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Creating a performance culture at Allerdale Borough Council

Allerdale borough council

A case study by Sam Cartwright, Senior Corporate Improvement Officer, Allerdale Borough Council

Context

The borough of Allerdale is located in the north west of Cumbria and covers an area of 1,258 square kilometres and, with a population of 94,500, it is a relatively sparsely populated borough. Its challenges are its contrasts with urban areas, dispersed farms, forests and lakes and its rural coast. There are areas of deprivation, tourism and affluence. Population projects show growth and above national residents over retirement age.

The project

2006 saw Allerdale Borough Council's (ABC) first Corporate Plan turning our vision, 'Allerdale, a great place to live, work and visit' into reality through the development of our first Corporate Improvement Plan (CIP). The plan continues to be refreshed to retain our focus on what's important for our communities.

We needed a performance management system which would support the development of a robust performance management culture and drive forward the achievement of our aims. We got what we were looking for with Covalent and set about transforming the culture of the organisation, using Covalent as the driver.
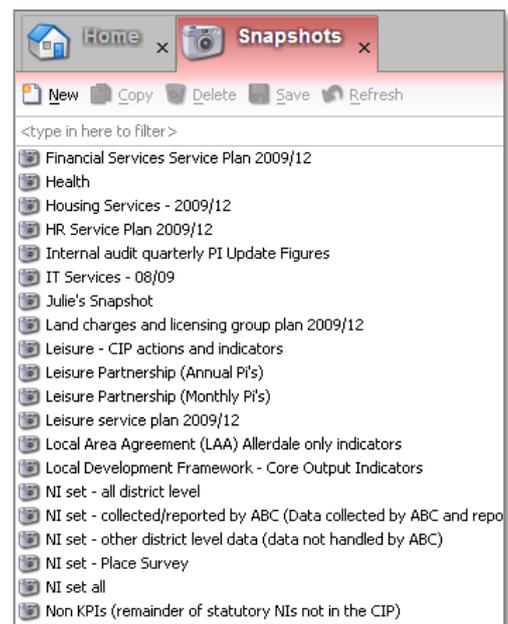
YC Change Consultants were providing senior interim management support and, as a member of the Management Team, drove the project forward and ensured an engaging approach across the organisation.

The process

The marketplace was fully tested for the "best" and the "right" system for Allerdale – for its staff, managers and Councillors. Our project management group of staff across a wide range of front line and corporate services unanimously chose Covalent as its system of choice – for its ease of use and its flexibility.

What was clear from the start was that in order to create a performance management culture we needed 'buy-in' to managing performance across the whole of the organisation. We had huge buy-in right at the top and we had approval to purchase a site licence. This gave access to everybody, at any level, in any service across the organisation and also for our Executive and Scrutiny Teams. As the system and culture has developed the system has also been made accessible to members of our partnerships such as the CDRP and LSP. This way they can enter data direct into our system and also access partnership reports as and when required, reducing the burden on performance staff.

After setting up our PIs we developed the 'golden thread' so that the Sustainable Community Strategy, the Corporate Plan and Service Plan targets, PIs and actions could be set up.


Fast, easily accessible snapshots

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Supporting your journey towards excellence

Our Corporate Improvement Team worked hard in training 'champions' in each of the service areas to use the system and to update and add key data. The team now run training sessions throughout the year to support new staff and to help people develop their usage of the system. The team are also in the process of setting up a Covalent helpdesk which will include self-servicing 'how to' guides based on the most frequently asked questions.

We held promotional sessions showing those less advanced teams how more advanced teams were using the system, not only to manage performance but for action planning at team and at individual, one-to-one level.

