

LIVE BORDERS

PERFORMANCE INDICATORS & TRENDS

Q2 FY22/23

1. Overview

- 1.1. This is the first year of delivery of all activities following the lifting of COVID-19 pandemic restrictions. Unfortunately, participation levels have not returned to pre-COVID levels. Actions are being taken to grow participation levels in sport and leisure activities as well as increase visitors to museums, galleries and other visitor attractions. However, the revised view of overall participation levels, based upon member surveys conducted by Community Leisure UK as well as a survey undertaken by the Association of Scottish Visitors Attractions, is that they will only reach c.80% of the FY22/23 targets.
- 1.2. Couple with this, Live Borders is also facing several headwinds including the impact of the cost-of-living crisis on customer and colleagues, the unprecedented and extraordinary rise in energy costs as well as inflation rising to c.10% in recent months. These factors are out-with Live Border's influence and control and there are limited actions that can be taken to mitigate their impact.
- 1.3. Live Borders is continuing to work hard to increase participation levels, grow revenues and manage costs so that it can continue to support its business recovery as well as transform the business over the next 2-3 years, so it remains a sustainable charity. However, current industry analysis suggests that it will take c.5 years for participation levels to return to pre-COVID levels, with FY22/23 being the first year of un-interrupted operations (to date).

2. Performance Indicators & Trends

- 2.1. During February 2022, Live Borders Board agreed the key indicators and targets to be used to monitor progress against our strategy for the current financial year.
- 2.2. Appendix 1 contain summaries of indicator performance presented in the form of graphs with contextual commentary. During FY21/22 performance was gauged by Directors 'best estimate' of position as comparison to prior year (pre-COVID) was futile. Performance reporting for FY22/23 has been reset against the targets agreed at February 2022 Board.
- 2.3. Each graph has information presented alongside to enable at a glance summary to show:
- Performance gauge for Q2: Green, Amber or Red as per Table 1 below
 - Annual target approved by Board during February 2022
 - Q2 target performance
 - Q2 actual performance
 - Annual forecast position: Green, Amber or Red as per Table 2 below

Table 1: Quarterly Performance







Green		95% plus of target met in the quarter	There are 5 green flagged indicators
Amber		85-94% of target met in the quarter	There are 0 amber flagged indicators
Red		Significant under achievement against target in the quarter	There are 11 red flagged indicators

Table 2: Annual Forecast

Green		Expect to meet our target	There are 13 green flagged indicators
Amber		At risk of not meeting our target	There are 0 amber flagged indicators
Red		Unlikely to meet our target	There are 3 red flagged indicators

- 2.4. Appendix 2 provides examples of Live Border's current work through case studies.

Appendix 1: Detail of Performance Indicators and trends

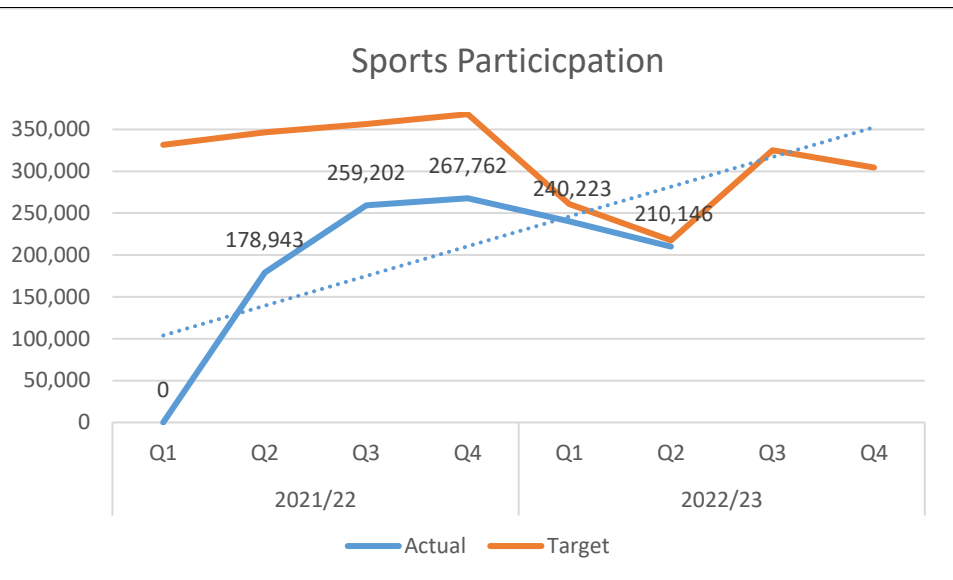
Ref	Key Strategic Indicator	Quarterly Gauge	Trend	Annual Forecast
EXPAND LEVELS OF PARTICIPATION				
KSI 1A	Sports participation		↑	
KSI 1B	Culture visits		↑	
KSI 2	Sport Active Membership (One Club)		↓	
KSI 3	Learn 2 Swim Membership		↑	
KSI 4	Other sport/active membership		↓	
KSI 5	Library Membership		↑	
KSI 6	Health Referrals		↓	
GROW OUR EARNED INCOME				
KSI 8	Earned income as percentage of total turnover		↑	
KSI 9	Staff costs as percentage of total income less management fee		↑	
DEVELOP PLURAL FUNDING STREAMS				
KSI 10	Funding income achieved and as percentage of total turnover	Annual		
KSI 11	Donations income achieved and as percentage of total turnover	Annual		
KSI 12	Percentage success rate for external funding applications	Annual		
BUILD ON OUR REPUTATION FOR GREAT CUSTOMER SERVICE				
KSI 13	Net Promoter Score		↓	
KSI 14	Number of staff trained in World Host (as percentage of front-line staff)	Annual		
KSI 15	Percentage of active members retained each year		N/A	
CREATE A SUSTAINABLE CHARITY				
KSI 16	KSI11: Communicating our charitable objectives		N/A	
NURTURE OUR STAFF TO BE PROUD OF WHAT THEY DO				
KSI 18	Staff absence rate		↓	
KSI 19	Staff turnover	Annual		
KSI 20	Volunteer numbers	Annual		
FINANCIAL				
KSI 21A	Energy consumption by square meter (KW/sqm)			
KSI 21B	Carbon Management tCO ² e	Annual		
KSI 22	Surplus/deficit (Service Provision Agreement)		↑	
KSI 23	Cost per attendance – Sport (plus other key ratios)		↓	
KSI 24	Cost per attendance – Library (plus other key ratios)		↓	
KSI 25	Cost per attendance – Museum (plus other key ratios)		↓	

