

**Field Housing & Care**

**Performance Management Framework**

## Contents

Introduction .....	1
Defining performance management.....	2
Improving the way in which we manage our performance.....	3
Being more able to respond to change quickly and effectively.....	3
Breaking down barriers and recognising complexity.....	4
Setting priorities.....	5
Strategic and operational planning.....	5
Departmental Plans .....	6
Risk Management .....	6
Providing the right information, to the right people, at the right time.....	7
Measuring Performance .....	7
Reporting performance.....	8
Managing information & data quality .....	10
Evaluating Performance.....	12
Involving employees in performance management .....	13
Involving tenants and service users in performance management.....	14
Self-evaluation .....	15
STAR (Striving to Achieve Results) .....	17
Benchmarking .....	18
Audit & inspection .....	19
Scrutiny .....	19
Acting to deliver improvement .....	20
Project management.....	21
Bield Improvement Programme .....	21
Improvement tools .....	21

## Introduction

Bield's vision seeks a "Scotland where people of all ages are respected, can make their own choices and are able to live independent and fulfilling lives" supported by a mission "to improve the quality of life of older people by offering a diverse range of housing, care and other services".

The vision will be delivered via the Business Strategy (2016-21). 'Putting customers first' is at the core of the Strategy; as a result Bield aims to:

- Provide good quality homes and cost effective services that recognise customers' individual needs, produce positive outcomes and represent value for money
- Ensure that our customers drive our service improvements through their involvement and scrutiny
- Increase our customer satisfaction levels across our entire customer base and sustain this at 90% or above
- Develop mechanisms to ensure that we know what our customers want and how we can meet their expectations
- Develop services that provide good value and are financially competitive

Twelve strategic outcomes are described in the Strategy, which explain the results that Bield aims to achieve in greater detail. The Strategy also includes six values that we will uphold when delivering our services.

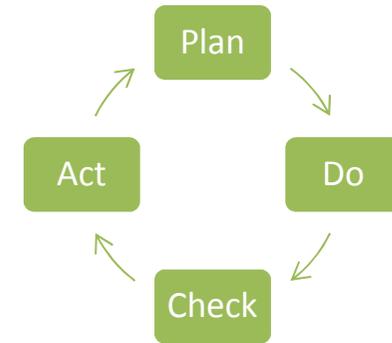
Achieving these ambitions will be challenging. Bield, as an organisation, will need to self-aware of its strengths and weaknesses, and be willing to change to improve its services. The Performance Management Framework has been designed to help identify how the organisation can improve. The Framework describes the system of inter-related activities that help us to address the following questions:

- Are we doing the right things?
- Are we doing them right?
- How do we know how well we are doing?
- Could we do things differently and better?
- Have we got the right people in the right posts with the right skills?

## Defining performance management

Performance management is the process for ensuring that all parts of the organisation are working to achieve the objectives outlined in the Business Strategy. Performance management includes service planning, performance monitoring and service improvement. Each of these activities are part of a recurring cycle, which at its simplest can be conceptualised as Plan-Do-Check-Act.

Performance management aims to link the Business Strategy to Departmental objectives, team objectives and individual responsibilities. The Plan-Do-Check-Act cycle exists at each of these levels. In practice performance management involves setting objectives; using relevant performance indicators to monitor progress; evaluating performance; and ultimately using the knowledge gained to improve processes or modify objectives if necessary.



The performance management framework will fulfil the needs of stakeholders in different ways. Tenants, for example, are likely to prioritise different outcomes from care users. All stakeholders will be interested in performance improvement, although they may focus on different aspects of improvement. Examples of the expectations of different stakeholders are provided below:

<p><b>Tenants</b></p> <p>What value for money do I receive for the rent I pay?</p> <p>How do the services I receive improve my quality of life?</p>	<p><b>Care users</b></p> <p>Is the service providing a high quality of care?</p> <p>Are the fees I pay comparable with elsewhere?</p>	<p><b>Owners</b></p> <p>What value for money do I receive for the service charges I pay?</p>	<p><b>Managers</b></p> <p>What do I need to prioritise to improve my service?</p> <p>Are resources being allocated effectively?</p>	<p><b>Staff</b></p> <p>What skills do I need to develop to help the service improve?</p> <p>What ideas can I put forward to improve the business?</p>
<p><b>Care Inspectorate</b></p> <p>What quality of care do people receive?</p> <p>Does Bield have processes in place to identify and act upon poor performance?</p>	<p><b>Social Housing Regulator</b></p> <p>How well does Bield perform in relation to the Social Housing Charter?</p> <p>Does Bield have processes in place to identify and act upon poor performance?</p>	<p><b>Board of Management</b></p> <p>To what extent is the organisation meeting the objectives of the Business Strategy?</p> <p>Do we need to make changes to policy or services to improve performance?</p>	<p><b>Performance &amp; Audit Committee</b></p> <p>How well is Bield performing in relation to its Key Performance Indicators?</p> <p>Does Bield have processes in place to identify and act upon poor performance?</p>	<p><b>Scottish Government</b></p> <p>To what extent is Bield contributing to Government policy (e.g. Health &amp; Social Care Integration)?</p>

## Improving the way in which we manage our performance

Many aspects of performance management are well established at Bield. However, there are areas that the organisation would like to improve upon, especially to assist with the delivery of the Business Strategy. The following areas reflect drivers for change identified in the Strategy that the Performance Management Framework will help to address.

