GB Mainline

CUSTOMER INFORMATION MEASURE (CIM)

User Instructions & Guidance

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Customer Information Measure (CIM) - User Instructions &

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1. INTRODUCTION

1.1 Overview

Providing a world class railway service is not just about running a punctual, reliable service – it is also about providing timely and accurate customer focused information under all circumstances that meets the needs of every passenger.

Customer information is an output of integrated, joint working across the rail industry. Generally Train Operators and Network Rail have the prime industry responsibility for leading on customer information provision, but they cannot deliver excellence without the buy-in and commitment of other critical partners in the rail industry who provide essential information. The collective term of Rail Delivery Organisations (RDOs) has been used to future proof this document and encompasses all organisations which have a role in delivery to customers. A full list of abbreviations and acronyms can be found in the Schedule 1 assessment document.

This document sets out the requirements of the Customer Information Measure (CIM) which will provide an industry framework for Customer Information Provision (CIP) management and delivery throughout GB Mainline Rail. It has been developed on behalf of The Office of Rail & Road (ORR) in conjunction with GB Mainline Rail and will form a primary industry measure of Customer Information Provision. This version incorporates learning from the two pilot assessments undertaken in 2020 by Winder Philips Associates involving LNER and Cross Country TOCs plus supporting Network Rail colleagues.

The CIM is based on 34 **Elements** organised into 7 interlinked **Components** that cover all of the essential activities and arrangements that are used to deliver, manage, review, and improve customer information provision across GB Mainline Rail. The arrangement and scope of the **Components** is shown in the schematic below.

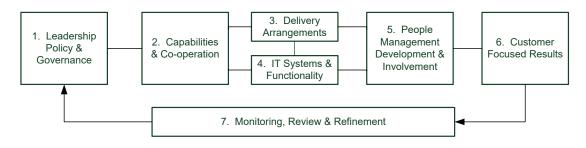


Figure 1
CIM Components

The 7 **Components** of the CIM cover all the essential activities within Rail Delivery Organisations such as Train Operators, Station Operators and Network Rail and the supporting collaborative arrangements between all RDOs, Railway Entities and other partners with a role in customer information provision. The CIM has been developed so that the **Components** and constituent **Elements** encourage a unified industry approach. As a consequence it also addresses crucial 'enabling' aspects such as Leadership, Policy & Strategy, and Partnerships.

Customer Information Provision is currently the outcome of a complex and often disparate sets of arrangements under the control of many different organisations. The CIM model seeks

to align these into a simple framework that is based on the recognised EFQM¹ management principles of RADAR²:

The underpinning rationale of the RADAR approach is shown below.

Excellent Customer Focused

Results are achieved through a sound, integrated **Approach** that is

 $\underline{\textbf{D}} \textbf{eployed}$ in a systematic way, then measured by

Assessment and

Refined in order to provide learning and drive improvement

The supporting guidance contained in Schedule 1 of this document sets out how customer information provision will be measured and also describes "What Good Looks Like" in order to provide a clear focus for all those with a part to play in delivering timely and accurate customer focused information under all circumstances, that meets the needs of every customer.

The CIM Maturity Model provides a means by which all GB Mainline Rail organisations can evaluate where they are on the journey from basic Level 1, "Ad-hoc", customer information arrangements towards the goal of Level 5, "Excellence" using a common evaluation methodology. However the CIM is not split by organisations, it is intended to provide a 'whole system' measure that evaluates how information is sourced, collated, and provided to customers of all types during all possible travel phases, under all operating conditions.

The structure of the CIM Maturity Model broadly mirrors the structure of the Assessment Protocol that Winder Phillips Associates used to assess the robustness, maturity and effectiveness of the TOC and Network Rail arrangements during the 2019 review visits that formed the basis of the report commissioned by the Office of Road & Rail titled 'Research into the provision of information to passengers - including disruption'. A copy of this report can be found on the ORR website³.

The CIM uses a Maturity Model approach that has been successfully used by the rail industry to manage safety in a structured way (RM3). It also closely mirrors the Maturity Model approach introduced by the rail industry in 2019 to manage performance (RM3P). So the principles of this methodology should already be well understood within the industry.

Customer Information is of course, part of the overall Customer Experience that includes many important factors. It is therefore vital that we constantly remind ourselves that the information needs of customers vary. Not everyone has a Smartphone or is an accomplished user of social media and other internet-based sources of information; there are also huge differences in the information needs of experienced daily commuters and those unfamiliar with the rail environment who travel perhaps only once or twice a year. Those with physical or sensory impairments, health conditions or vulnerabilities may also have particular and very important needs.

