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Origins

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Issues covered during this stage

- Terms
- [Levels of performance management](#)
- [Strategic level performance management](#)
- [Business level performance management](#)
- [Operational level performance management](#)
- [Critical success factors](#)

Version 1.00

| Principles | Guidance | People involved: |
|--|---|--|
| <p>Terms</p> <ul style="list-style-type: none"> ● Inputs are the resources that contribute to the production and delivery of an output. ● Outputs are goods, services or conditions produced by activities and delivered to a recipient within or outside the organisation. Products can be physical products: reports, letters, briefing documents, records, magnetic media, notices, and physical objects. Another kind of output is the result of service provision. ● Outcomes are the situations the business or organisation is trying to bring about: the impacts, or consequences for the community, of the activities of the government | <ul style="list-style-type: none"> ● Understanding these terms is important as they are used consistently across performance management. ● See also checklist on Culture and Leadership. | <p>Senior manager</p> <p>Documents required:</p> <p>--</p> <p>Useful techniques:</p> <p>Decision Map</p> |
| <p>Levels of performance management</p> <p>Performance management can operate at three levels:</p> <ul style="list-style-type: none"> ● strategic (organisational) ● business ● operational. | <ul style="list-style-type: none"> ● The level at which performance management will operate will have an impact on the chosen approach. ● Depending on the scope, you may need measures at more than one level to gain a full and balanced picture of performance. ● Look at the questions below that each level of performance management seeks to answer to determine your level (or levels of focus). | <p>Guidance/briefings:</p> <p>--</p> |
| <p>Strategic level performance management</p> <p>The highest level of performance management is the assessment of organisational success in achieving strategic, high-level aims. It is mainly concerned with outcomes.</p> | <p>The questions that strategic performance management seeks to answer are:</p> <ul style="list-style-type: none"> ● are we moving towards our high-level goals? ● are we moving towards those goals quickly enough? ● are we delivering the outcomes that we should? | |
| <p>Business level performance management</p> <p>This level of performance management is concerned with the performance of business units and service providers. It is mainly concerned with outputs.</p> | <p>The questions that performance management at the business level seeks to answer are:</p> <ul style="list-style-type: none"> ● how can we ensure that we meet our business objectives? ● how can we do better? ● are we getting value for money? ● what is an acceptable level of quality for the services we provide? ● should we be aiming for continuous improvement? | |

| | | |
|---|---|--|
| | <ul style="list-style-type: none"> • what should we be measuring, and how? • how can we set targets and provide incentives that will encourage quality of service and not distract from key objectives? | |
| <p>Operational level performance management</p> <p>Performance management at the operational level is often characterised by statistical or mathematical analysis; the precise weighing of costs against output and quality of output. This is the simplest level of performance management, but also a vital one. Information from this level may form an important basis for analysis at the higher levels.</p> | <p>It deals with questions such as:</p> <ul style="list-style-type: none"> • are we meeting our targets? • are we attaining the desired level of quality? • could we do more work in the same time (improving efficiency)? • could we do our work better (improving effectiveness)? • could we save money (improving economy)? • how are individual staff performing? | |
| <p>Critical success factors</p> <p>The main elements that must be in place for performance management to be effective are:</p> <ul style="list-style-type: none"> • a performance framework that is: <ul style="list-style-type: none"> ◦ focused on aims and objectives ◦ appropriate for those who operate it and those who use the information produced ◦ balanced in its assessment of all relevant aspects, including those that are hard to quantify ◦ robust enough to withstand change ◦ integrated into business planning ◦ cost-effective - producing performance information that realises benefits in proportion to the investment required to collect it • performance measures that are: <ul style="list-style-type: none"> ◦ well-defined, specific, clear and focused ◦ relevant to the requirements of users or the citizen ◦ not likely to create perverse incentives ◦ effective in leading to remedial action ◦ accurate and reliable • performance targets that are SMART: Specific, Measurable, Achievable, Relevant and Timed • roles and responsibilities for performance management: <ul style="list-style-type: none"> ◦ those who will collect information ◦ those who will compare it with targets ◦ those who will identify and take action as a result. | <ul style="list-style-type: none"> • Use the guidance in the rest of this workbook to create a balanced, focused and robust performance framework with well-chosen measures and set targets that will help improve performance. | |

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Building a performance framework

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Issues covered during this stage

- [Why measure performance?](#)
- [Cascade of strategic objectives](#)
- [Understanding business processes](#)

Synopsis

This section covers why performance management is important. It seeks to link measures and targets to strategic objectives and should reflect all the activities, outputs and services of the organisation.