### Being more able to respond to change quickly and effectively

*'We sometimes seem to have an inability to respond to change effectively and we need to be faster'*

*'Our governance, leadership and management structures need to be flexible and able to compete effectively in a fast-changing market'*

Bield Business Strategy 2016-21

The management structure and various committees of Bield represent a hierarchy of decision-making. Such a hierarchy is necessary to ensure that decisions (setting the budget, for example) are taken at the appropriate level with the required degree of oversight and scrutiny. However, the need for oversight and scrutiny should be balanced with the need to be responsive to service users. Requiring too many decisions to be taken at a senior level can slow down the decision-making process to such an extent that it poses a risk in itself.

Enabling people to take decisions at lower levels of the organisation can help Bield respond more quickly to challenges and opportunities. The performance management framework can assist by providing all employees with the timely, accurate performance information. However, providing information is only part of the solution. People also need to be empowered to make use of the information to improve the way in which services are provided. Processes will be established to ensure that decisions that should be taken close to the customer can, in fact, be made at that level. Practical measures to assist with this include:

- Reporting performance information online as close to real-time as possible for all employees to view
- The establishment of a quality management framework to engage employees in the identification of areas for improvement
- The implementation of the revised Performance & Development Framework
- Using formal programme and project management processes to ensure change is managed effectively
- Effective use of risk management to identify areas in which decision-making can (and cannot) be delegated to lower levels
- Management support for employees to identify and test / trial new ways of working

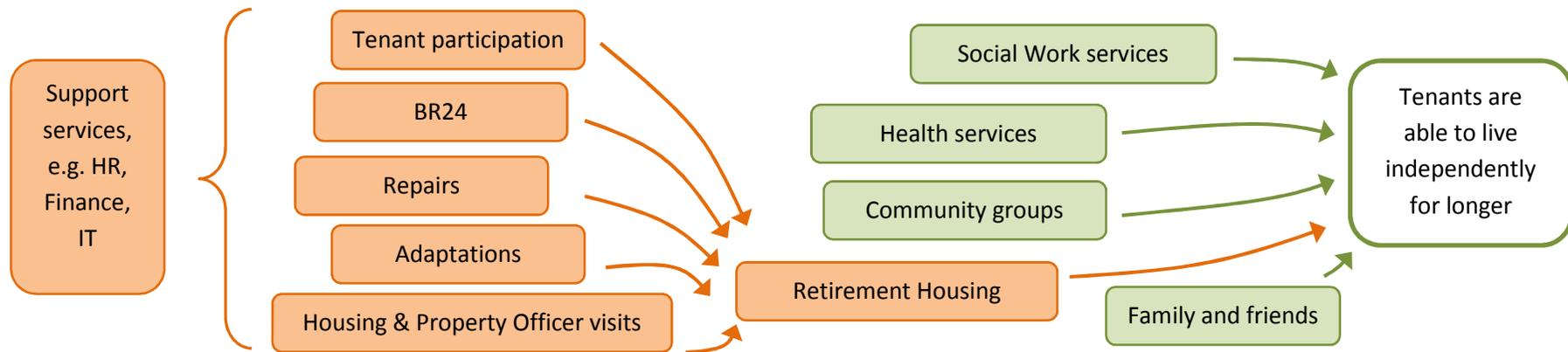
## Breaking down barriers and recognising complexity

*'We sometimes operate in departmental and geographical silos - and this may mean information and ideas are not shared easily and we miss opportunities'*

Bield Business Strategy 2016-21

Bield, in common with most large organisations, is split into different departments, services and teams. The organisational structure makes sense as it clarifies roles and responsibilities, divides operations into manageable areas and allows decision-making to be delegated to an appropriate level. However, Bield needs to deliver results that are often the product of several parts of the organisation working together, working in partnership with other organisations, or even working in partnership with service users.

The example below provides an indication of the range of services and groups that contribute to helping older people live independently for longer:



The performance management framework needs to account for this complexity by addressing problems from the perspective of the service user as well as the service provider. Examples of the measures that Bield will take to break down organisational barriers include:

- Involving service users, partners and other stakeholders directly in processes to evaluate performance
- Making customer feedback a key part of the KPIs, departmental scorecards and other performance management processes
- Establishing multi-departmental groups to evaluate performance in relation to outcomes that add value for the customer
- Applying business improvement techniques that identify the linkages between activities undertaken by different services and stakeholders
- Using formal programme and project management processes (that identify linkages and dependencies) to implement improvement actions
- Developing performance indicators that are shared by different departments

## Setting priorities

### Strategic and operational planning

The objectives that the Performance Management Framework evaluates are defined in a number of plans and strategies. Improvement actions arising from performance evaluation will, in turn, inform the content of strategic and operational plans. This feedback loop is characterised by the Plan-Do-Check-Act cycle.

