People Management Framework

Mini guide 2012

UHR People Management Framework

Introduction

The People Management Framework was launched by Universities HR in summer 2010.

Developed in conjunction with PricewaterhouseCoopers and in collaboration with the Higher Education Funding Council for England with input from over 50 HR Directors and universities and colleges in the UK the PMF is a framework to enable higher education institutions to measure the effectiveness of their people management interventions and activities, against internal and external comparators, and over time, using both common and individually developed measures.

The People Management Framework enables organisations to measure the impact of their people management interventions across the organisation, over time, allows for internal benchmarking, and uses KPIs and other organisational strategic objectives within it.

The tool is flexible, it can be adapted to suit your own purposes – not every step is needed.

What is the PMF?

The PMF is...	The PMF isn't...
✓ A sector wide Framework that measures the impact of people management practices ✓ Focused on supporting continuous improvement activity ✓ Evidence based, providing a mixture of quantitative measures and qualitative indicators to systematically assess people management	× Linked to any funding conditions × A compulsory requirement × A 'tick-box' exercise × A compliance and monitoring tool × Only intended to measure the HR function (although it can do so if required)
What will the PMF help me do?	
• Provide evidence to assure senior managers and Governors / Councils that people management issues are being managed effectively • Provide a flexible approach for HEIs to understand, assess and report on the impact of people management practices within the institution • Offer a framework that will help HEIs to improve continually, at a pace that is aligned with their priorities and ways of working • Equip HEIs with meaningful data that can be used to inform operational and strategic planning across the institution	

Use of the People Management Framework is free to institutions in full and associate membership of Universities HR. To register your institution to use the PMF and be issued with a licensed copy of the software, you will need to complete the online form, available here; http://www.uhr.ac.uk/pmf-4-PMF-Home.html

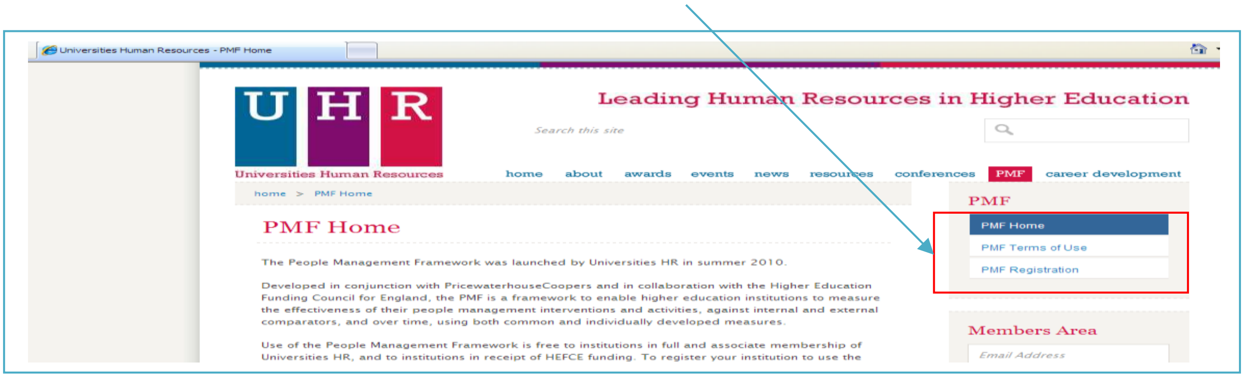
For enquiries about use of the PMF, email pmf@uhr.ac.uk. If you have questions about the development and plans for ongoing use of the PMF, please contact Helen Scott, UHR's Executive Director, via helen@uhr.ac.uk.

Contents

Mini guide tool features

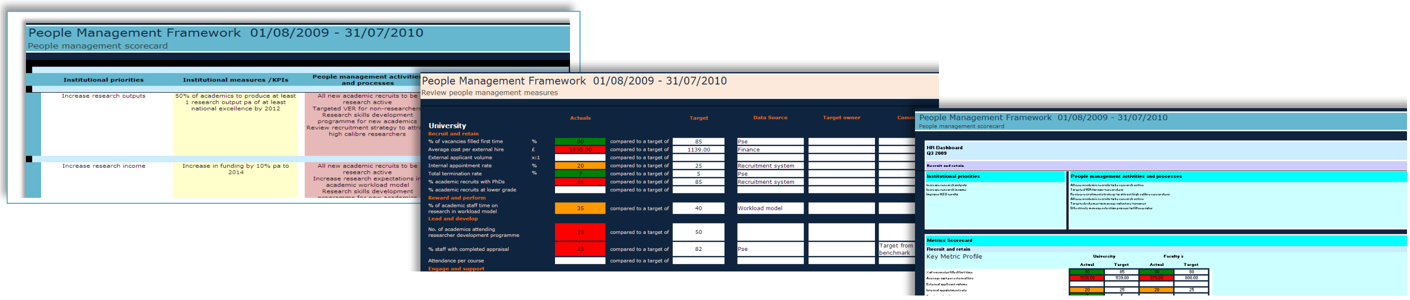
- This mini guide pack is intended to be used alongside the Excel-based People Management Framework (PMF) Tool and supplemented by the more detailed 'User Guide' launched previously (2010).
- The PMF tool itself includes some general guidance and instructions, but this document provides a quick and simple overview of its main functions and features to enable users to become proficient quicker.
- This is a flexible tool designed to fit individual needs. You may wish to start small by just focussing on two objectives that you wish to measure.
- As it is excel-based it is simple to update and then add to it at a later stage when you need to re-visit it.
- In order to get started you just need to follow the below steps;

  1. To register your institution to use the PMF and be issued with a licensed copy of the software, you will need to complete the online form, available here; http://www.uhr.ac.uk/pmf-4-PMF-Home.html
  2. You will then be taken to a screen that looks like this to register your University;



Once you receive the PMF tool you will then be in a position to use the framework, which will enable you to get started and;

- *Focus, prioritise and align your Institution and Department's key objectives*
- *Benchmark against your Institution / Department and other Institutions/Departments for data such as absence, turnover, costs, etc*
- *Generate interest and discussion within both your institution and other institutions*
- *Generate handy reports to facilitate objective discussions and planning*
- *Keep track and monitor progress against previous data you have collated*
- *Create links with other PMF users to allow a forum to share best practice*



Thank-you for your interest and support for the PMF we hope you have found it useful in prioritising and focusing your objectives and activities

Helen Scott, UHR, Executive Director

Navigation of mini guide

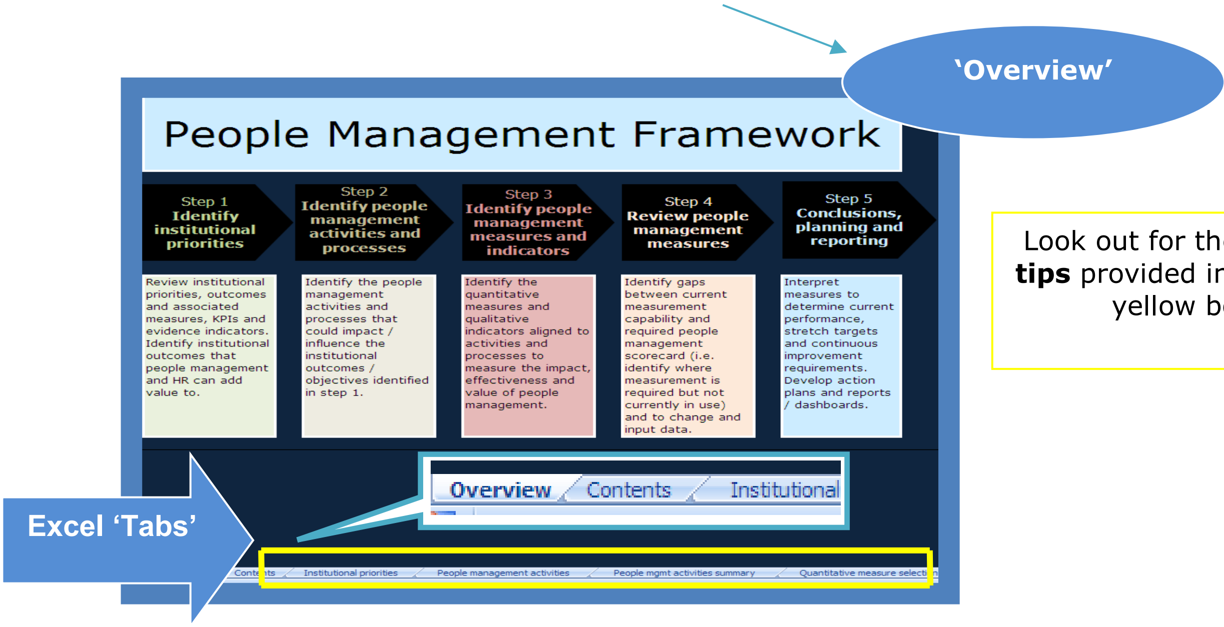
The PMF contains **5 easy steps**, these run alongside the top of each page of this guide so you know whereabouts in the process you are:

Step 1 **Identify institutional priorities** → Step 2 **Identify people manageme** → Step 3 **Identify people manageme** → Step 4 **Review people manageme** → Step 5 **Conclusions, planning and**

The PMF provides a series of quantitative measures and qualitative indicators that can be used to measure current performance which are aligned to the following **people categories:**

Recruit and retain → **Reward and perform** → **Lead and develop** → **Engage and support** → **HR strategy and function effectiveness**

On each page of the guidance you can easily identify which of the **PMF Excel tabs** the guidance is referring to from the blue circle at the top of each screen shot as per the below;



Look out for the **hints** and **tips** provided in each of the yellow boxes.

Where you see this symbol;  page numbers are suggested to direct you to further information within the **User Guide (2010)** for more comprehensive support.

Where can I get a copy of the User Guide (2010)?

- Please email PMF@uk.pwc.com if you do not have access to a copy of this.

Checklist

Three easy steps you may wish to consider that link to steps 1-3 on the following pages. This is outlines all of the preparation needed to utilise the PMF fully. If you just want to skip steps for your specific purposes - that's fine as well:

Four Step Checklist	Things to Consider	Pages in Reference Guide (2010)
Step 1…'Identify institutional priorities'		
Identify your institutional Priorities	• Make sure you are aware of what these are for your institution so you are able describe and then discuss the best ways of measurement. *- You may need to meet with your Senior Management team to do this.*	14
Identify your HR Strategy	• Review existing strategy documents and plan to identify where your key focus of effort should be. *- You may want to refer to the questions outlined on the 'Qualitative Indicators' to aid discussions as they provide a useful list of questions and help to think about suitable measures.*	2, 21, 23, 24, & 191 - 197
Step 2…'Identify people management activities and processes'		
People management activities & processes	• For one or more of the institutional priorities you identified previously, now consider the people management activities and processes undertaken to reinforce these. • This could include any activity that supports their delivery such as reviewing your institution's Recruitment strategy to attract more candidates, or, delivering targeted training to line managers on the performance management cycle. *- These may already be in place.*	4, 7, 16 & 17
Step 3…'Identify people management measures and indicators'		
Quantitative measures	• Review the selection of measures outlined on the 'Quantitative Measures Selection' and see which are the most relevant and obtainable for your selected people management activities. *- You may need to review the options available to you with the HR contact responsible for reporting to ascertain which existing reports you may be able to access or, use them as a means of discussing implementing new reports that are fit for purpose for your institutional priorities.*	2, 6, 8, 19-20, 32-34, & 41 - 190
Step 4…'Review people management measures'		
Targets	• Enter the institutional / departmental targets set against the quantitative measures you listed previously in Step 4. *- You may need to meet with your Senior Management team to do this.*	25-28

No further information is needed for ***Steps 4 – 5,*** *as these are automatically populated based on the information inputted in previous steps.*

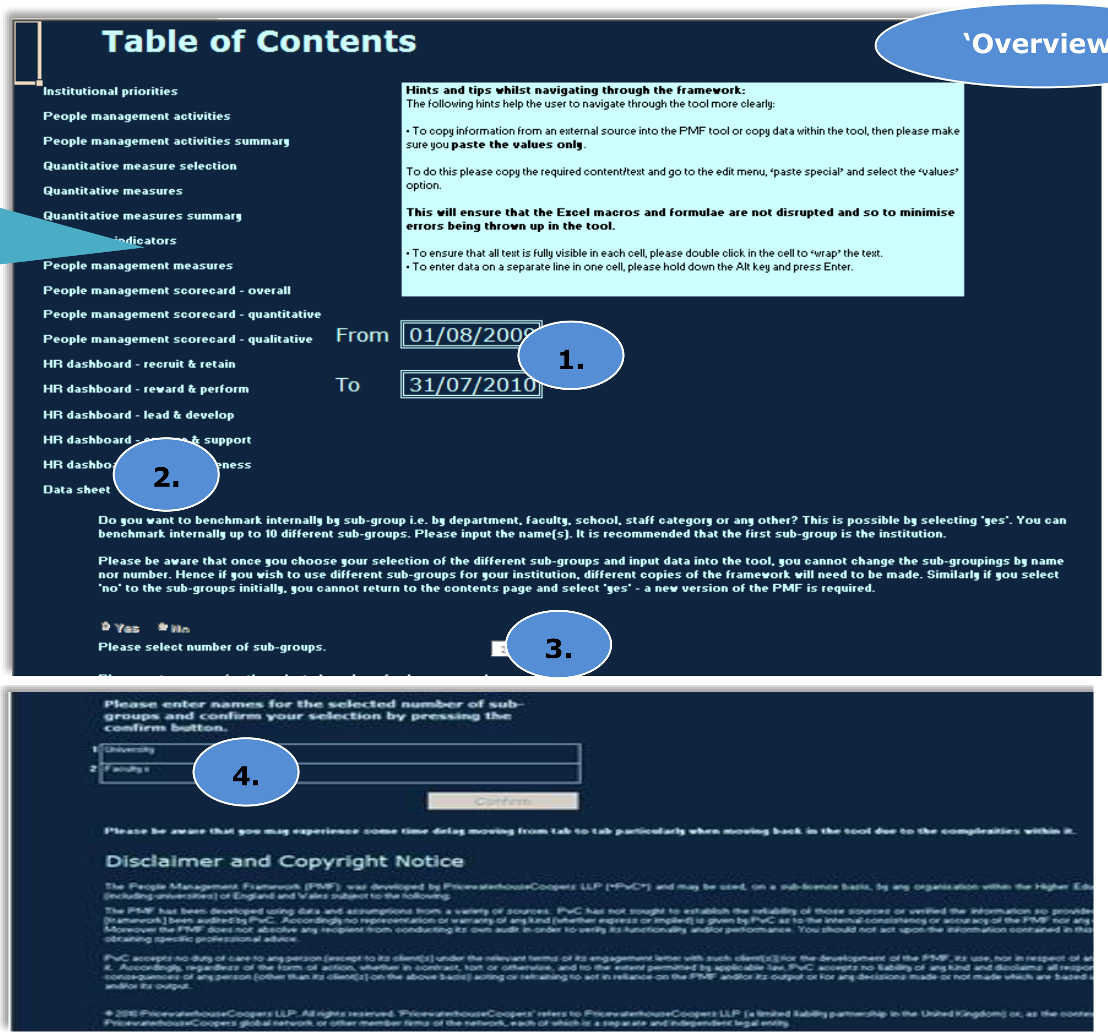
Contents

Pages 4, 11 – 12 & 26 of the **User Guide 2010**

'Overview'

The **Contents** page allows direct access to the specific page you want.

Simply click on each of the **links** found here;



Why benchmark?

- Benchmarking your departments or institution internally enables you to track progress and make comparisons over time.
- Any examples of best practice can then be shared easily across departments / institutions.

