance measure can be misleading.

Step 8:

Analyse data in relation to external benchmarks where possible.

Step 9:

Present the above analyses at the performance review meeting and discuss the causes of the trends.

Step 10:

Agree actions to develop and / or improve the service.

Measuring and predicting progress relating to your service outcomes

Ref	Service Outcomes	Performance Measures and Indicators	How will we collect the data?
Perspective A: Service Users and the Wider Community			

Ref	Service Outcomes	Performance Measures and Indicators	How will we collect the data?
Perspective A: Service Users and the Wider Community			

Ref	Service Outcomes	Performance Measures and Indicators	How will we collect the data?
Perspective B: Parent Body			

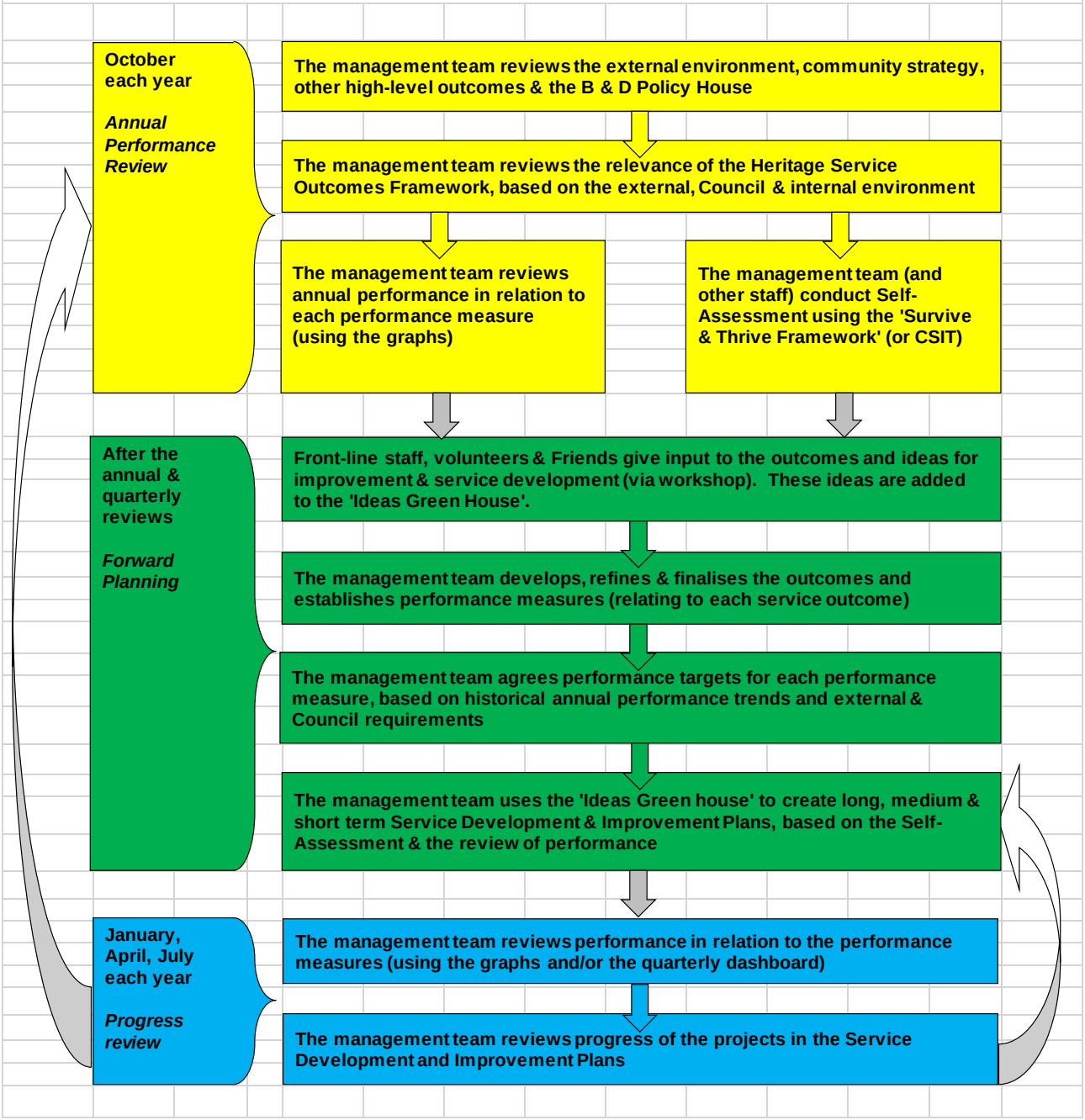
Ref	Service Outcomes	Performance Measures and Indicators	How will we collect the data?
Perspective C: Workforce			