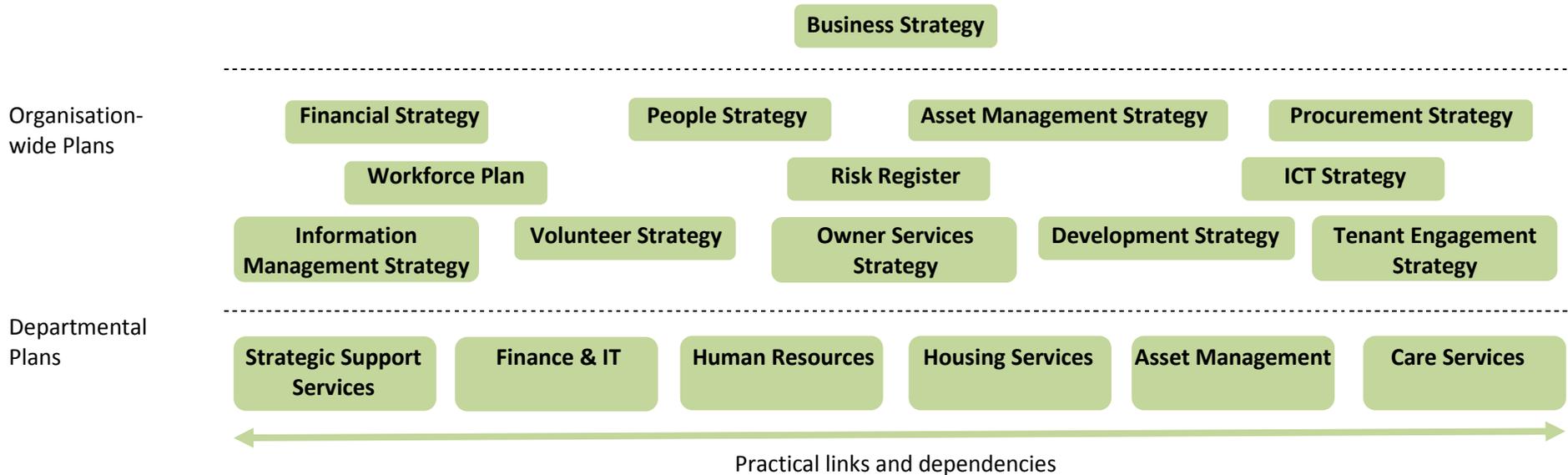
The Business Strategy sets out Bield’s future direction, outlines strategic objectives and ensures that action plans and sufficient resources exist to achieve those objectives.

Several organisation-wide plans support the achievement of the Business Strategy, including the Financial Strategy, Asset Management Plan, Workforce Plan, Risk Register and ICT Strategy.

Departmental Plans identify the activities that each Department will undertake to help achieve the ambitions outlined in the Business Strategy.

Various service specific plans and strategies will also be taken into account when evaluating performance at Departmental level.

Strategic planning hierarchy:



## Departmental Plans

Departmental Plans include an action plan that demonstrates how the Department will contribute to Bield's wider objectives. The content of the action plan is influenced by the Business Strategy, other organisation-wide plans and legislative requirements. Although each Plan is reviewed annually, it also needs to be adaptable enough to account for changes that occur during the year. Improvement actions resulting from the evaluation of performance information should be included within Departmental Plans as they arise.

## Risk Management

Risk management is closely linked to performance management. Bield's risk registers highlight the main risks that might prevent the organisation from achieving its objectives. Each risk is ranked according to the likelihood of the risk occurring and the impact of the risk should it occur. Risk registers include actions to mitigate each risk with the aim of reducing the likelihood or impact of the risk. Reporting performance measures alongside relevant risks will help to gauge whether the risk is likely to occur.

Risk management should, as far as possible, be integrated with performance management arrangements. Practical examples of how risk can be integrated with performance include:

- incorporating the mitigating actions from risk registers into Departmental plans
- evaluating risk management processes using self-evaluation
- discussing risk alongside performance at team meetings
- integrating risk and performance within a single report

## Providing the right information, to the right people, at the right time

### Measuring Performance

Performance can be measured in a number of ways; therefore it can be useful to adopt the concept of the Balanced Scorecard to help identify useful performance measures. The Balanced Scorecard is divided into four perspectives that need to be addressed in order to achieve the organisation's aims and objectives:

- Customer – what outcomes do we need to achieve for our customers?
- Resources – what financial results do we need to achieve to ensure that the organisation is sustainable and able to deliver the services customers require?
- Capabilities – what capabilities do we need to possess to deliver our objectives? How do we know they are being delivered?
- Learning & Growth – what does the organisation need to do to enable it to develop the capabilities that it needs?

The format of the Balanced Scorecard helps to capture various dimensions of performance from short-term inputs to long-term outcomes. It is the balance of short-term and long-term perspectives that gives the Balanced Scorecard its name.

The perspectives of the Balanced Scorecard prompt consideration of various sources of information to help measure performance. Some areas are easier to measure than others with quantitative data. Financial performance, for example, lends itself to this kind of measurement. Specific surveys or evaluations might need to be developed to measure other areas, to understand staff attitudes for example.

Bield's Key Performance Indicators (KPIs) are developed on the basis of the Balanced Scorecard. Departmental indicators are also developed on the same basis.

## Reporting performance

KPIs measure progress in relation to the objectives of the Business Strategy. However, there remain aspects of Bield's performance that although measured, will not be reported among the KPIs. The organisation has a wide range of stakeholders that have different needs and expectations. The Scottish Public Services Ombudsman, for example, may expect to see a breakdown of complaints being reported in greater detail than would be appropriate for inclusion among the KPIs.