Version 1.00

| Principles | Guidance | People involved: |
|--|--|--|
| <p>Why measure performance?</p> <p>Performance measures lie at the heart of performance management. They provide the foundations for improvement.</p> | <ul style="list-style-type: none"> • The careful selection of performance measures is vital. | -- |
| <p>Cascade of strategic objectives</p> <p>It is important that performance measures are linked to strategic objectives, or to desired outcomes.</p> | <ul style="list-style-type: none"> • Measures should reflect those activities, outputs and services that are important to the business or to the organisation as a whole. • Linking measures and targets to strategic objectives helps to put them in context and communicate their integral importance to the organisation. | -- |
| <p>Understanding business processes</p> <p>This is the first and perhaps the most important step in building a performance framework. Some activities in the organisation will be more important than others. You will need to identify those processes that are most critical to delivering business success; doing so will create a clearer picture of what needs to be measured.</p> | <p>Questions to be considered here will include:</p> <ul style="list-style-type: none"> • what are we trying to achieve? • what are our core products or services? • who are our customers (internal and external)? • what are our main business and supporting processes? • what are the two-way flows of materials and information involved in product or service delivery? <p>To fully understand a business process, it may be helpful to analyse it in terms of their inputs and outputs, and the relationships between them; it may be useful to create flow diagrams and flowcharts.</p> | <p>Documents required:</p> <p>--</p> <p>Useful techniques:</p> <p>Decision Map</p> <p>Guidance/briefings:</p> <p>--</p> |

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Choosing performance measures

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Issues covered during this stage

[Types of performance measure](#)
[Choosing measures](#)

Synopsis

This section deals with selecting the right measures with which to assess the organisation's performance.

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| Principles | Guidance | People involved: |
|--|---|--|
| <p>Types of performance measure</p> <p>There are three main types of measure:</p> <ul style="list-style-type: none"> economy measures express the relationship between resources and inputs (the costs of inputs) efficiency measures express the relationship between inputs and outputs (how well the process performs with the given inputs) effectiveness measures express the relationship between outputs and outcomes (how the process contributes to business, strategic, organisational or policy goals). | <ul style="list-style-type: none"> A balanced performance framework may have to include measures of all three types. Focusing on one type of measure may lead to bias or gaps in coverage, for example focusing purely on economy neglects the wider concept of value for money. Effectiveness measures are often necessarily subjective. This is not a reason to exclude them; avoid a focus on outputs simply because they are easier to quantify. | <p>--</p> <p>Documents required:</p> <p>--</p> <p>Useful techniques:</p> <p>Decision Map</p> |
| <p>Choosing measures</p> <p>The performance measures you choose, at whatever level, should be:</p> <ul style="list-style-type: none"> focused reliable worthwhile balanced avoiding perverse incentives ready for change. | <ul style="list-style-type: none"> Focused: exclude measures that are interesting but not directly relevant. Make sure everyone involved agrees that the measurements are going to be useful Reliable: the information you gather must be accurate, as you will base your management decisions upon it. Worthwhile: remember that measurements and analysis have resource implications - the benefit of each measure must be in proportion to the effort required to take it. Existing information sources should be considered before new ones are created. Balanced: choose measures for all important areas, and at all levels - costs, output volumes, efficiency, quality, progress towards strategic aims - even if the measures have to be subjective. Avoiding perverse incentives: that is, those that encourage behaviour that exists to meet a target rather than to improve. For example, measuring the quantity of letters answered but not the usefulness of the responses may not produce a better service. ready for change: measures that are relevant both before and after a radical change are useful in judging its success; those that focus on temporary aspects, or those that may change, are less useful. | <p>Guidance/briefings:</p> <p>--</p> |

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Setting targets

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Issues covered during this stage

- [What are targets?](#)
- [Types of target](#)
- [What makes a good performance target?](#)
- [Continuous improvement](#)

Synopsis

This section deals with setting the business targets, which should be stretching and challenging but not unrealistic. The targets should also drive forward the initiative for continuous improvement.

