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Paper 11. The Reporting and Support Framework

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Abstract. The Reporting and Support Framework is an integral component of the Measuring, Monitoring and Evaluation (MME) strategy. This framework is designed to capture changes in practices, processes and outcomes in the CI&I partnerships and in beef businesses, partnerships, value chains and the broader Australian beef industry so as to provide support within the CI&I partnerships and to meet project and CRC reporting requirements. Because of the multiple users of the information, and the multiple environments in which it is expected to be used, the BPP reporting and support framework has been a difficult framework to develop. There have been several versions that have been adapted and improved over time, but we hope that it is now sufficiently flexible to capture real changes in practices, processes and outcomes.

Keywords: Measuring; monitoring; evaluation; reporting; support; KPIs.

Background and Rationale

As outlined in Paper 10, the focus of the Measuring, Monitoring and Evaluation (MME) Strategy is to ensure BPP partners and the broader beef industry are able to demonstrate achievements and obtain feedback and support to contribute to achieving further improvements and innovations within 180-day timeframes. The Reporting and Support Framework outlined here is an integral component of the MME strategy. This framework is designed to capture changes in practices, processes and outcomes in the CI&I partnerships and in beef businesses, partnerships, value chains and the broader Australian beef industry so as to provide support within the CI&I partnerships and to meet project and CRC reporting requirements.

Because of the multiple end-users, the BPP reporting and support framework has been a difficult framework to develop, with several versions having been adapted and improved over time. In designing the current version, a flowchart was developed of how a "best-practice" BPP partnership would work through the CI&I steps, assessing options, making decisions, implementing actions and measuring their consequences. The reason why such an approach is considered necessary is the very long lead times between when decisions are made and when consequences become evident. If we are trying to achieve ***rapid*** improvement and innovation (as argued in Papers 3 and 4), then we cannot afford to wait until the consequences of a practice change shows up in the end-of-year financial accounts. Not only do we need to have an idea of the expected financial consequences, but we also need to have some checkpoints along the way to demonstrate that the change is having the intended consequences in either the bio-physical production system or in one or more of the components of the final measure of profitability.

An example of such a flowchart is given in Table 11.1 for a hypothetical cattle producer. Here we assume the producer is turning off steers for the domestic market at around 18 months, at approximately 220kg carcase weight or 500kg live weight. 120 weaners are purchased annually in the autumn sales, grown out over spring and summer and sold in February or March. The hypothetical problem is that the producer has received feedback from the processor that these cattle have a relatively high level of bruising (around 8 per cent of all carcases). The average price received for all the cattle (bruised and non-bruised) ($2.00/kg) is around $0.30/kg lower than the price for non-bruised cattle ($2.30/kg), which equates to over $65/steer or almost $8,000 over the whole herd each year. The short-term focus of the producer is to implement an action plan that reduces the level of bruising in the cattle coming off this property.

In this hypothetical example, during the Impact Analysis stage of the CI&I process (March 2008), the producer investigates some options for reducing the level of bruising. By building new yards and watering points and undertaking some further training in animal handling, the producer believes that it is technically feasible to reduce bruising to around 3 per cent. This is checked by doing a partial budget on whether to invest in improved yards and watering and an animal handling course. Extra income is assumed to be $66/steer if the 3 per cent bruising target is achieved, and the cost of the new

infrastructure is assumed to be around $20,000, or $1,295 annually including repairs and maintenance cost with a useful life of 20 years. On the basis of this projected profitability, the producer decides to undertake the investment.

During April 2008 the producer purchases the materials and builds the new yards and watering system at the expected cost, and during winter he attends a livestock handling course and seeks some specialist advice about handling techniques. During September 2008 he has the cattle in for drenching and notices a 30 minute saving in his labour time due to the new layout of the yards.

When the cattle are sold in February 2009, the producer receives feedback showing that the level of bruising has fallen to 4 per cent (close to the target of 3 per cent), and the average price for the steers has risen to $2.25/kg. Once the extra costs incurred have been deducted, the gross margin for this enterprise has increased by some $40/steer. So in terms of the Outcome 1 KPIs (Paper 10), this decision could be considered a great success.

