

Maximising performance at South Lakeland District Council



Context

South Lakeland covers a large area covering 600 square miles including notable market towns and villages. It has stunning landscape and includes parts of the Lake District National Park and Yorkshire Dales National Park, a breathtaking coastal peninsula, part of Morecambe Bay, major lakes (Windermere and Coniston), the River Kent and Lancaster Canal.

Key issues for the area include the essentially rural nature of the district and linked affordable housing, effective transport and economic growth challenges. Although seen as a wealthy area, there are pockets of deprivation – including poverty in the older population and individual low incomes in homes of several occupancies.

The project

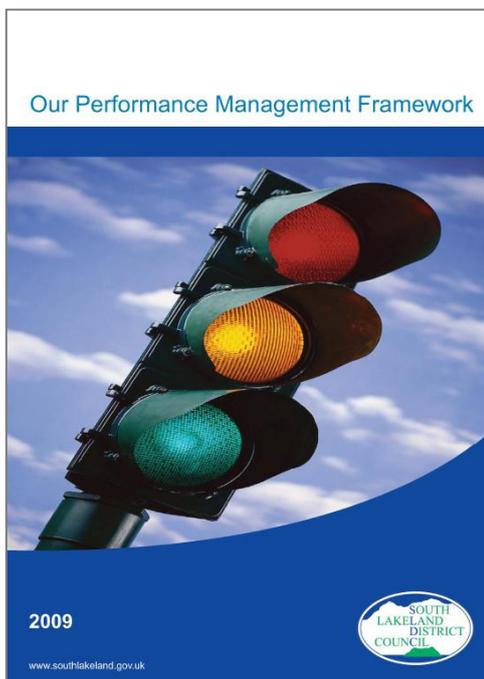
South Lakeland District Council (SLDC) developed a new 'customer centric' Corporate Plan and needed a comprehensive Service Planning framework that would deliver its aspirations. Influenced by the Community Strategy for South Lakeland, the Corporate Plan adopted the shared vision "by involving people and creating opportunities we will make South Lakeland the best place to live, work and visit". The Corporate Plan was clear on the outcomes required to deliver the corporate objectives, the targets to be set and the action planning approach to ensure delivery.

The Community Strategy, the Corporate Plan and the Service Planning Framework needed to drive the delivery of the Local Area Agreement (LAA), key services (KPIs) and local performance indicators (PIs).

With high expectations South Lakeland District Council had set itself a "Transformation and Change Strategy" that used the following key drivers of change:

- User focus
- Community engagement and leadership
- Efficiency and value for money
- Organisational capability

Any process for taking forward the delivery of the Corporate Plan needed to integrate current improvement planning milestones into this transformation agenda.





The process

YC Change first critiqued the current South Lakeland approach to service planning and performance management covering:

- The 'golden thread' of performance management including measurement and management of the LAA, KPIs and local PIs
- Linkages with performance management through the personal appraisal process
- Clarity of roles of the different elements in the performance challenge process such as the role of project teams, service managers, the executive team and councillors, including overview and scrutiny
- Use of Covalent by staff for performance management and action planning
- Integration of risk and financial management into performance reporting
- Linkage with efficiencies
- Performance reporting – for staff, managers, councillors, overview and scrutiny, partners and customers – ensuring the right information is produced in the right format at the right time
- Use of an escalation process for managing performance where current performance is not meeting expectations
- The extent of challenge provided when reviewing performance reports.

The council ran workshops with a wide range of managers, firstly to feedback our findings and recommendations and then to work with them to develop, understand and own the refreshed service planning and performance management framework.

Once the frameworks had been agreed we then went into a service plan development stage.

Through workshops we ran a series of service planning sessions covering:

- The organisational values and how each directorate individually contributed to the council's values.
- Working through each project and performance indicator in the Corporate Plan to identify which directorates took a 'lead' and/or 'contributes' to the wider delivery.
- A SWOT analysis to support celebrating current strengths, identifying areas to deal with weaknesses and, to help develop an action plan moving forward over the next 12 months, tackling opportunities and threats (risk management).
- Stressing partnership working, community engagement, customer driven priorities, risk and financial management.
- Development of a SMART action plan (set in line with the Covalent format) to deliver those targets, performance indicators and projects that would evidence delivery of the Corporate Plan objectives.

"Yvonne and her team have been helping South Lakeland to maximise our performance through developing and implementing a more robust approach to corporate and service planning and performance management. They are first class consultants. I found the YC Change "6P model for excellence" an extremely helpful framework for identifying the key priorities for the organisation. The team blend their approach of being supportive yet challenging in a most effective way. The combination of their intellect, insight and emotional intelligence has helped to make a real difference to this organisation and meet our needs. I would commend their approach and style to any organisation."