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¹ European Foundation for Quality Management

² Results, Approaches, Deployment, Assessment, Refinement

 $^{^3\} https://orr.gov.uk/__data/assets/pdf_file/0018/42435/passenger-information-during-disruption-research-report-may-2019.pdf$

1.2 Scope

The CIM has been developed for use across GB Mainline Rail with the primary focus being on Train and Station Operators. However, completion of all the elements within the CIM will require a very strong input from Network Rail, specifically NR Operations and NR Managed Stations plus input from other key organisations such as National Rail Enquiries. The CIM has therefore been developed as a composite assessment tool so that <u>all</u> the aspects that collectively provide information to all customers can be measured, refined, and improved.

The CIM is also capable of sub-division into management units (such as NR Managed Stations) if the industry considers the introduction of 'sub-set' CIM extracts are a useful way of driving improvement in an aligned manner. However we strongly recommend that changes to the wording of **Elements** and the constituent **Criteria** are tightly controlled or the ability to make comparisons will be compromised.

1.3 Application

Each of the 34 **Elements** is defined by between 2 and 6 **Criteria** and each of these has a description of the attributes assigned to each of the five **Achievement Levels** as shown below.

ACHIEVEMENT LEVEL	DEFINITION
5	Excellent
4	Predictable
3	Standardised
2	Managed
1	Ad-hoc

Each of these provide a clear description of the verifiable arrangements that must be in place for each attribute in order to confirm that referenced level of **Achievement**. It will be essential to ensure that clear evidence is available in order to claim compliance and it must be emphasised that in order to obtain a particular **Achievement** level for an **Element** then each **constituent Criteria must be met at that level or better**. Whenever a range of levels have been assessed within an element then the lowest level is the appropriate overall level that should be assigned to that Element. For example if the constituent **Criteria** scores for **Element** 3.8 were: 4, 2 & 3 then the applicable **Achievement** level is '2'.

There is no opportunity to claim a '3.5' or a '3+' as the Maturity Model is intended to highlight areas requiring development and effort, and enable the organisation concerned to prioritise areas for improvement. However it is inevitable that for some **Elements** the initial scores may fall across the full 1 to 5 range and will therefore be assessed as Level 1 for that element. A Maturity Model approach has been adopted to encourage measurable improvement that will deliver increasing levels of consolidated excellence to customers using the clear descriptions of **What Good Looks Like**.

1.4 Calibration

The current CIM is uncalibrated and it will be necessary to adjust the content and scoring in the light of experience, although not by weakening the ambition. ORR consultation with TOCs, Network Rail and RDG will form part of that process and any future adjustments.

ORR will maintain independent oversight in order to reduce the potential for "gaming" or interpretation of scoring. Caution will also need to be exercised in order to avoid oversimplification or weakening of the Achievement Criteria and it is anticipated that the CIM will be formally reviewed annually.

1.5 Revising the Benchmarks

As technology changes and customer expectations increase, it will be necessary to review and potentially refine/revise the five **Achievement** definitions within applicable **Element** attributes. This will be an issue for the ORR and the rail industry, but a process should be determined at the earliest opportunity to ensure that the arrangements remain credible, challenging and fit for purpose. Establishing an ORR led user group would seem the most appropriate solution to the provision of oversight and governance.

1.6 Innovation and Learning

Once the CIM is established within the rail industry there will be clear opportunities to seek good practice and examples of excellence in other sectors and territories. European Rail benchmarking quality groups were used in the Rail Industry prior to privatisation and the Japan Exchange programme has remained a strong focus for identifying good practice over the last thirty years.

For many years other benchmarking groups have also existed for rail operators such as:

- CoMET and Nova are the world's metro benchmarking groups
- ISBeRG is an international benchmarking group for suburban rail operators
- IMRBG is the International Mainline Rail Benchmarking Group
- RIAMBG is the Railway Infrastructure Asset Management Benchmarking Group

CoMET and Nova⁴ summarise the process of benchmarking as "a structured approach to identify actions that lead to superior performance". Benchmarking allows comparisons of performance data but importantly also stimulates questions and lines of inquiry for more indepth analysis and research as to how to drive improvement.

Establishing similar arrangements for customer information would provide an additional means of driving excellence and provide a clear signal that GB Mainline Rail is serious about delivering excellent customer information.

