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### Overview

This standard relates to your evaluation of organisational performance which may be undertaken on an annual basis, by regular scheduled review or for audit. It includes your application of formal measurement methods to evaluate the organisation effectiveness and propose action to rectify actual or potential shortfall.

#### There are three elements

##### **1 Measure organisational performance against operational targets**

This includes extracting relevant information relating to performance against target criteria and key performance indicators, analysing the data and determining actual measurements over the defined period.

##### **2 Measure the effectiveness of the organisation in achieving strategic goals**

This relates to your review of strategic goals, consultation with relevant stakeholders and the identification of any shortfalls in performance. It involves investigating the reasons for such shortfalls and making recommendations for changes to improve performance.

##### **3 Evaluate overall performance and take action to rectify actual or potential shortfalls**

This involves collating data from all available sources and comparing results across the organisation to identify specific shortfalls and needs for improvement. It includes generating options for action to meet those shortfalls, evaluating the options, presenting findings and obtaining commitment to change.

# SFJ EFSM7

## Evaluate organisational performance against agreed measures

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### Performance criteria

*You must be able to:*

#### Measure organisational performance against operational targets

- P1 extract relevant information relating to operational target performance over the specified period
- P2 utilise data from relevant sources including surveys, evaluations and audits
- P3 determine the most suitable method of measurement
- P4 analyse data to determine actual measurement of performance against agreed criteria
- P5 identify areas of both successful and unsuccessful performance
- P6 investigate reasons for performance results to identify areas for change
- P7 benchmark results against other related reports and data to compare and contrast performance with other organisations
- P8 make recommendations for future improvement based on analysis of results

#### Measure the effectiveness of the organisation in achieving strategic goals

*You must be able to:*

- P9 review strategic goals for the relevant period and against relevant reports on organisational performance
- P10 consult with relevant stakeholders to obtain further information to support your evaluation
- P11 measure actual performance against strategic goals and identify any shortfalls
- P12 investigate the reasons for shortfalls in performance, including internal and external factors
- P13 determine the implications of shortfalls on the organisation's future performance
- P14 evaluate the changes which may be required in systems and procedures in order to rectify shortfalls
- P15 recommend changes in strategy to meet identified shortfalls or improve overall performance

#### Evaluate overall performance and take action to rectify actual or potential shortfalls

*You must be able to:*

- P16 obtain all relevant data from organisation performance reviews at all levels
- P17 compare results of performance across the organisation and identify trends, shortfalls and areas of successful performance
- P18 validate the information through consultation with relevant internal and external stakeholders and contacts
- P19 generate options to address shortfalls or improve systems and procedures

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- P20 evaluate options and determine the preferred route through a detailed cost benefit analysis
- P21 gain support and commitment to changes required
- P22 establish relevant piloting and review processes to monitor and confirm expected improvements

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#### Knowledge and understanding

*You need to know and understand:*

- K1 measurement methods, tools and techniques for evaluation of organisational performance and their selection as suitable for context
- K2 how to set, validate and evaluate performance against key performance indicators
- K3 methods of disseminating results of evaluations
- K4 methods of benchmarking, the processes involved and their relevance to the evaluation to be performed
- K5 type, range and sources of information for evaluation and comparison of data
- K6 how to analyse results as a level of detail sufficient to meet organisational planning needs
- K7 the range of internal and external stakeholders, their responsibilities and interests
- K8 existing methods of performance planning and review at all levels and who is responsible for their management and reporting
- K9 existing roles, responsibilities and methods of communication in respect of performance monitoring and review
- K10 models of change management and their relevance to instigation of plans to meet shortfalls in performance
- K11 methods of cost-benefit analysis and their applicability to organisational performance review
- K12 methods of investigation and research to elicit sufficient, valid information
- K13 information management techniques

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