Snapshots are the easiest way for managers, staff and members to access information really quickly. Each year service plans are uploaded and snapshots are formed. There are also various other useful snapshots such as 'all national indicators' or 'all local indicators', we also have snapshots for cross cutting pieces of work such as 'Children and Young People', 'Climate Change' and 'Annual Governance Work'.
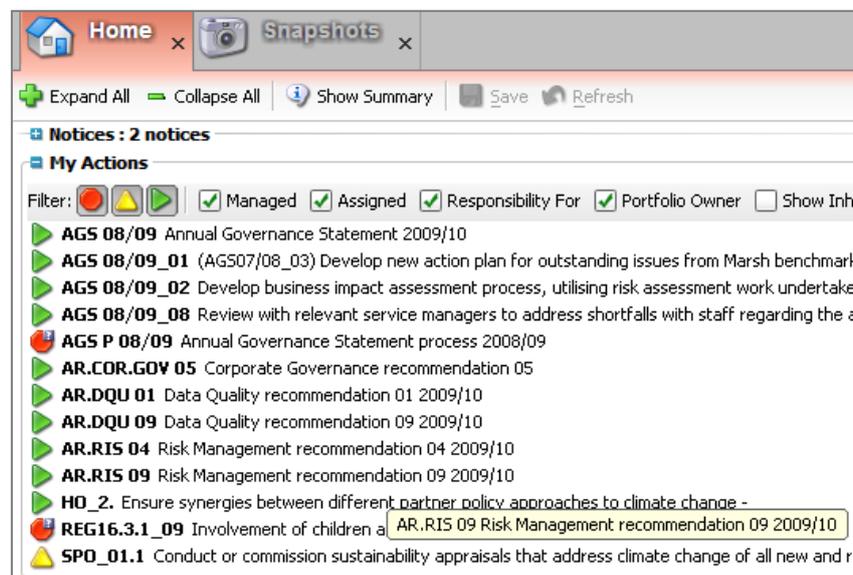
Everything in one place – Annual Governance Statement, actions, audit recommendations, and cross cutting action plans (e.g. climate change)

Scorecards provided an alternative way to access actions and indicators. They also help with thematic reporting of the achievement of our Corporate Improvement Plan and the contribution we are making to the Local Area Agreement.

Using Covalent Scorecards helps to show the link to the corporate improvement plan through thematic reporting. Some common reports using scorecards are:

- CIP reports
- Performance analysis and trend reports
- Cross cutting reports
- Service Plan reports.

Scheduling reports prompts service areas to update their performance data prior to corporate deadlines. Other individual areas are further advanced and routinely use reports within their team meetings.

We ran the system live in management meetings so that managers were accountable for their performance. Live presentations of the system lead to individual challenges where performance was below target, or actions had not progressed as planned.

We now do live reports at executive level, which is really useful as it allows us to look into areas of underperformance, look at past trends, look at notes and benchmark data, and view previous targets. Live reports give the decision makers much more comprehensive information.

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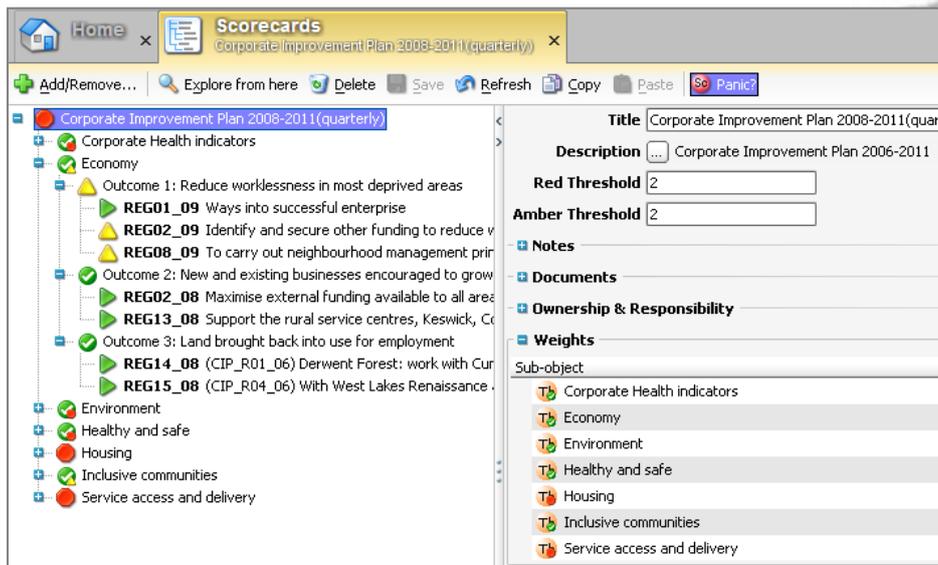
Thematic reporting of our Corporate Improvement Plan using Scorecards

The benefits

The site licence ensured that the system was not just one for the Corporate Team but it was everyone's responsibility to be accountable for performance and to manage it.

