

Unit A8 Evaluate and improve organisational performance

This Unit has been imported from the Management Standards

Unit Summary

Overview

This unit is about managing the strategic performance of your organisation and achieving necessary improvements. This involves developing measures and criteria to evaluate your organisation's performance, carrying out evaluations, and finding the reasons for success and failure in your organisation's strategy.

This unit is for you if you are a manager and you

- have responsibility for substantial programmes and resources
- have responsibility for the strategic development of your organisation
- have a broad span of control
- proactively identify and implement change and quality improvements
- negotiate budgets and contracts, *and*
- lead high-level meetings.

This unit contains three elements

A8.1 *Develop measures and criteria to evaluate your organisation's performance*

A8.2 *Evaluate your organisation's performance*

A8.3 *Explain the causes of success and failure in organisational strategies.*

To *develop measures and criteria to evaluate your organisation's performance*, you need to select measures and criteria which are cost-effective, make best use of available resources and provide the information you need to judge your organisation's progress.

To *evaluate your organisation's performance*, you need to gather and analyse valid and reliable evidence, present a complete and balanced view of what you have found, and ensure your evaluation and its presentation are compatible with organisational values, policies and legal requirements.

In order to *explain the causes of success and failure in organisational strategies*, you need to gather and analyse valid and relevant information, weigh up possible explanations and identify ones which are realistic and plausible, present your case clearly and concisely, and identify what lessons your organisation should draw from its successes and failures.

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Key words and concepts

These definitions are provided to explain how key words and concepts are used in this unit

criteria	principles or standards against which performance can be evaluated
evaluation	a balanced assessment of what has been achieved
measures	methods of assessing how well your organisation is performing
mission	the long-term goal your organisation seeks to achieve
organisational objectives	clearly defined and measurable results which your organisation should achieve
policies	guideline covering the way the organisation deals with key issues, for example, health and safety, employment practices or customer relations
strategies	long-term plans which will guide your organisation in achieving its mission
values	those things the organisation believes in and seeks to realise in its work, for example, customer service, team working, quality or value for money
vision	the model for the way you would like your organisation to be in the future

Unit A8 Evaluate and improve organisational performance

Knowledge and Understanding

To perform effectively in this unit, you need to have knowledge and understanding in the areas of

- Analytical techniques
- Communication
- Continuous improvement
- Information handling
- Monitoring and evaluation
- Organisational context
- Strategic planning.

You will find detailed knowledge requirements listed with each element.

Personal Competencies

In performing effectively in this unit, you will show that you

Acting strategically	<ul style="list-style-type: none">• Display an understanding of how the different parts of the organisation and its environment fit together• work towards a clearly defined vision of the future• clearly relate goals and actions to the strategic aims of the organisation• take opportunities when they arise to achieve the longer-term aims or needs of the organisation
Communicating	<ul style="list-style-type: none">• listen actively, ask questions, clarify points and rephrase others' statements to check mutual understanding• adopt communication styles appropriate to listeners and situations, including selecting an appropriate time and place
Influencing others	<ul style="list-style-type: none">• develop and use contacts to trade information, and obtain support and resources• present yourself positively to others• create and prepare strategies for influencing others• understand the culture of the organisation and act to work within it or influence it
Searching for information	<ul style="list-style-type: none">• actively encourage the free exchange of information• make best use of existing sources of information• seek information from multiple sources• challenge the validity and reliability of sources of information
Thinking and taking decisions	<ul style="list-style-type: none">• push for concrete information in an ambiguous situation• break processes down into tasks and activities• identify patterns or meaning from events and data which are not obviously related• produce a variety of solutions before taking a decision• take decisions which are realistic for the situation.

Element A8.1 Develop measures and criteria to evaluate your organisation's performance

The National Standard

This section provides criteria to assess whether you *maintain work activities to meet requirements* to the National Standard of competence. It also lists the knowledge and understanding which are essential for effective performance.

Performance criteria

You must ensure that

- a) the **measures and criteria** you develop are cost-effective and make optimum use of existing sources of data and means of data gathering
- b) the **measures and criteria** you develop are capable of providing information in time to enable an effective response
- c) the **measures and criteria** you develop provide sufficient information to make judgements about progress towards the mission and objectives and the implementation of policies.