However the BPP project has two other target outcomes:

- Providing a supportive network of rewarding partnerships, contributing to accelerated beef industry growth, and
- Equipping partners to achieve sustainable improvement and innovation.

Looking at the project as a whole, we would also like to know how measured achievements in beef enterprise productivity and profitability are related to measured achievements in partnership support and capacity building, and vice versa. In the present example, at the time of the decision to invest in the new yards, watering points and animal handling course, the producer had placed a high value on the support received from the other members of the CI&I partnership, and had placed a high value on both the CI&I process and the specific tools that were used in the impact analysis step. Our interpretation is that the high value scores in the Outcomes 2 and 3 KPIs led to a high level of confidence by the producer in the CI&I process, in the tools used in the impact analysis, and in the support received from other members of the partnership. These factors contributed to a good decision that improved productivity and profitability in the beef business.

The Reporting and Support Framework has to provide a sufficiently detailed, sufficiently flexible but sufficiently simple mechanism to capture and transmit all of these large and small changes in practices, processes and outcomes in the CI&I partnerships and in beef businesses, partnerships, value chains and the broader Australian beef industry so as to demonstrate impact on profit and growth.

Reporting and Support in BPP CI&I Partnerships

The objective of this type of reporting and support is to enable all BPP partners (beef business managers, local groups, regional networks, facilitators, network leaders, specialists and researchers) to benefit from the improvements and innovations that occur by developing and sharing their own reports of success and failure, by supporting the reports of other partners, and by evaluating and promoting the rapid adoption of successful improvements and innovations through the whole Beef Profit Partnerships network.

Reporting and support is efficient, stimulating and rewarding when clearly focused. Figure 11.1 shows how reporting and support is focused on highlighting the relationship between targets (focus), methods used and results achieved. In this way BPP partners discover which actions, methods and technologies achieve best results, and which are less valuable. This enables further improvements and innovations.

The timing of reporting and support is critical to success and should occur at least every 90 days to enhance the rate of improvements and innovations. BPP facilitators and network leaders lead reporting and support in a simple effective way. The Reporting and Support Framework for BPP CI&I Partnerships provides a set of Critical Success Factors (CSFs) and Key Performance Indicators (KPIs) to focus reporting and support on achieving the BPP targets

In Table 11.2 below are two examples of how the Reporting and Support Framework for BPP CI&I Partnerships can be used. Suppose the focus of one of the partners was to "Improve reproduction rates from 70% to 80% in the commencing breeding season."

Following the steps in the CI&I process, the partner would be encouraged to report to the rest of the group on progress toward achieving an outcome from this focus at each meeting.

In the first 90-day meeting, the partner would be encouraged to report on how they undertook their situation analysis: for example – "I identified specific data on the reproductive performance of my herd, and I identified the range of new or different inputs, tools and technologies that might help me meet my target." Then the partner would be encouraged to report on how they undertook an impact analysis and developed an action plan: for example – "I used a gross margin budget to compare a subset of the alternate inputs, tools and technologies, and I chose a particular option because it did not require any extra labour and showed an improved gross margin…".

Then the partner would be encouraged to describe and justify how they were going to put their decision into effect: for example - "I developed a plan to implement my selected actions, with descriptions of KPIs, tools and technologies, and I designed a recording system so that I could compare the results when they occur with those of current practice."

In subsequent 90-day meetings, the partner would be encouraged to report sequentially on their Action and Monitoring, Performance Analysis and Evaluation, and Creativity and Re-focussing steps. For example – "I used a checklist of actions, tools and technologies, and a chart of progress with KPIs." Etc.

In the second example, the partner has a focus to "Reduce the cost of production from $0.90/kg LW to $0.52/kg LW while maintaining price and throughput by January 2008." Using the Reporting and Support Framework for BPP CI&I Partnerships, this partner also would be encouraged to report to the rest of the group on progress toward achieving an outcome from this focus at each meeting, using the same steps.

Space is also available to record the needs of partners with respect to specialist support required to help them make or implement decisions.