The table below outlines the minimum set of reports that Bield will provide, highlighting the purpose, audience and content of the reports:

Report	KPI report	Business Strategy monitoring report	Scottish Social Housing Charter comparison report	Departmental performance report	Complaints performance report	Annual performance report/ Landlord Report	Value for Money benchmarking
<b>Content</b>	Indicators demonstrating performance towards Business Strategy objectives	Performance and progress towards the tasks outlined in the Business Strategy	Scottish Social Housing Charter Indicators	Operational indicators that contribute to the success of the Departmental Plan	Number, subject and performance against stage 1 & 2 complaints	Summary of performance in relation to Bield's priorities and the Social Housing Charter	Value for money indicators that enable a comparison with other social landlords
<b>Audience</b>	Performance & Audit Committee Board Senior Management Team (SMT)	Performance & Audit Committee Board SMT	Scottish Housing Regulator Performance & Audit Committee	Departmental Management Teams Staff	Performance & Audit Committee Scottish Public Services Ombudsman	Tenants / service users Owners	Performance & Audit Committee Board
<b>Frequency</b>	Quarterly	Quarterly	Annual	Quarterly	Quarterly	Annual	Annual
<b>Media</b>	Committee report Grapevine	Committee report	Committee report	Grapevine Departmental newsletters	Committee report	Website Bield Bulletin	Committee report

## Presenting performance information

The purpose of performance information is to promote action; therefore performance information needs to be understandable to its intended audience. The UK Government Service Design Manual on Data Visualisation<sup>1</sup> provides useful guidance on presenting performance data.

‘Know your audience so you give the right amount of supporting information. External or non-technical audiences will need more explanation but internal or expert audiences may find this tedious. Don’t use the text to simply repeat what’s being said by the data’ (Government Service Design Manual)

Performance indicators will be reported using some of the following techniques depending upon the needs of the target audience:

*Comparisons* – displaying performance in relation to the Scottish average, an average of comparable organisations (i.e. a peer group of similar specialist housing providers), higher or lower quartiles etc. may be useful in helping people interpret performance for some indicators

*Targets* – providing a target helps to provide context to help the viewer understand whether performance has reached the level that was anticipated. Performance against targets is usually demonstrated using a red (significantly below target), amber (slightly below target) and green (above target) colour scheme

*Trends* – reporting data for several previous periods provides a trend that can help to demonstrate whether a result is unusual or part of a longer-term pattern. Trends are often a good indication of future performance

*Rates, proportions and actual numbers* – rates and proportions allow data to be reported consistently in circumstances where the actual number may differ significantly over time or between comparators. However, it may still be necessary to report the actual number alongside the rate / proportion to provide the viewer with a realistic understanding of the issue

*Segmentation* – it may be possible to break indicators down into a greater level of detail to help viewers understand what caused a particular result. Useful ways to segment an indicator might include, for example, a breakdown of the results based on different geographic areas, demographic groups, or business units

*Commentary* – explanatory comments are necessary to help viewers understand the reasons for changes in performance. The potential audience should be considered when providing commentary, as knowledge of the subject can vary considerably

Performance information will be reported in such a way that it can be integrated into existing business processes to ensure that it is used effectively. In some circumstances the role of performance reporting is well established (e.g. in relation to committee meetings); however, performance information could be used more widely to help inform decision-making (e.g. at team meetings). Providing performance information online in order that it can be viewed at any point in time, at a range of levels suitable to different stakeholder needs, will enable it to be utilised more effectively.

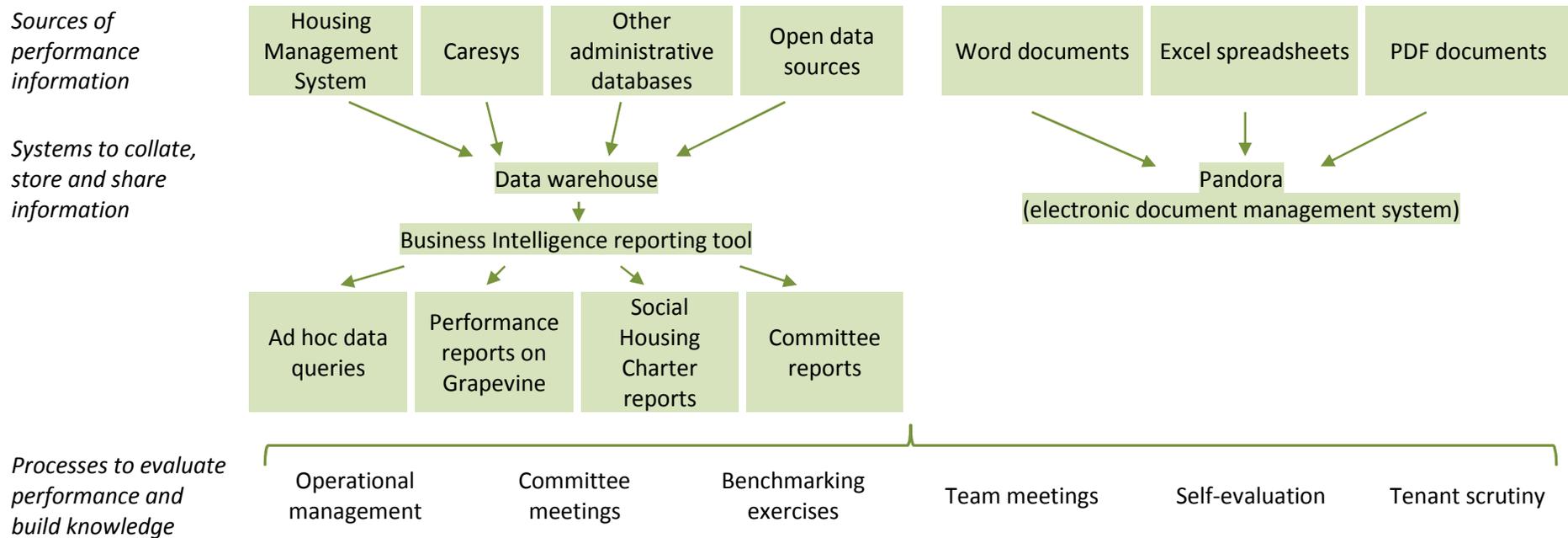
<sup>1</sup> <https://www.gov.uk/service-manual/user-centred-design/data-visualisation.html#further-reading>