Case Study – Performance Review Cycle

Heritage Services Review and Improvement System

Process Leader: Chris Foord

Process Output: Up-to-date Service Development & Improvement Plans which are designed to help Heritage Services achieved enhanced Outcomes



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Section Seven: Building Block 3 – Stakeholder Review and Engagement

"Seek first to understand, then to be understood" (Dr Stephen Covey)

Introduction

Resilient heritage organisations develop a clear understanding of their stakeholders and engage with them effectively to....

- inform service development and improvement
- create supporters of and advocates for the service.

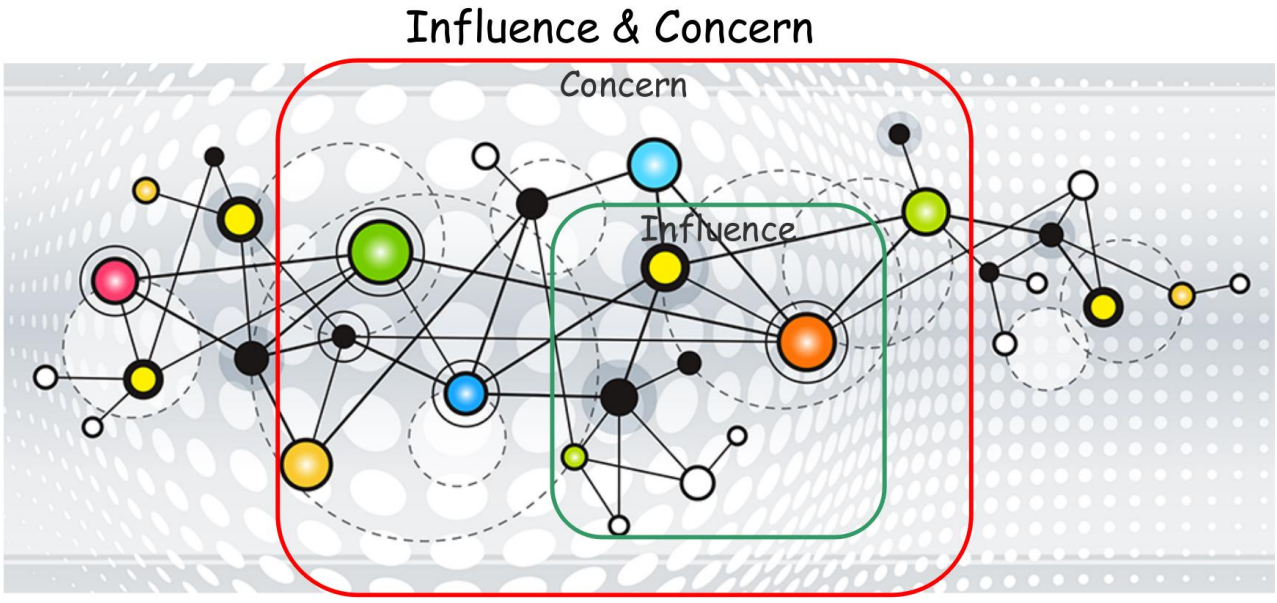
Stakeholder engagement is also a key part of all the types of service review described in Section Four.