2. MEASURING CUSTOMER INFORMATION PROVISION

2.1 The CIM Structure and Methodology

The Customer Information Measure (CIM) is a Maturity Model based assessment tool as this methodology is well understood in the rail industry.

Maturity models are a tool for assessing an organisation's ability to successfully manage an issue or system of issues. They help to identify areas for improvement and provide a benchmark for year-on-year comparison. As an organisation invests and develops its management systems, it can measure progress and understand areas for further development as it strives to progress from "ad-hoc" towards "excellence".

The CIM approach has been blended with the European Foundation for Quality Management (EFQM) model that describes truly excellent organisations as those which:

"Strive to satisfy their stakeholders by what they achieve, how they achieve it and what they are likely to achieve".

⁴ https://cometandnova.org/benchmarking/

According to the EFQM Excellence Model (2009), excellence relating to management systems can be achieved by:

"Providing visionary and inspirational leadership, coupled with constancy and consistency of purpose, delivered through the operation of interdependent and interrelated organisational management systems which maximise the contribution of employees through their development and involvement to deliver results that exceed stakeholder expectation and create sustainable customer value."

Excellence should not be considered as a theory, it relates to an organisation in what it does, how it does it, the results it gets and the confidence that these results will continue into the future.

2.2 Plan, Do, Check, Act

The diagram below, from "Managing for Health and Safety (HSG65), published by the HSE in 2013, shows a typical good practice model of how an organisation might address Safety Management in a

Excellence
Predictable
Standardised
Managed
Ad hoc

Figure 2
The 5 levels of CIM achievement

structured way. This approach is directly transferrable to the management of issues such as performance and Customer Information Provision and therefore this has been included as a recommended tool.



Figure 3
The Plan-Do-Check-Act process

We have adopted the principles from these models to develop the CIM Maturity Model and for many primary organisations such as Train and Station Operators and Network Rail all components and elements will be relevant in organising and evaluating their maturity in managing Customer Information Provision delivery.

For other companies or parts of companies it will be appropriate to apply a sub-set of the CIM model.

The assessment components and

elements plus the associated attributes are set out and fully described in Schedule 1 to this document. An assessment sheet for assessors is attached as Schedule 2.

2.3 How to Use the CIM

When undertaking a CIM assessment the following recommended steps should be followed.

Step 1

Familiarise yourself with the documents. This document provides an overview of the arrangements and it should be reasonably self-explanatory. There is no need to spend too much time looking at the parts of the document dealing with the CIM Excel Model. That aspect will become relevant once the assessments has been undertaken; then reviewed and moderated by an independent assessor appointed by the ORR.

Schedule1 contains a comprehensive description of the Maturity Model criteria applicable to each Element. Each set of criteria has a description for each of the five Maturity Model levels. Two version of this schedule are provided; An assessor's version that has a row after each set of criteria containing space for the assessor to record their findings of the assessments plus sections for the comments of the reviewer/moderator. A clean version without these rows is also provided.

Schedule 2 is the Assessment Summary document that enables the Assessor, Reviewer and Moderator to enter the agreed ratings and provide an overview of the assessment. All documents are available in Word and pdf formats.

Step 2

Decide who should be engaged within your company and identify the correct people within RDG and other Railway Delivery Organisations (RDOs) such as Network Rail. You may also want to involve colleagues in other TOCs. *It is strongly recommended* that you syndicate responsibility for completing the various **Elements** to the most suitable people. Everyone has a role in CIP so, as an example, involve a director for Component 1 and someone within Human Resources/Personnel for Component 5.

Outside your own organisation you will always need to include the relevant Network Rail Routes/Areas and NR Major Stations where appropriate.

Step 3

Contact the ORR nominated helpline contact PassengerInformation@orr.gov.uk and arrange a video link briefing for those carrying out your assessments. This will enable any issues to be clarified prior to commencement of the assessments.

Step 4

Set aside sufficient time in order to tackle the document in a sensible and structured way. It is best to start on familiar ground so you may find the easiest order is Component 2, 3, 4, 5, 6, 7 then 1. However, whichever order you choose - always start with Component 2.

Components 1 & 2 will require conversations with your director responsible for customer information whilst your RDG Board member will also need to be involved when addressing component 1. Those responsible for customer information issues in the Rail Delivery Group (RDG) will also need to be involved as necessary throughout the assessment. The reason for suggesting that the CIM assessment is tackled in the order recommended above is because you will then have a clearer understanding of all the issues and the importance of Leadership & Governance. Tackling the CIM in the order recommended above will help you prepare for that discussion and also help the RDG Board member appreciate the status of the CIP issues you will have assessed.

