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Utilising HR data to understand top team performance

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- **Utilising HR metrics that you already collect**
- **Consider – presentation, grouping and how they help you understand performance**
- **People manager performance and organisational performance**

Utilising Metrics you already collect



- You can utilise a combination of subjective quality based metrics as well as quantity/ hard data metrics
- Quality metrics might include: staff survey information, training programme reviews/ assessments
- Hard data metrics might include: Sickness absence monitoring, Grievance/ Disciplinary numbers, Turnover rates, workforce profile data

Consider how they help you understand performance



- Group metrics into performance categories – for example
- **Organisational performance** - measures might include Customer satisfaction, Employee satisfaction, Resource/ capacity measures, Staff performance levels
- **HR performance** - Employee satisfaction, Sickness Absence, Disciplinary, Appraisals conducted, Recruitment speed, HR performance measures
- **Organisational Capacity** - Turnover rates, Workforce profile (ethnicity, disability, age, etc.), Agency staff
- Consider when and how you will collect information. What systems you need in place and how you will present the information.

Developing a People manager performance system



- Outlined below is an example for grouping people management performance measures.
- Manager Influence - These are measures over which the manager has influence in terms of leadership, but not direct control. Examples include workforce profile information, sickness absence, % of agency staff
- Manager Action - These are measures of actions that the manager has direct control/influence over. Examples include % of sickness cases where (no) action is taken, % of capability cases, average days employees suspended
- Manager Engagement - These are measures from the staff survey, which provide an indicator of a good people manager. Examples include involvement/ engagement questions, development questions, good management questions.

People manager performance matrix



- Consider collection of data for a peer group of senior management
- How will you compare and assess their results – relative scores/ Index/ weighting
- Consider presentation of the information

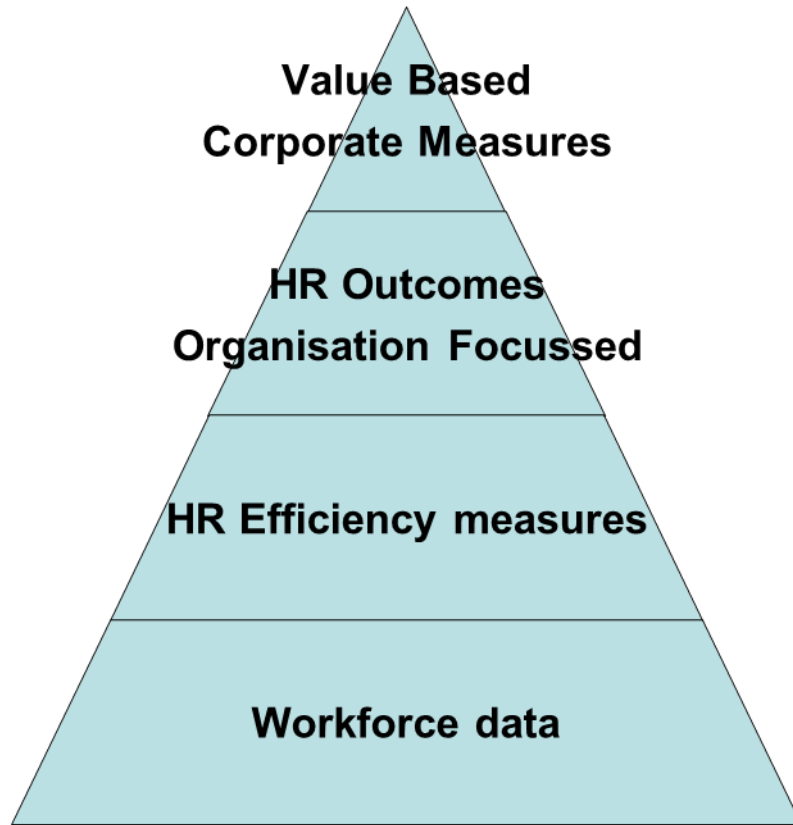
Category	Measure	Score (1, 2, 3)	Weighted Score*	Maximum Score	Group %
Manager Influence	Sickness Rate (Ave no. Days Diff 2011/12)	2	6	96	45.2
	Voluntary Turnover <1 year	3	7	112	
	% of Agency Staff of Total Workforce	1	5	80	
	Workforce % B&ME	1	5	80	
	Workforce % Disabled	1	5	80	
	Grievance Cases	1	5	80	
Manager Action	% of Sickness action not taken	3	7	112	27.4
	Capability Cases	2	6	96	
	Suspension Ave. Days	3	7	112	
Manager Engagement	Leadership & Management	3	7	112	27.4
	Development	2	6	96	
	Involvement	3	7	112	

