

<b>Objectives, Goals, Initiatives, Metrics (OGIM)</b>	
<b>What should I expect the outcomes to be of using the tool?</b>	<p>Using an OGIM framework helps to structure how the organisational vision and strategies will be delivered by identifying objectives, goals, initiatives and metrics that can be cascaded through the organisation. It is also a visual tool that supports the linking of organisational objectives to specific goals and initiatives at all levels within the organisation. This helps all parts of the organisation to understand, align and work together to support the delivery of the organisations objectives and demonstrate achievement and progress.</p> <p>The output from using this tool is an annual plan for your department or team that can be used to manage and monitor progress and form part of team and individual objective setting.</p>
<b>Tool/ method</b>	<p>The start point to identifying and developing Objectives, Goals, Initiatives and Metrics (OGIM) for an organisation, department or team is understanding the Vision and Purpose.</p> <p><b>The Vision/ Purpose</b> You will have an organisation vision statement/purpose.</p> <p>There is one vision and purpose for everyone but it can help to develop a departmental/team vision and purpose that aligns and translates the organisational vision. It may include the following elements.</p> <ul style="list-style-type: none"> <li>• Vision - big picture idea of what you want to achieve.</li> <li>• Purpose - general statement of what you do and how you will achieve your vision.</li> <li>• Core Values - how you will behave <b><i>(there is a separate tool for supporting the development of behaviors – see Developing a Compact)</i></b></li> </ul> <p>The Vision is:</p> <ul style="list-style-type: none"> <li>• Relatively timeless</li> <li>• Ambitious, positive, aspirational</li> <li>• Memorable (short)</li> <li>• Useful</li> <li>• Helps alignment</li> <li>• Guides decisions</li> <li>• Supports priority setting</li> </ul> <p>The Purpose:</p>

- Describes what we do – our purpose for existing and our core business
- Creates focus and clarifies priorities
- We expect all our staff to subscribe to it

This vision can then be translated via strategies and objectives into how the organisation wants to achieve that vision.

### Strategies

There may be a number of strategies or programmes that give more details about how the organisation plans to achieve the Vision and Purpose. Strategies give:

- High level summary of a priority area that contributes to the achievement of the vision
- Covers the next 5 years or so
- A narrative that includes evidence, principles, values and intended outcomes
- It covers the “what/when/how”
- It will have a sense of place and target audience
- It will be system wide and be shared with partners



### Developing the OGIM

Objectives, Goals, Initiatives and Metrics are then used to align and support the delivery of the organisational vision and strategies. The following defines the elements of the OGIM framework:

### ***Define Objectives***

These are described in **words**, and are the key, overarching, headline level benefits you want to achieve. An example may be “we will reduce health inequalities and promote quality of life”.

They should be:

- A clear, plain English description of something that must be done in support of one or more strategies – or on the healthy running of the organisation.
- It is something for us to do (or to lead).
- It has a timescale within the lifetime of a strategy (usually 1 – 2 years, up to 5 max).
- It may have a particular focus on change or on a maintenance task.

Objectives represent CHANGE ACTIONS in a certain direction. Usually start with an action/verb, like: 'Improve ...', 'Reduce ...', 'Increase ...', etc.

### ***Define Goals***

These are described using **numbers**, it is a measure of the change which is relevant to your objective(s). An example might be “we will reduce premature mortality associated with respiratory illness by 11% by 2018”

They should be:

- A number based outcome linked to an objective and that will measure success of that objective.
- Measurable in the appropriate timescale – but not necessarily a real time performance measure.
- Representative of the objective – not necessarily comprehensive.

Goals represent the desired value/magnitude of the where you want to be. May be a long term goal that is given to you to achieve and will usually have a numerical target.

### ***Define Initiatives***

These are described in **words**, and is the specific improvement project you will deliver to enable you to meet your objectives. An example might be “we will commission additional capacity in our pulmonary rehabilitation service”.

