

# PERFORM

# *Or Perish...*



...The Realities & Practicalities Of Performance Management  
For Boards, Chief Executive Officers & Senior Management  
Teams Of Community Businesses

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# Presentation Objectives

To provide Boards, Chief Executive Officers and senior managers with:

- \* ideas and information about developing and using a performance management system that is both governance and organisationally focused, not just contract or funding and service agreement focused.
- \* models, ideas and information about the potential value and benefit of developing and using a performance management system.
- \* a practical performance management tool called DASHBOARD™ that can be customised to measure Board, organisational, team and individual performance.

# Performance Management Definitions

## ...from the Australian Public Service Commission

*'the effective use of inter-related strategies and activities to improve the performance of individuals, teams and organisations'*

## ...from the Macquarie Dictionary

Performance: *'the execution of doing, as of work, acts of work, acts or feats, the way in which something reacts under certain conditions or fulfils the purpose for which it was intended'*

Management: *'the act or manner of managing, handling direction or control'*

## ...from United States Workforce Compensation and Performance Service

*'performance management is the systematic process of planning, working and setting expectations, continually monitoring performance, developing the capacity to perform, periodically rating performance, rewarding good performance'*

# Performance Management Model

Some people mistakenly assume that performance management is concerned only with appraising and rating a Board, Chief Executive Officer and staff's performance. Actually, this activity is only one part of the overall process.

Performance management is the systematic process of:

- \* planning work and setting expectations
- \* continually monitoring performance
- \* developing the capacity to perform
- \* periodically rating performance
- \* recognising and rewarding good performance.

# Performance Management Model



# Applying The Performance Management Model

From a Board perspective the performance management model presented on the previous page provides a sequential process by which a Board and Chief Executive Officer's performance management activities can be undertaken.



# Applying The Performance Management Model

Performance Activities	Example: Strategic Planning
<b>Planning:</b>	<p>Through strategic planning processes the Board establishes the key result areas, the end results they require management to deliver.</p> <p>A Board develops key performance measures for each key result area.</p>
<b>Monitoring:</b>	<p>On a quarterly or monthly basis management reports against the key performance indicators contained in the performance management system.</p>
<b>Developing:</b>	<p>The Board supports management's good performance and addresses poor performance.</p>
<b>Recording:</b>	<p>By using a strategic plan status report or similar, Board and management are able to record performance against key performance indicators.</p>
<b>Rewarding:</b>	<p>The Board's recruitment, review and remuneration committee undertakes an annual performance appraisal of management, focusing on the achievement of the strategic plan, employment contracts and position description requirements, and rewards them accordingly.</p>

# Industry Challenges & Opportunities

## *Key Industry Challenges & Opportunities*

State and Commonwealth government departments are increasingly focused on performance management.

Tenders, contracts and funding and service agreements are increasingly including key performance indicators/targets/ratios as well as milestones and outcomes.

Community businesses who have robust performance management systems are utilising measurement results to measure their organisational and operational growth and development strategies.

In some human service industries, organisational performance management has enabled the development of industry benchmarking, eg: Residential Aged Care Industry.

# Industry Challenges & Opportunities

## *Key Industry Challenges & Opportunities*

Creating a culture that truly incorporates robust performance management can be a challenge.

Intent, focus and discipline are required if the implementation and use of a performance management system is to succeed at all levels of the organisation.

Ensuring the Board takes the time to understand, implement and use the performance management system.

Developing and using concise, easy to read reports that are meaningful.

# Industry Challenges & Opportunities

## *Key Industry Challenges & Opportunities*

Chief Executive Officers who assist managers and staff to develop their own key performance indicators set the scene for 'ownership and utilisation' of those measures.

Ensure each manager and staff's position description, performance appraisal and/or employment contract/EBA, etc all contain the same key performance indicators.

Provide adequate training and information for managers and staff on the performance management system, its use and wider application to position descriptions and performance appraisals.

Use key performance indicators to performance manage managers or staff who are under performing.

# Performance Management Barriers & Solutions

## Barriers

Quiet, subtle resistance to change, accountability, organisational discipline or focus.

We haven't got the time or expertise to undertake a comprehensive performance management system.

We only need to measure the money, if the money is OK, then everything else is OK'.

Failure to develop and use the key elements of the performance management model listed on page 7.

## Solutions

\* Each employee's position description, performance appraisal and employment mechanism has the same key performance indicators.

\* Engage a consultant who can assist or talk with Board members who have undertaken a similar exercise in their career, use their expertise.

\* Discuss this presentation, then develop a Performance Management Action List.

\* Discuss this presentation, then develop a Performance Management Action List.  
\* Gather and read performance management articles.