People manager performance – example of results



Rank	Lower Quartile	Median	Upper Quartile	1	2	3	4
Org Unit				50000750	50000575	50000474	50000017
Manager Name				xx	xxx	xx	xx
Directorate				CR	A&HS	CR	CE
Business Unit				Legal Services Business Unit	Adult & Community Services	Corporate Finance BU	Human Resources
No. Employees in BU				70	738	83	72
Total Score	639	718	794	988	872	856	812
Agency % of Workforce	1.7	6.0	11.8	19.3	3.9	0.8	0.4
WS Agency % of Workforce				60	80	80	80
% Involvement	3.1	3.2	3.2	3.28	3.25	3.11	3.29
WS Involvement				112	112	56	112
% Leadership & Management	3.2	3.4	3.5	3.86	3.41	3.30	3.46
WS Leadership & Management				112	84	56	84
% Development	2.5	2.5	2.7	2.89	2.81	2.62	2.89
WS Development				96	96	72	96
Susp. Ave. Days	0.0	48.8	61.9	0	55	0	55
WS Susp. Ave. Days				112	84	112	84
Capability Cases	0.0	0.0	0.0	0	0	0	0
WS Capability Cases				0	0	0	0
Grievance Cases	0.0	1.1	1.3	0.0	1.5	0.0	0.0
WS Grievance Cases				60	20	60	60
% Disabled	4.0	6.0	9.0	10.0	9.7	4.8	4.2
WS Disabled				80	80	40	40
% BME	40.6	46.7	55.6	49	69	55	43
WS BME				60	80	60	40
Vol Turnover <1	0.0	0.0	7.4	0.0	7.3	0.0	0.0
WS Vol Turnover <1				112	56	112	112
Sickness (diff 2011/12)	-2.1	-1.0	1.4	-0.5	-2.9	-1.9	1.3
WS Sickness (diff 2011/12)				72	96	96	48
Sickness Action Taken	6.3	8.0	10.6	2.3	7.3	5.9	9.1
WS Sickness Action Taken				112	84	112	56

Utilising HR data for a balanced scorecard



Organisational fitness – Ability of organisation to deliver excellent services.

Organisational HR performance – effectiveness of organisation in managing people performance.

HR customer focus – degree to which People & OD delivers services that meet customer expectations and provide value

Organisational Capacity – level of staff resourcing and capacity within the organisation

Examples of HR measures in the Balanced Scorecard



Organisational fitness

Measures include: Customer satisfaction, Employee satisfaction, Resource/ capacity measures indicating good employer. Future measures - ROI measures, Staff performance levels/ competency

Organisational HR performance

Measures include: Employee satisfaction, Recording Sickness Absence, Disciplinary/ sickness actions, No. of days suspension, Appraisals conducted, Employment Tribunal claims

HR customer focus

Measures include: HR Customer satisfaction surveys, HR costs/ capacity, Recruitment speed, HR performance measures, Training programme success, Redeployment success

