



Performance Management

How public sector organisations in Scotland
can meet their increasing challenges

A Charteris White Paper

CHARTERIS

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The background

The Scottish Government has set demanding performance targets for all public sector bodies as it pursues its strategic objectives for a wealthier and fairer, smarter, healthier, safer, stronger and greener Scotland.

High level targets for improved economic growth and productivity, and a reduction in inequalities, are underpinned by an ambitious set of national outcomes, indicators and targets, which all public bodies – in both central and local government – are expected to work together to achieve.

A new partnership approach to the relationship between central and local government is reflected in the outcome agreements, which local authorities have prepared in return for a relaxation of the detailed central government monitoring systems – a feature in recent years.

As an indication of its commitment to achieving its purpose, the Government has published a national performance framework to track progress.

Meanwhile those public bodies responsible for delivery have been set ambitious targets for efficiency savings to be achieved by 2011. The pressure on all public bodies – central government, local authorities, non-departmental public bodies and the NHS – to fulfil the Government's high level aims, and to deliver high quality services while freeing up resources for re-investment in those services is therefore intense.

A relentless drive for improved services and greater efficiency, backed by effective performance management, are key features in the delivery of public services at national and local level in Scotland. The challenge to public service managers to manage their organisations' performance to deliver service excellence and cost efficiency side by side is becoming ever more intense.

Rising to the challenge will require strong leadership, a willingness to seek new solutions to service delivery, and effective performance management. It will also require a deeper understanding of the potential benefits ICT can offer to support business change and squeeze out cost.

Charteris' experience of working within the public sector in a variety of innovative endeavours makes us extremely well-placed to help leaders and managers meet that challenge.

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The major challenges facing public sector organisations in Scotland

Delivering national outcomes whilst improving service excellence and achieving cost efficiencies present further challenges for leaders and managers in the public sector.

Key priorities include:

Efficiency savings

- ◆ Efficiency savings of 2% per annum need to be identified and realised from human resource, structural, process and technological changes at the same time as processes require re-orientation to become more outcome focused. This means focusing hard on those activities that add value and deliver results, and challenging existing practice and procedures to minimise inefficiencies.

Performance Management changes

- ◆ Business planning processes need to be shaped to support the outcome-based approach. This requires the alignment and integration of planning processes to achieve set outcomes while ensuring effective delivery and continuous improvement of services.
- ◆ Efficient and appropriately targeted performance management regimes must be defined and implemented. This means devising an outcome based performance framework not only to report on agreed targets but also to establish a balanced methodology that has a real impact on the day to day actions that deliver effective performance.
- ◆ Effective governance must be established and supported by robust internal controls and risk management. This means being clear about accountability and responsibility for agreed outcomes, and establishing regimes for effective information sharing.

Cultural change

- ◆ The implications of change for organisational culture need to be considered to ensure that new approaches and new systems are successfully and permanently implemented. This requires clear vision: a culture that anticipates change and the active management of a change programme to ensure outcome-focused performance becomes effectively embedded.

Effective working with Partner organisations

- ◆ More robust and collaborative working relationships need to be established with partner organisations to ensure the joint delivery of outcomes. This means ensuring information and reporting are managed across partner organisations and that cross-partner business processes function effectively to deliver shared objectives.

Which issues affect you?

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- ◆ Efficiency savings need to be delivered?
- ◆ Business planning processes need to be orientated to support the outcome-based approach?
- ◆ Efficient and appropriately targeted performance management regimes must be defined and implemented?
- ◆ Effective governance must be established?
- ◆ The impact of change on organisational culture needs to be considered?
- ◆ More robust and collaborative working relationships need to be established with partner organisations?

Charteris' outcome-based consultancy can provide the solutions to these problems.

The Charteris solution to outcome-focused performance management

How aligned are your processes and people to delivering on the Single Outcome Agreements?

Research suggests, as does our experience of activity analysis within major organisations, that as much as 50 to 70% of internal effort expended does not in fact add value in delivering the organisation's desired outcomes.

This not only wastes scarce resources but is also highly damaging to service delivery, frustrating for customers and citizens, and, most importantly, distracts from achieving agreed outcomes.

Charteris outcome based consultancy can provide the solution to this problem.

1. Outcome Based Process Improvement

Our Customer Centricity programme, which is part of a complete set of organisational change management solutions from Charteris, provides a framework to align your organisation structure, information and processes to deliver services to both customers and citizens in the successful attainment of agreed local outcomes.

Working with you and your partner organisations, Customer Centricity puts the customer at the heart of your organisation, to enable enhanced customer and citizen services whilst achieving efficiency improvements.

2. Performance Indicator Design and Result Interpretation

From the design of a coherent suite of performance indicators to the implementation of performance management solutions, Charteris can provide expert help to promote a common understanding of key organisational performance indicators and targets.

3. Change Management

As experts in business agility – the ability to respond quickly and effectively to change – Charteris can help your organisation and people develop the outcome-focused behaviours and culture that will ensure successful change, both in the immediate future and longer term.