# The Perform Or Perish Paradigm

In a nutshell, the new world of competition, tendering and the increasing growth and development of private and public businesses could be viewed by Boards, senior management and Chief Executive Officers of community businesses as a 'Perform or Perish Paradigm'.



# The Perform Or Perish Paradigm

For those leadership groups that wish to:

- \* meet or exceed targets
- \* meet or exceed contract requirements
- \* meet or exceed service organisational budgets
- \* meet or exceed client requirements or expectations
- \* meet or exceed organisational or industry benchmarks...

...performance is everything and performance management is the only way Boards, Chief Executive Officers and managers can ensure the organisation, its operations, teams and individuals perform now and in the future.

# Performance Management Considerations

Key performance indicators, ratios, targets or measures of success can be either quantitative or qualitative.

Data, information or knowledge should be relevant, timely and accurate, otherwise a lot of time is wasted sifting through documentation and reports looking for the pertinent facts or issues.

At previously agreed Board meetings, Chief Executive Officer and senior managers should provide various performance management reports. However some reports should not be taken in isolation, it is their cumulative trends and results that Board members should be seeking, eg: client satisfaction.

Once a Board has established its own internal benchmarks by collating performance data, it should consider engaging an external benchmarking company, to compare its internal organisational results against known industry best practice.

# Performance Management Considerations

Given that one of the overall tenants of governance is to 'turn the members, stakeholders or shareholders wishes, their vision, mission and desired future into organisational performance', it should raise two key questions in the minds of directors, the Chief Executive Officer and senior managers:

- \* what, when, how and who do we measure?
- \* is our governance and organisational performance improving or declining?

Boards of community business tend to have an array of 'things' reported to them by Chief Executive Officers, whether by verbal or documented reports, analyses, studies or letters.

# Performance Management Considerations

However, the array of 'things' may not always be relevant, timely or accurate, or assist directors to make critical directions or give directives.

The over arching challenge for Boards and Chief Executive Officers of community businesses is to sift out and make sense of all this data, information and knowledge from the standpoints of:

- \* how is the organisation and therein its products and services performing?
- \* how does this data, information and knowledge impact on our current and future strategy that is focused on us achieving our vision, mission and desired future?

# Performance Management System Options

Given the previously raised tenants, questions and challenges, if a performance management system is developed and used, a Board and Chief Executive Officer can not only address these items but can put themselves and other internal stakeholders in a position of greater knowledge about how the organisation, its operations, and teams or individuals are performing.



# Performance Management System Options

Boards, Chief Executive Officers and senior managers who wish to establish and use a performance management system have four options:

- \* adapting an existing system
- \* purchasing a system
- \* developing their own system
- \* customising and using the following performance management system called DASHBOARD™.



# Steps To Developing DASHBOARD™

If your Board has TAGS™, The Australian Governance System, refer to Folder 2.

If your Board wishes to customise and use DASHBOARD™ the following 5 steps will assist in its establishment, implementation and use.

**Step One:** Develop the DASHBOARD™ Spreadsheet

**Step Two:** Develop the Categories of Measurement

**Step Three:** Develop a Bank of Measures

**Step Four:** Develop a Schedule of Measurement

**Step Five:** Develop and Use Reports

# Steps To Developing DASHBOARD™

## Develop the DASHBOARD™ Spreadsheet

- Step One:**
- Form a board Performance Management Taskforce, eg: management, two board members.
  - Using a data projector and laptop computer open Excel and develop the following template to reflect your board, management and staffing structure.
  - The board, management and managers will have their own columns, people such as personal care assistants or division one nurses, etc will be clustered by occupational title, level or organisational structure into their own columns.

## Develop The Categories Of Measurement

- Step Two:**
- Discuss and develop five or six categories of measurement.
  - Do not be tempted to develop too many categories of measurement, as you will see later, too many categories of measurement will cause your organisation to be measuring everything all of the time.
  - If you are a medium-large organisation with several services or departments, you may need to develop one Excel sheet per category of measurement.