Organisational Capacity

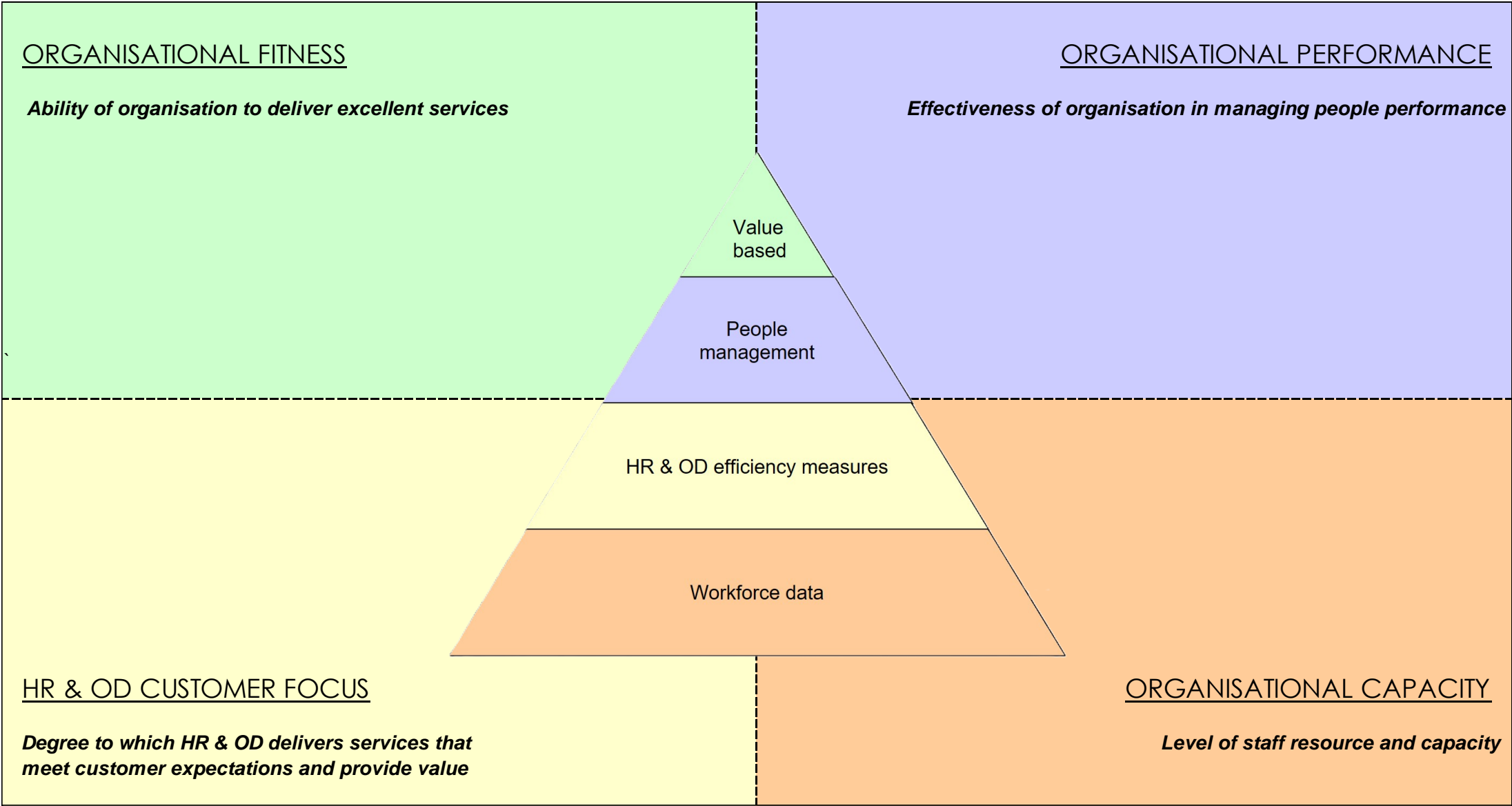
Measures include: Vacancy rates, Turnover rates, Workforce profile (ethnicity, disability, age, etc.), Agency staff

HR Balanced Scorecard – Measurement and assessment



- Identify frequency of measures and consider weighting for each measure and each tier level of the scorecard
- Assess the relative Red, Amber, Green values for each indicator based on benchmarks or best judgement
- Create a percentage or index score for each metric and apply weighting
- Total index score for each tier/ quadrant and overall score