Range

measures and criteria for at least two of the following areas

- performance against organisational objectives
- performance against other relevant organisations
- performance against externally imposed indicators.

Evidence requirements

You must prove that you *develop measures and criteria to evaluate your organisation's performance* to the National Standard of competence.

To do this, you must provide evidence to convince your assessor that you consistently meet **all** the performance criteria.

Your evidence must be the result of real work activities undertaken by yourself. Evidence from simulated activities is **not** acceptable for this element.

Knowledge requirements

You must know and understand

Information handling

- the existing sources of data and means of data gathering available to you
- how these sources may be optimised to review organisational performance.

Monitoring and evaluation

- how to develop appropriate measures and criteria to review your organisation's performance.

Organisational context

- your organisation's mission, objectives and policies and how to interpret these, drawing out the implications for strategic planning
- your organisation's principal competitors, collaborators and other relevant organisations
- the externally imposed indicators which are relevant to measuring your organisation's performance.

Strategic planning

- the principles of strategic planning and review and their importance in maintaining organisational performance
- your role and responsibilities for strategic planning
- different models of strategic planning and review and their relative advantages and disadvantages to your organisation, your work and available resources.

Element A8.2 Evaluate your organisation's performance

The National Standard

This section provides criteria to assess whether you *maintain work activities to meet requirements* to the National Standard of competence. It also lists the knowledge and understanding which are essential for effective performance.

Performance criteria

You must ensure that

- a) your **evaluations** of your organisation's performance are based on sufficient, reliable evidence against agreed criteria
- b) your **evaluations** of your organisation's performance take account of all relevant factors
- c) the way you present the results of **evaluations** gives a complete and balanced picture of the organisation's performance
- d) where performance fails to meet the agreed criteria, you identify possible reasons and discuss these with stakeholders
- e) your **evaluations** and your presentation of results are consistent with organisational values and policies and with legal requirements.

Range

both of the following types of **evaluation**

- qualitative
- quantitative.

Evidence requirements

You must prove that you *evaluate your organisation's performance* to the National Standard of competence.

To do this, you must provide evidence to convince your assessor that you consistently meet **all** the performance criteria.

Your evidence must be the result of real work activities undertaken by yourself. Evidence from simulated activities is **not** acceptable for this element.

Knowledge requirements

You need to know and understand

Analytical techniques

- how to identify possible reasons for failure in meeting organisational mission, objectives, values and policies.

Communication

- how to present the evaluation results effectively, both formally and informally
- how to consult effectively with stakeholders on organisational performance.

Information handling

- the types of information required to evaluate organisational performance and how to gather and validate such information.

Monitoring and evaluation

- the principles and methods underpinning the evaluation of organisational performance
- the different models of organisational performance evaluation and their relative advantages and disadvantages to your own organisation, work and available resources

how to evaluate organisational performance using both quantitative and qualitative methods.

Element A8.3 Explain the causes of success and failure in organisational strategies

The National Standard

This section provides criteria to assess whether you *maintain work activities to meet requirements* to the National Standard of competence. It also lists the knowledge and understanding which are essential for effective performance.

Performance criteria

You must ensure that

- a) your **explanations** of the causes of success and failure are based on sufficient, reliable information
- b) your **explanations**, and reasons for rejection of any alternative explanations, are clear, concise and appropriate to the audience you are presenting to
- c) where it is likely to be difficult to find remedies for the causes of failure, you offer reasons to counter possible objections
- d) you make the lessons to be drawn from success and failure available for use in future organisational planning.

Range

both of the following types of **explanations**

- informal briefings
- formal reports.

Evidence requirements

You must prove that you *explain the causes of success and failure in organisational strategies* to the National Standard of competence.

To do this, you must provide evidence to convince your assessor that you consistently meet **all** the performance criteria.

Your evidence must be the result of real work activities undertaken by yourself. Evidence from simulated activities is **not** acceptable for this element.

Knowledge requirements

You need to know and understand

Analytical techniques

- how to analyse the reasons for success and failure in achieving mission, objectives, policies and values.

Communication

- how to present possible causes of success and failure effectively to a range of different audiences both formally and informally.

Continuous improvement

- how to identify the lessons which may be drawn from past successes and failures and their implications for future organisational planning.

Information handling

the types of information required to identify potential causes of success and failure in meeting the mission, objectives, policies and values and how to gather and validate such information.