Who Category of Measurement	Board	Chief Executive Officer	Manager Corporate Services	Manager Residential Care	Personal Care Assistants	Hospitality Staff
Finances						
Quality						
People						
Contracts & Agreements						
Strategy						

Who	Board	Chief Executive Officer	Manager Corporate Services	Manager Residential Care	Personal Care Assistants	Hospitality Staff
EXAM						

## Developing A Bank Of Measures

- Step Three:**
- Now develop two-three key performance indicators, measure of success, targets or ratios that can be placed in the relevant box.
  - It is worthwhile considering engaging your full board to develop management's key performance indicators.
  - Your performance management taskforce will need to carefully consider the key performance indicators, ensuring they are as specific as possible, be they:
    - qualitative or quantitative
    - lead key performance indicators, measuring in front
    - lag key performance indicators measuring from behind

Who	Board	Chief Executive Officer
Finances	<ul style="list-style-type: none"> <li>Cumulative trends and results of projected or actual profit and loss and cashflow statements.</li> <li>Cumulative trends and results of Balance Sheet.</li> </ul>	<ul style="list-style-type: none"> <li>Cumulative trends and results of projected or actual profit and loss and cashflow statements.</li> <li>Cumulative trends and results of Balance Sheet.</li> </ul>
Strategy	<b>Key Result Area One; Performance Indicators</b> Planned versus actual timeframes, costs. 10% increase in client satisfaction per annum.	<b>KRA One; Strategic Objective 1.1</b> <b>Key Performance Indicators</b> 1.1 Project with budget, time and resource allocation. 1.2 Board sign off on strategy. 1.3 ...

## Develop A Schedule Of Measurement

- Step Four:**
- Now that the Bank of Measures have been developed, Step One-Three, it is now time to develop a Schedule of Measurement.

- The following example table portrays the various columns and typical information taken from the Schedule of Measurement or developed in the Bank of Measures, pages 13-14.

Category of Measurement	Key Performance Indicator	Who Reports	When They Report	How They Report	To Whom
Finance	Key Performance Indicators, measures of success, targets or ratios from the bank of Measures are placed in this column	Board	Annually	Bar Chart	MYOB
		CEO	Quarterly	Trend Line	Written Report
		Board	Annually	Matrix	Excel
		Corporate Services Mgr	Quarterly	Verbal Report	Governance Tool ABC
		Mgr Residential Care	Quarterly	Pie Chart	Powerpoint

## Developing and Using Reports

- Step Five:**
- The Schedule of Measurement provides the basis for the development of a range of reports, eg exception reports, written reports, trend lines, bar charts, pie graphs etc.

- Depending on the system or process which is used for collating and managing data and information, management or senior managers may be able to either

# Develop The DASHBOARD™ Spreadsheet

## Step One:

Form a Board performance management taskforce, eg: Chief Executive Officer and two Board members.

Using a data projector and laptop computer open Excel and develop the following template to reflect your Board, Chief Executive Officer and staffing structure.

The Board, Chief Executive Officer and senior managers will have their own columns, staff who have a common occupational title will be clustered together by level or organisational structure and have their own columns.

# Develop The DASHBOARD™ Spreadsheet

Who Category Measurement	Board	Chief Executive Officer	Manager Corporate Services	Manager Employment Services	Employment Consultants	Administration Staff
<p style="font-size: 48px; color: red; opacity: 0.5; transform: rotate(-15deg);">EXAMPLE</p>						
<p>← Categories of Measurement →</p>	<p>← Governance Measures →</p>		<p>← Organisational &amp; Operational Measures →</p>			

# Develop The Categories Of Measurement

## *Step Two:*

Discuss and develop five or six categories of measurement.

Do not be tempted to develop too many categories of measurement, because as you will see later, too many categories of measurement will cause your organisation to be measuring everything all of the time, an impossible task.

If you are a medium–large organisation with several services or departments, you may need to develop one Excel sheet per category of measurement.

# Develop The Categories Of Measurement

Who Category Measurement	Board	Chief Executive Officer	Manager Corporate Services	Manager Employment Services	Employment Consultants	Administration Staff
Finances						
Quality						
People						
Contracts & Agreements						
Strategy						

EXAMPLE

← Categories of Measurement →

← Governance Measures →

← Organisational & Operational Measures →

# Develop A Bank Of Measures

## *Step Three:*

Now develop two-three key performance indicators, measure of success, targets or ratios that can be placed in the relevant box.

Your performance management taskforce will need to carefully consider the key performance indicators, ensuring they are as specific as possible, whether:

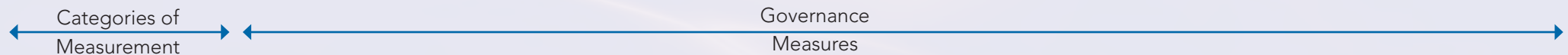
- \* qualitative or quantitative
- \* lead key performance indicators, measuring in front
- \* lag key performance indicators measuring from behind

It is worthwhile seeking your full Board's approval of both the Board's and the Chief Executive Officer's key performance indicators.