This section provides practical tools to help you identify your stakeholders, establish their needs and plan how to understand, engage with and influence them more effectively.

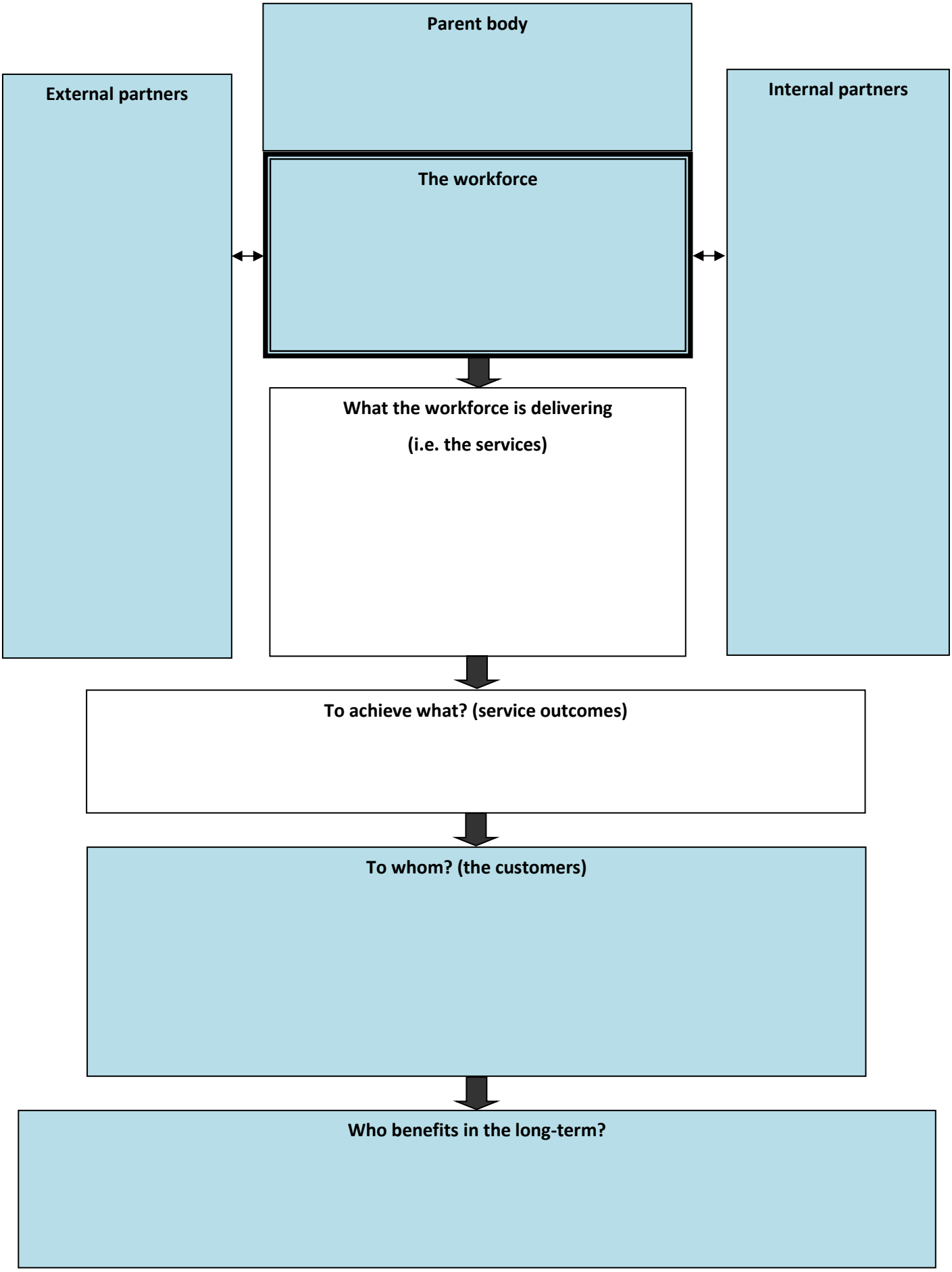
When working on stakeholder review and engagement, remember the following principles:

- **"Seek first to understand, then to be understood"**
- **Think 'win/win'**
- **You can't force people to change, either overtly or covertly!**
- **Successful influencing is a <u>collaboration</u>....allow your ideas and views to be built on by others so that you create a consensus which is more powerful than what you started with**

Also, remember that you can't influence everyone! One of the keys to personal and organisational resilience is to focus your energies, resources and passion on what is within your 'sphere of influence'....and to forget about what is not! Sounds harsh...but this skill really makes a difference! Your 'sphere of influence' is always smaller than your 'sphere of concern'. However, the more you collaborate the more your 'sphere of influence' grows.



Stakeholder Model



Understanding your stakeholders

What are their needs, their likes and preferences? How do they like to be communicated with?

Users?

Parent body?

External partners?

Internal partners?

Workforce?

Wider community?

Creating advocates for the service

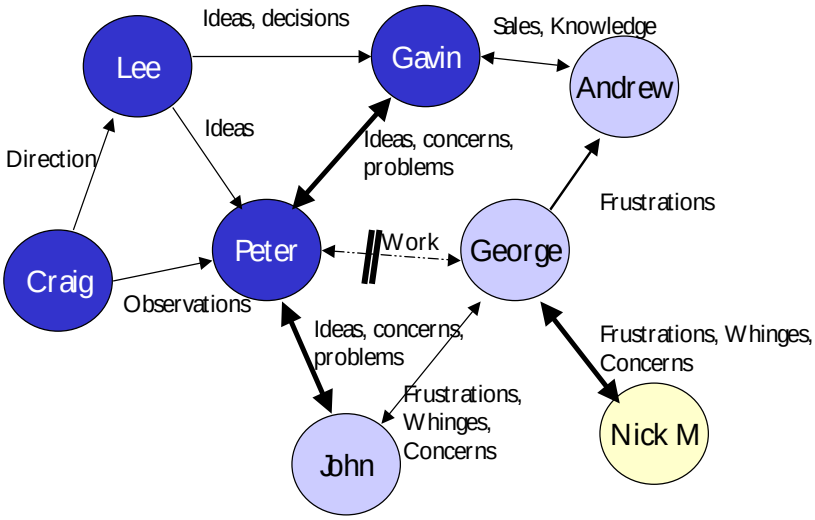
This would all be so much easier if you had unlimited time! But you haven't, so you need to target your energies carefully. This technique will enable you to identify whom you need to be influencing. Often, creating advocates for your service is not as straight forward as it sounds…..you might need to influence someone, to influence someone else! Remember that it doesn't matter if the change ends up being "someone else's idea"!

Conduct this exercise with your collaborators and review it at regular intervals or when the internal environment changes. A small amount of time spent on this will pay great dividends later.

'Micro-Political Analysis'

1. Consider the 'system' that you are seeking to influence (i.e. the network of people)
2. Write the names or roles of all the key people and groups within the 'system'. Attach these to a large sheet of paper.
3. Draw links and the prime flow of information/data between the different people / groups.
4. Increase the relative strength of the link where there are strong alliances between individuals
5. Where there are conflicts, mark the lines with a double cross through.

The example below provides an analysis of a small 'system'. "Peter" is the central role (He is Office Manager). The various other players have different levels of relationship with Peter; e.g. Peter has strong relationships with Gavin and John. Also shown are the different exchanges of information, etc. There is one relationship with real issues – Peter and George.