Learning Point:- The Pilot assessments made extensive use of 'Teams' video conferencing for many of the joint TOC/NR assessment sessions. This approach proved very effective and should be considered when undertaking CIM assessments (even if COVID restrictions have been lifted).

Step 5

Collect and analyse evidence. This is so that you can verify & support the assessed ratings and the reviewer/moderator can verify the results from a sample check.

When gathering evidence you should consider 4 main issues:

- Consistency of the evidence if evidence from a number of sources suggests a similar level of maturity this will generally indicate that the findings of the assessment are accurate
- Quantity of the evidence whether there is enough evidence to provide an informed opinion on the organisation as a whole. For example, if evidence from a single station revealed a Level 3 'Standardised' level of achievement, is that sufficient to form an opinion on every other station?
- Quality of the evidence whether the evidence is based on a limited observation from one site or is consistent across a number of sites
- **Currency of the information** when the evidence was initially defined/gathered and whether there are likely to have been any significant changes since then.

Step 6

Assign a rating. Each Element has between 1 and 6 constituent **Criteria** and each of these has 5 levels described by a number of attributes. As explained in section 1.3 the 5 levels range from 1 'Ad Hoc' to 5 'Excellent'. In order to claim a particular achievement level for an element - **YOU MUST MEET THAT LEVEL OR BETTER FOR EACH ATTRIBUTE** in that **Element AND** be able to provide **EVIDENCE** to support the claimed level. However **Achievement** levels usually vary across each **Element** and in these cases the lowest level is the achieved rating. For example if the constituent **Criteria** scores for **Element** 3.8 are: 4, 2 & 3, then the assessed **Element Achievement** Level is '2'.

It is recommended that you use a copy of Schedule 1 as a workbook. If you do not understand the CIM assessment process, a particular question and/or set of attributes you should contact the nominated helpline for advice and guidance.

Step 7

Complete the CIM Schedule 2 Assessment Summary sheet. This should be self-explanatory and will enable you, your colleagues, and your management team to see where the current CIP strengths and weaknesses are.

Step 8

Share the assessment internally in accordance with your Director's requirements and as agreed with your partnering RDOs. Discuss and review as necessary then sign-off.

Step 9

Submit the completed schedule 1 & 2 documents plus any supporting evidence to the nominated independent assessor for review and validation.

Step 10

The nominated independent assessor will review the documents and request further information and/or evidence, where necessary. Following validation the documents will be returned and feedback will be provided.

Step 11

A stand-alone Excel based model will be provided by ORR to plot the assessment results in a 'Spiders Web' within each RDO undertaking a CIM assessment.

Step 12

ORR will discuss the findings with the RDO(s).

3. THE CIM COMPONENTS AND ELEMENTS

The seven CIM Components and 34 Elements are illustrated in the following schematic.



Figure 4
Schematic Representation of the CIM Excel Model

4. USING THE CIM EXCEL MATURITY MODEL

4.1 Overview

The CIM Maturity Model ('The Model') is provided as an Excel Model designed to be simple to use. It takes simple statistics and displays them to enable the user to gain a quick understanding of their CIM maturity.

This brief user guide intends to give the user:

- An overview of the role of each sheet
- An overview of the data inputs required of the user, including how to input them
- Instruction of how to operate the basic macros and selection tools in the Model
- Instruction of how to interpret the outputs.

Note: that the Model is locked to avoid:- a) users entering information into the wrong cells, and b) users changing the structure of the model.

The PIDD Maturity Model is currently a draft model developed for the Pilots. It has undergone minimal testing and calibration and is intended as a prototype to demonstrate the potential benefits of a CIM Maturity Model. It will require calibration, and possibly modification, prior to any national roll-out.

4.2 General

The CIM Excel Model employs standardised formatting to indicate those cells that are editable and those that are not. The table below indicates the formatting. There are some minor deviations from these rules, but users will be informed by a pop-up message if they try to edit a locked cell.

Title 1	Not editable
Title 2 / Description	Not editable
	Editable by user, either freeform, or
Data	from drop-down

4.3 Title Sheet

Purpose - The purpose of this sheet is to:

- Inform the user of the any disclaimers relating to The Model
- Record the name of the Rail Organisation that is populating The Model
- Record the year/period for which PIDD data is being entered, and
- Record the year/period against which data can be compared.