# Develop A Bank Of Measures

Who Category Measurement	Board	Chief Executive Officer
Finances	<ul style="list-style-type: none"> <li>* Cumulative trends and results of projected or actual profit and loss and cashflow statements.</li> <li>* Cumulative trends and results of Balance Sheet.</li> </ul>	<ul style="list-style-type: none"> <li>* Cumulative trends and results of projected or actual profit and loss and cashflow statements.</li> <li>* Cumulative trends and results of Balance Sheet.</li> </ul>
Strategy	<p>Key Result Area One; Performance Indicators</p> <ul style="list-style-type: none"> <li>* Planned versus actual timeframes, costs.</li> <li>* 10% increase in client satisfaction per annum.</li> </ul>	<p>KRA One; Strategic Objective 1.1 Key Performance Indicators</p> <ol style="list-style-type: none"> <li>1.1 Project within budget, time and resource allocation.</li> <li>1.2 Board sign off on strategy.</li> <li>1.3 Tender success ratio 4:10 by December 2012</li> </ol>

EXAMPLE



# Develop A Bank Of Measures

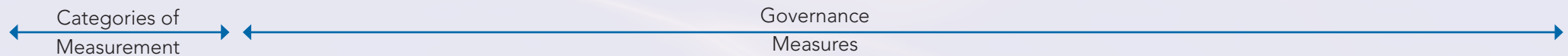
## *Step Three (continued):*

Boards and Chief Executive Officers should develop key performance indicators that specifically relate to a range of quality components, eg: OHS, Accreditation, ISO Accreditation, Certification.

Following is an example of accreditation key performance indicators as they may apply to a Board and Chief Executive Officer, against the Category of Measurement, Quality.

# Develop A Bank Of Measures

Performance Activities	Example: Strategic Planning	Chief Executive Officer
Quality	<ul style="list-style-type: none"> <li>* Organisation meets or exceeds contract requirements</li> <li>* Organisation gains Preferred Provider status.</li> <li>* Organisation is granted three year Accreditation.</li> <li>* Organisation is compliant and has coverage against all contracts and funding and service agreements</li> </ul>	<ul style="list-style-type: none"> <li>* Maintenance of Accreditation status.</li> <li>* Results of quality assessor reports.</li> <li>* Years that organisation is granted accreditation against the Employment Service Industry Standard.</li> <li>* Annual results of Quarterly Contract Compliance Reports.</li> </ul>



# Develop A Schedule Of Measurement

## *Step Four:*

Now that the Bank of Measures have been developed, Steps One-Three, it is now time to develop a Schedule of Measurement, the who, when, how etc.

The following example table portrays the various columns and typical information taken from the Schedule of Measurement or developed in the Bank of Measures, pages 27-30. You may wish to add or delete columns.

# Develop A Schedule Of Measurement

Category of Measurement	Key Performance Indicator	Who Reports	When They Report	How They Report	To Whom
Finance	Key Performance Indicators, measures of success, targets or ratios from the Bank of Measures are placed in this column	Board	Annually, AGM	Bar Chart, Using MYOB	Members
		CEO	Quarterly	Trend Line, Written Report	Board
		Board	Annually, AGM	Matrix, Using Excel	Members
		Corporate Manager Services	Quarterly	Governance Tool & Verbal Report	Board
		Manager Community Care	Quarterly	Pie Chart, Using Powerpoint	CEO &SMT
		Manager Employment	Weekly	Written Report, Bar Chart	CEO &SMT

# Developing & Using Reports

## *Step Five:*

The Schedule of Measurement provides the basis for the development of a range of reports, eg exception reports, written reports, trend lines, verbal reports etc.

Depending on the system or process which is used for collating and managing data and information, Chief Executive Officers or senior managers may be able to either automatically produce a report or it may require significant time and manual effort.

Finalised data or information can be provided to a Board in a wide variety of reporting formats eg: trend lines, pie graphs, bar charts, exception reports, etc.

# Developing & Using Reports

## *Step Five (continued):*

Some reports can be developed as exception reports. An example of an exception report is provided on the following page.