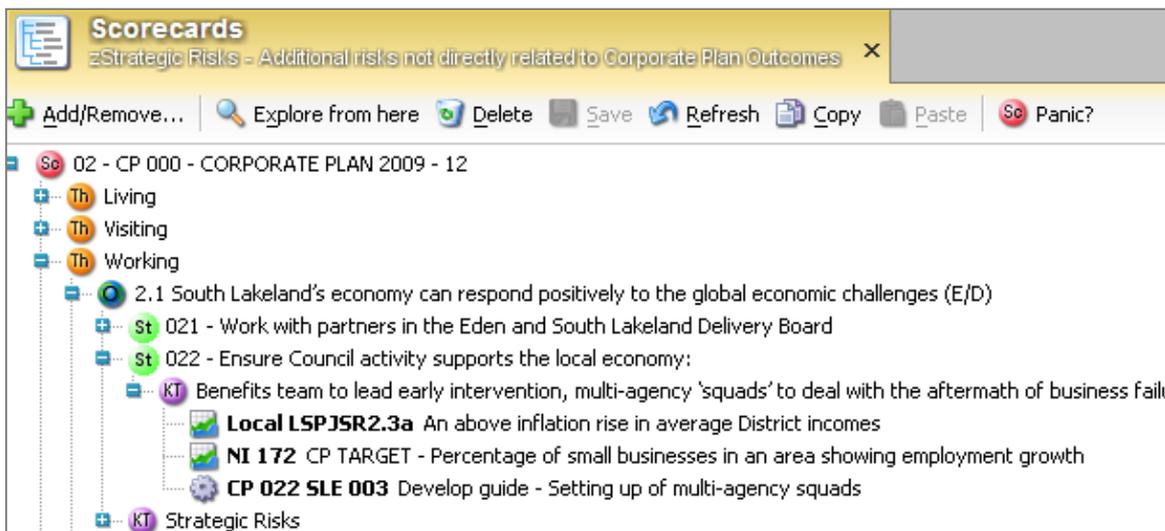
Peter Ridgway, Chief Executive



The final session with the managers was an away day to 'sign off' each of the service plans and to encourage and facilitate debate and agreement as to the priorities, timings and resources required to turn the planning and the thinking into reality. This worked exceptionally well, especially in relation to cross-cutting issues, and the skills and capacity required.

These plans are now downloaded into Covalent and are being used on a daily basis both to measure and manage performance and also action planning.

Finally YC Change critiqued the new style performance reports, again to ensure delivery of the Corporate Plan – the ultimate aim for the executive team and cabinet members.



The benefits

SLDC now have a comprehensive service planning framework that ensures the 'golden thread' is clear, that measures the right things and, above all, is SMART. Plans include responsibilities, timescales, resources and actions which will ultimately deliver a very outcome-focused and strategic Corporate Plan. It has a focus on outcomes for customers AND the impact of working in partnership with others.

Through working with operational service areas first in the service planning process, SLDC were able to identify what resources were required from corporate support services, such as legal, human resources, Information technology and project and performance management.

The performance management framework provides good practice, for example:

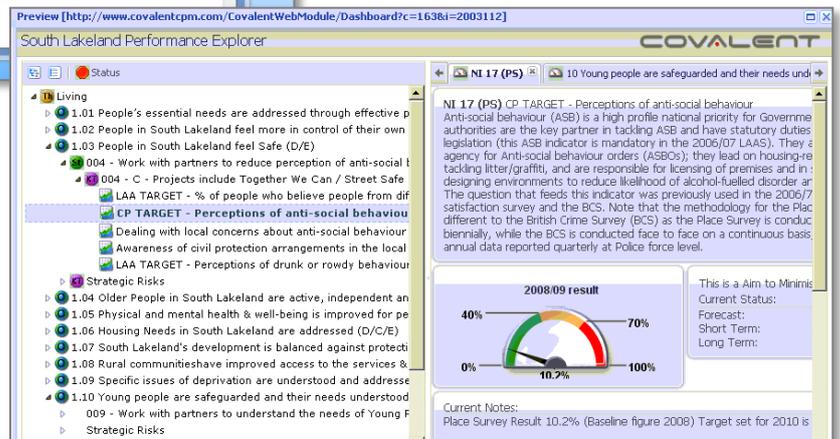
- Role clarity across the organisation in individual and team responsibilities in driving forward improved services and outcomes for customers
- Alignment with clear reporting timescales which complements timely decision making.
- Clear and easy to understand performance reports for a wide range of audiences
- performance, risk and financial reporting in one place providing a holistic approach to delivering corporate priorities.



The supportive approach from YC Change gave managers an opportunity to shape the framework and ultimately provided 'time out' of the hustle and bustle of daily work to take stock of the past and consider the future – especially in delivering a very ambitious and challenging agenda.

Using the Covalent Theory Taster 8: Creating a Performance Management Framework SLDC have ensured action planning and risk management are now linked and routinely reported upon using scorecard performance reporting. The Council have also made access to this information easier by using the Covalent web module through its intranet.

Through aligning the Service Plan Action Planning Template with the Covalent structure SLDC has quick and easy upload of the data into Covalent that wastes little time to maximise performance of SLDC.



"With the help of YC Change I have personally seen a greater commitment from the council to embed performance management in terms both of delivering the priorities for the people in South Lakeland and the council being fit for purpose. It has been exciting to see staff across all sectors work together to develop and improve our service planning process, thus helping to shape the next stage of delivery and implementation of effective performance management."

Gillian Llewellyn, Performance Officer