Quarterly	
	95% plus of target met
	85-94% of target met
	Significant under achievement

Annual	
	Expect to meet
	At risk of not meeting
	Unlikely to meet

Trend	▶ Static	▲ Positive	▼ Negative
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KSI 1A: Sport participation	
Indicator	<input type="checkbox"/>
Annual Target	1,108,879
Q2 Target	217,445
Q2 Actual	210,146
Annual forecast	<input type="checkbox"/>

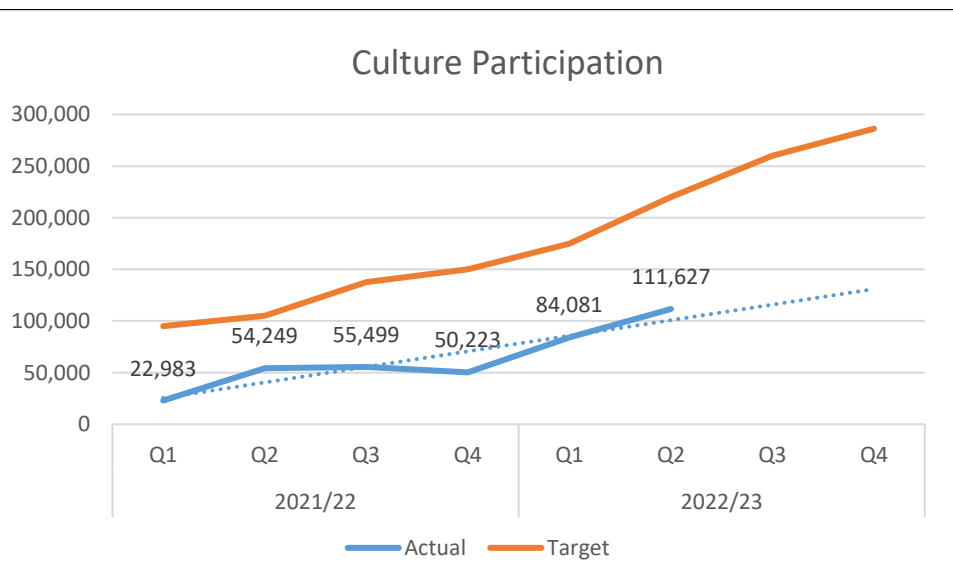


Why: This measure captures the participation numbers engaged in sport and physical activity and demonstrates the reach of the Trust. Participation is not only important to the economic viability of the Trust, but it also demonstrates Live Borders is contributing to improving health and wellbeing of the Borders population. Quarters 1, 3 and 4 include ASMO (active schools participation data).

Performance:

Whilst the overall figure is down, Q2 has a lower target due to no ASMO occurring during this quarter. Achievement compared to target has increased from 92% to 96%. The Get into Summer programme provided an inclusive approach to summer holiday activity with over 4,170 visits made to activities, a 91% occupancy with 69% of places allocated free of charge to low-income families meeting certain criteria. During the period under review, Tri fitness was closed for refurbishment and Peebles swimming pool closed following a fire.

KSI 1B: Culture Participation	
Indicator	<input type="checkbox"/>
Annual Target	286,235
Q2 Target	220,000
Q2 Actual	111,627
Annual forecast	<input type="checkbox"/>



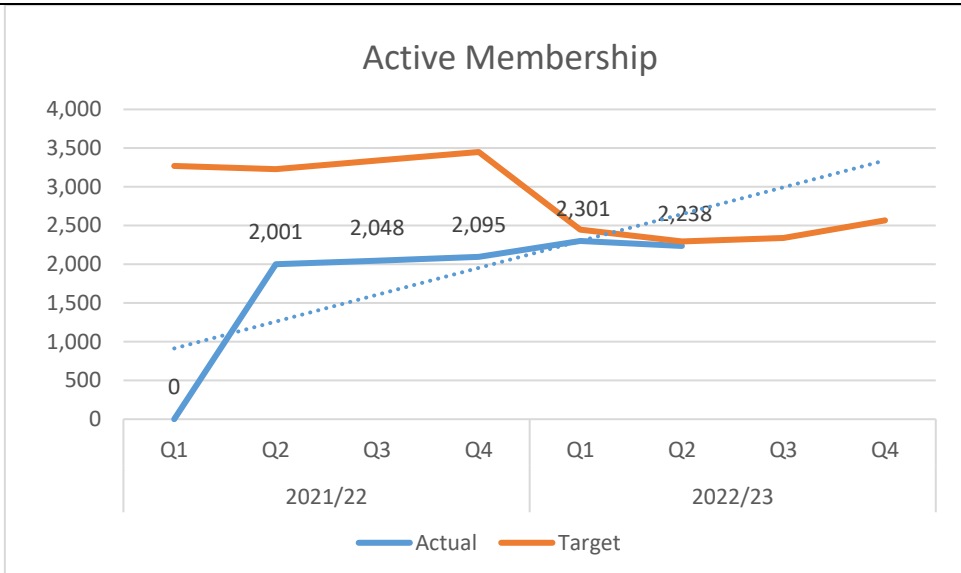
Why: This measure captures the participation numbers engaged in cultural activity and demonstrates the reach of the Trust. Participation is not only important to the economic viability of the Trust but it also important to improving health and wellbeing of the Borders population. 9 of the 12 Live Borders museums close during October/ November and re-open during March /April.

Performance:

Culture museums visitor numbers were 18% above target and Libraries visitors were up 54% on last year’s figures. Libraries conducted a lapsed members survey which has provided useful management information. Visitor numbers at the Great Tapestry of Scotland were well under target (Jura estimates). Heritage Hub visitors were over target by c.85%, with the majority of these accessing income generating archive research services. Creative Communities Arts led events were on target however Heart of Hawick audience numbers are under target for film, due to a dearth of blockbuster releases in Q2.