Instructions:

1. Enter the **date** period here. This is to ensure data is collected within the same time period to increase the validity for making inferences about the relationships.
2. You would need to select 'yes' if you wanted to **benchmark** your data against other Departments within your Institution. *Benchmarking is optional.*
3. Enter the number of **sub-groups** you wish to benchmark against and add a descriptor.
4. Add in names of **subgroups** here, i.e. 'University', 'Faculty'. These headings will the filter through to subsequent report headings.

***NB** – you cannot add subgroups after you have completed inputting the Framework, therefore you may want to consider which areas you want to benchmark **before** you start to use the tool.*

Further pointers;

3.1 A **sub-group** may consist of other different colleges, faculties, schools and/or departments. Users may also wish to compare data between different staff categories or employee groups – for example, between academic and non-academic staff. For example, you may want to measure qualitative data at an institutional level and quantitative data at a Faculty level.

3.2 What happens if I choose the sub-group option?
If you decide to compare your data to other sub-groups further columns will become available within your report to allow you to enter in additional data to compare.

3.3 How many sub-groups can I compare?
Users are able to benchmark internally up to 10 different sub-groups for their institution. Should the user wish to submit data for more than 10, we recommend that the user creates a new additional version of the Excel workbook (just copy and paste data across from one spreadsheet to another).

Step 1

Step 1
Identify
institutional
priorities

Pages 4, 6, 8, 12 - 18, 20, 28, & 31 of the **User Guide 2010**

Institutional priorities

The **date** period is always automatically populated from the **'Contents Page'** tab.

'Institutiona l priorities'

Additional 'Guidance' is provided within each section for further information

People Management Framework 01/08/2009 - 31/07/2010
Institutional priorities

Guidance

... purpose of this step is to review your institutional priorities and outcomes and identify which of these institutional prioritiess people management and the HR function can add value to. Enter the institutional prioritiess, a short description, the institutional measures and select a priority value (high, medium, low) for each in the appropriate cells. This information may already be available in the form of strategic plans. Where this does not already exist you may need to formulate and gather this through discussions with the senior management team within your institution. Please double click on the cell to wrap text. Also use Alt+Enter function to enter in more than one measure.

Please refer to t... ser guidance documentation for mor... ation on how to complete this step ... ome examples of institutio... ies.

	1. Institutional priorities	2. Description	3. Institutional measures	4. Priority for the year
1	Increase research outputs	Higher proportion of academics contributing to research	50% of academics to produce at least 1 research output pa of at least national excellence by 2012	High
2	Increase research income	Increase external research income	Increase in funding by 10% pa to 2014	High
3	Improve student progression and completion	Improve student progression and completion	Reduction in non-completions to 10% and improvement in progression	High
4	Improve NSS results	Increase student satisfaction		High
5	Creation of Super Faculty	New faculty structures to improve collaboration and efficiency	reduce support staff costs	High
6	Creation of Super Faculty	New faculty structures to improve collaboration and efficiency	implement new staffing structure by 1.8.2011	High
7	Increase enterprise activity	Increase volume of enterprise related activity and income	Increase KTPs to 20	Medium
	<outcome 8>	<enter description>	<enter institutional measure>	<please select>
	<outcome 9>	<enter description>	<enter institutional measure>	<please select>
	<outcome 10>	<enter description>	<enter institutional measure>	<please select>

Instructions:

1. Enter your **institutional priorities** here (10 max). You may wish to only add 1 or 2 a key areas of focus.
2. Enter a brief description of what your chosen **institutional priorities** are.
3. Enter the **target / goals /desired outcomes** your institution is striving to achieve through the priorities.
4. Enter your **institutional priority** value either; high / medium / low

Further pointers;

1.1 What does success for your institutional priority look like?...

If this has not yet been established then it may be an ideal opportunity to discuss and agree this with your Senior Management team.

1.2 An **'institutional priority'** is the desired strategic objectives of your institution.

1.3 A **'priority'** describes the change that the institution hopes to drive over a specific time period.

1.4 Where should I focus?
You may only wish to focus on one priority and add to it throughout the year, it isn't necessary to identify every priority.

Initial focus should be on those where HR and people management practices can make a difference to their achievement (see examples within the screenshot above).

The information you feed into the PMF tool here can be seen as outcomes on tabs;

'People management activities'

'People management activities

Step 2

Step 2
Identify people management activities and processes

Pages 4, 7, 13, 16 – 19, & 22, of the **User Guide 2010**

People management and processes

'People management activities'

People Management Framework 01/08/2009 - 31/07/2010

People management activities and processes

Guidance

The purpose of this step is to identify the people management activities and processes that could impact / influence the institutional priorities that you have already identified as part of the institutional priorities tab. Institutional priorities are automatically populated in the worksheet based upon the data entered in the institutional priorities tab. Input a short description of the actual activity providing more detail in the cell ... institutional priority. You can enter up to 5 people management activities and processes against each institutional priority. This information may already be available in the form of ... Where it does not already exist, or if a refresh of data is required you may need to gather or update data through discussions within the HR leadership team, ...e unions within your institution. Please double click on the cell to wrap text.

...ntation for more information on how to complete this step and for some examples of people management activities and processes.

Automatically populated

1.

Institutional Outcomes	A	B	C	D	E
1 Increase research outputs	All new academic recruits to be research active	Targeted VER for non-researchers	Research skills development programme for new academics	Review recruitment strategy to attract high calibre researchers	<input description of activity>
2 Increase research income	All new academic recruits to be research active	Increase research expectations in academic workload model	Research skills development programme for new academics	<input description of activity>	<input description of activity>
3 Improve student progression and completion	Ensure Teaching Fellowship criteria reflect progression and completion outcomes	Correlate staff engagement with student satisfaction	Implement customer service training	<input description of activity>	<input description of activity>
4 Improve NSS results	Develop new Associate Dean for Quality roles	Targeted schemes to manage voluntary turnover	Effectively manage selection process to fill new roles	<input description of activity>	<input description of activity>
5 Creation of Super Faculty	Effectively manage process of selection to posts	Review role descriptors for new Faculty roles	<input description of activity>	<input description of activity>	<input description of activity>
6 Creation of Super Faculty	Introduce voluntary severance scheme	Introduce new redeployment policy	<input description of activity>	<input description of activity>	<input description of activity>
7 Increase enterprise activity	Introduce new incentive and reward schemes for entrepreneurial activity	Develop new role descriptors for Enterprise Unit	Creative recruitment campaign for new Head of Enterprise	<input description of activity>	<input description of activity>
8 <outcome 8>	<input description of activity>	<input description of activity>	<input description of activity>	<input description of activity>	<input description of activity>
9 <outcome 9>	<input description of activity>	<input description of activity>	<input description of activity>	<input description of activity>	<input description of activity>

The **institutional priorities** you inserted in the previous tab will automatically populate here.

Instructions:

1. You can enter 1- 5 **people management activities and processes** against each of your **institutional priorities** here.

- Input a short description of the actual activity.
- You can complete this screen - even where you do not yet have institutional priorities.

'People management activities and processes' covers any HR and people management interventions. It is; ***'the action we will take to bring the institutional priority to life'***

Where can I get this information?

This may already be available from existing people / HR strategy and plans.

