

Report on outcomes from the workshop on the Partnership's Performance Management Framework, 30 January 2009

1. Introduction

- 1.1. Partners were invited to attend a workshop to discuss the new Performance Management Framework for the Children and Young People's Plan and to explore the best ways to gather quantitative and qualitative data from reporting templates.
- 1.2. The following projects/organisations attended:

Mel Davies	Barnardo's	Participation Coordinator
Bethan Hughes	Library Adviser	Denbighshire County Council
Jane Shakespeare	Public Health Practitioner - Healthy Sexuality	West Rhyl Young People's Project
Barbara Bell	Project Co-ordinator	Action for Children

- 1.3. Attendees work with a range of ages and with children and young people with different needs. This allowed for lively discussion and awareness of different experiences and practices.

2. Presentation and discussion on the new Performance Management Framework agreed by the strategic Partnership on 23 January 2009

- 2.1. Emma Banfield, Policy Planning and Performance Officer, presented the Framework and obtained positive feedback from the group on the Framework.
- 2.2. Attendees felt that the key elements of the Framework, such as **accountability** by identifying lead reporters, would be important to ensure its effectiveness.
- 2.3. They welcomed the **simple, visual** approach of Red, Amber and Green and smiley faces and arrows to indicate whether trends are 'good' or 'bad'.
- 2.4. In terms of how performance information is requested, attendees felt that requesting **quarterly** updates for Cymorth-funded projects would be fine. Attendees felt that really important requests could be sent by email with appropriate persons copied into emails, but that they could also be sent by letter.

3. Performance reporting template

- 3.1. Attendees felt that there needed to be read across with the reporting templates used by **Flying Start**; especially where projects deliver services using Flying Start and Cymorth grants.

Recommendation: Emma Banfield to discuss the issue further with Frances Taylor, Flying Start Coordinator.

- 3.2. Attendees felt that it was very useful to request projects comment on any **delays/risks** to targets/outcomes measures being met and provide a **future forecast** (although it needs to be clarified whether an overall forecast or a forecast for each priority is requested). However, they felt the columns asking 'How well was it done?' and 'Are children and young people better off?', could be problematic. They felt without auditing and inspecting, projects might report to achieve a range of outcomes for children and young people in Denbighshire when either that has not been the case or when it just cannot be **proven**.
- 3.3. The group also felt that asking for evidence of outcomes being achieved every quarter was **'overkill'**, as some outcomes take a considerable length of time to manifest. It can be particularly difficult for projects to regularly monitor outcomes/impact when they are run on a drop-in/confidential basis.
- 3.4. It was felt that some projects are backed up by **national and international research** that proves good outcomes are achieved for children and young people when they have access to services, support and guidance. It was felt that projects should be more inclined to use this national research as strong evidence of the outcomes there project achieves. However, it was noted that a **local dimension** and **evidence of outcomes and impact** achieved for local children and young people was still needed. Part of need to demonstrate outcomes locally is an audit of the quality of services – are they delivered well, are staff trained and qualified, do they have CRB checks, feedback from children and young people, their families and carers etc. (Part of this is encompassed with the self-assessment tool produced by the Partnership: see here <http://www.denbighshire.gov.uk/en-gb/DNAP-7NRFKG>.)
- 3.5. **Case studies** were felt to be a useful way of capturing the difference a project can make to the lives of children and young people. **Distance-travelled exercises** were also felt to be useful, although they require a degree of planning and organisation that cannot always be achieved.
- 3.6. Attendees said their own organisational reporting systems, especially **software**, can be unwieldy and is only as good as the information that is fed into it. The group felt though that the

proposed reporting template could be completed relatively easily by their organisation.

- 3.7. It was agreed that a template in **MS Word** would be easiest to use, although the use of logos should be limited due to the disk space they require. Furthermore, the template should be workable, ie cells expand when they need to.

Recommendation: Emma Banfield to amend template in light of discussion (see annex 4).

4. Finance reporting template

- 4.1. Attendees welcomed the fact that the finance reports were now **cumulative**, and included previous quarter's finance reports.
- 4.2. Attendees said **MS Excel** was the most convenient format for the finance returns as they allow automatic calculations.
- 4.3. While it was accepted that the finance reports could not be altered greatly, attendees suggested amendments that would make them easier to complete. Such as:

- Explanations of **terms**, eg what to include in staffing costs (travel for instance)
- Include internal **transfer sheet** as an additional tab in the same spreadsheet workbook for projects/services within Denbighshire County Council.

Recommendation: Emma Banfield to amend template in light of discussion.

5. Capturing other important achievements

- 5.1. The group also discussed the value in capturing **accreditation** and awards (for children and young people, and staff and volunteers), developments in **basic skills**, the use of the **Welsh** and other languages, whether children and young people **participate** and **have a say** in services. It was felt these were such valuable achievements that are insufficiently shared and celebrated. The group agreed that these could be incorporated into the 'Are children and young people better off?' section as probes.

Recommendation: Emma Banfield to amend template in light of discussion.

6. Conclusions

- 6.1. Attendees welcomed the new performance management framework and felt it incorporated all the elements needed to suit the Children and Young People's Plan and the Partnership.
- 6.2. The new reporting templates were a good start on monitoring the impact and outcomes projects have on children and young people, their families and carers but further tweaking was needed to improve them and recognise that outcomes are not achieved immediately and therefore cannot be monitored quarterly.
- 6.3. Attendees understood that Denbighshire County Council needed certain financial information in order to meet the requirements of managing public funds. Further improvements could be made though to reduce burden on those that complete them.