Data Inputs - The data inputs required are as follows

Cell Title	Description	Input format	Where input is used
Organisation Name	Name of the Rail Organisation whose maturity is being recorded	Free-form	To label graphs
Results Year	Year/period for which CIM maturity data is being entered	Free-form, although it is suggested this is limited to: • Year • Year + Period • Year + Quarter	 To label graphs As a reference name to save data – this will eventually be available in the 'Comparison against' drop-down
Comparison against	Year/period against which data can be compared	Drop-down with list of all available years with populated data Default is 'None' as the delivered Model will have no data to use for comparison.	 To label graphs To populate the model with historical data, for the purpose of comparison only

Operation - Only one drop down exists ("Comparison against"). This can be accessed by selecting the cell and clicking on the downward-pointing triangle to the right of the cell.

Interpretation of results - No results to interpret

4.4 Dashboard sheet

Purpose - The purpose of this sheet is to input maturity scores for each of the CIM elements and present outputs that:

- Enable comparison against previous year's performance
- Monitor progress against a user-defined target

Data Inputs - The data inputs required are as follows.

Cell Title	Description	Input format	Where input is used
Results Year (the heading uses the freeform entry from the Title sheet)	Column contains the maturity score for each of the CIM elements	Whole numbers from 1-5. If the criterion is not applicable to your organisation, enter 'n/a'	 Displayed in the graphs on the same sheet
Target	Column contains the target maturity score for each of the CIM elements (default = 4)	Whole numbers from 1-5. If the element is not applicable to your organisation, enter 'n/a'	 Displayed in the graphs on the same sheet

Note that the format of the cells in the Results Year column does not follow the standard formatting shown in 4.2. These cells have conditional formatting so change colour according to the value entered in each cell.

Operation - In order to determine the appropriate score for each element, please refer to section <u>2.3 Step 6</u>. This provides guidance on the levels of attainment that align with each score.

Once data has been entered for a given year, it can be saved by clicking the button labelled 'Save [year] data?' If data already exists for that year, the label will read 'Overwrite [year] data?' Only click this if you are happy to overwrite the previous version of the data. If you are not, return to the Title sheet and change the input for 'Results Year'. Appending the relevant quarter or period would enable you to distinguish between the different data sets. Note that, because the workbook is locked, users cannot click on the graphs to enable them to be copied. Instead, highlight the cells within which the graph lies, and click Ctrl+C to copy. This can be pasted into another application such as MS Word or PowerPoint, as has been done below. It is recommended that you paste the graph as a 'Picture'.

Interpretation of results - The Dashboard contains a variety of outputs. The first shows the results for each element, for both the results year and the comparison year, as demonstrated below. The component within which each element sits is also listed. The data in the Results year is colour coded according to the score of that element.

Illustrative CIM Maturity table with data for 2020 and comparison against 2019 results.