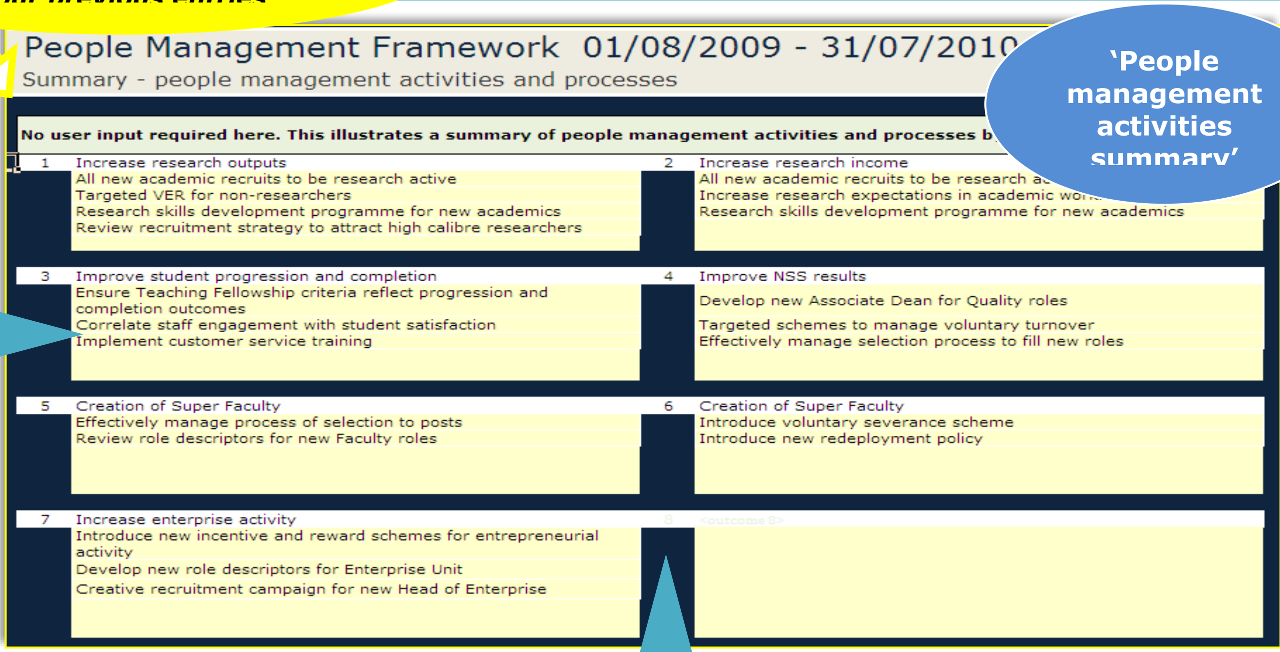
Where it does not already exist, or, if new data is required you may need to gather or update it through discussions with;

- *HR leadership team*
- *Senior management*
- *Staff groups*
- *Trade unions*

Summary: People management activities and processes

Pages 5, & 16 – 18 & **more detailed definitions** of each of the categories along with the quantitative measure and qualitative indicators associated with each can be found in **User Guide 2010**

The entire page output is automatically populated from your previous entries



People Management Framework 01/08/2009 - 31/07/2010

Summary - people management activities and processes

No user input required here. This illustrates a summary of people management activities and processes b

1	Increase research outputs All new academic recruits to be research active Targeted VER for non-researchers Research skills development programme for new academics Review recruitment strategy to attract high calibre researchers	2	Increase research income All new academic recruits to be research ac Increase research expectations in academic wo Research skills development programme for new academics
3	Improve student progression and completion Ensure Teaching Fellowship criteria reflect progression and completion outcomes Correlate staff engagement with student satisfaction Implement customer service training	4	Improve NSS results Develop new Associate Dean for Quality roles Targeted schemes to manage voluntary turnover Effectively manage selection process to fill new roles
5	Creation of Super Faculty Effectively manage process of selection to posts Review role descriptors for new Faculty roles	6	Creation of Super Faculty Introduce voluntary severance scheme Introduce new redeployment policy
7	Increase enterprise activity Introduce new incentive and reward schemes for entrepreneurial activity Develop new role descriptors for Enterprise Unit Creative recruitment campaign for new Head of Enterprise	8	<outcome 8>

'People management activities summary'

The sheet is **read only** and is protected so data cannot be edited.

Following discussions you may wish to **review and revise Steps 1 – 2.**

This handy table can be **printed and taken to meetings** to validate and share with relevant stakeholders. Once circulated, this provides people with a **focus and consistent message** around potential **hotspots** for your institution.

Instructions:

1. This page simply provides a summary overview of your previous entries against the institutional priorities and people management activities from **Steps 1 and 2** which include the tab headings;

'Institutional priorities' & **'People management activities'**

1) Recruit and retain	The institution's resourcing strategy, recruitment and selection policies and procedures, resource planning, retention strategy and exit management.
2) Reward and perform	The institution's reward strategy, pay and grading arrangements, recognition initiatives, pay equality and performance management policies and procedures and the alignment of individual performance to institutional performance.
3) Lead and develop	The institution's development and training activities, appraisal activity, leadership and management development, plus equality and diversity.
4) Engage and support	The institution's employee communications strategy, employee involvement initiatives, staff surveys, absence management policies and procedures and wellbeing initiatives.
5) HR strategy and function effectiveness	The institution's HR and people strategies, processes and practices for the efficient delivery of HR and people management.

&

People categories

The framework has been designed around the **five categories of people activities.**

You will therefore need to see how your strategy or HR priorities fit against each people category.

Remember - you don't have to use them all. You could for example, just choose one or two priority areas.

Step 3

Step 3
Identify people management measures and indicators

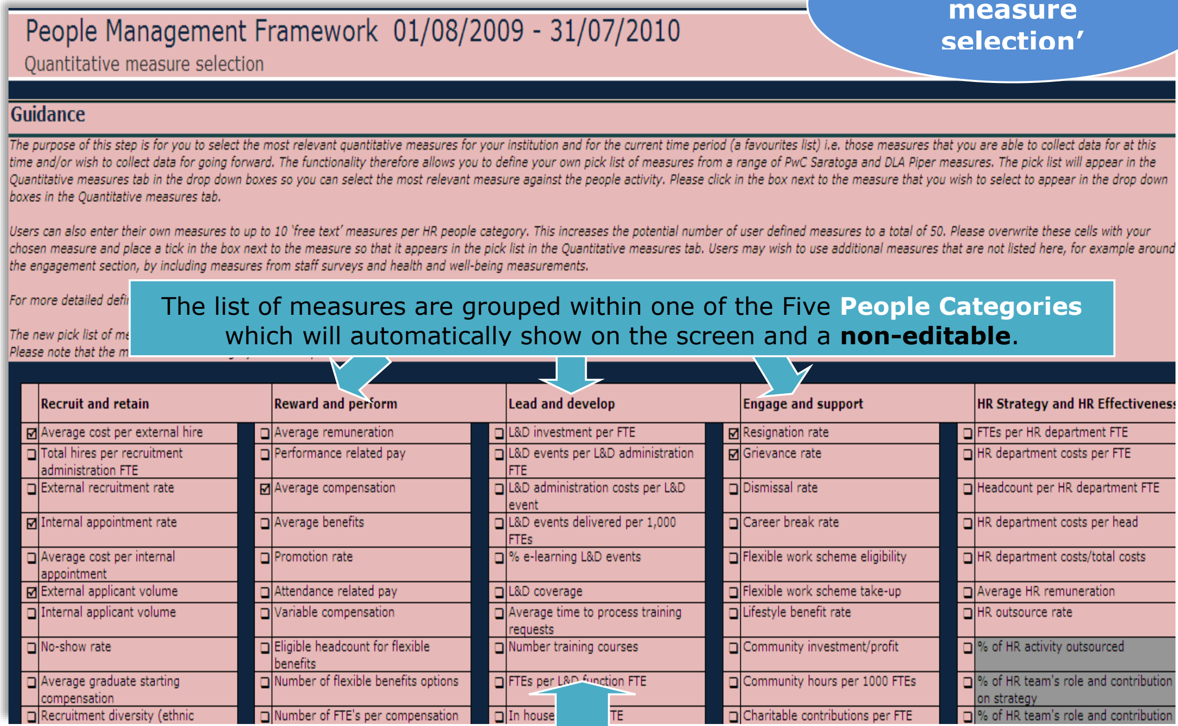
Pages 2, 5 – 8, 19 – 23, & Appendix A2 (pages 40 – 177) of the **User Guide 2010**

Quantitative measures selection

Measures not available?
Even if measures are not currently available, you can still select them and discuss ways around implementing them. This will be useful in identifying any gaps or strengthening existing ones.

Where can I obtain the data?
You are likely to be drawing data from a range of sources, typically including HR, Finance, Payroll, Planning and other departments. Initial consultation with colleagues can also sometimes uncover less well-known information sources.