KSI 2: Sports Active Membership

Indicator	<input checked="" type="checkbox"/>
Annual Target	2,566
Q2 Target	2,295
Q2 Actual	2,238
Annual forecast	<input checked="" type="checkbox"/>

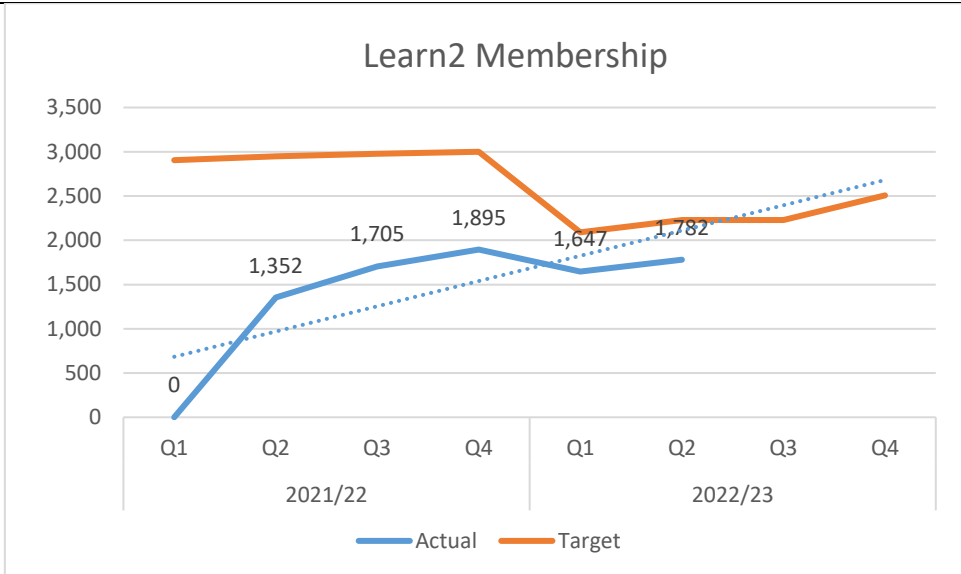


Why: This measure captures the number of distinct users who pay for gym, swim and fitness membership. Payments are through direct debit, a scheme that provides the Trust with a regular, stable source of income and encourages users to become more active more often. Member attendance is included in the participation numbers reported in KSI 1A.

Performance: Q2 performance would have been on target once the closure of the Peebles swimming pool closure is taken into account.

KSI 3: Learn 2 Membership

Indicator	<input checked="" type="checkbox"/>
Annual Target	2,508
Q2 Target	2,230
Q2 Actual	1,782
Annual forecast	<input checked="" type="checkbox"/>



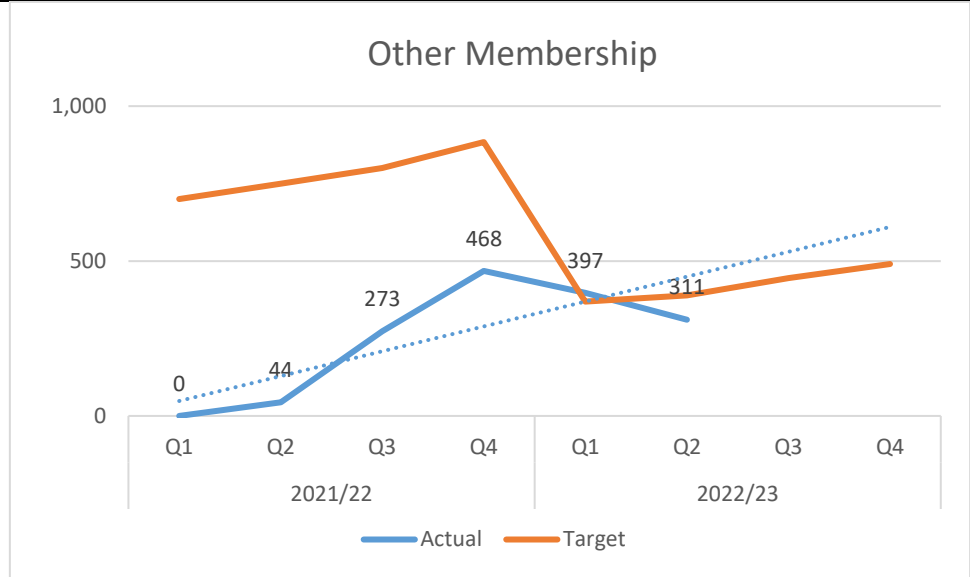
Why: This measure captures the number of distinct users who pay for swim tuition. Their attendance is included in the participation numbers above. Payments are through direct debit, a scheme that provides the Trust with a regular, stable source of income and encourages children to become more active more often and stay safe around water.

Performance:

Q2 performance was just behind target due to closure of Peebles swimming pool. Really strong performances observed at Galashiels, Teviotdale and Selkirk Leisure Centres.

KSI 4: Other sport / active membership

Indicator	
Annual Target	490
Q2 Target	389
Q2 Actual	311
Annual forecast	



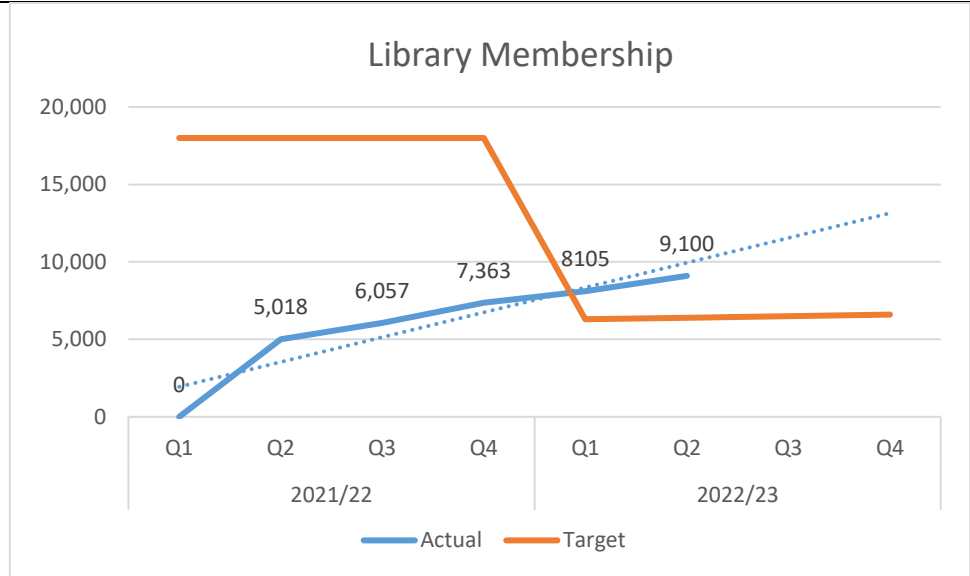
Why: This measure captures the number of distinct users who pay for services. Their attendance is included in the participation numbers above. Payments are through direct debit, a scheme that provides the Trust with a regular, stable source of income and encourages users to become more active or in the case of the advance player development supports players through a performance pathway.