### Managing information & data quality

Information management has a significant role to play in helping the organisation to build knowledge over time. In this context information management means interpreting data (or other qualitative performance information) to develop an understanding (i.e. knowledge) of the factors that influence performance. Documenting and sharing knowledge across Bield will help the organisation learn and improve the services that it provides.

Effective information management will also help Bield to become more efficient in the way it conducts performance management. Sharing of knowledge means that lessons learned by one part of the organisation will not need to be re-learned, either at some point in the future or by another part of the organisation.

Examples of mechanisms for managing performance information are provided below:



Performance data needs to be reliable, timely, accurate, relevant and complete. The Performance Management Manual explains Bield's processes for ensuring that high quality performance data is provided.

Performance data also needs to be cost effective. Specifically, the time and effort required to collect performance data should not outweigh its usefulness to the organisation. Inefficient processes for generating and reporting performance data can diminish the time available to analyse the results. The balance between data collection and analysis ought to be weighted more towards the latter.

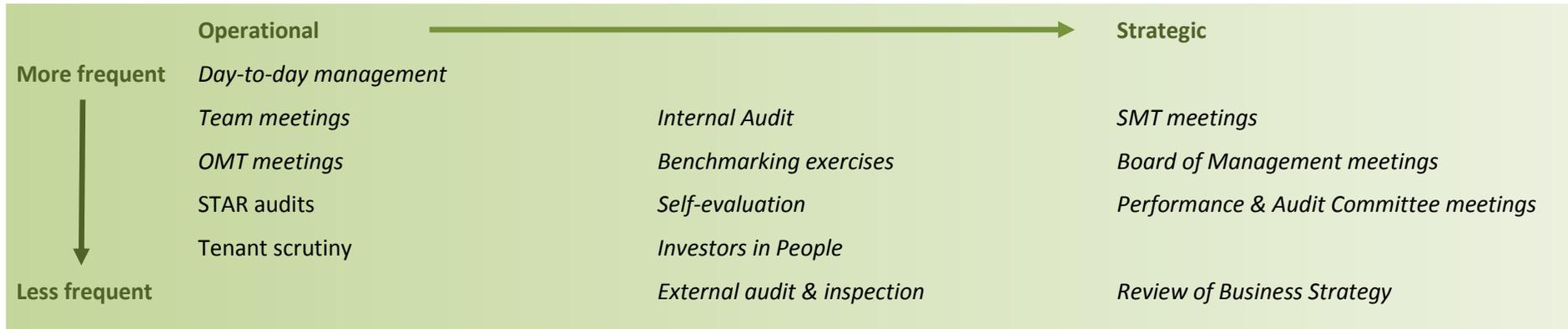
Efficient use will be made of performance data by re-using data from a single source in several different reports.

## Evaluating Performance

Performance information can, and should, be evaluated in a number of different ways to help identify where Bield could improve. ‘We will nurture innovation’ is one of our objectives. Involving a wide range of people with different perspectives in evaluating performance (including staff, partners, tenants and care users) will increase the likelihood of generating innovative approaches to improve performance. Evaluating performance in this manner can also help to work across geographical and departmental silos, which will make better use of knowledge and expertise.

Developing a range of methods to evaluate performance will help to account for the many different aspects that need to be addressed to ensure the long-term success of Bield. Some approaches will focus upon making the most of our existing capabilities, while others will highlight what needs to be developed based on external comparisons and changes in the environment.

Performance reporting and evaluation methods need to be aligned to ensure that the right information is available for evaluation at the right time. Although evaluation can occur as part of formal processes that occur at set intervals, it should not be seen as being confined to these occasions. Considering and evaluating performance information during ‘business as usual’ is possibly the most important form of evaluation.



## Involving employees in performance management

Every employee has a role to play in helping the organisation to improve its performance. While some elements of performance management may seem remote, there are numerous practical actions that all employees can undertake to help Bield achieve its objectives.

Informally, every employee can contribute to improving performance simply by identifying and implementing actions that could improve their own performance (or the performance of their team) on a day-to-day basis. All employees will already do this to some degree, even if they do not recognise it as being part of performance management. What most employees would simply consider to be 'work' already involves the fundamental elements of performance management i.e. planning what needs to be done, doing the work, checking whether results were achieved and identifying actions to improve things in future.