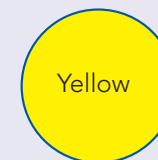
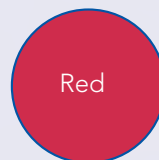
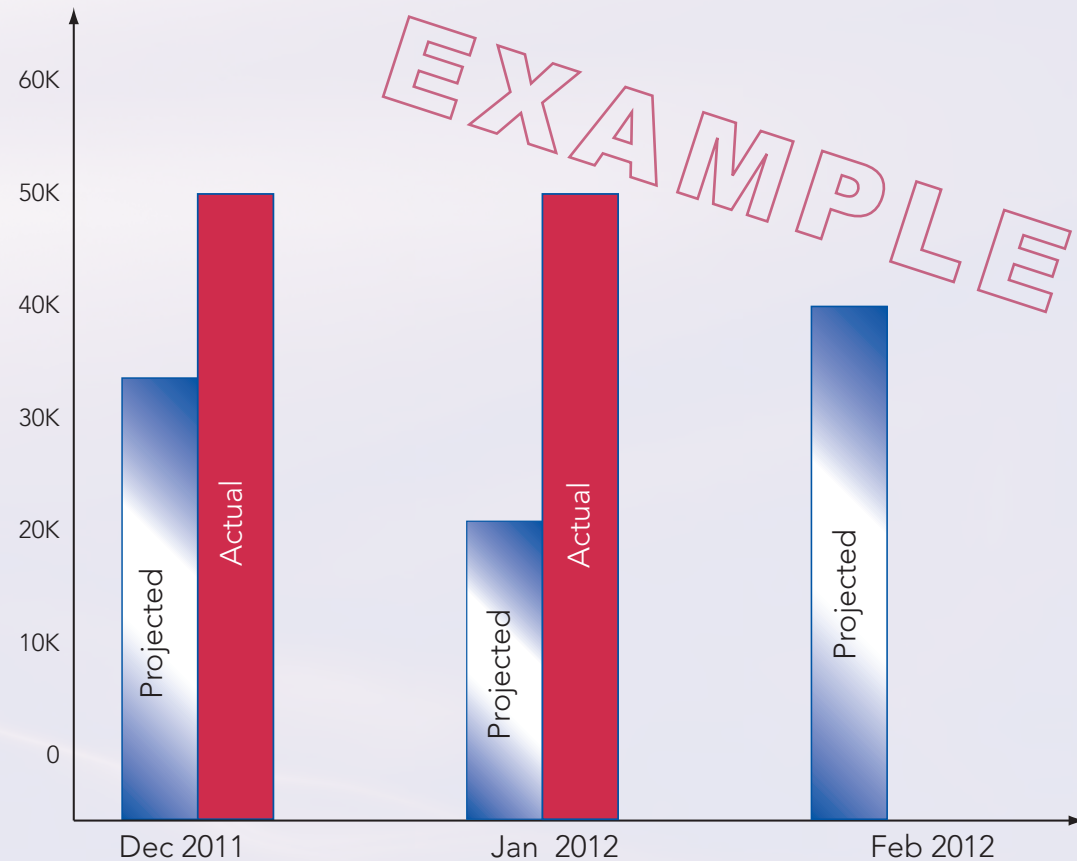
Exception reports are a concise and succinct way for key performance measures to be monitored and reported. When used correctly they can also significantly reduce the amount of time a Board or Chief Executive Officer spends on developing, reporting and discussing a particular item that is being measured.

Using a Red Light, Yellow Light and Green Light approach, management is able to provide succinct exception reports. Remember that these types of reports are only one form of reporting performance to a Board.

# Example Exception Report

Projected Profit & Loss vs Actual Profit & Loss

Category of Management	Finance
Key Performance Indicator	Project Profit & Loss vs Actual Profit & Loss
Who Reports	Chief Financial Officer
Report Type	Bar Chart
Report Filing	Board Minutes
Report Supporter	Finance Manager
When Report	Monthly
How Reports	Bar Chart
Report To	Board
System	MYOB
Month	January 2007



# Reporting Board, CEO & Organisational Performance

The Chief Executive Officer and/or senior managers, with or without assistance, will prepare the various performance reports as described on pages 23–28.

The schedule of measurement should clearly state what agreed key performance indicators will be reported when, by whom, to whom and in what format, refer to pages 31–32.



# Reporting Board, CEO & Organisational Performance

Typically the Chief Executive Officer will meet with the chairperson prior to the forthcoming Board meeting to discuss amongst other things, the agenda items and the results of the various performance reports.

Remember each Board meeting's agenda should be a reflection of the agreed focus and activities from the Board's annual program of work.



# The Value & Benefits Of Performance Management

## Primary Value

All the measures are in one place and we have a list of who's doing what, when, how, etc.

## Primary Benefits

- \* Board & management have a performance management system, a bank of measures, a schedule of measurement, and reporting mechanisms.

Everyone is 'publicly' accountable

- \* All internal stakeholders of the organisation can see who is accountable against what and when and how they report and to whom.

Governance and organisational performance can be measured and reported to stakeholders

- \* A Board can monitor & report on its own & the organisation's performance to its members or shareholders.
- \* The Chief executive officer & senior managers can monitor & report on the performance of the organisation, the operation & themselves.

Peace of mind, planning not panic

- \* The Board, Chief Executive Officer and senior management team have peace of mind because they have timely & accurate data & information.
- \* It enables a Board to fulfil its strategic leadership roles and responsibilities.