BPP Project Performance Measures

The objective of this second type of reporting and support is to measure and monitor the actions and outcomes occurring in the BPP CI&I partnerships, to evaluate and promote the rapid adoption of successful improvements and innovations through the whole BPP network and across the beef industry, the Beef CRC and the wider community, and to support further improvement and innovation in beef businesses. Thus, this aspect of the reporting framework is closely linked with the Reporting and Support Framework for BPP CI&I Partnerships, in that it uses and extends the information provided by partners to highlight at a broader level the relationship between targets, methods used and results achieved. It also provides one conduit to the broader beef industry for the discoveries that are made in BPP groups about which actions, methods and technologies achieve best results, and which are less valuable.

As with BPP CI&I Partnership reporting, project reporting should occur at regular intervals (every 90 days at least) to enhance the rate of improvements and innovations, and should be lead by BPP facilitators and network leaders.

The Reporting and Support Framework for BPP Project Performance Measures incorporates the three sets of KPIs related to achieving the three BPP project target outcomes.

In relation to Target Outcome 1 "Rapid and measurable improvements in productivity, profit and growth", it is important to have as accurate a picture as possible of the productivity and profitability status of the beef business before the BPP CI&I process begins, so that the achievements of the BPP partnerships can be accurately measured and communicated. A data form has been designed for this purpose. Table 11.3 shows an example for recording the initial benchmark data of a hypothetical BPP partner. A related form provides a framework for recording ongoing changes in business practices and productivity and profitability outcomes as and when they occur.

In relation to Target Outcome 2 "Supportive network of rewarding partnerships, contributing to accelerated industry growth", and Target Outcome 3 "Partners equipped to achieve sustainable improvement and innovation**",** it is important to have an indication of the extent to which the partnership and capacity-building targets of the project are being met as the KPIs associated with these outcomes provide evidence of whether the CI&I process and its components are being used and valued by partners. Some of these KPIs relate to the level of use, understanding and value attributable to individual partners, so a specific reporting form has been designed for this purpose. An example is provided in Table 11.4 below. Other KPIs relate to the partnership as a whole, and these are generally recorded by the facilitator on behalf of partnership members. An example of this is provided in Table 11.5 below.

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Conclusion

The Reporting and Support Framework is designed to capture changes in practices, processes and outcomes in the CI&I partnerships and in beef businesses, partnerships, value chains and the broader Australian beef industry so as to provide support within the CI&I partnerships and to meet project and CRC reporting requirements. It is an integral component of the MME strategy.

By its nature, this framework has to provide a sufficiently detailed and flexible mechanism to capture and transmit all of the many and varied large and small changes in practices, processes and outcomes across all partners in the BPP network. However it has to also be sufficiently simple so as not to waste time and incur other costs. Because of the multiple users of the information, and the multiple environments in which it is expected to be used, the BPP reporting and support framework has been a difficult framework to develop. There have been several versions that have been adapted and improved over time, but we hope that it is now sufficiently flexible to capture real changes in practices, processes and outcomes.

Appendix

Table 11.1. Hypothetical flowchart of CI&I partner decisions, actions and measures

Date	**Mar 08**	**Apr 08**	**Jul 08**	**Sept 08**	**Feb 09**	**Comments**
Focus	Reduce bruising from current high level					Review target, is further improvement achievable?
CI&I Step	Impact Analysis, Action Design	Action Implementation	Action Implementation	Action Implementation	Results Assessment	Creation and Synthesis
Analysis done	Partial budget whether to improve yards, handling. Extra income ↑$66/steer (3% bruising target). Infrastructure annual cost including R&M: $1295/yr (20yrs)			Calculates time saving from using new yards	Calculates improvement in GM	
Decision Made	Build new yards, install new watering system, attend a cattle handling course					
Action taken		Build new yards and watering system	Attend handling course/seek advice			
KPI Outcome 1						
- biophysical	Bruising (baseline 8%)				Bruising after new yards 4%	Didn't work quite as well as expected
- throughput						No change in throughput
- price	$2.00/kg dw				$2.25/kg dw	Price had fallen a little
- cost		Yards Capital+R&M ↑$1295/yr	Course $250	Reduced labour 30min saving at drenching		
- profit					GM ↑$40/steer	Not as high as

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						expected but still positive
KPI Outcome 2						
- partnerships value	High					High value and support from partners
KPI Outcome 3						
- tools value	High					High value on partial budget and GM tools
- CI&I understanding	High					High value on CI&I process

Additional potential benefits not quantified:

- Reduced labour at yarding;
- Improved OH&S
- Generic animal welfare outcomes

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Table 11.2. Example of Reporting and Support for BPP CI&I Partnerships Date: ……..