Criterion	Segment	2019	2020	Target	
Leadership	LEADERSHIP, POLICY & GOVERNANCE	3	4	4	•
Policy & Strategy	LEADERSHIP, POLICY & GOVERNANCE	4	3	4	•
Governance	LEADERSHIP, POLICY & GOVERNANCE	4	4	4	
Partnerships	CO-OPERATION & CAPABILITIES	3	3	4	•
Organisation & Resources	CO-OPERATION & CAPABILITIES	4	4	4	•
Roles & Responsibilities	CO-OPERATION & CAPABILITIES	5	5	4	•
Customer Communication Needs & Segmentation	DELIVERY ARRANGEMENTS	3	4	4	•
Information Provision – Requirements, Processes & Plan	DELIVERY ARRANGEMENTS	4	4	4	•
Applicable Operational Processes & Plans	DELIVERY ARRANGEMENTS	4	4	4	•
Operational Decision Criteria During Disruption	DELIVERY ARRANGEMENTS	4	4	4	•
Instructions & Customer Guidance During Disruption (in	DELIVERY ARRANGEMENTS	2	3	4	1
CSL2 Arrangements	DELIVERY ARRANGEMENTS	4	4	4	-
Formulation of Messages - One Version of the Truth	DELIVERY ARRANGEMENTS	3	3	4	•
Customer Information Channels/Interfaces	DELIVERY ARRANGEMENTS	4	4	4	•
Amended Timetables - Pre-Planned & Short Notice Tem	DELIVERY ARRANGEMENTS	5	4	4	
Major Timetable Change	DELIVERY ARRANGEMENTS	2	3	4	1
Access to Alternative Routes	DELIVERY ARRANGEMENTS	4	4	4	-
Clarity of Communications	DELIVERY ARRANGEMENTS	3	3	4	-
Relevant Operational Systems	IT SYSTEMS & FUNCTIONALITY	4	4	4	-
Internal & Customer Facing Information Systems	IT SYSTEMS & FUNCTIONALITY	5	4	4	
3rd Party Data Access arrangements	IT SYSTEMS & FUNCTIONALITY	3	4	4	•
Job Specifications (Attitude & Skills)	PEOPLE MANAGEMENT, DEVELOPMENT & INVOLVEMENT	4	4	4	-
Recruitment & Training	PEOPLE MANAGEMENT, DEVELOPMENT & INVOLVEMENT	4	4	4	-
Accreditation & Competence Assessment	PEOPLE MANAGEMENT, DEVELOPMENT & INVOLVEMENT	1	3	4	1
Internal Key Performance Indicators	CUSTOMER FOCUSED RESULTS	4	4	4	-
People Results	CUSTOMER FOCUSED RESULTS	3	3	4	-
Customer Results	CUSTOMER FOCUSED RESULTS	4	4	4	-
Societal Results	CUSTOMER FOCUSED RESULTS	5	5	4	-
Real-time Feedback & KPIs	MONITORING, REVIEW & REFINEMENT	3	5	4	1
Internal and External Quality Assessments	MONITORING, REVIEW & REFINEMENT	4	4	4	•
Independent Quality Assessments	MONITORING, REVIEW & REFINEMENT	4	4	4	•
Structured Incident Reviews (Incident/information)	MONITORING, REVIEW & REFINEMENT	4	4	4	-
Independent Research Reports	MONITORING, REVIEW & REFINEMENT	4	4	4	-
CIM Assessments	MONITORING, REVIEW & REFINEMENT	1	1	4	-

The data in the Results year is highlighted according to the score of that element.

Score	Colour
n/a	
1	
2	
3	
4	
5	

The icons alongside the Target column show how that specific element criterion compares to last year (in this case, 2019).

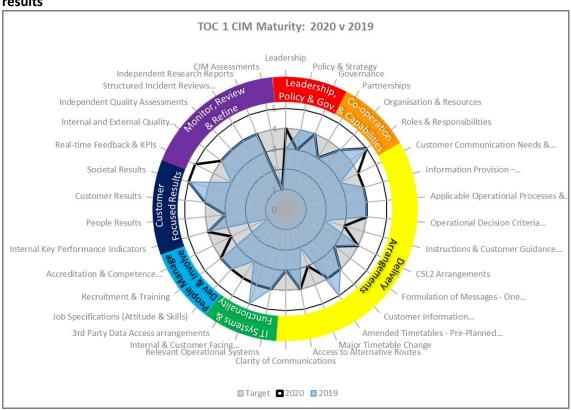
Score versus previous year	Icon
Improvement	1
Deterioration	•
No change	-

The colour of that icon shows how that specific element compares to its target.

Score versus target	Colour
Below target	
Meeting or exceeding target	

The detail from the table above is also displayed graphically in a web diagram (see below). The formatting allows the user to easily compare the results year (solid black line) against the target (grey shaded area) and the previous year (blue shaded area).

Illustrative CIM Maturity web diagram with data for 2020 and comparison against 2019 results



- The table contains icons and colour coding that demonstrate progress against targets or previous years; the graph alongside the table presents the same information
- Summary of the results aggregated to segment level; the graph alongside presents the same information

The second table on this sheet shows the results for each component, for both the results year and the comparison year, as demonstrated below. This is calculated as an average from the table above, so decimals are possible. All colour coding is consistent with the previous table

Segment	2019	2020	Target	
LEADERSHIP, POLICY & GOVERNANCE	3.7	3.7	4.0	•
CO-OPERATION & CAPABILITIES	4.0	4.0	4.0	-
DELIVERY ARRANGEMENTS	3.5	3.7	4.0	•
IT SYSTEMS & FUNCTIONALITY	4.0	4.0	4.0	•
PEOPLE MANAGEMENT, DEVELOPMENT & INVOLVEMENT	3.0	3.7	4.0	1
CUSTOMER FOCUSED RESULTS	4.0	4.0	4.0	-

This table is also presented graphically, as demonstrated below:

