



The Golden Thread Healthcheck

WHAT DOES IT GIVE YOU?

• Short term – better performance management

Our recommendations lead to clearer, simpler, more useful plans and clearer, simpler, more useful performance reports. Your plans and reports will reflect your single outcome agreement, and will be more SMART – **S**pecific, **M**easurable, **A**tttributable, **R**elevant and **T**imebound.

• Short term – confidence

Confidence that your single outcome agreement sits on a set of performance management arrangements that have been checked and are solid (or will be after implementing our recommendations).

• Medium term – better performance

Performance improves if you are crystal clear at all levels about what you want to achieve. Better accountability and scrutiny helps drive improvement in performance too. In addition, better reports mean that you are able to demonstrate that your performance on outcomes is indeed improving. This should lead to reduced external scrutiny attention.

WHAT CAN IT COVER?

Expert, constructive, straightforward advice & support on:

Corporate and Service Planning

- Strengthening objectives – making sure that your objectives are SMART and deal with outcomes as much as possible
- Making sure that your outcome agreement is reflected in your service plans
- Ensuring development projects **and** the quality of service delivery are both covered
- Ensuring the implications for services of national/local developments are covered.

Performance information

- What measures do you need to make sure you deliver your outcome agreement?
- Getting the Goldilocks mix (just the right number, not too many, not too few) of delivery, efficiency, equality, customer satisfaction, and sustainability indicators
- Setting performance information in context – time trends and comparisons with other councils
- Helping staff understand the different types of indicators and which ones they need when.

Reporting performance

- What aspects of performance need to be reported to which audiences? Are you sure outcome agreement indicators in your performance reports are covered?

- How to make sure your performance is reported in a clear and balanced way that supports accountability and effective scrutiny.

WHAT DO WE DO?

We start with an **in-depth meeting(s)** to understand where you are and what you are looking to develop. Each assignment is different, reflecting the different starting point, situation and context of each council. We'll then write up a **detailed proposal** setting out **what we plan to do and why**, together with a **clear breakdown of time/cost** against each element of work.

As a rough guide, our experience so far suggests **between 14-16 days** are required for a 'healthcheck', covering your Single Outcome Agreement, council plan and top tier service / departmental plans. For development or critical friend review work, the time required just depends on your needs - we have completed pieces of work lasting between **2 – 30 days**. If the proposal is acceptable to you, we will carry out the work, **keeping in regular contact** with you to let you know what's going well and identifying any issues that arise.

We will then discuss with you what we are finding, and what **improvements** we think you should be making. Depending on the work involved we will use:

- Detailed review and analysis of your plans and reports
- Facilitated workshops
- One to one interviews – either telephone or face to face.

We can help you to make changes, working as an extra pair of hands for corporate policy, or in a critical friend role, supporting your staff. We also have a growing bank of information on how good councils across UK handle different aspects of performance management.

WHO DOES IT?

Lesley Bloomer and Karen Chapman deliver this work. Both are experts in performance management and, crucially, have the ability to work alongside staff to help them understand why changes are needed and how to make them. Karen and Lesley generally work as a team but on occasion undertake assignments individually depending on existing work commitments, clients' needs and the scale of the project.

For further information please contact the Resource Centre. You can either phone on **0845 601 0649** or email resource.centre@solaceenterprises.com

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The Golden Thread Healthcheck: UPDATE

CURRENT / COMPLETED WORK IN SCOTLAND

Perth and Kinross Council (2008)

Over summer 2008, Lesley was engaged as Interim Head of Strategic Change and Improvement at Perth and Kinross Council. Work included:

- Finalising SOA with Community Planning Partners and Scottish Government.
- Development of approach to ensure that SOA commitments are delivered. This included (1) tightening up and streamlining of service and other plans and (2) development of an approach that used the SOA as a basis for locality planning and public performance reporting.
- Draft Best Value report - reviewing and suggesting justified amendments of the draft to the audit team. The great majority were accepted.
- Review, from a performance management viewpoint, of work to raise education attainment.

Main Client Contact; Bernadette Malone, Chief Executive.

East Dunbartonshire Council (2008)

Reviewed the quality of service plans and how well they tied in with the commitments made in the corporate and community plans. We also reviewed how well targets were used to improve performance.

In detail, during a 9 day assignment, we reviewed a sample of service plans:

- Analysed to check if they covered commitments made in the corporate and community plans.
- Reviewed the strength of objectives – ie were they SMART, outcome focused?
- Examined the sets of indicators being used to report on performance – did they cover outcomes, efficiency, equalities, sustainability and so on?
- Looked at how well targets were used in driving performance up.
- Presented our results and recommendations to the corporate management team and to all service heads.

Main Client Contacts; Sue Bruce, Chief Executive and Tom Duncan, Policy and Public Affairs.

Renfrewshire Council (2008)

As part of a wider, multi-disciplinary team reviewing service level budgets, Karen completed a “mini” golden thread exercise reviewing current planning guidance, its implementation, performance monitoring and reporting against plan. A range of improvements to strengthen planning and reporting were put forward and critically recommendations to improve the link between financial and performance reporting were made. Following this work Renfrewshire revised their service planning guidance to make the links between Council and service priorities and actions / measures much more explicit.

Main Client Contact: Ron Morrison, Head of Policy.

West Lothian Council (2008)

We looked at how West Lothian planned, managed and reported their performance. This covered both corporate and service levels and also at how locality performance worked. Councillors’ roles in approval of plans and scrutiny of performance were considered in detail.

In detail, we:

- Met with staff from all services to discuss what worked well (and less well) in performance management.
- Analysed plans and performance reports from all services to assess linkage to corporate plans, choice of indicators, use of targets and so on.
- Reviewed the role of councillors in approving plans and scrutinising performance.
- Considered whether the relevant recommendations made in the council’s Best Value report had been satisfactorily addressed or not.
- Presented our findings and recommendations to the Chief Executive and to the Management Team.
- Prepared a short written report on the findings of our work and our recommendations for improvement.

In follow-on work, we provided “critical friend” expert analysis of proposals to further develop service planning and performance reporting.

Main Client Contact; Jim McIvor, Best Value.





The Golden Thread Healthcheck: UPDATE

Aberdeen Council (2008)

At a time of significant pressure on management to improve clarity and transparency Karen completed a short assignment with the Head of Performance Management. This covered:

- Quality and coverage of current service planning guidance.
- Links between the corporate plan and a sample of service plans and extent to which plans are SMART.
- Range and type of measures used to monitor performance.
- Clarity and coverage of management reports – can they tell if they'd done what they said they would?

Main Client Contact: Martin Murchie, Head of Performance Management.

South Lanarkshire Council (2007/2008)

Initially invited to pilot the Golden Thread Healthcheck, looking at the council plan and one resource plan.

During our 12 day review, we:

- Reviewed the community plan and the links between it and the council plan.
- Reviewed the council plan (2003-2007) and annual reporting framework for clarity of objectives, quality and coverage of performance measures used and simplicity and roundedness of reporting.
- Examined the extent to which the council plan drives resource plans using one resource as a sample. For example, do the objectives “cascade” from council to resource to service? Are the same measures used consistently? Is accountability clear?

Following this pilot we have been asked back to undertake a number of assignments for SLC. Over the past year we have:

- Worked with Corporate Management Team and senior managers to develop council plan with clear priorities, outcome measures and rounded reporting.
 - o Workshop with Corporate Management Team to identify structure and their priorities for 2007 – 2011 council plan.
 - o Detailed review of draft council plan to help ensure outcome focus and consistency between different areas of work.
 - o Development of framework for reporting progress in implementing the council plan.
- Worked with service management teams to ensure (1) all service plans were SMART, clear and directly driven by the council plan and (2) performance reports are clear, balanced, user-friendly and produced in an efficient way.
 - o Development of new service plan format for 07/08 plans, realignment of 07/08 service plans to new council plan and development of mid-year progress reports against plan.
 - o Work with staff from all services to support development of consistently clear, robust service plans for 08/09.
 - o Development of new reporting framework for service plans ensures reporting is robust, ie balanced, and done in context of time trends and performance of other councils.
 - o Work with directors and their staff on developing service plans and performance reports. We have got to know the services and their issues, yet we also retain an expert independent and corporate view of what is needed. So, the result is service plans that are consistently good.

Main Client Contacts – Linda Hardie, Deputy Chief Executive; Helen Black, Financial Performance Manager.





The Golden Thread Healthcheck: UPDATE

Fife Council (2007)

Looked at performance planning and reporting, with a particular emphasis on what was happening at departmental level as well as links between community, council and service plans. We pulled out areas that were good, and set out straightforwardly some things that needed to be improved.

In detail, during a 16 day assignment:

- Examined links between the different levels of plans – community, council and services to see if it was possible to track what was happening to achieve what ends.
- Met with directors to discuss what worked well and what not so well in performance planning and reporting.
- Examined the quality of service plans – were there clear priorities / SMART targets and so on.
- Looked at what information was reported on performance – both to council management team and to committees.
- We were also happy to provide advice requested during the work on the developing council plan and on new service plan formats.

Following this work, the council then asked us to develop individual feedback reports for each of the services reviewed to help ensure that new service plans took on board the necessary improvements. The reports are balanced, identifying what works well in the plans and what should be developed further. Since then, individual services have requested additional tailored performance management support.

**Main Client Contacts – Ronnie Hinds, Chief Executive;
Paul Vaughan, Strategy and Information Manager.**

Glasgow City Council (2007)

We conducted a review of Glasgow's performance planning and reporting. The review highlighted to the Chief Executive and his team what was working well and where improvements could be made.

In detail, during a 14 day review:

- Reviewed council plan – in particular looked at how clear priorities were and whether reporting to councillors/management was clear and balanced.
- Examined linkages between council and service plans – looked to see if it was possible to track how services would achieve council aims.
- Examined the quality of service plans – whether there were clear priorities/SMART targets, output/outcome focus and so on.
- Examined plans and reporting to Corporate Management Team/committees at service level to see how clear and balanced reporting was.
- Looked at Glasgow's approach to performance planning in a number of areas compared to Liverpool.
- Presented and discussed findings with Chief Executive and subsequently, Corporate Management Team.

Main Client Contact – Dawn Corbett, Head of Corporate Policy.

Current Work (July 2008 – present)

We are currently working with South Ayrshire Council on a full review of performance management starting with introductory sessions with the Chief Executive, Corporate Management Team and Heads of Service to review best practice principles and agree the planning approach to be taken forward.

**Main Client Contacts: David Anderson, Chief Executive;
Peter Linton, Performance Manager.**

