

Developing KPIs without BI Technology

Andrea Buttle (Consultant - SUMS Consulting)
Alison Hartrey (Head of Planning - SOAS)

February 10 2010

Who are we?

- Andrea Buttle
 - Engineer by training
 - Then a programme manager
 - 12 years private sector
 - 9 years SUMS Consulting
 - SUMS Consulting
 - Niche (HE only) management consultants
 - working for universities, owned by universities
 - A successful shared service!

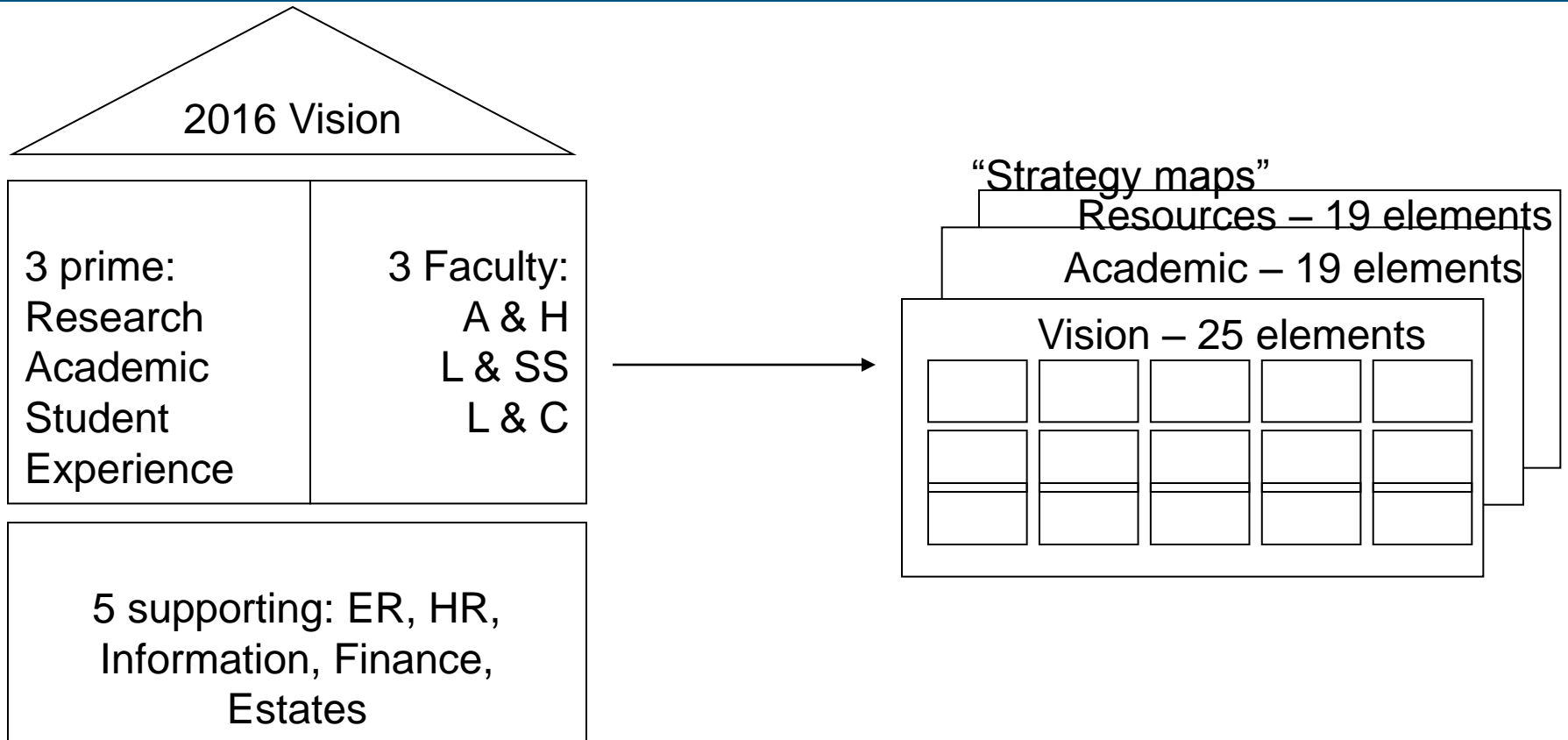
Who are we?

- Ali Hartrey
 - English graduate + postgraduate business administration
 - HE experience – funding council/universities for the best part of 20 years
 - Have worked extensively as a business technical analyst
 - Developing a Planning Department from scratch

- Initial requirements definition (Andrea)
- Piloting initial requirements (Ali)
- Conclusions