Version 1.00

| Principles | Guidance | People involved: |
|---|--|--|
| <p>What are targets?</p> <p>Targets are quantified objectives, set by management, to be attained at a future date. They express the aims of the process, at any level, and provide the basis for identifying problems and moving towards solutions as early as possible. Setting targets, objectives or goals is essential, otherwise there is no basis for choosing what to measure, how to assess the information obtained, or what action to take. Defining a target answers the question 'what are we aiming for?'</p> | <ul style="list-style-type: none"> ● The careful selection of performance measures is vital. | <p>--</p> <p>Documents required:</p> <p>--</p> |
| <p>Types of target</p> <p>Targets can take different forms, depending on the process being assessed. For complex processes, there may be several targets, at different stages in the chain, and it may be that meeting targets at lower levels is a vital, enabling step towards meeting higher-level targets.</p> | <ul style="list-style-type: none"> ● Some kinds of targets, with examples of each, are: <ul style="list-style-type: none"> ○ fulfilling a binary (yes/no) measure, often within a set timescale (service operational, building constructed) ○ achieving a set level of input (costs reduced by a certain percentage each year) ○ achieving a set level of output (number of queries answered) ○ achieving a set level of quality (number of complaints below a set level) ○ realising outcomes (improved health, education, housing, transport, and so on) ● Binary and input targets may be important but have no regard to quality. Make sure quality targets are included. | <p>Useful techniques:</p> <p>Decision Map</p> <p>Guidance/briefings:</p> <p>--</p> |
| <p>What makes a good performance target?</p> <p>Setting the right targets is just as important as selecting the right measures. It is crucial that targets are realistic (not a management 'wish list') but at the same time challenging for those involved in the process.</p> | <ul style="list-style-type: none"> ● Good performance targets will be SMART: Specific, Measurable, Achievable, Relevant and Timed. <ul style="list-style-type: none"> ○ specific: clear, unambiguous and easy to understand by those who are required to achieve them ○ measurable: there is no point setting a target for which success cannot be gauged by referring to a specific measure or measures ○ achievable: expressing specific aims that staff feel can realistically be achieved, with some effort: 'out of reach, but not out of sight' ○ relevant to those who will be required to meet them; they must have enough control over their work to be able to meet their targets, or their motivation will suffer | |

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| | <ul style="list-style-type: none"> ○ timed: there should be a set timescale for achieving a target; open-ended targets may not encourage focused effort on improving performance. ● If targets are hard to quantify, the definitions of the terms used to describe them are crucial and should be agreed between all concerned. Terms such as 'satisfaction' and 'milestones' are open to different interpretations and may have to be precisely defined for your situation. | |
| <p>Continuous improvement</p> <p>Public sector managers are under constant pressure to improve. This can translate into a need for continuous improvement in performance.</p> | <ul style="list-style-type: none"> ● Improvements can be sought in a range of areas - resource costs, efficiency, quality - but most can be summed up as improvements in value for money. ● Over time, as experience increases, lessons are learned and opportunities are perceived, it should be possible to improve output volumes, quality or efficiency without additional resource or investment. ● If your focus is on the performance of an external provider, you will almost certainly be seeking continuous improvement in value for money. The requirement for continuous improvement is often written into the contract. ● Targets for continuous improvement might be expressed as year-on-year increases in output volume or cost savings. | |

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People and processes

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Issues covered during this stage

- [Defining processes for data collection](#)
- [Roles and responsibilities](#)
- [Communication](#)
- [Stakeholders](#)

Synopsis

This section deals with slightly less mechanistic issues than the previous four sections. The process of data collection is defined, specific roles and responsibilities are assigned. Communication and engagement are vital for speeding up the flow of information, within which, stakeholder analysis enables identification of those with whom continuous engagement and communication is essential to manage requirements, expectations and performance measurements.

Version 1.00

| Principles | Guidance | People involved: |
|---|---|--|
| <p>Defining processes for data collection</p> <p>The processes by which performance information will be gathered need to be considered, as well as the information itself.</p> | <ul style="list-style-type: none"> ● Methods of collecting data include: <ul style="list-style-type: none"> ○ Regular data collection: information can be collected on a regular and routine basis as part of the normal working process. Some information may be generated automatically (as a by-product) by an information system. ○ Planned checks such as Project Evaluation Reviews (PERs), Post Implementation Reviews (PIRs) and quality audits are examples of planned checks. These checks provide verification that events are occurring as planned. The checks also reinforce information that is collected as other performance measures, or highlight where other performance measures may be showing a distorted picture of real events. ○ Regular inspection keeps operational processes and activities under review to ensure that they are working as specified. Processes may be regularly audited for efficiency, effectiveness and compliance to the chosen procedures. ○ Customer surveys: to collect information about customers' views of a process or service. Methods of surveying customers include questionnaires, telephone samples and user groups. ● Bear in mind these guidelines for collecting data: <ul style="list-style-type: none"> ○ keep it focused - a firm focus will ensure that the right data is collected and irrelevant, tangential or repetitious data is avoided ○ keep it flexible - data should be collected from a variety of sources and through a variety of media ○ keep it meaningful - data collection must not depend on standard checklists as opposed to results-oriented approaches. To be meaningful, the data collected must contribute, directly or through interpretation, to the understanding of the organisation. | <p>--</p> <p>Documents required:</p> <p>--</p> <p>Useful techniques:</p> <p>Decision Map</p> <p>Guidance/briefings:</p> <p>--</p> |
| <p>Roles and responsibilities</p> <p>If the performance management system is to operate effectively, the</p> | <ul style="list-style-type: none"> ● The key responsibilities to be assigned are likely to include: <ul style="list-style-type: none"> ○ selecting and collecting the performance measurement data | |

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| <p>organisation must be clear about the responsibilities for the various tasks to be undertaken.</p> | <ul style="list-style-type: none"> ○ comparing measurements against objectives or targets ○ setting or approving performance objectives or targets, and changes to processes or targets ○ deciding what action to take to affect the performance of the process ○ managing the process itself, in line with the defined targets ○ deciding how to modify the resources assigned to the process, or to change the process itself. <ul style="list-style-type: none"> ● In practice, two or more of these responsibilities might be carried out by a single individual. | |
| <p>Communication</p> <p>Communication is a key factor in gathering information. Once responsibilities are defined, it is important that all involved feel confident in the information flows between themselves and others involved; that their information is being used constructively, that problems can be raised if required, and that they are fulfilling a useful role . Communication will help to co-ordinate the various tasks involved in performance management, speeding up the flow of information and helping to iron out any glitches in the performance framework and its implementation.</p> | <ul style="list-style-type: none"> ● Informal means of communication, such as group meetings, seminars and 'brainstorming' sessions can all help people to feel more able to raise concerns and communicate openly with others who are involved. ● If performance measurement focuses on a service provider, communication becomes even more crucial. The levels at which staff in the two organisations communicate and the tone of their relationships must all be established and used. | |
| <p>Stakeholders</p> <p>In performance management, stakeholder is an individual or group of individuals who have an interest in plans and activities because of their direct involvement or because they may be affected by the outcome. Stakeholders can include employees, directors, shareholders, service providers, consultants or external organisations.</p> | <ul style="list-style-type: none"> ● Stakeholder analysis is an approach to identifying stakeholders in the organisation, assessing their potential impact and determining their requirements and expectations. The results of a stakeholder analysis will inform the specification of the organisation's objectives and targets, the performance measures to be used and the requirements for reporting results. The main steps in a stakeholder analysis are: <ul style="list-style-type: none"> ○ identify the stakeholders ○ assess the importance and influence of stakeholders ○ identify the performance requirements of stakeholders. | |

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Using performance information

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Issues covered during this stage

- [Analysis and reporting](#)
- [Comparing performance with targets](#)
- [Making other comparisons](#)
- [Taking action](#)

Synopsis

This section deals with the use of performance data once it has been gathered. The performance reporting and analysis, when compared with the agreed targets and benchmark indicators, helps to identify whether they are being met. Finally, actions will be taken to correct performance where necessary or to ensure ongoing improvement.

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| Principles | Guidance | People involved: |
|--|---|--|
| <p>Analysis and reporting</p> <p>Performance information will be used for two main purposes: to report on performance to interested parties and to compare against targets as part of ongoing performance management. It must be made appropriate to, and useful for, all those who use it.</p> | <ul style="list-style-type: none"> ● There may be a range of users of performance information, with varying requirements. Consulting them in advance will help ensure that what is proposed in terms of reporting will be useful to them. ● Different stakeholders may also have varying ideas of what constitutes good performance. It may be necessary to tailor the information for different audiences, presenting the most relevant subsets in the most accessible format. ● Other questions to be considered here include: <ul style="list-style-type: none"> ○ are the internal reports useful for their intended purpose? ○ are reports produced in good time? ○ do reports reach their intended audiences in good time? ○ are external reports easy to use? ○ are all key performance measures reported on? ○ have aggregate measures been correctly calculated? ● Exception reporting, where managers receive a brief outline of the instances or periods when performance fell short of targets, is a useful way of drawing attention to measures that warrant special attention. | <p>--</p> <p>Documents required:</p> <p>--</p> <p>Useful techniques:</p> <p>Decision Map</p> <p>Guidance/briefings:</p> <p>--</p> |
| <p>Comparing performance with targets</p> <p>The information gathered by performance measurement will form the basis of comparison with targets. This will identify whether the process is meeting its targets or not.</p> | <ul style="list-style-type: none"> ● A minor or short-term deviation from targets should not lead to precipitate corrective action. It may be helpful to specify the limits of deviation - what constitutes a serious performance shortfall in terms of nature, magnitude or duration. ● The communication flow between those who measure performance and those who compare performance with targets must be reliable and responsive. | |
| <p>Making other comparisons</p> <p>Comparisons are vital. Measures by themselves may tell the organisation very little, unless there is a standard or baseline against which to assess the data.</p> | <ul style="list-style-type: none"> ● The following comparisons can be useful: <ul style="list-style-type: none"> ○ comparisons over time, such as complaints or consumer satisfaction ○ efficiency targets, such as cost reduction, occupancy | |

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| | <p>rates or increased number of users</p> <ul style="list-style-type: none"> ○ internal comparisons, such as overheads between departments in the same organisation ○ comparisons between similar bodies ○ comparisons with other organisations. | |
| <p>Taking action</p> <p>A vital part of performance management is taking action to improve performance. Measurement is a useful tool for learning about a process, but not an end in itself; it is a tool for planning changes and solving problems.</p> | <ul style="list-style-type: none"> ● Those who receive performance information must be able (and willing) to use it to make a case for proactive change. As with measuring and comparing, the responsibility for taking action must be clearly allocated, ideally to a single individual in the organisation. ● Corrective action must take effect in areas that will affect unsatisfactory measures. Performance information must be analysed with realism and pragmatism, even when it reveals problems that may be sensitive for the organisation, or difficult to deal with. ● Some types of corrective action are: <ul style="list-style-type: none"> ○ varying the quantity of the inputs (more investment) ○ varying the nature of the inputs (different staff) ○ making changes to the process (changing service provider, internal reorganisation) ○ transforming the process completely (creating a new business model, outsourcing a service previously provided in-house) ○ changing the process and its outputs (business process re-engineering) ○ making changes to related processes that are clearly affecting performance (changing the context) ○ amending unrealistic or unreachable targets ○ replacing inappropriate targets ○ adding new measures and removing those that have not been useful or that have created perverse incentives. | |

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