Running live data on a projected screen at our management meetings meant challenge was directed at those accountable and there was no place to hide!

The system makes it easier to be more sophisticated with our data. For example, we now have locality indicators for all of the Place Survey data. Without the system this would have been too big a task to take on within the team but now they are there and can be accessed by anyone. We also have crime data at locality level and have indicators set up for these too. The Council is undergoing a project at the moment to improve locality working and we are one step ahead in terms of performance management at a locality level.

Everything in one place

These days managers must contribute to so many cross cutting projects and corporate assessments. To reduce the burden everything is in one place!

1. Annual Governance Statement (AGS)

The Council uses Action Central to carry out the managers assurance checklist in preparation for the AGS. Managers must go through a series of actions and using milestones identify awareness and compliance with the relevant policies and procedures.

2. Audit Recommendations

The Council Internal Audit Team use Covalent to monitor annual audit recommendations. Each recommendation is uploaded onto the system and assigned to the owner of the action. The team then generate reports which they take direct to the Audit Committee. The Audit Committee receive regular training so that they understand what the reports are showing and how the process works.

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3. Corporate Assessments

In 2008 the Council procured the Models module and kicked off straightaway with the 2008/09 Use of Resources Corporate Assessment. Covalent made the process so easy. Just like actions and indicators, KLOEs could be assigned to individuals so that they could upload their notes and evidence. Not only was it more accessible but it allowed us to directly link projects, risks and indicators to each KLOE to show the auditor what the Council is doing and how we are performing. This made it far easier for us to coordinate and created much more ownership of the assessment amongst senior managers. Being able to score the assessment within Covalent is useful to highlight key areas for improvement and subsequent action planning can be linked to the assessment to show how we are addressing weaker areas. In short, this is an invaluable module. The Council have recently carried out the Managing Performance Assessment too and the process was much more fluent. What we plan to do next is continuous updating of the assessments rather than once a year.

4. Climate change action plan

On page 2 there is an example of a council wide plan that all managers must contribute to. Their actions appear on their home page like any other action they are responsible for and are reported to the Climate Change Group.

In conclusion

Covalent works well for us still in maintaining our focus on continuous improvement.

Everything is in one place and nothing can be forgotten; it is always there on your home page until you sort it out! You can see how actions feed into the bigger picture and challenge why we are doing things.

Reducing the burden on information gathering allows us to spend time analysing data and performance trends to improve the information given to decision makers and to support improvement planning.

Performance is no longer one person's job – it is everyone's job!

Whilst at Allerdale, Yvonne was a real asset to the team, her vision of what a positive performance culture looked like and being able to translate this into action really helped to get decision makers on board. Since her departure and a change in leadership and chief executive this vision has stayed with the Council and is continuing to develop. Yvonne worked furiously to ensure the implementation of the Covalent system went smoothly, on time and within budget. Yvonne was inspirational and motivating and a pleasure to work with.

"I use Covalent frequently to check audit recommendations are being done. I can see who is responsible for the implementation of the recommendation and also see what is being done. I can also look up all the e-mails associated with the responsible person and internal audit.

I find Covalent very good as I can see when any actions are overdue and keep an eye on them to see if they are progressing.

It also helps us when we have an Audit Committee meeting as we can look on Covalent and get an up-to-date progress report.

It helps me to see if we need to call anyone in to our meetings for a discussion on progress of a recommendation."

Cllr Jacqueline Mounsey, Chairman of the Audit Committee

"During her time with Allerdale Borough Council Yvonne has been a highly regarded colleague to us, wider portfolio holders and elected members, and the rest of the Management Team. She is a highly motivated individual who is delivery orientated and certainly a colleague that can be relied upon to take forward sound decisions, and deliver tangible results in an inclusive and measured way. Throughout this period at Allerdale, Yvonne has tackled complex management issues, providing professional evidence-based solutions and has used her expertise in local government and performance management to address a number of service-based and corporate performance challenges. This has raised awareness of the importance of evidence-based solutions to officers and elected members to support our improvement and development agenda. Yvonne was a valued member of the Corporate Team and the knowledge and expertise she has provided will have a lasting effect within the organisation."

Jim Musgrave, Leader of the Council and Gillian Bishop, Chief Executive (as in post during 2006/07)

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