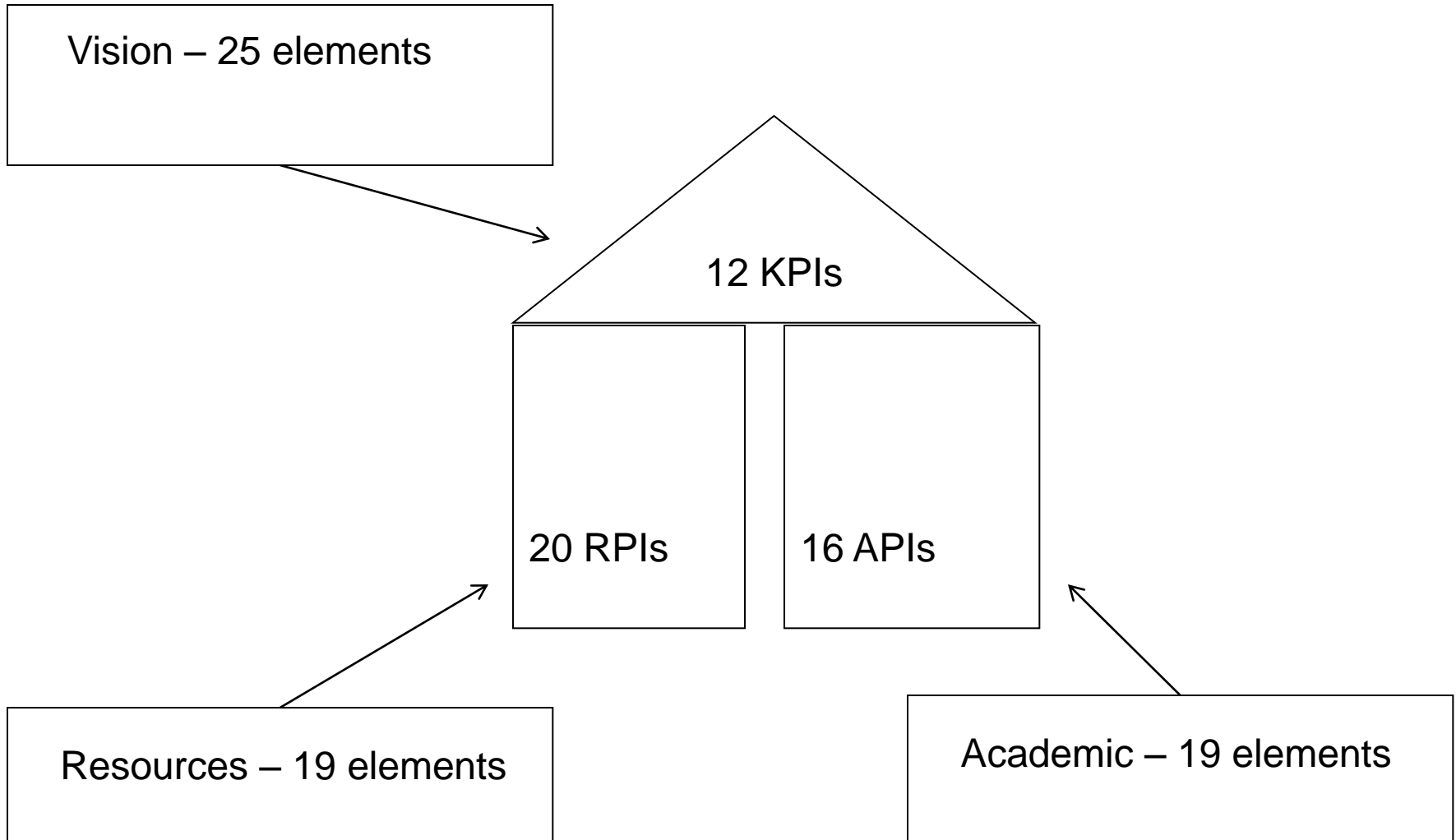
“Assist SOAS to determine the management information needs of the Executive Board and appropriate governing committees, and those tasked with delivering the eight sub-strategies and with those responsible for implementing the new planning framework and resource allocation model”