Performance:

APDS figures reduce through the summer period however the target phasing does not reflect this.

KSI 5: Library Membership (active users)

Indicator	
Annual Target	6,600
Q2 Target	6,400
Q2 Actual	9,100
Annual forecast	

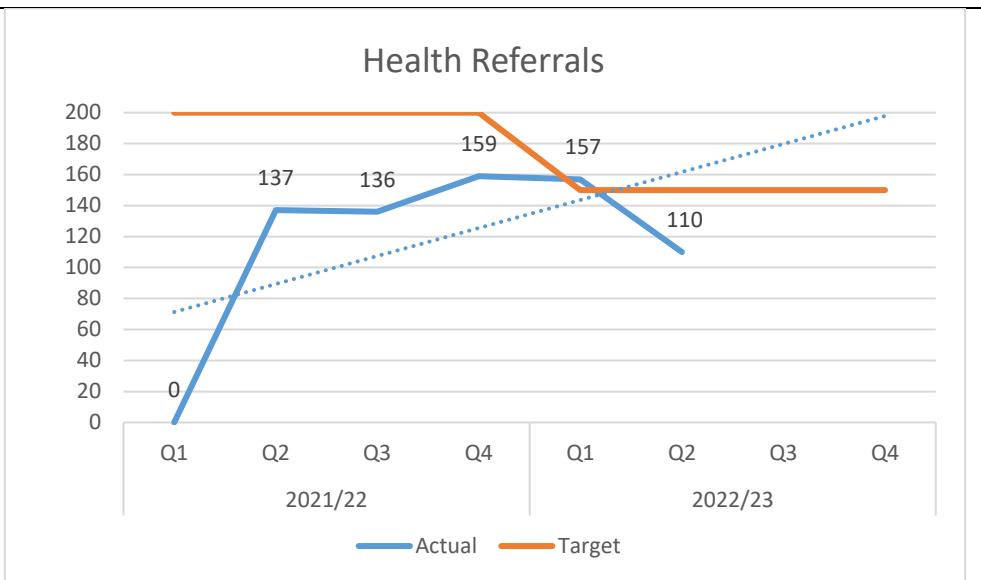


Why: This measure captures the number of distinct users who use library service. Their attendance is included in the participation numbers above. With the evolving demands on libraries this a key measure to report the reach of library services.

Performance

The post-COVID recovery has been better than anticipated. In addition, the target setting for library membership has not been accurate, with a projected growth through the year falling well below the actuals. Membership is presently 42% above target. It is recommended that the target be reviewed.

KSI 6: Health Referrals	
Indicator	
Annual Target	600
Q2 Target	150
Q2 Actual	110
Annual forecast	

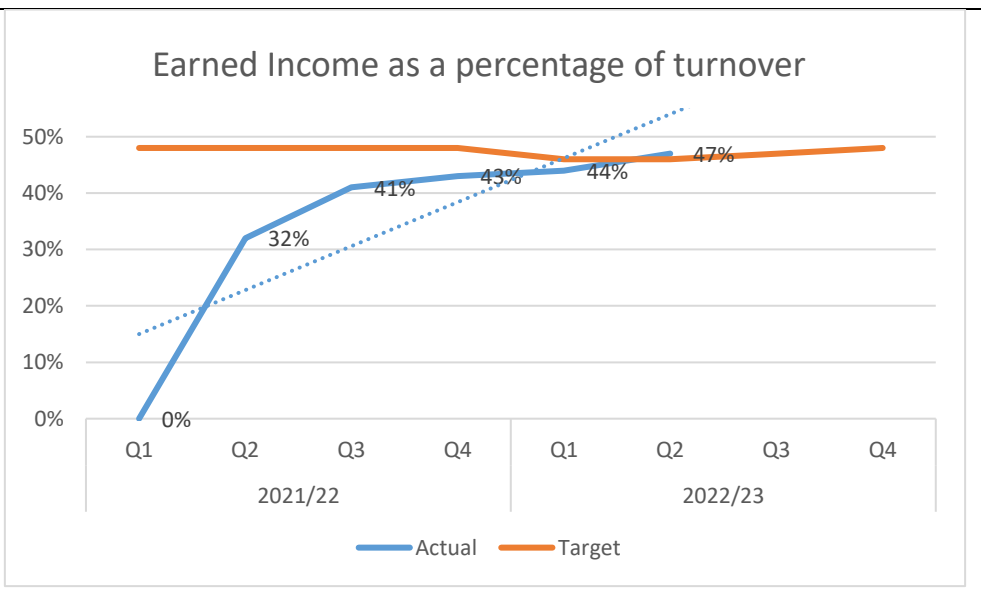


Why: Early intervention advice and medical referrals are increasingly taking the form of exercise and social prescribing. The number of referral demonstrates Live Border’s active engagement and ability to influence key partners (NHS) and funders in an area of growing demand.

Performance:

Health referrals slightly down in number during Q2 due to Live Borders not being able to accept referrals through the secure account during this period. This was the result of a change in personnel at Live Borders and a new log-in to the secure account having to be obtained which took longer than anticipated. This has now been rectified.