'Quantitative measure selection'



People Management Framework 01/08/2009 - 31/07/2010
Quantitative measure selection

Guidance

The purpose of this step is for you to select the most relevant quantitative measures for your institution and for the current time period (a favourites list) i.e. those measures that you are able to collect data for at this time and/or wish to collect data for going forward. The functionality therefore allows you to define your own pick list of measures from a range of PwC Saratoga and DLA Piper measures. The pick list will appear in the Quantitative measures tab in the drop down boxes so you can select the most relevant measure against the people activity. Please click in the box next to the measure that you wish to select to appear in the drop down boxes in the Quantitative measures tab.

Users can also enter their own measures to up to 10 'free text' measures per HR people category. This increases the potential number of user defined measures to a total of 50. Please overwrite these cells with your chosen measure and place a tick in the box next to the measure so that it appears in the pick list in the Quantitative measures tab. Users may wish to use additional measures that are not listed here, for example around the engagement section, by including measures from staff surveys and health and well-being measurements.

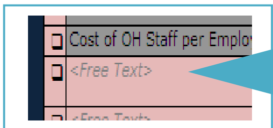
For more detailed defi

The new pick list of me
Please note that the m

Recruit and retain	Reward and perform	Lead and develop	Engage and support	HR Strategy and HR Effectiveness
☑ Average cost per external hire	❑ Average remuneration	❑ L&D investment per FTE	☑ Resignation rate	❑ FTEs per HR department FTE
❑ Total hires per recruitment administration FTE	❑ Performance related pay	❑ L&D events per L&D administration FTE	☑ Grievance rate	❑ HR department costs per FTE
❑ External recruitment rate	☑ Average compensation	❑ L&D administration costs per L&D event	❑ Dismissal rate	❑ Headcount per HR department FTE
☑ Internal appointment rate	❑ Average benefits	❑ L&D events delivered per 1,000 FTEs	❑ Career break rate	❑ HR department costs per head
❑ Average cost per internal appointment	❑ Promotion rate	❑ % e-learning L&D events	❑ Flexible work scheme eligibility	❑ HR department costs/total costs
☑ External applicant volume	❑ Attendance related pay	❑ L&D coverage	❑ Flexible work scheme take-up	❑ Average HR remuneration
❑ Internal applicant volume	❑ Variable compensation	❑ Average time to process training requests	❑ Lifestyle benefit rate	❑ HR outsource rate
❑ No-show rate	❑ Eligible headcount for flexible benefits	❑ Number training courses	❑ Community investment/profit	❑ % of HR activity outsourced
❑ Average graduate starting compensation	❑ Number of flexible benefits options	❑ FTEs per L&D function FTE	❑ Community hours per 1000 FTEs	❑ % of HR team's role and contribution on strategy
❑ Recruitment diversity (ethnic	❑ Number of FTE's per compensation	❑ In house ... TE	❑ Charitable contributions per FTE	❑ % of HR team's role and contribution

The list of measures are grouped within one of the Five **People Categories** which will automatically show on the screen and a **non-editable**.

- Under each of the **People Categories** there are a list of measures that have been pre-defined for you for ease and to ensure consistency across institutions and sub-groups within reporting.
- Select the most relevant / feasible to your chosen people management activities.
- You can select 1- 50 measures.



❑ Cost of OH Staff per Emplo
❑ <Free Text>

At the end of each list of measures you will find a **free text** section, tick the box and write a brief indicator – this will then populate to other tabs.

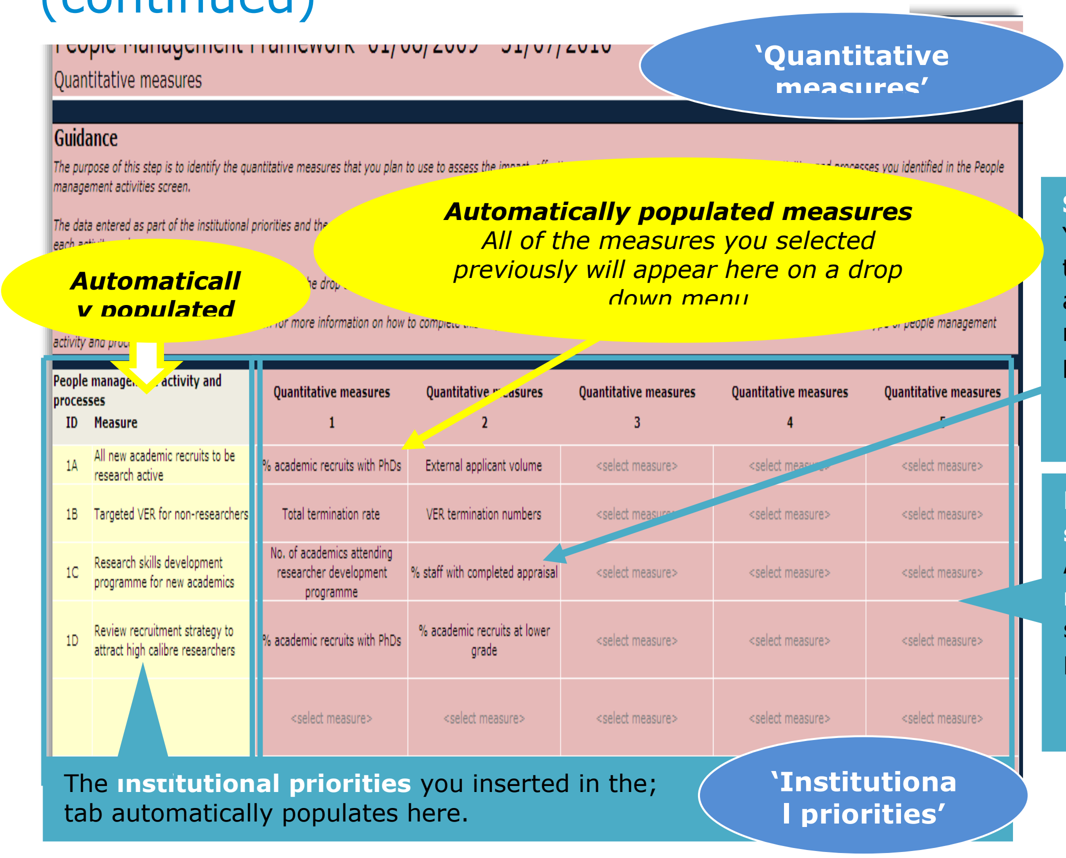
Purpose
- The purpose of this step is for to select the most relevant quantitative measures relating to the processes and activities you have inserted for the current time period.
- This allows you to define your own pick list of measures from a range of PwC Saratoga and DLA Piper measures. Only the selected measures will appear in the quantitative measures tab in the drop down lists on the next screen.
- Try not to be overwhelmed by the list – simply tick the ones you want to use first, there is no minimum number.
- The **grey boxes** are DLA Piper sector measures.
- You may decide on 1 area of focus, or all 5, and can select any of the measures that that are most relevant.