They should be:

- A description, in plain English, of all the things (projects, tasks

etc.) that need to be done to achieve the objective or objectives.

- Timescales will be much shorter and rarely longer than a year (one planning cycle) – so they describe the current work.
- Includes the work to achieve ‘must dos’ given to the organisation.

Initiatives represent the change projects/programs that effectively change the operational processes that are relevant and influential for the Objective(s) that the Initiatives are associated with.

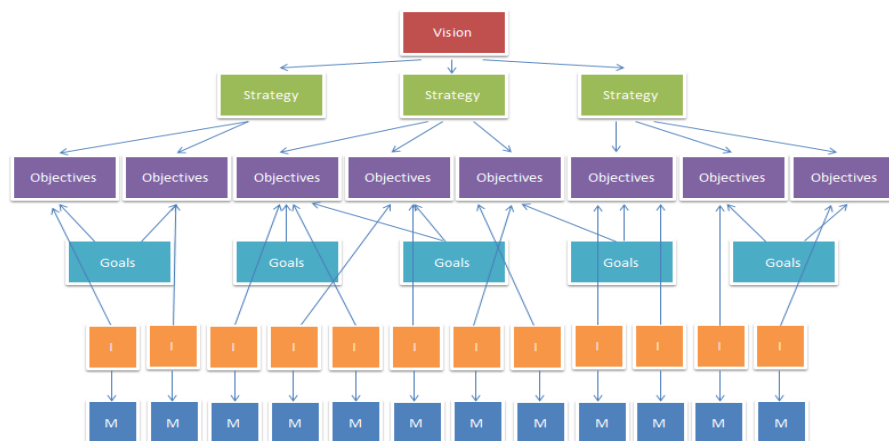
### ***Define Metrics***

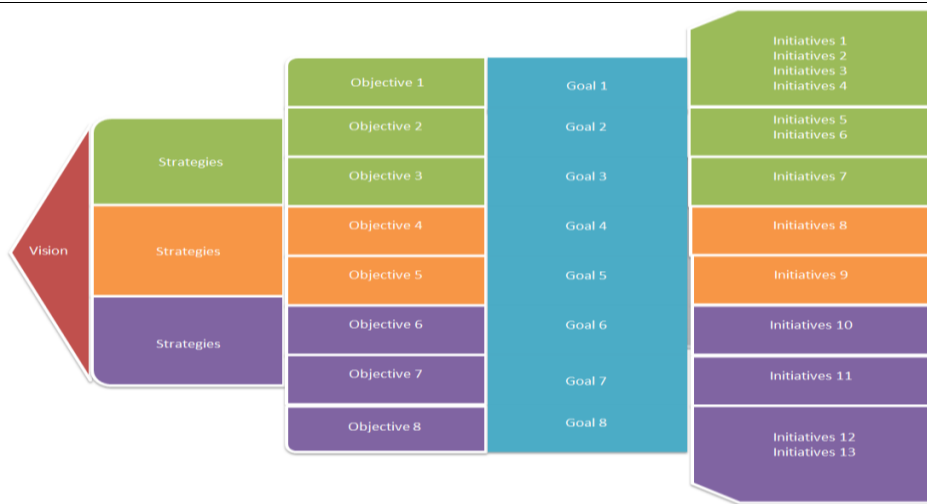
These are described in **numbers**, and are a way of keeping track of whether you are delivering your initiative. An example might be “we will have in place 6 additional pulmonary rehab courses by October 2015”.

They should be:

- Performance management numbers that keep the work on track.
- Comprehensive but must add value.

The diagrams below show how the OGIM is built up and aligned to the vision and strategies of the organisation. The first shows the flow and linkages. The second shows how the OGIM can be captured and made visible to departments/teams.