KSI 8: Earned income as percentage of turnover	
Indicator	
Annual Target	50%
Q2 Target	46%
Q2 Actual	45%
Annual Forecast	

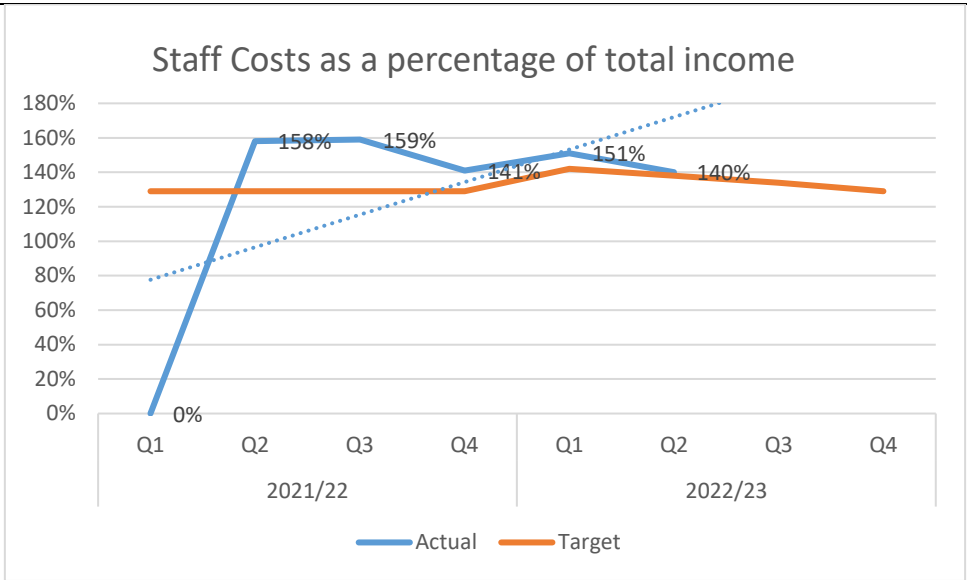


Why: This measure shows Live Borders’ reliance on the income it generates rather than grant or management fee. It is important measure to this strategic goal of growing earned income.

Performance:

Performance during Q2 was slightly below target. Actions are continuing to be taken to develop our sources of sustainable earned income. For example, museums are able to offer some important niche opportunities including bespoke research services for academic partnership work, probate specialists/family history enthusiasts as well as activity groups interested in paid for guided tours with curatorial staff experts and private bookings to commercial organisations for ghost night group events.

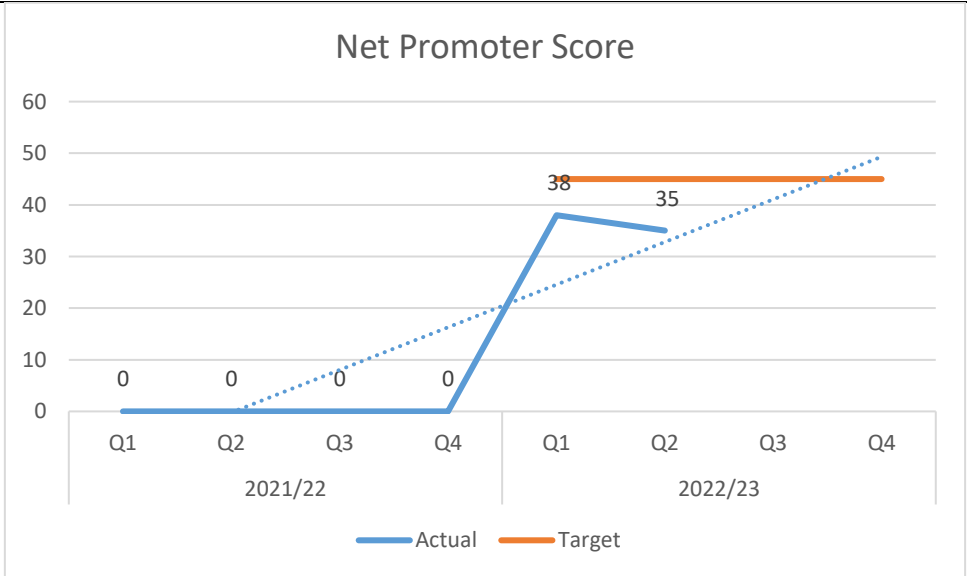
KSI 9: Staff costs as percentage of total income (less management fee)	
Indicator	<input type="checkbox"/>
Annual Target	120%
Q 2 Target	138%
Q 2 Actual	140%
Annual forecast	<input type="checkbox"/>



Why: This measure shows how Live Borders is managing staff costs in relation to income. Income includes grants, reflecting grant funding often involved staff costs. It is an important measure to demonstrate how Live Borders is effectively managing its business.

Performance:
 This KSI was unfavourably impacted by earned income being slightly adverse to target for the Q2. As outlined above KSI 8, activities are being undertaken to grow income. Staff levels are carefully monitored and recruitment managed to ensure levels are maintained to deliver both business-as-usual activities and growth initiatives.

KSI 13: Net Promotor score	
Indicator	<input type="checkbox"/>
Annual Target	45
Q2 Target	45
Q2 Actual	35
Annual Forecast	<input type="checkbox"/>

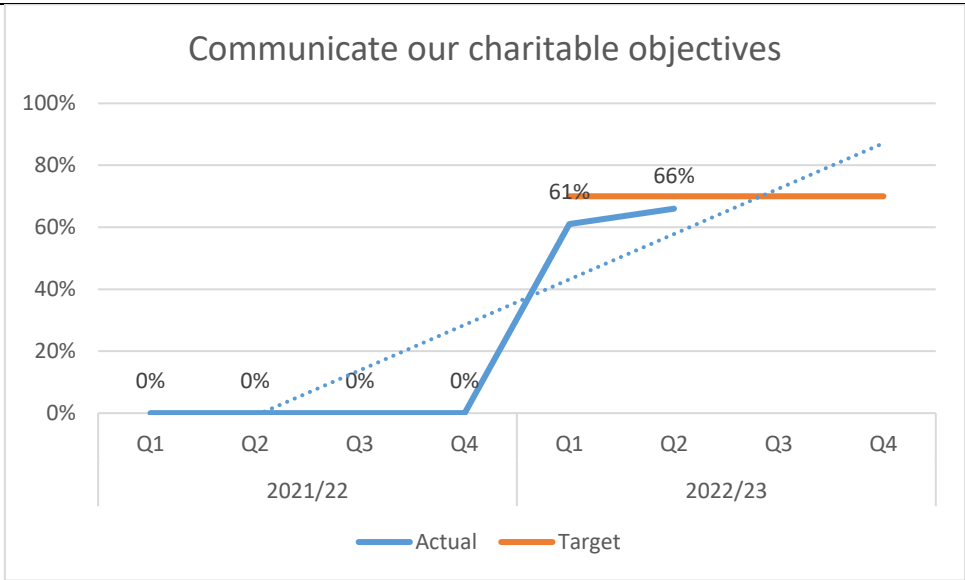


Why: NPS is an indicator that measures the willingness of customers to recommend and is used as a proxy for gauging customers overall satisfaction. Continual improvement to customer service is core to Live Border’s service delivery.

