



## Managing performance

Working in partnership will require a similar approach to managing performance as in any other environment. However, it may be more challenging as the agreement of clear objectives and SMART targets may need to balance the differing expectations and abilities of all members.

### The performance management cycle



#### 1. Plan

At the planning stage there needs to be shared values and a shared sense of direction. All partners should understand the partnerships aims, along with the actions and effort needed to meet them.

Partnership aims and objectives should be clearly aligned to published objectives in high level plans (such as the Community strategy, Corporate Service Plan or Local Area Agreement), and should demonstrate a contribution towards these high level objectives. This clear line of sight is often referred to as the “golden thread”.

Partnerships should prepare written plans, which set out the key issues and the action needed to address them. Plans should be ambitious, but they must also be SMART (specific, measurable, achievable, realistic and time specific). Partners may need to think creatively about where the partnership is going – what it needs to achieve – and how to get there – while taking a managed approach to risk.

The partnership should also consider the appropriate pace of change. Some members may have a greater capacity for change than others, some may have different drivers or timescales to meet.

Being open and inclusive is important, but must be balanced with decisiveness. The partnership will also need to consider what other organisations can contribute to improvements for local people.

The degree of complexity or simplicity of the plans will depend on the nature of the partnership and the work to be undertaken. Do not over-complicate plans – it is better to keep them clear and concise. Partnership strategies and action plans must be communicated effectively to all stakeholders

## 2. Do

Making changes and getting things done often requires **determination** and **resilience** as things don't always go to plan, or don't change fast enough.

People will be more likely to stay committed when they feel a sense of **ownership** and **responsibility** about what needs to be done. However, people also need to be **flexible** enough to allow for changes of direction along the way. It's important to recognise when plans need to be revised. Managers need to **support people** through change and help to **solve problems** that inhibit performance.

## 3. Review

The review stage is important and time should be scheduled in to allow this to happen.

Effective review requires a willingness to **reflect** on what has happened and be **challenging** and **open** about how things have gone. It also means being positive about successes.

Review should **involve** a range of people – partnership members, customers, and stakeholders. The partnership should also look externally, to other partnerships, councils, or organisations, to reflect on how it's performance compares to that of others.

There also needs to be a **problem solving** approach when things haven't gone as planned. People are more likely to engage in reviewing performance where the focus is on supporting improvement, not apportioning blame.

In order to do this, the partnership must have a very clear view on what has and hasn't been achieved. The partnership will need to develop a clear approach to monitoring and reporting performance, which should be linked to it's financial reporting cycle (if it has one). The regularity of reporting will depend on the nature of the partnership, but should occur at least quarterly, otherwise there will be very limited opportunity to respond with corrective action. Wherever possible the council's on-line performance recording and reporting system, PB Views, should be used.

## 4. Revise

This is the stage to apply **learning** about what has worked, and what hasn't, including learning from other partnerships, councils, partners and organisations in other sectors.

As with planning, revising your actions in the light of what you know requires an **innovative**, **flexible** and **ambitious** but **realistic** approach to developing new plans and tackling under performance. You need to be adaptive – revising both the systems that drive service delivery but also the cultural aspects of the partnership, so that both are fit for purpose to drive improvement.

This is the stage at which to tackle performance issues and to celebrate success.

### Minimum requirements

All partnerships are expected to :-

- Produce a written plan or strategy setting out what it intends to achieve
- Monitor progress at least quarterly
- Consider the use of PB Views (the Council's computerised performance monitoring system)
- Produce an annual performance summary report
- Submit an annual update form (completed by the SGC lead link officer)