Annex 1: Workshop agenda

1. Welcome and introductions

2. Presentation and discussion on performance management framework for the Partnership

3. Reporting templates

- a. How does your organisation already capture performance for its own purposes and for funders?
- b. What do you think should be the main elements of a quarterly performance report?

4. What do you think of these?

- a. Proposed draft quarterly monitoring template
- b. Existing financial monitoring template

5. Do you have any comments, suggestions, ideas?

- a. Should we capture accreditation, basic skills, use of Welsh, participation and rates?
- b. If so, how and how often?

Annex 2: Performance reporting template

LEAD OFFICER:		DATE:	
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R	<p>a. Major barriers to task completion</p> <p>b. Time slippage of more than 2 months from key milestone</p>	A	<p>a. Minor barriers to task completion</p> <p>b. Time slippage of more than 1 month from key milestone</p>	G	<p>a. No barriers to task completion</p> <p>b. No time slippage</p>
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	Outcome measure or target	What's been done before? What's the story behind this figure?	How much have you done this quarter?	Have you experienced any delays? If so, describe what they are and how you will overcome them.	How well has it been done?	Are children and young people better off? How do you know?	What's your weather forecast for the next 3-12 months? Think about risks and changes	R A G STATUS
Examples	1.1.3	91.5% immunisations uptake in 2007-8. The uptake we low because immunisations was not available in community settings across the whole county.	20% immunisations achieved	Referrals have been slow but we have met with community groups for better information to be supplied to parents	We are improving but our links with community groups still needs developing	Children and young people are receiving immunisations to safeguard their health, in time. But too few parents are coming forward.	Cloudy! One member of staff is going on maternity leave. We will second someone to her post.	A
	5.2.7	The encouragement of the social use of Welsh has not been successful in the north of the county.	2 sessions held with children in Rhyl to encourage their use of Welsh while playing sport. 20 children attended the	None.	These events were extremely successful so far but only boys are attending.	Children completed a 'distance travelled' game before and after the sessions and the evidence has been attached. Children said they felt more confident in using their Welsh language skills as it was encouraged in an informal, non-classroom environment. Children felt less self-conscious in	Good	G

Outcome measure or target	What's been done before? What's the story behind this figure?	How much have you done this quarter?	Have you experienced any delays? If so, describe what they are and how you will overcome them.	How well has it been done?	Are children and young people better off? How do you know?	What's your weather forecast for the next 3-12 months? Think about risks and changes	R A G STATUS
		sessions.			expressing their Welsh identity with their peers.		

Annex 3: Financial reporting template

PROJECT Number DEN XX Project XX								
PROJECT MANAGER:								
Total Grant 2008 - 2009		£ 10,000.00						
Expenditure	1st Quarter 1st April- 30th June 2008	2nd Quarter 1st July- 30th Sept 2008	3rd Quarter 1st Oct - 31st Dec 2008	4th Quarter 1st Jan - 31st March 2009	Total Expenditure	Grant Allocation	Variation	PROJECTED UNDERSPEND
Revenue costs								
Premises costs	£250.00	£0.00	£0.00	£0.00				
Staffing Costs	£500.00	£0.00	£0.00	£0.00	£500.00			
Service provision costs	£800.00	£0.00	£0.00	£0.00	£800.00			
Administration Costs	£250.00	£0.00	£0.00	£0.00	£250.00			
Management costs	£50.00	£0.00	£0.00	£0.00	£50.00			
TOTAL REVENUE	£1,850.00	£0.00	£0.00	£0.00	£1,850.00			
TOTAL CAPITAL	£0.00	£0.00	£0.00	£0.00	£0.00			
TOTAL CAPITAL & REVENUE	£1,850.00	£0.00	£0.00	£0.00	£1,850.00	-£10,000.00	-£8,150.00	-£8,150.00

completed by
(name & position)

Supporting Information and
Evidence Provided
(please list)

Date of Return:

Annex 4: Amended performance reporting template

Don't forget to tell us about accreditation (of CYP, staff/volunteers), improvements in basic skills, use of Welsh and participation!

LEAD OFFICER:		DATE:	
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R	c. Major barriers to task completion d. Time slippage of more than 2 months from key milestone	A	c. Minor barriers to task completion d. Time slippage of more than 1 month from key milestone	G	c. No barriers to task completion d. No time slippage
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	Outcome measure or target	What's been done before? What's the story behind this figure?	How much have you done this quarter?	Have you experienced any delays? If so, describe what they are and how you will overcome them.	How well has it been done?	Are children and young people better off? How do you know?	What's your weather forecast for the next 3-12 months? Think about risks and changes	R A G STATUS
Example header row to be at the top of every template as guidance	This is the place to put the action number, eg 1.1	If your project is a new Cymorth-funded initiative, you will only be asked to provide this information once. It will give a 'baseline', an indication of what your performance has been previously.	Can be numerical or a narrative of what you've achieved. Remember you will be asked to submit evidence of this from time to time...	Can be staffing, time of the year etc. Anything of relevance!	Eg are staff receiving more/new training? Or do you need do something new to improve quality? Remember you will be asked to submit evidence of this from time to time...	Has this action made a difference yet? It's okay if it hasn't, just say need more time for children and young people to feel affects, or that you need more time to measure the outcomes etc. Feel free to provide case studies. You may have access to specific national/international research that backs up the positive impact your project has. Remember you will be asked to submit evidence of this...	This can for your project as a whole or you may find that different issues affect different actions. Use this column in a way that best helps you to tell us what's happening.	Use this column to say whether progress against the action is red, amber or green. Use the key above to help you decide.