## OGIM Cascade

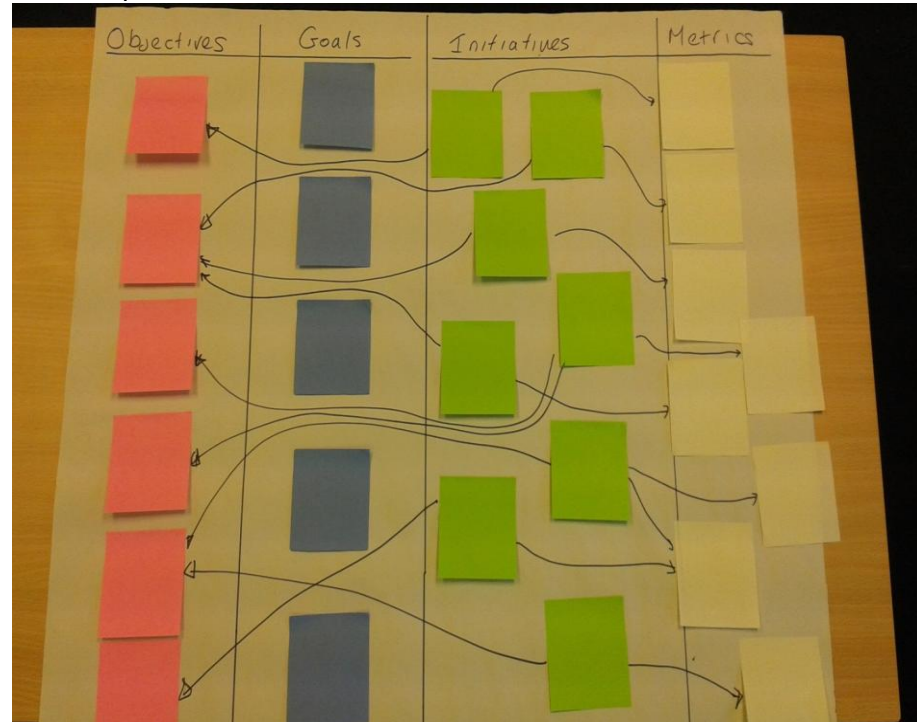
### ***An OGIM approach cascades down through an organisation:***

- We all have the same vision and purpose.
- The strategies are shared across the organisation.
- Objectives belong to the whole team and are cascaded down from the Director level 'team'.
- The subsequent initiatives that support each objective will always have an accountable 'owner' (but may be delegated to a team(s) or individual(s)).
- An initiative for one manager can then become an objective for a team reporting to that individual – and so on, cascading through the organisation.
- Individual initiatives may support many objectives.

	<p style="text-align: center;"><b>OGIM Cascade</b></p> <p>The diagram illustrates the OGIM Cascade across four levels of an organization:</p> <ul style="list-style-type: none"> <li><b>Director Team:</b> Five Objectives (O) are shown in a row. Two of these are linked to Goals (G), which are further broken down into Initiatives (I).</li> <li><b>Director of Quality:</b> This level has its own cycle of Objectives (O), Initiatives (I), and Metrics (M). Arrows show that the Director of Quality's Objectives are supported by their Initiatives and Metrics, which in turn support the Director Team's Objectives.</li> <li><b>Quality Team:</b> This level also has its own cycle of Objectives (O), Initiatives (I), and Metrics (M). Arrows show that the Quality Team's Objectives are supported by their Initiatives and Metrics, which support the Director of Quality's Objectives.</li> <li><b>Quality Lead:</b> This level has its own cycle of Objectives (O), Initiatives (I), and Metrics (M). Arrows show that the Quality Lead's Objectives are supported by their Initiatives and Metrics, which support the Quality Team's Objectives.</li> </ul>
<p><b>Why we may choose to use this tool/ method?</b></p>	<p>OGIM can be used at all levels of an organisation to give structure to developing an annual plan that is linked and aligned to the organisational vision and strategies. It is visual and simple to understand.</p>
<p><b>How you might use this tool/ method?</b></p>	<p><b>Using OGIM in a team or department</b></p> <p><b>Preparation:</b> Involve the team/team leads and set aside time to work together. It can help to have some post it notes and brown paper available to help you develop the framework. Divide the paper into four columns, headed left to right: Objectives, Goals, Initiatives, Metrics. As you work through the framework, capture the Objectives, Goals, Initiatives and Metrics on post it notes in each column so that you can easily move them around, group them, change them etc. and see the links between them (you can draw links on the paper between). Developing an OGIM may not be a sequential process as outlined below, as a start point you may start by</p>

listing all the initiatives you are currently delivering and work back from there.

An example:



1. Taking the organisational vision and strategies, identify the key objectives that your team/department will deliver to support the vision and strategies. The objectives you identify will be part of the cascade (i.e. An initiative that is delegated to your team will become a team objective). The number of objectives depends on the scope/size of your team but ideally not more than 10.

2. Identify the Goals that you are using to measure the success of your objectives – a goal may be linked to more than one objective. You will probably have goals that have cascaded down to your team (see OGIM cascade). Capture these on post it notes.

3. Identify the initiatives that you will deliver in the next six to twelve months that will support the achievement of the objectives you have identified. You are likely to already have a number of initiatives that you are currently delivering. Initiatives may be linked to more than one objective.

4. Each initiative should then have a metric to measure and manage the achievement of your initiative.

As an alternative to using post it notes, the following template may help to get you started on your OGIM, and begin to capture your ideas:

**Tip:** It is rare to start with a blank piece of paper as you are likely to have initiatives that are already being delivered and/or objectives are ongoing. If this is the case you can start by detailing your initiatives and ensuring that they link and align with an existing or new objective. If they are not contributing to the delivery of an objective you may need to review why you are delivering this initiative.

Objectives (describe link to two and five year plans)	Goals (include specific outcomes, targets & timescales)	Initiatives (describe key initiatives to ensure delivery)	Metric (how do we measure and monitor)	Lead
Describe the overall result that you want to achieve, e.g., reduce outpatient activity	Describe the specific outcomes and target to be achieved, e.g., reduce dermatology outpatient activity by 5% by 2015	Describe the high level actions or projects to be implemented to achieve your goals and objectives	Describe how you are going to measure and monitor your progress	

### What next?

The OGIM can be used to cascade objectives through an organisation, to teams and individuals. Once you have developed your department/team OGIM you can use this to cascade further so that team initiatives become individual objectives.

#### **An example of OGIM cascade:**


An organisational objective has two initiatives linked to it, one of these initiatives is cascaded to the Finance Team and another to the Quality and Commissioning Teams.

These initiatives then become objectives for the Finance, Quality and Commissioning Teams, who can develop these objectives into team initiatives with metrics.

Individual Managers within the Finance, Quality and Commissioning Teams may then be assigned an initiative which becomes their objective which they may develop into initiatives that will then be cascaded to an individual.

At individual level these initiatives become individual objectives to be



	<p>delivered as part of their annual objectives.</p> <p>The OGIM can then be used for monitoring and reporting progress and can be used to ensure that plans are kept on track.</p>
<p><b>Examples/ case studies/ links to best practice/ evidence</b></p>	<p><i>An example from CCG Furness Locality:</i></p> 
<p><b>Contact for further information</b></p>	<p>Karen McAllister – CLIC Programme Manager  <a href="mailto:Karen.McAllister@cumbriaccg.nhs.uk">Karen.McAllister@cumbriaccg.nhs.uk</a></p>

Template to help you start to define your OGIM

Objectives (describe link to two and five year plans)	Goals (include specific outcomes, targets & timescales)	Initiatives (describe key initiatives to ensure delivery)	Metric (how do we measure and monitor)	Lead
<b>Describe the overall result that you want to achieve, e.g., reduce outpatient activity</b>	<b>Describe the specific outcomes and target to be achieved, e.g., reduce dermatology outpatient activity by 5% by 2015</b>	<b>Describe the high level actions or projects to be implemented to achieve your goals and objectives</b>	<b>Describe how you are going to measure and monitor your progress</b>	