State & Region _____ Regional or State BPP Network Leader _____
BPP Group/Team Name _____ BPP Group/Team Facilitator/Leader _____

BPP Code[1]	**Productivity or Profit Focuses[2]/Themes**	**Situation Analysis**	**Impact Analysis**	**Action Plan**	**Action and Monitoring**	**Performance Analysis and Evaluation**	**Creativity and Re-Focus**
	Improve **reproduction rates** (RR) from 70% to 80% this breeding season	Identified specific RR herd data, inputs, available tools[3] and technologies[4]	Used Gross Margins of possible inputs, tools and technologies to compare options. Chose an option for these reasons…	Developed a plan to implement new RR actions, with descriptions of KPIs, tools and technologies. To compare the results with those of current practice	Used a checklist of actions, tools and technologies, and a chart of progress with KPIs.	Evaluated the impact of the new RR actions, tools and technologies on improving reproduction rate and profit by calculating actual gross margins and compared the results to those obtained using old practices tools and technologies.	Created ideas for further increasing profit and developed new SMARTT Focus using the following tools…
	Reduce **cost of production** from $0.90/kg LW to $0.52/kg LW while maintaining price, and throughput by January 2008	Identified specific grazing herd data and inputs and available tools and technologies	Used Gross Margins of potential grazing actions, tools and technologies to compare options. Chose an option for these reasons…	Developed a plan to implement the new grazing actions, with descriptions of KPIs, tools and technologies. To compare the results with those of current practice	Used a checklist of actions, tools and technologies, and a chart of progress with KPIs.	Evaluated the impact of the new grazing actions, tools and technologies on reducing cost of production and increasing profit by calculating actual gross margins and compared the results to those obtained using old practices tools and technologies.	Created ideas for further increasing profit and developed new SMARTT Focus using the following tools…

Support Required:
Specialist to answer specific questions about Reproduction Rate improvement.
Specialist to answer specific questions about optimising Cost of Production from grazing.
Business management input on how to improve efficiency of achieving targets.
……

[1] Business address and details including cattle numbers, herd structure and breed, property size
[2] SMARTT Focuses for impact on productivity, profit & growth KPIs
[3] Examples of tools are: Breeding objectives; Gross Margins; Action Plans; KPI Charts
[4] Examples of technologies are: Genetic tests: Nutritional products; Vaccines

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Table 11.3. Individual partner data collection form – initial benchmarks example

Partnership Name: Northern Tablelands NSW **Partner Name or ID:** ***ARM01***
Facilitator Name: John Smith **Date information collected:** ***1/12/2006***
Type of Beef Business: Heavy Feeder Steers (Self replacing) *200 Cow herd. Cows calve in August and September, heifers joined to calve at 2 years of age. Heifers are sold as weaners at 9 months, steers sold at 18 months 440-450 kg (lw.), suitable for entry into feedlots. British breed*.
Type of Production System (climate, pastures, breeds, resources, etc): ***Climate:*** *high rainfall with a summer dominant pattern, cold winter conditions limits pasture growth April through October.* ***Pastures:*** *Fescue/Phalaris/white or sub clover 316 ha, available to beef cattle.* ***Breeds:*** *Hereford and Angus.* ***Resources:*** *Part of Merino wether/beef grazing farm business, quoted land resource available to beef enterprise. Owner- manager operated by husband and wife approx 50% of time, casual labour employed at peak time for Merino wether enterprise.*
Focus for Taking Action:

Reasons for Taking Action:

Cattle activity	Number of cattle in this activity	Number of Ha allocated to this activity	Number of these cattle sold last year	Average weight for these cattle (kg)	Price received for these cattle ($/kg)	Gross margin for this activity ($/kg)	Cost of production ($/kg)	Reproduction performance	Mortality	Growth rate
Heavy feeder steers (SR)	**200 cows**	**500**				**$1.25/kg lw (no pasture cost)**	**$1.79/kg lw)**	**84% weaning rate**	**2% adults 5% calves**	**(steers 9 mo wean to 18 mo) 0.76 kg lw/day**
- steers			**81**	**448 kg lw**	**$1.70 kg/lw**					
- heifers			**33**	**205 kg lw**	**$1.65 kg/lw**					
- cull female			**42**	**450 kg lw**	**$1.30 kg/lw**					
- cull bull			**2**	**900 kg lw**	**$1.35 kg/lw**					

Table 11.4. BPP partner evaluation

Participant Name:____ Date: _____

1. What improvements and innovations, if any, have you implemented into your business following information and/or discussions held at the last BPP session you attended? (please list)

_____

_____

_____

2. How many producers (outside this BPP) have you told about improvements and innovations you have implemented in your business that utilise information and/or discussions from the last BPP session? (please circle)

0 *1-3* *4-6* *7-9* *10-12* *more than 12*

3. What were the three most valuable aspects of today's session to you as a participant?

(i) _____

(ii) _____

(iii) _____

4. Please rate your level of understanding of the topics covered today on a scale of 0 – 5. *(0 = lowest; 5 = highest)*

Before the session	*0*	*1*	*2*	*3*	*4*	*5*
After the session	*0*	*1*	*2*	*3*	*4*	*5*

5. Please rate your current level of understanding of the Continuous Improvement and Innovation (CI&I) process on a scale of 0 – 5. *(0 = lowest; 5 = highest)*

0 *1* *2* *3* *4* *5*

6. Please rate the value that you personally place on Continuous Improvement and Innovation (CI&I) as a process for decision making, self development and support on a scale of 0 – 5. *(0 = lowest; 5 = highest)*

0 *1* *2* *3* *4* *5*

7. How do you rate the value of being a member of this BPP on a scale of 0 – 5? *(0 = lowest; 5 = highest)*

0 *1* *2* *3* *4* *5*

8. How do you rate the value of being involved in the wider BPP network on a scale of 0 – 5? (Beef CRC newsletters, interactions with the other BPPs etc) *(0 = lowest; 5 = highest)*

0 *1* *2* *3* *4* *5*

9. Do you have any suggestions on how BPP sessions and the BPP network could be improved in the future?

_____

_____

_____

_____

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Table 11.5. BPP Facilitator Session Report

Partnership Name:		**Facilitator Name (2):**	
Facilitator Name (1):		**Session Date:**	12/12/2007
Specialist Presenter:			
Session Location:			
Number of Enterprises that attended session:	11		
Proposed date of next session	12/02/2008		

Collation of Individual Participant Evaluation Forms

Please complete the questions below by utilising the information provided on the individual participant evaluation sheets from the relevant BPP session. Where average values are required please round to the nearest 0.5. Please use your discretion as a facilitator as to whether the information provided on individual evaluation forms is worthy of inclusion into this facilitator session report.

Question 1

What improvements and innovations, if any, have you implemented into your business following information and/or discussions held at the last BPP session you attended?

Please list (and summarise if required) improvements and innovations listed on participant evaluation sheets:

CoP discussion
Plan ahead
starting a new enterprise
change of focus / objective towards farming
annual pasture for hay production
CoP data collection
marketing animals considered
attempting to improve efficiency of labour day to day
stricter feedbudgeting and projections
balanced feeding against costs
drenching program
make most of feeding groups and fed to stock
water reticulation

Question 2

How many producers (outside this BPP) have you told about improvements and innovations you have implemented in your business that utilise information and/or discussions from the last BPP session?

Please indicate the number of participants who circled:

0	1	**7 – 9**	0
1 – 3	7	**10 – 12**	0
4 – 6	2	**> 12**	0

Question 4

Please rate your level of understanding of the topics covered today on a scale of 0 - 5.

What was the average value given by the BPP

before the session	3	**after the session**	4

Question 5

Please rate your current level of understanding of the Continuous Improvement and Innovation (CI&I) process on a scale of 0 – 5.

What was the average value given by the BPP: 3.5

Question 6

Please rate the value that you personally place on Continuous Improvement and Innovation (CI&I) as a process for decision making, self development and support on a scale of 0 – 5.

What was the average value given by the BPP: 3.5

Question 7

How do you rate the value of being a member of this BPP on a scale of 0 – 5?