Formal processes to involve employees in performance management attempt to bridge the gap between what an individual does on a day-to-day basis and what the organisation needs to do in order to achieve its goals. Formal processes to involve employees in performance management also help to:

- Share information – improvements identified in one area can more easily be documented and shared with others facing similar issues
- Inform other business processes – learning captured from employees can be used to inform other plans or processes, e.g. departmental plans
- Provide a 'common language' – creating a common understanding of how to evaluate performance across all parts of the organisation
- Ensure that all aspects of performance are addressed – encouraging a balanced view of performance
- Track improvement over time – conducting formal processes on a regular basis allows improvement to be measured over time

Formal opportunities to involve employees in performance management include:

### ***Performance & Development Framework***

Regular meetings between line manager and employee to identify individual objectives and development needs. Performance is evaluated against Bield's values.

### ***Self-evaluation***

Self-evaluation exercise conducted by a cross-section of employees from each department. Performance is evaluated against a range of criteria relating to the results the organisation achieves and the factors that influence the results.

### ***Team meetings***

Offer a regular opportunity to discuss matters relating to team performance.

### ***Team and individual work plans***

Formal plans are developed annually. Individuals should be consulted during the planning process to help develop the content of the plans.

## Involving tenants and service users in performance management

Tenants and service users should be involved in performance management to help ensure that the services they need are delivered effectively. Opportunities exist throughout the performance management framework to engage with tenants and service users. Several processes have been established to help gauge the views of tenants and service users, including:

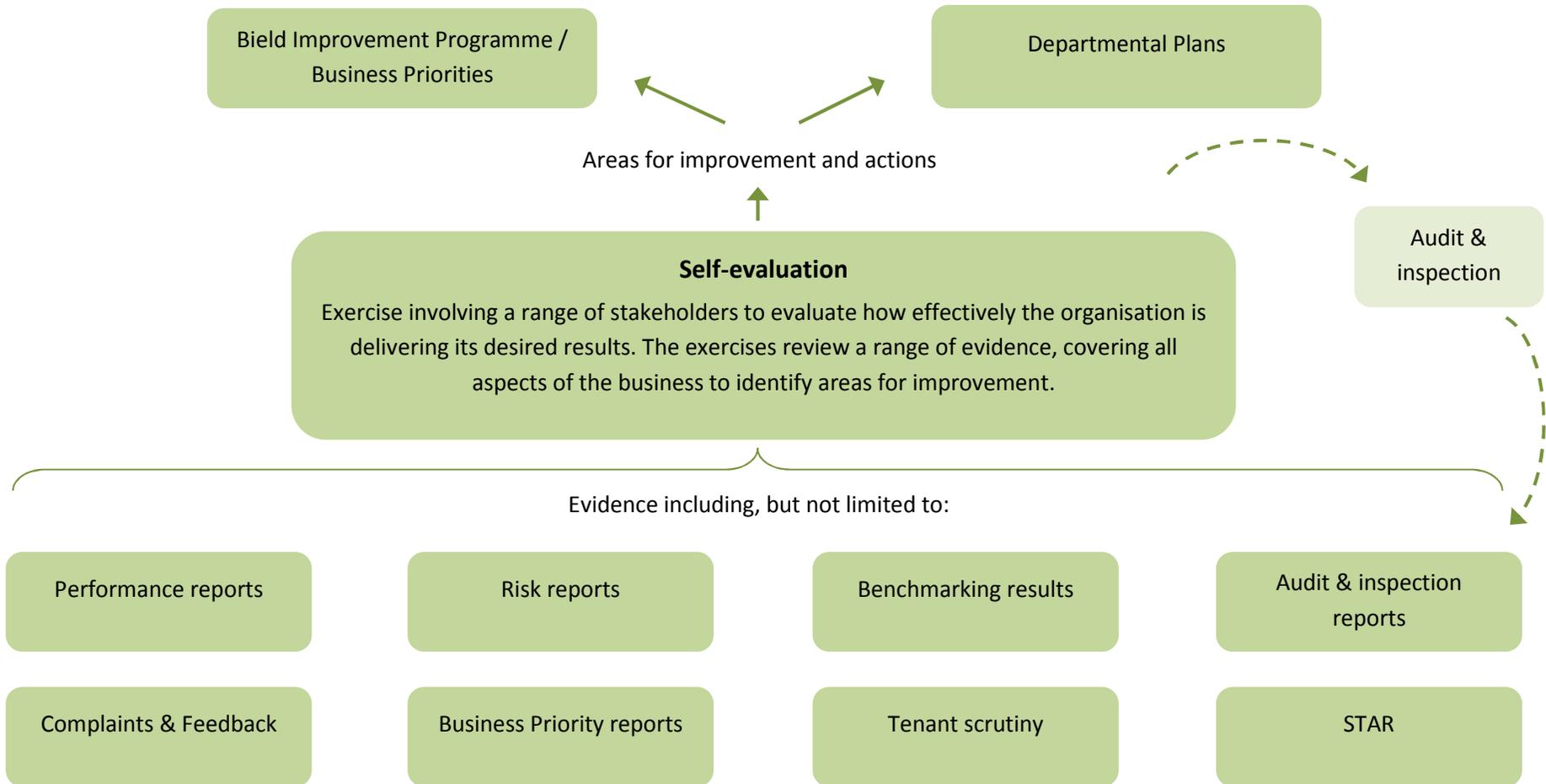
- Satisfaction surveys
- Field Improvement Group
- Complaints and feedback
- Partnership Forum
- Focus Group meetings

The output from these processes is a valuable source of evidence for other aspects of the performance management framework (e.g. self-evaluation). Tenants and service users should also (where possible) be involved in the design and implementation of improvement actions that affect them.