Each measure has been defined within the **User Guide 2010** to ensure consistency.
E.g. 'Flexible work scheme take up';

$$\text{Flexible work scheme take-up} = \frac{\text{Flexible Workers}}{\text{Eligible Flexible Workers}}$$

Quantitative measure selection (continued)

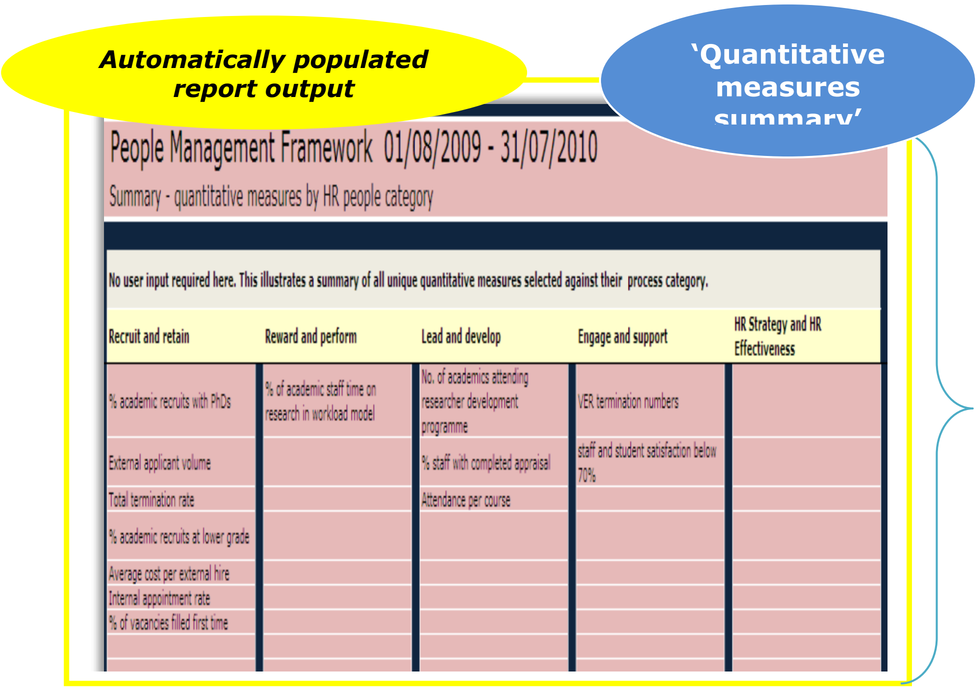
Pages 2, 5 – 8, 19 – 23, & Appendix A2 (pages 40 – 177) of the **User Guide 2010**



People management activity and processes ID	Measure	Quantitative measures 1	Quantitative measures 2	Quantitative measures 3	Quantitative measures 4	Quantitative measures 5
1A	All new academic recruits to be research active	% academic recruits with PhDs	External applicant volume	<select measure>	<select measure>	<select measure>
1B	Targeted VER for non-researchers	Total termination rate	VER termination numbers	<select measure>	<select measure>	<select measure>
1C	Research skills development programme for new academics	No. of academics attending researcher development programme	% staff with completed appraisal	<select measure>	<select measure>	<select measure>
1D	Review recruitment strategy to attract high calibre researchers	% academic recruits with PhDs	% academic recruits at lower grade	<select measure>	<select measure>	<select measure>
		<select measure>	<select measure>	<select measure>	<select measure>	<select measure>

Selecting measures
You can select a measure more than once if you wish to do so across the range of people management activity and processes.
There is no need to complete every field.

How many measures should I select?
Add up to **5 quantitative measures** (you previously selected) for each institutional priority.
Only select measures appropriate to your activity.



Recruit and retain	Reward and perform	Lead and develop	Engage and support	HR Strategy and HR Effectiveness
% academic recruits with PhDs	% of academic staff time on research in workload model	No. of academics attending researcher development programme	VER termination numbers	
External applicant volume		% staff with completed appraisal	staff and student satisfaction below 70%	
Total termination rate		Attendance per course		
% academic recruits at lower grade				
Average cost per external hire				
Internal appointment rate				
% of vacancies filled first time				

Sample report output

For your convenience report outputs are automatically populated into a template that can be used to aid your performance discussions

Reports
For extra convenience the PMF tool will automatically populate a smart looking report illustrating the quantitative measures you have selected against each category – handy for;

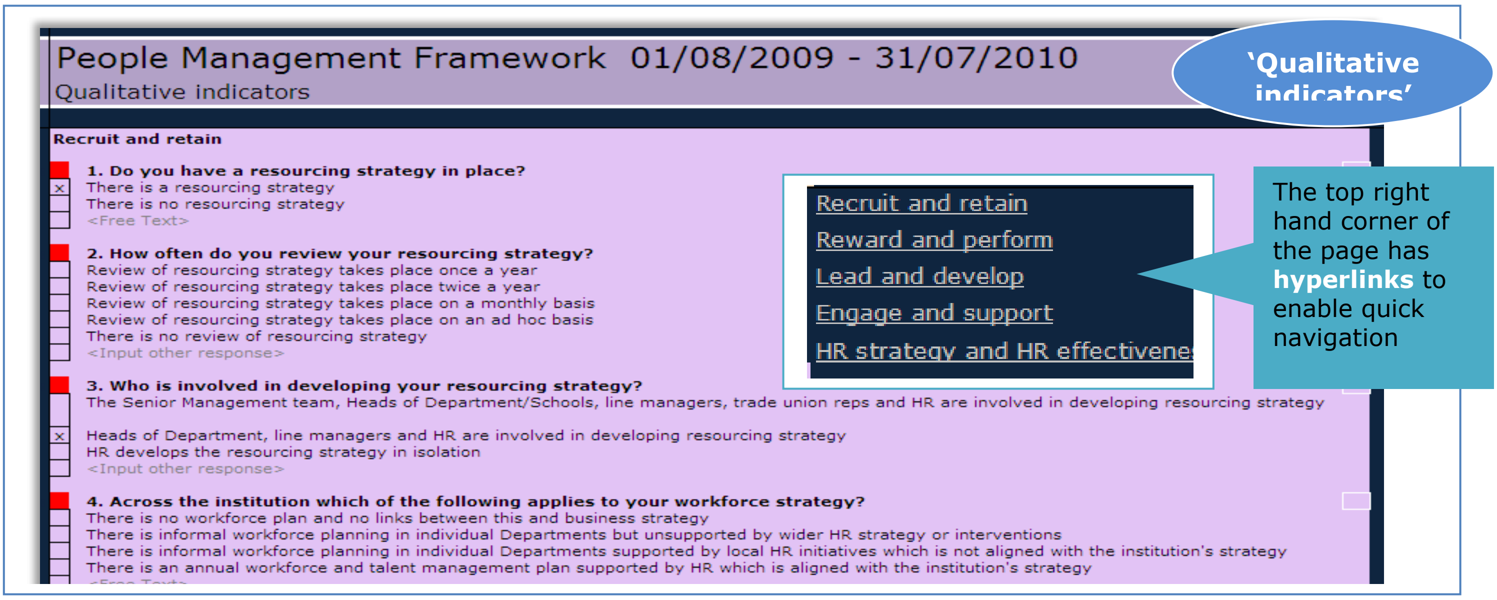
- Meetings and discussions
- Reviewing objectives over the year
- Scorecard production to senior stakeholders.
- Trend analysis – to monitor continuous improvement.

Purpose

- The purpose of this section is to enable you to map your chosen quantitative measures to your institutional priorities (see screen shot for examples).

Qualitative indicators

Pages 3 - 4, 8, 19 – 28, of the
User Guide 2010



Instructions:
1. Review the list of **qualitative indicators** in this step within each **People Category**
2. Review the numbered **questions** for the indicators that you wish to use and indicate your response(s) accordingly by marking an 'x' to the left of the most relevant response(s) for your institution and activities.

- Don't feel the need to tick every indicator, just use the ones of most use and impact to you.

Pointers

Each qualitative indicator is grouped by each of the **People Categories**

- For all **indicators**, you can provide; comments, a variation to the response or another response that has not been provided by using the **'input other response'** option. Select this option by marking an 'x' in the box and overwrite the; '<input other response
- Some qualitative measures have pre-recommended indicators.
- The **qualitative indicators** are designed to provide additional context to the **quantitative measures**.
- Provide responses to those questions that are *most relevant* to your institution and that you think will provide most context against your chosen quantitative measures.

Why use qualitative indicators?

- The qualitative indicators are to be used in conjunction with the quantitative measures to provide **greater context and background** so that, for example, when presenting a series of quantitative cost measures, further detail is provided to **contextualise results** e.g. recruitment costs could be high when compared against previous years however, qualitative indicators may reveal this is due to a large volume of 'difficult to fill' vacancies.
- The qualitative indicators are also intended to allow users to **raise debate** and **compare good practice** with other organisations with a view to identifying opportunities for continuous improvement in people management practice.

What do I need to write against the indicators?

- The qualitative indicators require either; a single answer response or, allow multiple responses. The tool will give an indication of this, via pop up messages, specifically if you have selected more than one response for a single response question.

Any indicators that are not relevant for you?

- Mark them as *'not applicable'* which greys out the cell.
- If a specific quantitative measure is selected, a range of qualitative indicators will be highlighted (by a red cell) in this sheet.

Purpose

- The purpose of this step is to generate a series of questions under the people categories to act as a prompt for your activities. They may also provide context for your results, i.e. if the recruitment target has not been met – it may be because there is no resourcing strategy in place.

NB: *This is a lengthy section, try not to be put off by this. Work through it on the screen and complete only the sections relevant to you.*

Step 4

Step 4
Review people management measures

Pages 3 - 4, 8, 19 – 28, of the **User Guide 2010**

Review people management measures

- *You need to enter data into this sheet in order to produce the quantitative measures selected.*

Why do I need to enter data?

- To show the value of the quantitative measure, these values represent evidence of any impact against the **people management processes and activities** identified as likely to have had impact upon **institutional targets**. This will help to determine performance against targets/benchmarks.

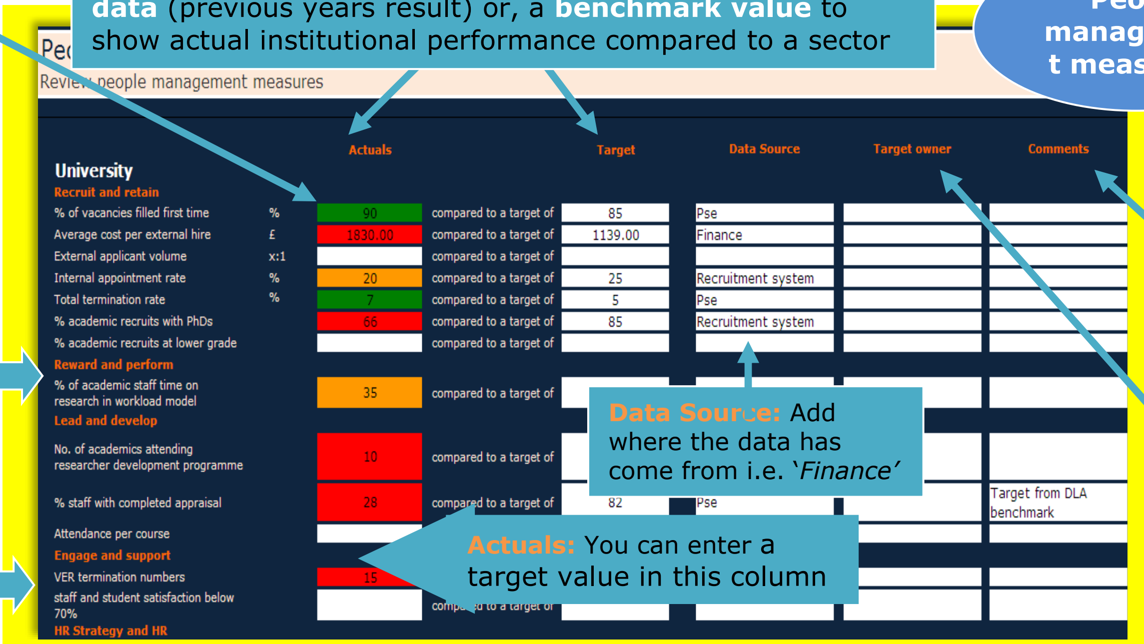
A user-defined **RAG** (Red-Amber-Green) status can be applied to provide a visual indication of comparison to the chosen target. If a quantitative measure is lower than the target you may wish to colour the cell in green, if it exceeds the target you could chose red. To apply a RAG status select the relevant colour in the **'Actuals'** column. To apply the relevant colour right click on the cell, select **Format Cells**, then the **Fill tab**. This RAG status will pull through to the relevant scorecards and dashboard summaries later in the Framework.

Actuals / Target; Free text columns to add either; **Trend data** (previous years result) or, a **benchmark value** to show actual institutional performance compared to a sector

'People management measures'

This sheet Requires data

The **quantitative measures** you have selected previously will appear here under the corresponding **people category** shown in **orange**



Data Source: Add where the data has come from i.e. *'Finance'*

Actuals: You can enter a target value in this column

Comments Add any relevant comments here.

Target Owner – Add the name of the individual responsible for the KPIs.

External targets; You can use external targets, for example through DLA Piper, just ensure your actual data is collected and recorded using the same definitions as the target to ensure like-for-like comparisons. If using trend data from a previous year, this should be entered in the **'Target'** column.

Sub-groups; If the option to benchmark internally by sub-groups was be selected in the 'contents page', they will be presented here. For each named sub-group, the same set of quantitative measures will appear for you to input data, moving down the page.

- You have the flexibility to enter actuals and a target for each measure under each sub-group.

Step 5

Step 5
Conclusions, planning and reporting

'People management scorecard (overall)'