What was the average value given by the BPP: 4.5

Question 8

How do you rate the value of being involved in the wider BPP network on a scale of 0 – 5? (Beef CRC newsletters, interactions with other BPPs etc)

What was the average value given by the BPP: 4

Question 9

Do you (participants) have any suggestions on how BPP sessions and the BPP network could be improved in the future?

Do you as a facilitator, or do your BPP participants, have suggestions or comments you would like to communicate to the state coordinator and/or the BPP management team to improve the BPP project? If so, please list them. (Please indicate if they are from you as a facilitator or participants)

More open discussion always helps (x1)

address current issues - keep it up

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Newsletter on BPP
Good as they are
Inter group support always good (group therapy)
Explore new ways to improve high production of top quality beef products **Facilitator Session Evaluation** Please complete the questions below, from your perspective as the facilitator, in relation to the BPP session delivered. Answer the questions as you feel most comfortable.
1. Please list any new or revised group focuses that the partnership have selected (that were not detailed in the previous session report). For each focus, please indicate whether you consider the focus to be "SMARTT" on a scale of 0–5 (0 means completely un-SMARTT, 5 means extremely SMARTT).
By meeting 5 times annually over the next two years, we aim to increase profitability (additional 5%) and sustainable beef production, encompassing responsible environmental and animal welfare practice, whilst maintaining adaptability and resilience to changing global demands and conditions. This will be achieved by support and the sharing of management skills within the partnership, without detriment of our standards of living and our health and welfare.
Score: 4
To become familiar with a decision making process that one might use when making decisions in a difficult situation. Complete this as a BPP topic within 12 months, including an example practical application in relation to group focus.
Score: 5
Need to develop one around pastures, kg Beef/ha.
Score:
2. Please list the three (3) predominant actions (resources, communications or activities) undertaken by the partnership at the session. For each action, how would you rate the value of this activity in assisting the partnership achieve their chosen focuses? (0 means no value, 5 means extremely valuable).
Stockwise Workshop delivered. In relation to the desired outputs of Stockwise score is given.
Score: 3.5
BPP looked at Stephens pasture trial. I didn't attend but sounded good.

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Score:	4
Example: The partnership completed a live animal search (EBV) on the internet in local computer labs. This activity worked well, it will greatly assist partners in achieving their second KPI.	
Score:	
3. Please list the CI&I and financial analysis tools that you are aware of that were utilised by the partnership between the past two sessions and during the latest session. For each tool, how would you rate its value in achieving the desired outcome? Please include comments on why you provided the given score. (0 means no value, 5 means extremely valuable).	
CI&I was utilised in the decision making process as an example of a process to break decision making down.	
Score:	3.5
CoP calculator seems to be popular	
Score:	4
4. Please consider whether any improvements or innovations have been made by the partnership in relation to CI&I ideas or tools used, or to technologies that have been implemented* *(see comment below).*	
CI & I as a possible decision making process.	
** This question may be difficult to answer. What the project is seeking is concepts, methods (management practices), tools or technologies that have been created and/or improved as a result of the BPP program. It is saying 'what concepts, methods (management practices), tools and technologies has the BPP project and CI&I enabled or encouraged participants to establish?'.*	

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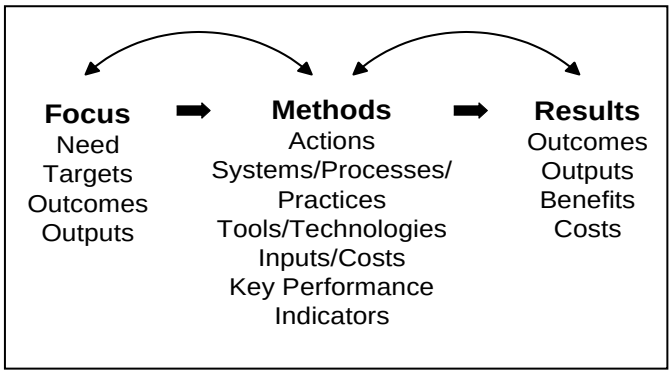
Figure 11.1. The value of ensuring a target focus, clearly identifying the actions, methods and technologies used to achieve and promote rewarding results