4. Solution Engineering

From systems that enable effective partnership collaboration to customer relationship management solutions, Charteris can design and implement a number of IT solutions utilising a variety of new and exciting Microsoft enterprise applications.

Benefits for public sector organisations – at a glance?



- ◆ Efficiency savings of more than 30% at Wiltshire County Council
- ◆ Improved collaboration with partners at West Lothian Council
- ◆ Better understanding of how to monitor performance at Wandsworth Council
- ◆ More effective and efficient reporting mechanisms at Ealing Council
- ◆ Reduced demands on performance management teams at Worcestershire County Council
- ◆ Improved customer service at Wiltshire County Council

Charteris solutions in action

Case study 1: Wiltshire County Council

Productivity improvements of over 30% identified

Wiltshire County Council has a strong commitment to change. Rather than simply delivering services, it wanted to put customers right at the very heart of everything that it does. Through the creation of a customer-centric organisation, Charteris identified that Wiltshire County Council can make potential productivity improvements of over 30% and benefit from significant annual cost savings. As part of the project, Charteris conducted 'voice of the customer' workshops to help the council better understand customer needs and preferences. Charteris then helped the council to interpret this feedback and use it to shape the processes and organisational structures of the new customer-focused business.



“Charteris’ whole approach is centred on the customer and inclusive of employees. In two years’ time, I expect customers to be much more satisfied with the services that we deliver.”

Sue Redmond,
Director of Community Services,
Wiltshire County Council

Case study 2: West Lothian County Council

Helping to fulfil a vision of collaborative working

Public sector organisations in West Lothian are embarking on a new period of co-operation. In order to improve services and generate efficiencies, a new Civic Centre is being built to provide joint headquarters for the local council, courts, police and other organisations. However, before the partners can share an office facility, they first have to share responsibility for managing the build. Charteris implemented Microsoft’s SharePoint Server solution to enable centralised document and project management which has paved the way for a new era of collaboration.



“Charteris has delivered a true enabling technology that is helping us to fulfil our vision of collaborative working.”

Roberto Riaviz,
Technical Strategy Manager, West
Lothian Council.

Case study 3: Worcestershire County Council

Improving the availability and accuracy of data for performance reporting

Worcestershire County Council is justifiably proud of its record for delivering high quality care for adults in the community. As part of a programme to further improve its services, the council had just gone live with a new case management system and there was a real concern that the council’s performance might fall in the first few months while staff got used to the new system. Charteris validated the data to ensure its accuracy, and advised the council about how best to collect and compile data for performance reporting.












“Charteris has played a very important role in helping Worcestershire County Council to embed its new case management system and streamline its performance reporting”

Jenny Bashforth,
Director of Adult and Community
Services, Worcestershire County
Council

Case studies

Charteris has undertaken a number of strategic engagements with central and local government:

<p>West Lothian Council</p> <p>Improving inter-departmental collaboration through the introduction of SharePoint services.</p>	
<p>The Improvement Service</p> <p>Pilot for improving inter-departmental collaboration through the implementation of SharePoint services.</p>	
<p>Wiltshire County Council</p> <p>Performance improvement programme for the provision of adults' services.</p>	
<p>Wandsworth Council</p> <p>Performance reporting improvement and delivery of a case management system to the adults' services department and ongoing advice on performance reporting and data integration.</p>	
<p>Ealing Council</p> <p>Delivery of a case management system to serve children's and adults' services and ongoing advice on performance reporting.</p>	
<p>Department for Children Schools and Families</p> <p>Managing the requirements for ContactPoint.</p>	
<p>Harrow Council</p> <p>Delivery of a case management system to serve children's and adults' services.</p>	
<p>Croydon Council</p> <p>Advice on performance reporting.</p>	
<p>Greenwich Council</p> <p>Advice on performance reporting and data integration.</p>	

About Charteris

Charteris is a specialist in business change, delivering true enterprise agility through the strategic application of technology.

Operating at a range of levels, from strategic advice to bespoke software development, we help public sector organisations gain real benefit from technology-enabled change programmes. We recognise that all organisations, both public and commercial, need to be more responsive, or agile. This means being more responsive to external change, such as changes in the market, new legislation or externally directed organisational change.

Charteris helps organisations to make significant improvements in service to the customer or citizen by identifying opportunities to re-direct staff and facilities into high value-add activities. It achieves this through a structured self-assessment approach that ultimately delivers significant financial benefits to the organisation and improvements in service to the citizen.

To find out more about any of Charteris' services to Government please contact:



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A selection of
Charteris clients:

ArmorGroup International
Cabinet Office
Criminal Justice IT
Croydon Council
Crown Office and
Procurator Fiscal Service
Ealing Council
Greenwich Council
Harrow Council
Perth and Kinross Council
Wales & West Utilities
Wandsworth Council
West Lothian Council
Wiltshire County Council
Worcestershire Council

For case studies and white
papers please go to
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