HR Balanced Scorecard



HR Balanced Scorecard



ORGANISATIONAL FITNESS

Ability of organisation to deliver excellent services

	Freq.	Score	Target	Rating
% staff understand Council's aims & objectives	2 yr	84	83	↓
% staff understand how they help achieve Council's aims & objectives	2 yr	88	88	↑
% staff believe we work with integrity & deliver on our promise	2 yr	52	60	↓
% staff believe different parts of the Council work well together	2 yr	48	50	↓
% staff believe the people they work with are always looking to improve	2 yr	65	65	↑
% staff who have the knowledge and skills to do their job	2 yr	87	74	↓
% residents think Council is doing a good job	A	69	67	↓
% residents think Council keep them informed	A	71	64	↓
% residents think Council keep them involved	A	50	45	↑
% residents think Council is efficient/well run	A	57	59	↓
% residents think Council staff are friendly	A	75	71	→
% employees with over 2 and less than 10 yrs service	Q	53.5	50	↓
% voluntary leavers within 2 years	Q	10	10	↑
% internal promotions	Q	7.5	10	↓
RIDDOR reportable accidents per 100,000 employees	Q	94	140	→
Redeployment savings	A	£191,351		↑
No. of FTE employees the Council's sickness equates to	M	153	180	↑

Effectiveness Index % 97.4

ORGANISATIONAL PERFORMANCE

Effectiveness of organisation in managing people performance

	Freq.	Score	Target	Rating
% staff who agree their manager shows appreciation for the work they do	2 yr	68	69	↓
% staff who say their manager helps them reach their full potential	2 yr	57	61	↑
% who believe their opinion is sought on decisions about their work	2 yr	53	65	↓
% staff who get the right information to do their job well	2 yr	52	43	↓
% staff who think working here makes them do the best they can	2 yr	78	73	↑
% staff who think are encouraged to give views for improving their work	2 yr	61	61	→
% staff who found their performance appraisal useful	2 yr	49	42	↓
% staff with a performance appraisal	A	33	95	↓
% ET claims won by employee	A	0	10	↑
Average no. of days suspended	Q	54	70	↑
% teams with recorded absence	Q	73	90	↑
Sickness absence rate	M	6.37	7.5	↑

Effectiveness Index % 90.7

HR & OD CUSTOMER FOCUS

Degree to which HR & OD delivers services that meet customers expectations and provide value

	Freq.	Score	Target	Rating
% staff believe Council ensure that all have an equal opp to Learn & Dev	2 yr	58	64	↓
% staff rating training courses as Good/Excellent to obj being met	Q	87	80	↓
Employees per HR & OD professional	A	61	95	↓
% successful redeployees	A	27	33	↑
% new starters that get a part 1 induction	Q	100	90	↑
% welfare referrals processed within timescale	Q	100	90	→
% health referrals processed within timescale	Q	84	90	↓

Effectiveness Index % 89.8

ORGANISATIONAL CAPACITY

Level of staff resourcing and capacity within the organisation

	Freq.	Score	Target	Rating
% agency staff as a % of workforce	M	9.1	12.0	→
% turnover	Q	15.3	14.4	↑
% voluntary turnover	Q	4.4	8.7	↓
% employees from Black, Asian & Multi Ethnic communities	Q	55.36	39.3	↓
% employees declaring they have a disability	Q	11.04	6.6	↑
% top 5% of earners from Black, Asian & Multi Ethnic communities	Q	19.30	22.0	↑
% top 5% of earners that are women	Q	53.34	50.0	↓
% employees 55 and over	Q	19.6	15.0	→
% employees under 25	Q	1.1	5.5	↓

Effectiveness Index % 87.9

Status Arrows (Indicate a change in performance between the current and previous period):

↑ Improvement ↓ Decrease → No Change

Overall HR & OD Effectiveness index % 91.9



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Overall HR & OD Effectiveness index % 91.9

Create a metrics mindset throughout HR and the wider organisation



- Tools produced can gain traction and credibility with top managers in the organisation and CMT – Chief Executive, S151 Officer, etc.
- HR issues considered on a par with financial and service performance issues
- Help demonstrate the value of HR and help put HR at the top table

Learning points/ tips



- Key with any HR metric is to get audience to think about people management and performance
- Comparative data helps to show relative performance (even if comparison is internal groups)
- Use trend data to indicate progress
- Colour is important - e.g. traffic lights, or metric separators

Thank you



Questions ?