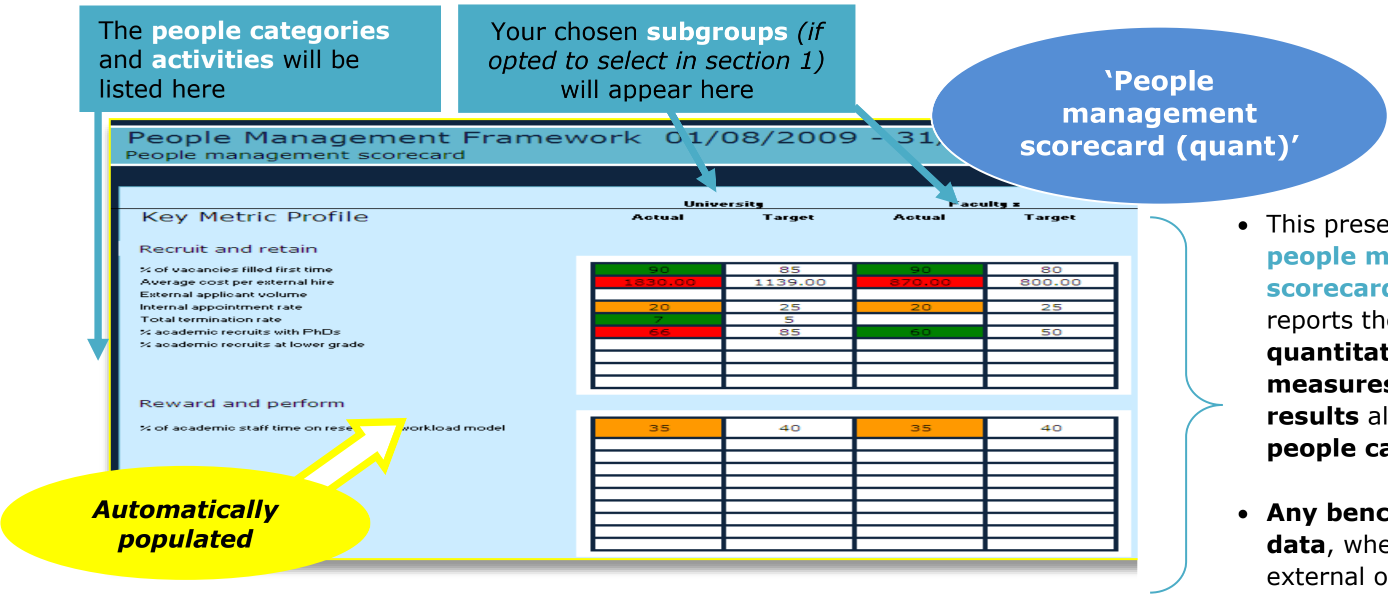
Automatically populated

Sample Report Output

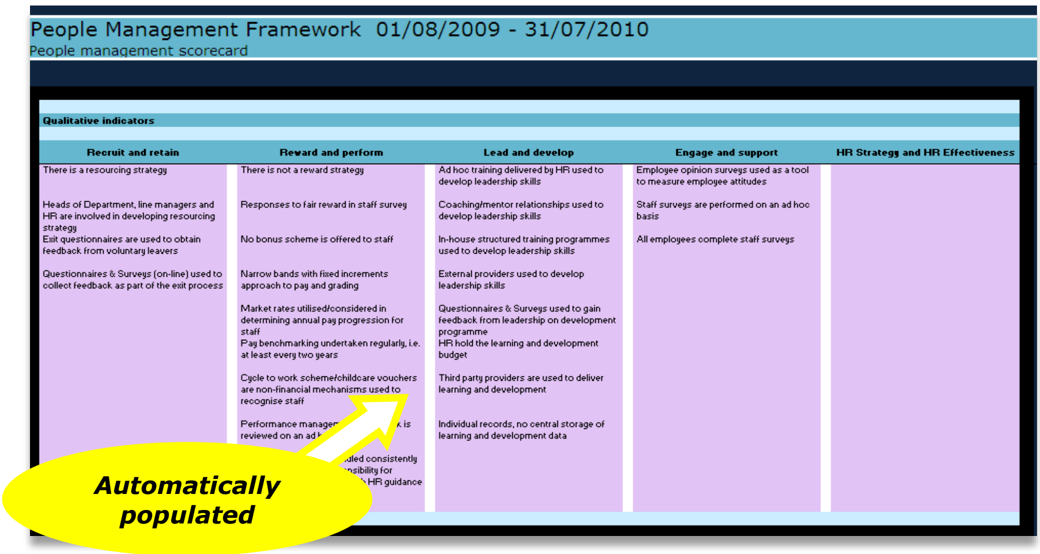
This report provides an overall summary of institutional priorities against quantitative measures.

People management scorecard

Pages 4, 8, 28 – 34 of the **User Guide 2010**



- This presents the **people management scorecard** which reports the **quantitative measures and results** aligned to the **people categories.**
- **Any benchmark data**, whether external or internal, is also presented here.



This report summarises all of the qualitative responses and answers, including any free-text commentary

Purpose

- Produce a series of summary reports which present the quantitative and qualitative measures and indicators you have selected to identify and share good people management practices;
- Identify and plan continuous improvement activity; and (where required)
- Present an individual institution's performance against other benchmark sample groups and against an institution's own sub-groups.

Outputs: People management scorecard

Pages 4, 8, 28 – 34 of the **User Guide 2010**

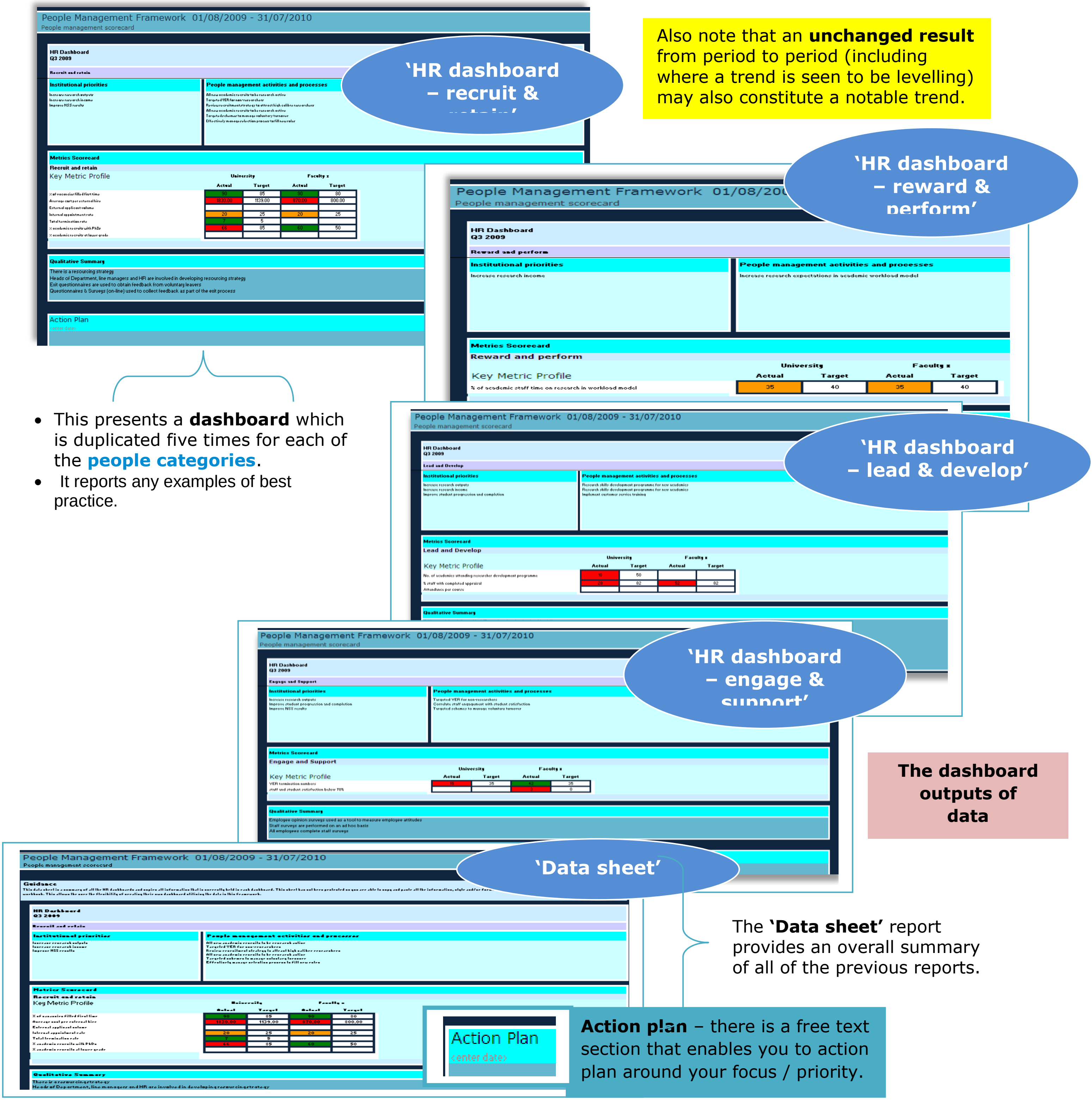
Interpreting results and data produced using the framework - Trend analysis:

Where data exists for previous reporting periods consider making reference to:

(i) important movements that can be observed and;

(ii) detailed reference to any significantly improved/weakened results, and the possible reasons for this in your analysis.

Also note that an **unchanged result** from period to period (including where a trend is seen to be levelling) may also constitute a notable trend.



- This presents a **dashboard** which is duplicated five times for each of the **people categories**.
- It reports any examples of best practice.

The dashboard outputs of data

The **'Data sheet'** report provides an overall summary of all of the previous reports.

Action plan – there is a free text section that enables you to action plan around your focus / priority.

- **Additional contextual information:** Consider incorporating additional background information that could add to the depth of understanding.
- Some of the information will be specific explanations of data coverage and trends that you are aware of. Other sources will provide important contextual background on which you can base your interpretations.

Testimonials

"The biggest benefit we took from using the PMF tool at UH was ensuring that what HR was doing was adding value to the key strategic endeavours of the University and our ability to articulate that credibly.

The discipline of systematically working through each thread of our strategic plan and questioning, what, if anything we could do to drive improvement resulted in the identification of a number additional actions or projects. The true benefit however, wasn't the production of a list (we are never short of potential projects) –it was that these were pro-active actions with HR initiating changes rather than responding to requests made or issues raised, it was the ability of HR to clearly articulate priority HR projects in business terms and it was the ability of HR to prioritise actions based on contribution to strategic progress."

Helen Ellis-Jones, Assistant Director HR, Strategy and Change, University of Hertfordshire

Further information needed?

For enquiries about use of the PMF, or the development and plans for ongoing use of the PMF, please contact Helen Scott, UHR's Executive Director, via helen@uhr.ac.uk or, **07592 504951.**

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