# Performance Management Tool



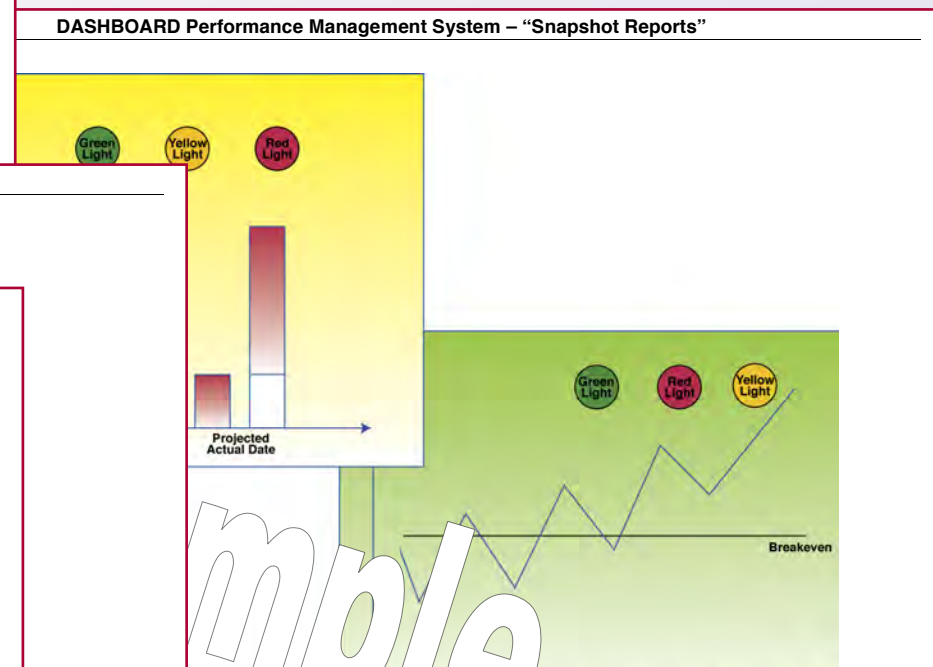
# DASHBOARD™

**Monitoring – “Bank of Measures”**

Performance Measurement Categories	Board	Chief Executive Officer	Managers	Staff
Financials	<ul style="list-style-type: none"> <li>* Cumulative results and trends of Annual Balance Sheets</li> <li>* Cumulative results and trends of agreed financial ratios</li> </ul>	<ul style="list-style-type: none"> <li>* Cumulative results and trends of Annual Profit/Loss and Cashflow Statements</li> <li>* Cumulative results and trends of agreed financial ratios</li> </ul>	<ul style="list-style-type: none"> <li>* Annual Profit and Loss Statements</li> <li>* Product or service financial ratios</li> <li>* Product or service key</li> </ul>	<ul style="list-style-type: none"> <li>* Budget targets</li> <li>* Income targets</li> <li>* Chargeable hours vs unchargeable hours</li> </ul>

**DASHBOARD Performance Management System - Instructions**

Software: Many organisations use Excel as their foundation software when setting up DASHBOARD.



**Strictly Private & Commercially Confidential**

(Organisation Logo)

(Organisation Name)

**DASHBOARD, Performance Management System**

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**DASHBOARD Performance Management System – “Schedule of Measurement”**

Financial KPI's	Who	When	How	Tool
Monthly Profit/Loss	Fred	Monthly	Bar Chart	MYOB
Monthly cash flow Statements	Mary	Monthly	Bar Chart	MYOB
Balance Sheet	John	Bi-Annually	Pie Graph	MYOB
Return On Investment	Mary	Bi-Annually	Trend Line	Excel
* Cash Position	Tom	Daily	Bar Graph	Excel

# DASHBOARD™

## DASHBOARD™


is one of a large number of governance and organisational development tools that are contained in TAGS, The Australian Governance System, Folder 2.

Refer to the last page of this presentation for contact details if you require further information.

**Strictly Private & Commercially Confidential**

*(Organisation Logo)*

***(Organisation Name)***  
**DASHBOARD, Performance Management System**



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# DASHBOARD™

## DASHBOARD Performance Management System - Instructions

- Tool:** DASHBOARD Performance Management System
- Purpose:** DASHBOARD, the Performance Management System 'PMS' (developed by Michael Goldsworthy of Australian Strategic Services Pty Ltd) provides not only a "home" for all the agreed categories of measurement and therein the agreed key performance indicators against each category of measurement, able to be used by the board, chief executive officer, managers, services/sites and individuals, but a simple and powerful performance management system.
- Usage:**
- Step One: At a board and/or senior management team meeting determine the agreed categories of measurement eg: quality, contractual outcomes, strategy etc.
- Step Two: Determine the board and chief executive officer key performance measures against each category of measurement.
- Step Three: The chief executive officer and senior management team typically determine the key performance indicators for managers, services/sites and individuals against each category of measurement.
- Step Four: The categories of measurement and key performance indicators can be used for such items as:
- |                                                                    |                                                          |
|--------------------------------------------------------------------|----------------------------------------------------------|
| <b>Board</b>                                                       | <b>Chief Executive Officer</b>                           |
| * Annual Report                                                    | * Manager contracts                                      |
| * Chief Executive Officer Contract                                 | * Performance appraisals of individuals                  |
| * Monthly Performance Management Reports at board meetings         | * Service/site performance management                    |
| * Annual General Meeting                                           | * Staff contracts                                        |
| * Board Quality or Performance Reports or Statements               | * Job Descriptions                                       |
| * Performance measurement against government or industry standards | * Senior Management Team Performance Management Reports  |
| * Reports to Local, State or Commonwealth Governments              | * Performance management of individual staff or managers |
- Step Five: Develop a Schedule of Measurement as per the example on page 4.
- Step Six: Using Excel or other software eg: MYOB, develop one page snapshot presentation that are concise and use the red light, green light or yellow light mechanisms as per the example on page 5.

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# DASHBOARD™

## Monitoring – “Bank of Measures”

Performance Measurement Categories	Board	Chief Executive Officer	Managers	Staff
<b>Financials</b>	<ul style="list-style-type: none"> <li>* Cumulative results and trends of Annual Balance Sheets</li> <li>* Cumulative results and trends of agreed financial ratios</li> <li>* Cumulative results and trends of agreed key performance indicators</li> </ul>	<ul style="list-style-type: none"> <li>* Cumulative results and trends of Annual Profit/Loss and Cashflow Statements</li> <li>* Cumulative results and trends of agreed financial ratios</li> <li>* Cumulative results and trends of agreed key performance indicators</li> </ul>	<ul style="list-style-type: none"> <li>* Annual Profit and Loss Statements</li> <li>* Product or service financial ratios</li> <li>* Product or service key performance indicators</li> </ul>	<ul style="list-style-type: none"> <li>* Budget targets</li> <li>* Income targets</li> <li>* Chargeable hours vs unchargeable hours</li> </ul>
<b>Quality</b>	<ul style="list-style-type: none"> <li>* Meet or exceed Local, State or Commonwealth government or industry standards/ Accreditations and registrations</li> </ul>	<ul style="list-style-type: none"> <li>* Meet or exceed Local, State or Commonwealth government or industry standards/ Accreditations and registrations</li> </ul>	<ul style="list-style-type: none"> <li>* Results of Audit Reports Contract or Funding and Service Agreements targets, ratios or key performance indicators</li> </ul>	<ul style="list-style-type: none"> <li>* Improvement measures Contract or Funding and Service Agreements targets, ratios or key performance indicators</li> </ul>
<b>Client Satisfaction</b>	<ul style="list-style-type: none"> <li>* Cumulative results and trends of Annual Client Satisfaction levels</li> <li>* Spread of client satisfaction against benchmarks</li> </ul>	<ul style="list-style-type: none"> <li>* Cumulative results and trends of Annual Client Satisfaction levels</li> <li>* Spread of client satisfaction against benchmarks</li> </ul>	<ul style="list-style-type: none"> <li>* Number of improvement ideas or complaints from clients per year</li> <li>* Number of Departmental Audits per year</li> </ul>	<ul style="list-style-type: none"> <li>* Number of improvement ideas or complaints from clients per year</li> <li>* Number of Departmental Audits per year</li> </ul>
<b>Project/Contract Deliverables</b>	<ul style="list-style-type: none"> <li>* Contract or project ratios</li> <li>* Contract or project targets or key performance indicators</li> </ul>	<ul style="list-style-type: none"> <li>* Contract or project ratios</li> <li>* Contract or project targets or key performance indicators</li> </ul>	<ul style="list-style-type: none"> <li>* Contract key performance indicators</li> <li>* % of bonuses paid</li> <li>* Targets vs actuals</li> </ul>	<ul style="list-style-type: none"> <li>* Assigned contract or project ratios in staff member's job descriptions</li> <li>* Results of Annual Performance Appraisals</li> </ul>