When you have completed this ask various staff within the 'system' about their views on the analysis:

- **Have you included all the significant players?**
- **Are the links and their relative strength and conflicts correct?**
- **What are people's perceptions on why these relationships are strong or in conflict?**

Support or Resist Matrix

Consider the orientation of each person to the service:

- Support/Resist – is the person supportive of or resistant to the potential changes?
- Power / influence – does the person have high or low power / influence in this situation?

Write the names of the people in the appropriate position on the following worksheet:

SUPPORT/RESIST

	Highly Resistant	Neutral	Highly supportive
Strong			
P O W E			
Weak			

Think about who falls into which category:

Influential and supportive	**Influential and resistant**
Not influential and supportive	**Not influential and resistant**

So whom do we need to influence / collaborate with in the future?

What is their usual leadership / communication style?

What are their potential 'interests' in supporting the identified activity (e.g. position, career, territory, advantages, ideological interests, personal values, sense of personal and professional identity, etc.)?

Your Stakeholder Engagement Plan

Person / group	How will we communicate with / engage them?	When can we do this?

Notes

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Section Eight: Planning your Service Transformation Programme

"If we always do what we have always done, we will always get what we have always got!" (Tony Robbins)

Our Plan

Type of review or improvement activity	Timescale	Which stakeholders should we engage?	How will we engage the stakeholders?	What are the potential pitfalls?	How will we avoid them?

Support

How could your peers support you? How will you make this happen?

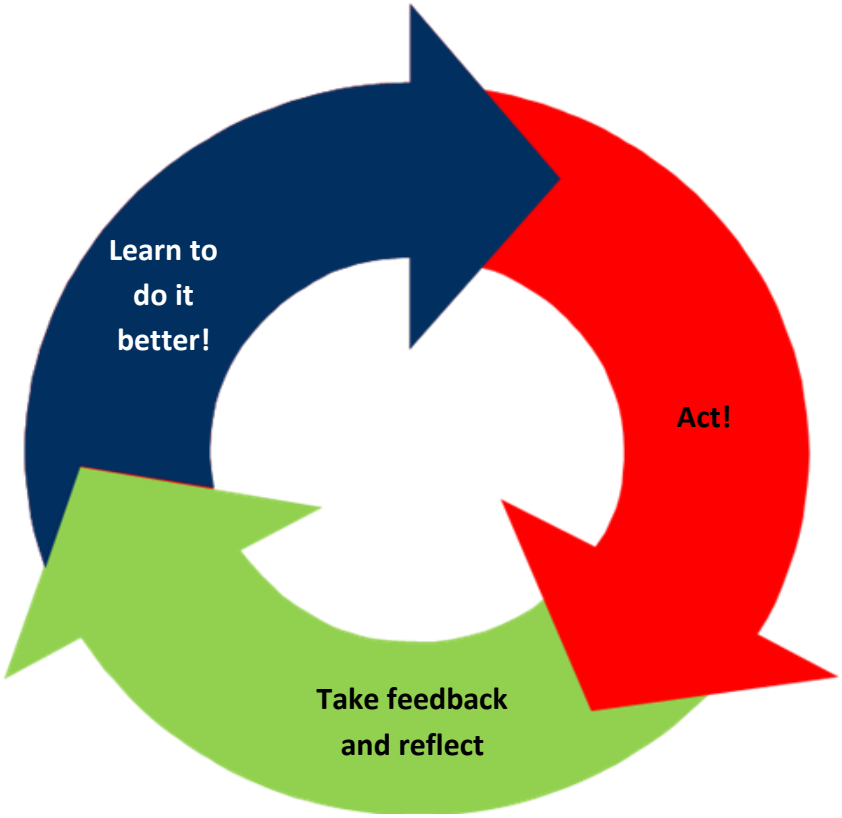
What further support do you need from The National Archives?

Commitment to act!

When I return to the workplace I will……

Tell someone that will be doing this. This will increase your commitment.

Adopt the following continual cycle:



Remember to celebrate your success, however small you may think it is!

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