## Self-evaluation

Conducting self-evaluation based on the quality management principles of ISO 9001 captures all of the elements of the performance management framework to gain an overview of the organisation's strengths and weaknesses. Using self-evaluation also helps to ensure that staff and other stakeholders are involved in the identification of areas for improvement. The results from self-evaluation will inform the content of the Improvement Programme and Departmental Plans.

The diagram below displays the links between self-evaluation and other aspects of the performance management framework:



## The principles of quality management

ISO, the International Organization for Standardization, publishes ISO 9001, which is an international standard for quality management. ISO 9001 outlines seven principles that form the basis for quality management:

Principle	Description
Customer focus	Meeting customer requirements and exceeding expectations
Leadership	Leaders establish unity of purpose, a sense of direction and create the conditions in which people are engaged in achieving objectives
Engagement of people	People throughout the organisation are competent, empowered and engaged
Process approach	Processes are consistent, understood and function as a coherent system
Improvement	There is an ongoing focus on improvement
Evidence-based decision-making	Decisions are based on an analysis of the evidence
Relationship management	The organisation manages its relationships with partners, suppliers and other stakeholders

Various self-evaluation models, including the European Foundation for Quality Management (EFQM), embody the principles of ISO 9001. Bield will use a self-evaluation model to assess itself on the basis of the principles of quality management. Self-evaluation will be conducted on a regular basis to ensure that improvements continue to be made and that the organisation adapts to changes in the wider world.

Being able to demonstrate that a robust quality management system is in place brings several benefits to Bield. External audit and inspection is increasingly being conducted on the basis of risk, with lower risk organisations receiving less scrutiny. The use of self-evaluation helps to provide assurance to auditors that Bield is well governed and is, therefore, a lower risk. Local authorities also want similar assurance when commissioning services and frequently request compliance with ISO 9001.

Self-evaluation can be beneficial in helping to gain the involvement of a broader range of staff and stakeholders in the evaluation of performance. Engaging people in performance evaluation can help to ensure that people take ownership of the results and help to implement the improvement actions that arise. Taking account of a wider range of perspectives can also lead to a more accurate and more useful evaluation.

The output from self-evaluation (in terms of improvement actions) will be integrated with other improvement activities. Actions arising from self-evaluation will be incorporated within Departmental Plans. However, there may be circumstances in which an action would be more successful if addressed corporately rather than by one department in isolation. In this case the action may be addressed via the Bield Improvement Programme.

## STAR (Striving to Achieve Results)

STAR is an example of one of Bield's quality assurance systems. It is applied across all Bield services that are registered with the Care Inspectorate, and provides clear guidance about the quality of services that Bield customers can expect to receive. STAR evaluates performance against 8 Standards:

1. Free to Be
2. Your Voice is Heard
3. Home Safe
4. Eating Well
5. Care to the End
6. The Service You Want
7. Carers Count
8. A Strong and Supported Workforce

Each standard has an audit tool that should be completed every quarter. The audit tool is designed to be used by managers and staff at local services to assess their performance against the standard and plan how to make improvements to the service. Service users may be involved in the audit process. The results of each audit are included within an action plan.

## Benchmarking

Benchmarking can be a useful tool to help gauge performance relative to other organisations. The use of benchmarks can help to expose areas where improvement is required, identify standards that should be achieved and assist in identifying good practice from elsewhere.

Different benchmarks will be appropriate for different measures. The national average, for example, might be an appropriate benchmark for sickness absence if the workforce is broadly similar to that of other housing and care providers. However, comparisons with a 'peer group' of similar organisations would be more relevant in other circumstances. Examples of when a peer group benchmark might be appropriate include circumstances where costs or performance differs from the national average due to the geographic scope of Bield's services or the specific type of services that are provided.

Simply measuring performance against a benchmark is useful in highlighting areas that might require further investigation. Participating in benchmarking exercises in collaboration with other housing and care providers can then help to highlight the reasons why performance differs. Benchmarking exercises can help identify areas of good practice that can be adopted to improve the performance of the business. Several organisations have been established to facilitate benchmarking, including the Scottish Housing Network, of which Bield is a member.

## Audit & inspection

Audit & inspection of Bield's services is undertaken by regulatory bodies and internal auditors. Audit provides assurance to the Board and other stakeholders that the organisation has effective policies and procedures. Several different areas of the business are audited each year.

Bield is also subject to audit and inspection from external regulatory bodies including:

- the Scottish Housing Regulator
- Care Inspectorate, and
- the Scottish Public Services Ombudsman
- the Homeowners Housing Panel (Property Factors Code of Conduct)

The inspection findings and recommendations of the regulatory bodies complement Bield's own performance management arrangements. Audit and inspection findings are used in conjunction with other methods of performance evaluation to identify and prioritise improvement actions. The regulatory bodies, in turn, take account of the robustness of Bield's own performance management processes when determining the level of scrutiny that should be undertaken.

Recommendations for improvement often arise from the audits. Action plans are developed to address the recommendations and progress is reported to the Performance & Audit Committee.