← Governance Key Performance Indicators →

← Operational & Organisational Key Performance Indicators →

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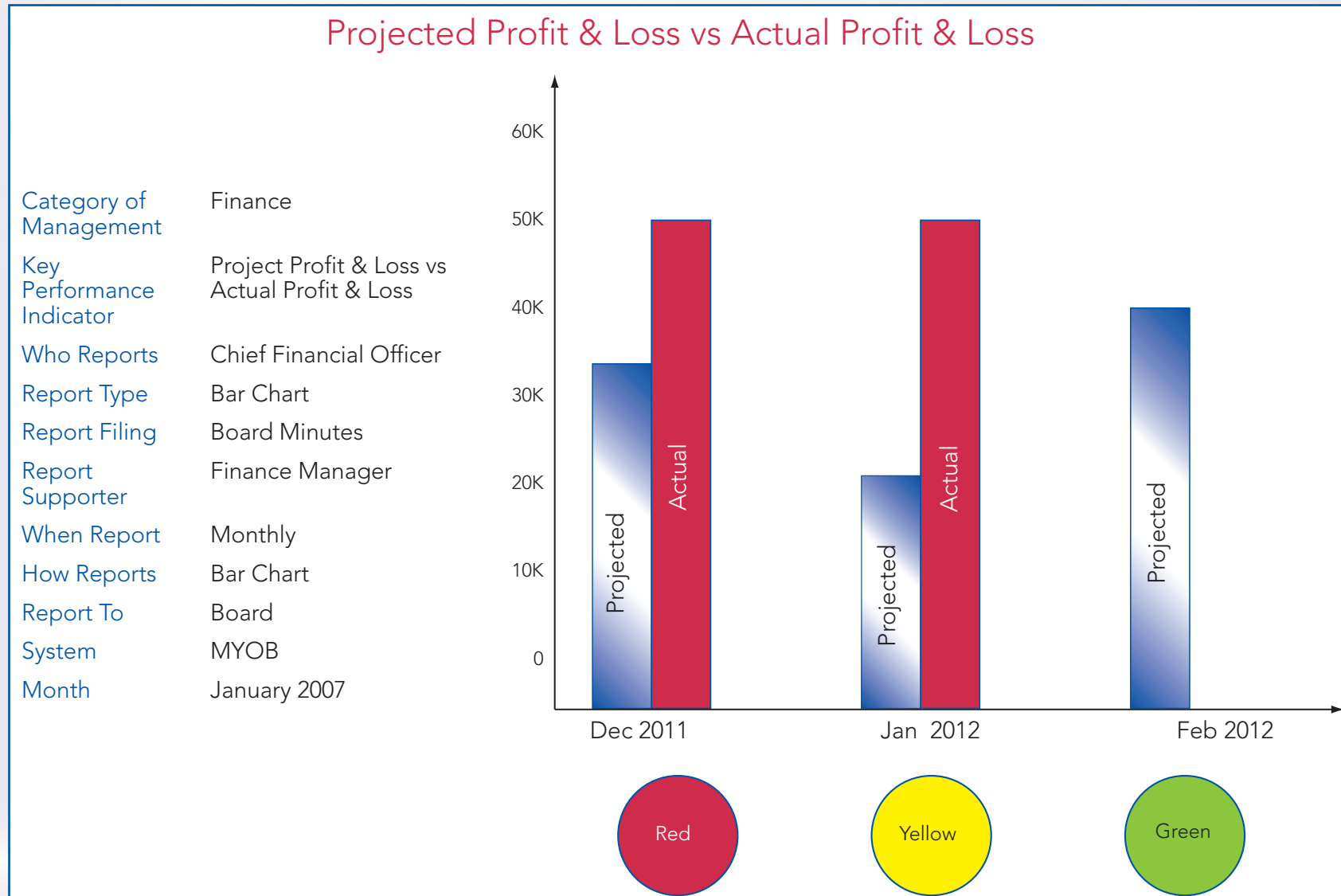
**DASHBOARD Performance Management System – “Schedule of Measurement”**

Category of Measurement	Financial KPI's	Who	When	How	Tool
Finance	* Monthly Profit/Loss	Fred	Monthly	Bar Chart	MYOB
	* Monthly cash flow Statements	Mary	Monthly	Bar Chart	MYOB
	* Balance Sheet	John	Bi-Annually	Pie Graph	MYOB
	* Return On Investment	Mary	Bi-Annually	Trend Line	Excel
	* Cash Position	Tom	Daily	Bar Graph	Excel
	* Investment Levels	Dick	Monthly	Trend Line	Excel
	* Construct Financials	Harry	Daily/Weekly	One page, written report	Word

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*Performance Management  
Action Planning*

# Performance Management Action Plan

Number	Performance Management Actions	Who	Time	Status
1				
2				
3				
4				
5				
6				
7				
8				
9				

# Governing Like Admirals on "SS Community Business"

For further information, a copy of this presentation, other presentations or to discuss your board's requirements contact:

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