Performance:
 This is the second measurement of NPS since reopening facilities post-COVID restrictions. The previous score was 38 so the change is not considered significant. The current score is still considered a positive score statistically and, in light of the current trading circumstances, this score would seem a good score.

Note: NPS as a performance management tool is to be reviewed.

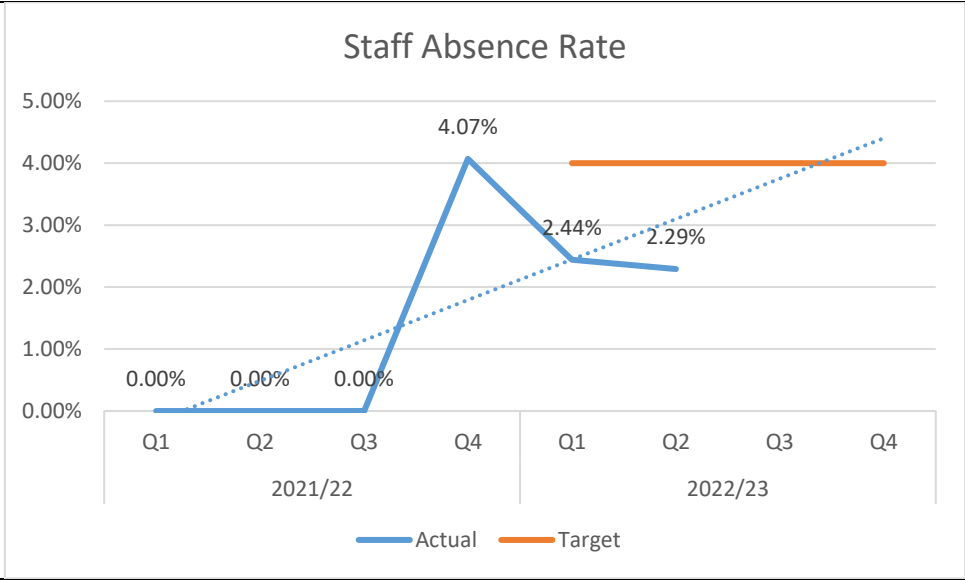
KSI 16: Communicate our charitable objectives	
Indicator	
Annual Target	70%
Q2 Target	70%
Q2 Actual	66%
Annual Forecast	



Why: This measure illustrates the success of key messages that Live Borders is a charity. This charitable status is considered a unique part of the Live Borders’ proposition and differentiates it from competitors.

Performance:
 The charitable status score is up five to 66%. This may be partly due to the use of radio messaging to position the charity, however this would need consistent adoption to grow and establish. A series of video shorts and social posts are scheduled weekly to promote the charitable and softer aspects of Live Borders’ deliverables including volunteering, health conditions and the positive impact of museums and libraries on health and wellbeing. In addition, museum front of house staff are also key in spreading the charitable aims message to visitors to encourage donations.

KSI 18: Staff absence rate	
Indicator	
Annual Target	4.0%
Q 2 Target	4.0%
Q 2 Actual	2.29%
Annual Forecast	



Why: This measure allows Live Borders to review frequency, types of absence or patterns to help better inform its people management strategies.

Performance:
 At Q2, the long-term sick rate was 1.62% whereas the short-term sick rate was 0.67%. Staff turnover, reported annually, has decreased from 8.25% in Q1 to 2.29% in Q2, and consists of 25 leavers.

KSI 21: Energy Consumption kw/h	
Why: Running facilities, especially swimming pools, uses a huge amount of energy and accounts for significant proportion of the Trust's expenditure (10%). Taking steps to reduce energy consumption means the Trust has more money to invest elsewhere in the business.	
Performance: Live Borders is currently unable to report this KSI with confidence. Actions are being taken to monitor energy consumption across sites more efficiently and effectively. An update on energy consumption and performance, including actions taken to reduce consumption, will be presented to Board during February 2023.	

KSI 22: Surplus / deficit		<p style="text-align: center;">Surplus Deficit (ex Tri)</p>
Indicator	<input type="checkbox"/>	
Annual Target	£294K	
Q 2 Target	-£206K	
Q 2 Actual	-£448K	
Annual forecast	<input type="checkbox"/>	

Why: This measure shows how Live Borders is performing financially against its budget.	
Performance: The higher deficit than target is due to a number of factors including higher than planned energy costs, lower earned income due to customers not returning to facilities post-COVID as anticipated as well as being impacted by cost-of-living pressures and other costs incurred to end Q2 being higher than forecast. This is in part due to timing as the FY22/23 Reforecast was flat-phased and is being monitored closely.	

KSI 23: Cost per visit - Sport		<p style="text-align: center;">Cost per visit - Sport</p>
Indicator	<input type="checkbox"/>	
Annual Target	£8.55	
Q2 Target	£8.55	
Q2 Actual	£9.79	
Annual forecast	<input type="checkbox"/>	

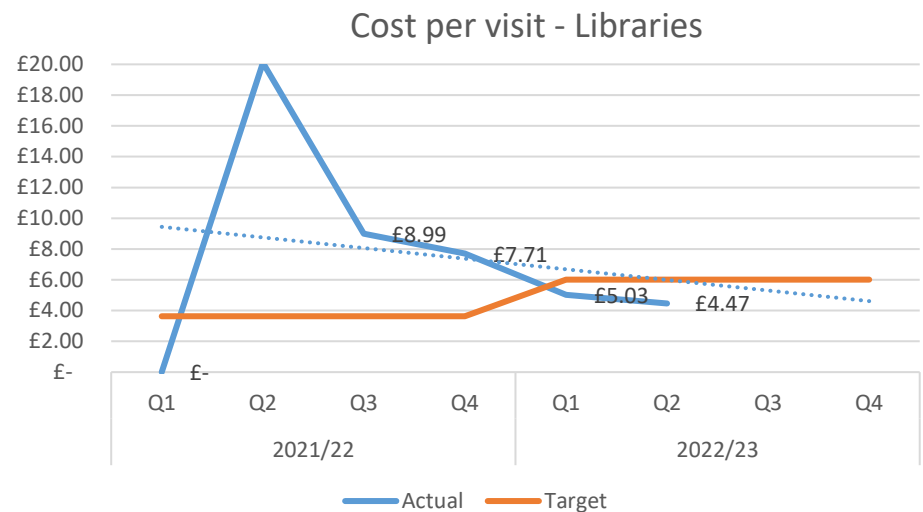
Why: Nationally reported comparable indicator and provides year on year trend for analysis. It demonstrates how Live Borders manages costs in relation to participant visits. 2019/20 figures in the table below are cumulative year to date.

Performance:

Numbers returning to activities remains behind target due to the legacy impact of COVID-19 on participation levels.

Key Performance Indicators		TOTAL				
Quarter 2		2021/22		2022/23		Growth %
2022/23						
Subsidy/Visit	((-F)+[H])/[A])	£5.33		£5.58		-5
Income/Visit	[(B)/[A])	£8.71		£4.21		-52
Cost/Visit	[(D)/[A])	£14.04		£9.79		30
Staff Cost/Visit	[(C)/[A])	£8.32		£5.70		32
Visits/000	[(A)/[G])	1.63		2.86		75
Rate of Return	[(B)/[D])	62.05		43.02		-31
Admissions			<i>R%</i>		<i>R%</i>	<i>Growth %</i>
	Quarter 1	73,783	40	161,879	50	119
	Quarter 2	111,745	60	163,380	50	46
	Quarter 3	0	0	0	0	0
	Quarter 4	0	0	0	0	0
Total Admissions	[A]	185,528	100	325,259	100	75
			<i>R%</i>		<i>R%</i>	
Pool Activities		55,064	30	58,488	18	6
Other Activities (Non Swim)		130,542	70	266,771	82	104
		185,606	100	325,259	100	75
	Swim Borders DD	1,352		1,781		32
	Membership	2,001		2,288		14
Income	[B]	£1,616,472		£1,370,249		-15
			<i>%Income</i>		<i>%Income</i>	
	Cost of Sales	£3,738	0	£33,656	2	
	Staffing [C]	£1,543,548	95	£1,853,106	135	
+ Expenses		£1,057,781		£1,298,146		
Expenditure	[D]	£2,605,067		£3,184,908		-22
Operating Loss	[E]	(£988,595)		(£1,814,659)		-84
Less Other costs		£0		£0		0
Surplus/ Deficit	[H]	(£988,595)		(£1,814,659)		-84
Population	[G]	113,780				

KSI 24: Cost per visit – Library	
Indicator	●
Annual Target	£6.01
Q2 Target	£6.01
Q2 Actual	£4.47
Annual forecast	●



Why: Nationally reported comparable indicator and provides year on year trend for analysis and shows how Live Borders is managing costs in relation to participant visits. 2019/20 figures in the table below are cumulative year to date.

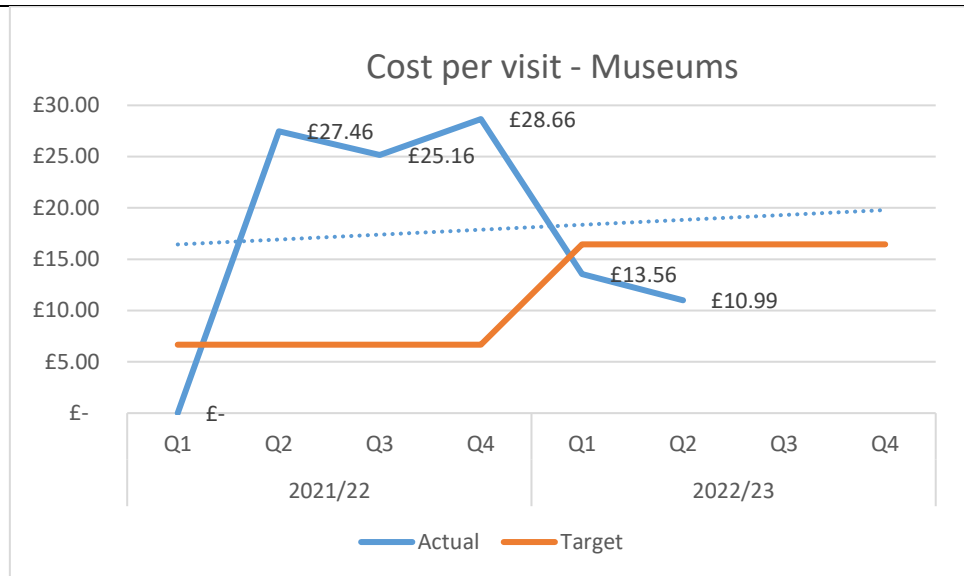
Performance:

Reduced opening hours and careful staff scheduling has resulted in better than target performance.

Key Performance Indicators

		Libraries		
		2021/22	2022/23	Growth %
Subsidy/Visit	$([-F]+[H])/[A]$	£962.73	£4.39	
Income/Visit	$([B])/[A]$	£2.22	£0.08	
Cost/Visit	$([D])/[A]$	£964.95	£4.47	
Staff Cost/Visit	$([C])/[A]$	£596.87	£2.85	
Visits/000	$([A])/[G]$	0.00	0.87	
Rate of Return	$([B])/[D]$	0.23	1.84	
Energy Consumption m2 (KWH)				
Admissions		R%	R%	Growth %
	Quarter 1		43,115	#DIV/0!
	Quarter 2	439	55,667	12,580
	Quarter 3			0
	Quarter 4			0
Total Admissions	[A]	439	98,782	22,402
Income	[B]	£974	£8,104	732
			%Income	
	Cost of Sales	£0		
	Staffing [C]	£262,024	£281,590	
	Expenses	£161,588	£159,836	
Expenditure	[D]	£423,612	£441,426	
Operating Loss	[E]	(£422,638)	(£433,322)	
Less Other costs				
Add Management Fee	[F]			
Surplus/ Deficit	[H]	(£620,855)	(£433,322)	
Population	[G]	113,780		

KSI 25: Cost per visit – Museum	
Indicator	●
Annual Target	£16.45
Q2 Target	£11.45
Q2 Actual	£10.99
Annual forecast	●



Why: Nationally reported comparable indicator and provides year on year trend for analysis and shows how Live Borders is managing costs in relation to participant visits. 2019/20 figures in the table below are cumulative year to date.

Performance:

Reduced opening hours and careful staff scheduling has resulted in better than target performance.

Key Performance Indicators

		MUSEUMS (INC GTOS)		
		2021/22	2022/23	Growth %
Subsidy/Visit	$([-F]+[H])/[A]$	£325.39	£6.91	
Income/Visit	$([B])/[A]$	£252.41	£4.07	
Cost/Visit	$([D])/[A]$	£577.80	£10.99	
Staff Cost/Visit	$([C])/[A]$	£390.21	£6.61	
Visits/000	$([A])/[G]$	0.01	0.72	
Rate of Return	$([B])/[D]$	43.69	37.08	
Energy Consumption m2 (KWH)				
Admissions		R%	R%	Growth %
	Quarter 1		32,453	
	Quarter 2	974	49,441	
	Quarter 3			
	Quarter 4			
Total Admissions	[A]	974	81,894	
Income	[B]	£245,849	£333,661	
			%Income	
	Cost of Sales	£42,450	£81,476	
	Staffing [C]	£380,066	£541,492	
	Expenses	£140,259	£276,926	
Expenditure	[D]	£562,775	£899,894	
Operating Loss	[E]	(£316,926)	(£566,233)	
Less Other costs				
Add Management Fee	[F]			
Surplus/ Deficit	[H]	(£638,273)	(£566,233)	
Population	[G]	113,780		

EVERYONE LIVING IN, WORKING IN AND VISITING THE BORDERS WILL BE HEALTHIER, HAPPIER, STRONGER

Provide OPPORTUNITIES to improve health and wellbeing, and to excel



GET INTO SUMMER

2022

HEALTHIER

64% more active

in the last year due to Get into Summer



20 young people employed as activity leaders

HAPPIER

97% reported having fun!



“ My daughter is from Ukraine, and despite little practice of English, she felt very comfortable. Every day she wanted to run to the camp. We would like to thank everybody from the Live Borders team. ”

“ Thank you. So rare for her to come home raving about going back. Well done. ”

“ We REALLY appreciated the support and opportunity offered to SEN children. Making the difference between attending or not. ”

STRONGER



47% children and young people reported an increase in resilience

82%

children and young people reported a greater confidence to attend further sport and cultural activity in the future



EMPLOYABILITY

80%

improved their self confidence

73%

learned or developed new skills

67%

felt more confident about their future employability

“ Given me a sense of purpose through the summer and allowed me to branch out in different ways. ”

“ Given me more confidence working with children and individually leading and planning sessions. ”

“ As a parent, to watch him grow in confidence through the week as he told me stories of new friends made and activities he had enjoyed was positive to see and hear. ”

HEALTHIER, HAPPIER AND STRONGER

We surveyed children, parents and employees involved with Get into Summer 2022.

www.liveborders.org.uk

Registration No: 80249877 | Registered Charity No: 80004227



EXPERIENCE

PARTICIPATION

COLLABORATION

EXPERIENCE

PARTICIPATION

COLLABORATION

EVERYONE LIVINING IN, WORKING IN AND VISITNG THE BORDERS WILL BE HEALTHIER HAPPIER,STRONGER

Champion INCLUSION & ACCESSIBILITY for all across arts, culture and sport

Live Borders brings al fresco live theatre to the Scottish Borders

Fans of live theatre were able to enjoy an outdoor play in the grounds of three of our historic buildings in July. 'The Bush' by Alice Mary Cooper recalls the inspiring true story of thirteen, 1970's 'housewives' who battled for 10 years to save bushland in her native Sydney. This kick-started a nationwide movement of Green Bans, protecting land and the natural environment from destruction in Australia.

Audiences were able to see the play within the grounds of Old Gala House, Mary Queen of Scots Garden and in Wilton Park beside Hawick Museum. The positive messages of the play were matched with the tranquil environment and the unusually warm and dry weather.

The tour of this production was fully funded by Creative Scotland, which meant Live Borders Arts & Creativity could bring high quality theatre to the grounds of museums with very little costs attached.

The impact on wellbeing as a result of engaging with culture and the arts are well documented, as are the benefits of spending time in the natural environment. This project was able to bring those elements together, as well as providing an opportunity for Arts & Creativity and the Museums team to work together.



We will CREATE amazing experiences and memories



Mary Queen of Scots new international audio tour

Sycamore partnered with Live Borders to produce a multilingual audio experience at the visitor centre. The attraction sees a large number of visitors from overseas. In fact, pre pandemic, these guests made up 45% of the audience. Mary Queen of Scots led a fascinating and complicated life, she has an international appeal, she is a romantic and dramatic character from the past who continues to fascinate people. This makes it all the more important that visitors can access an easy to use and clear audio tour, adding another engagement element to the experience.

Sycamore created a rich audio experience that immerses visitors in the story of Scotland's most famous monarch, complete with vivid sound design and expert narration. Live Borders goals were to upgrade the audio kit tour, minimise running and repair costs, modernise the content of the tour to enhance the guest experience and provide more language options in order to boost usage of the tour by overseas visitors.

Visitors to the 16th Century tower house can discover how Mary Queen of Scots spent a month in Jedburgh in 1566 during what would turn out to be a turning point in her life. The visitor centre is home to paintings, artefacts and textiles associated with her.

EXPERIENCE

PARTICIPATION

COLLABORATION

EXPERIENCE

PARTICIPATION

COLLABORATION