## Scrutiny

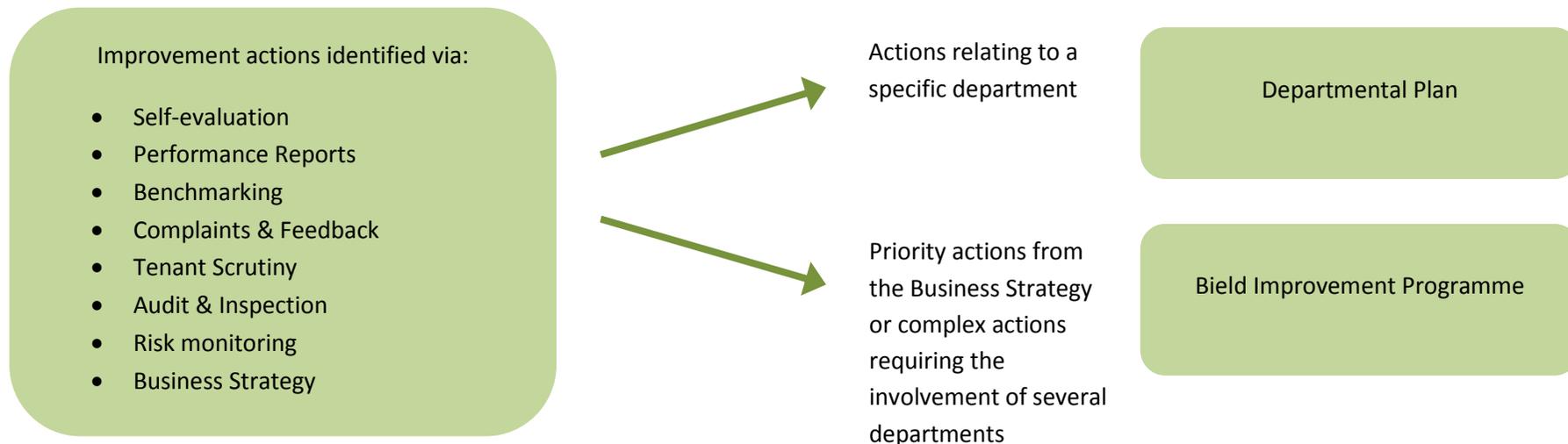
Performance is reported on a quarterly basis to the Performance & Audit Committee. The Committee is responsible for reporting to and advising the Board on all aspects of Bield's business performance against agreed targets, for promoting and driving continuous improvement and for promoting efficiency and effectiveness. The Committee advises the Board on appropriate benchmarking comparisons to aid performance review. The Committee will immediately bring any matter of serious concern to the attention of the Board.

## Acting to deliver improvement

Some improvement actions highlighted by the evaluation of performance information are likely to be straightforward to implement; in which case staff should be empowered to go ahead and act upon their findings. However, other improvements might be more complex to deliver, perhaps requiring additional resources, impacting upon other parts of the organisation, or being dependent upon the completion of other actions. More complex improvement actions will be incorporated within the Improvement Programme or Departmental Plans.

The action plans detailing how the Business Strategy and Departmental Plans are delivered will change throughout the year to take account of the changing needs of the business and its environment. Improvement actions arising from the 'checking' activities of the performance management cycle will be included within the actions plans as they arise. Other actions will be removed from the action plans when they are completed or if they are no longer deemed to be a priority.

Areas for improvement that affect the entire organisation will be addressed via the Bield Improvement Programme. The Programme aims to ensure that improvements are taken forward in a co-ordinated manner rather than being addressed in different ways by different parts of the organisation. Establishing the Bield Improvement Programme assists in prioritising areas in which effort will be focussed upon business improvement.



## Project management

### PRINCE2

PRINCE2 is a formal project management methodology designed to deliver a product (or set of products) that are defined at the outset of the project. The use of PRINCE2 would be appropriate for more complex one-off projects that are finite in length. PRINCE2 outlines a process for the planning, delivery, monitoring and governance of a project.

### Agile improvement models

Agile improvement models differ from PRINCE2 as they focus on a series of small (iterative) changes rather than attempt to plan how a product should be delivered in its entirety from the outset. The success of each small change is evaluated and adjustments can be made before moving to the next step. Agile improvement models help organisations to respond to changes in the environment and be more adaptable in how they implement a project – hence why they are termed ‘agile’.

The choice of which improvement model to employ will depend upon a number of factors. Where the specific solution to a problem is known (e.g. the implementation of a specific software system) the use of PRINCE2 is likely to be appropriate. In circumstances where the nature of the problem is understood, but the best means of solving the problem is not, an iterative approach using agile methods may be more appropriate.

## Bield Improvement Programme

Actions that are part of the Improvement Programme will be managed as projects in accordance with Bield’s project management framework. The Programme helps to provide more effective management of projects that are a priority for the organisation. Formal governance arrangements underpin the Programme, helping to ensure that projects are seen through to completion.

Initially the Programme is based upon the priority tasks included in the Business Strategy; however, further tasks (e.g. those arising from the evaluation of performance) may be added if they meet the following criteria:

- Completion of the task is likely to impact upon the resources required to undertake other projects in the Programme
- The project is identified as being a high priority in relation to the achievement of the Business Strategy, adherence to legislation or the mitigation of severe risks to Bield
- The project is complex, requiring the involvement of several different parts of the organisation or different disciplines
- The project impacts upon a wide range of stakeholders, some of whom might suffer an adverse impact as a result
- The progress of an existing project included within the Programme depends upon the completion of the additional project

### Improvement tools

Various techniques can be utilised to help deliver improvement. The most appropriate technique will depend upon the type of improvement that is desired. Examples of business improvement techniques include business process redesign, Lean thinking and Kaizen.