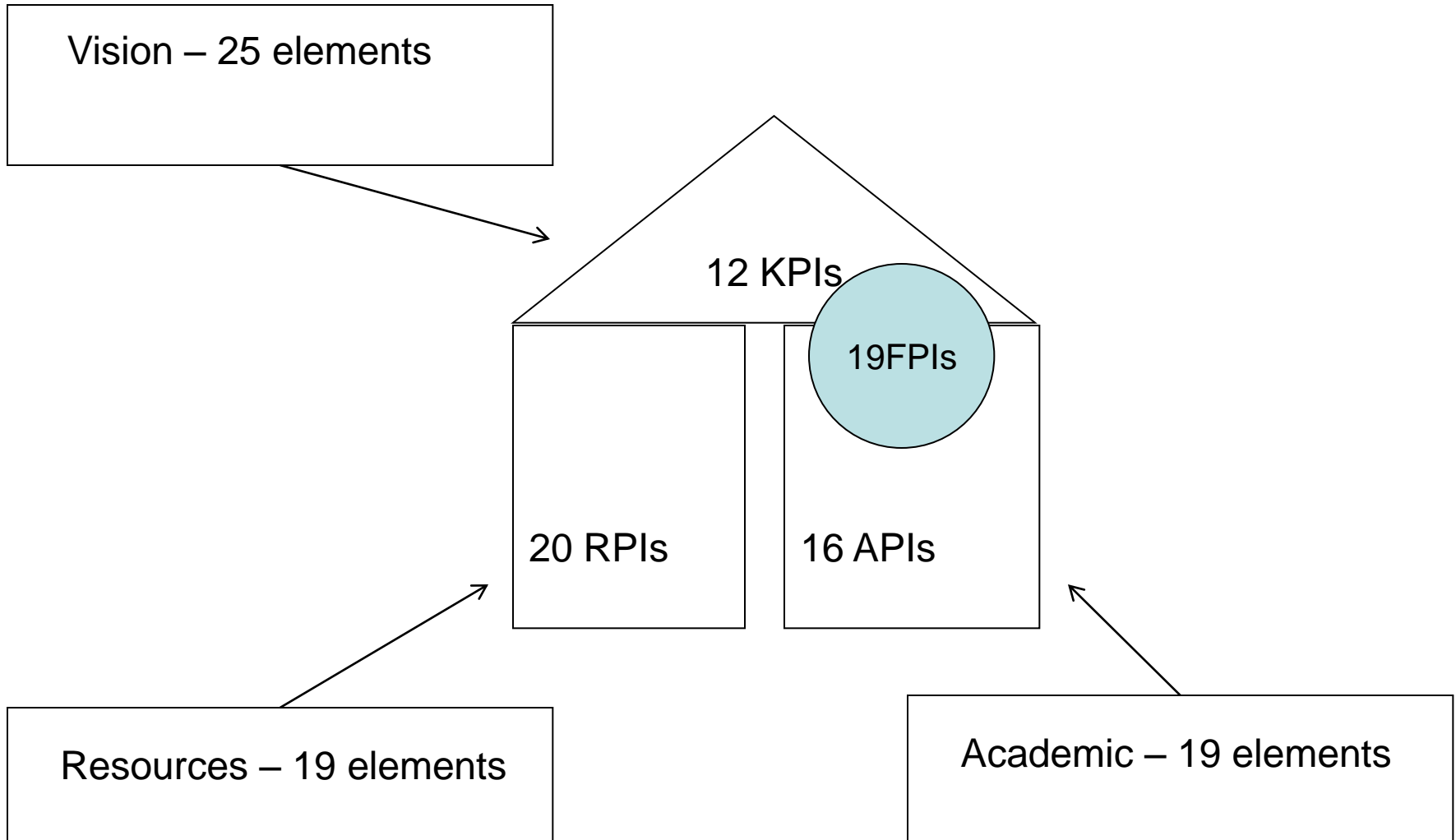
- Read strategies
- Prepare draft PI framework for discussion
- Revise PI framework based on discussion with key stakeholders
- Handover to Ali



SOAS will be the top University in its key areas of expertise and one of the top 20 universities in the World

Sustainable	Research-led teaching	Unique focus	Engagement	Student	Staff
SOAS will be autonomous, self-directed and sustainable institution	SOAS's research and PG strength will be linked to and sustained by high quality UG progs. informed by research	SOAS will provide a distinct coverage of disciplines in the humanities and social sciences	SOAS will promote global understanding. SOAS will focus on and engage with the contemporary world	SOAS aims to place the quality of its student experience at the heart of everything it does	SOAS' staff are its most valuable resource and will play a vital role in achieving the School's vision
Grow student numbers	Increase and extend its distance and flexible/blended learning	Prioritise: Islamic, Chinese, Thematic Masters, Africa	Strengthen the scope and effectiveness of our commitment to public education	Maintain the staff/student ratio at a level which is significantly above the HE sector average	Equality of opportunity is at the core of all the School's activities
Ensure all of its teaching programmes are viable	Increase PGR students	Develop further focus on contemporary issues building on the traditional historical strength	Encourage outreach that links the School to potential partners	Streamline services and gear to student needs and move towards guaranteeing residential accommodation for incoming students	Open communication
Identify academic activities that merit expansion and investment	Increase part-time PGT and individuals taking short courses and languages training	Maintain specialist language based study		The School will explore the means of encouraging and supporting student and staff volunteering	
Increase significantly research grant applications and income		Develop its focus on Diaspora		Improve access to and quality of library and other resources	





Don't run before you can walk!

- Identifying which performance indicators you start off with
- Realise that not everyone “gets” it
- Get your definitions right
 - What you are measuring
 - Why
 - Limitations
 - Data source, owner and frequency of update
 - Targets & benchmarks

- Governing Body hate charts and graphs!
- Reporting by exception
- How to cope with the fact that you don't have performance management software.....
- ... & is this really such a bad thing?

Strategies change...

- We thought we knew what we wanted, now we know what it is....
- During 2009/10 the three major strategies & all the sub-strategies are being updated and approved
- The academic and resource PIs are now coming into play as KPQs and KPIs for the sub-strategies are identified and refined

...KPIs evolve

- We try to stick to 10 KPIs which are reported to each meeting of Governing Body
- Performance of the Estate has been added
- Merged the student numbers KPIs
- Currently considering moving League Tables to a separate report and adding an extra Postgraduate Research indicator

- Good requirements are worth spending time on
- Priorities will change – but ability to promote and demote PIs should suffice
- Clearly understood definitions are essential
- Plenty of good material out there – use it!

Questions?

- A.Buttle@reading.ac.uk
- ah73@soas.ac.uk