THE EDINBURGH PARTNERSHIP

Developing an Integrated Performance Framework update – 5 March 2024

1. Executive Summary

This report updates on progress to develop an integrated performance framework and seeks approval to move to the next stage of delivery as set out in the next steps.

2. Recommendations

2.1 The Board is recommended to:

i. Discuss the proposal for developing an integrated performance framework.

3. Background

3.1 Guidance for the Community Empowerment (Scotland) Act 2015 (the Act), states that community planning partnerships should monitor performance and progress against its ambitions and use intelligence about the views and experiences of local communities to underpin its approach to effective performance management.

3.2 In summary, the guidance outlines the expectation that:

- CPPs (Community Planning Partnerships) have a deep-rooted commitment to continuous improvement.

- CPPs have effective processes and skills to understand and scrutinise performance.

- CPPs act wherever appropriate to improve performance following scrutiny.

3.3 The guidance explains continuous improvement in performance is as relevant and important for CPPs as it is for an individual organisation and Best Value duties to which statutory community planning partners are subject in how they conduct their business are equally relevant in the community planning context. The 2020 Best Value Review of the City of Edinburgh Council noted that there was limited evidence to demonstrate the impact of partnership working on outcomes within community planning.

4. Main Report

4.1 The Edinburgh Performance Framework (Appendix 1) was developed in 2018 for the Edinburgh Partnership but was not fully implemented at the time. Elements not implemented include:

- Medium-term performance indicators
- Exception reporting
- SMART target setting
- Monitoring framework

4.2 Other statutory reporting requirements related to part 2 of the Act such as the production of annual reports for locality plans have been varied and there is consensus that reporting is fragmented and could be improved. The EP Board has oversight of several statutory plans and others which the Board has agreed to , including the LOIP, the Children Services Plan, the End Poverty in Edinburgh Delivery Plan, the Local Child Poverty Action Report, Edinburgh's Joint Community Safety Strategy, the Community Justice Outcome Improvement Plan, Ending Hunger in Edinburgh Strategy, and the Climate Strategy.   Some areas in Scotland including Midlothian have attempted to harmonize annual reporting by creating a single annual report which brings together all relevant annual reports to improve connectivity and reduce duplication.

4.3 Following discussions at the last EP Board we have reconvened the integrated performance framework working group with representatives from the Council, NHS Lothian, and Police Scotland. A meeting was also arranged with LOIP Delivery Group members and strategic partnership leads. From these discussions there was consensus that:

4.3.1 an integrated performance framework is essential to improve transparency, scrutiny, and accountability of community planning activity.

4.3.2 we should adopt an approach that challenges performance and embeds continuous learning and evaluation to drive improvements over time.

4.3.3 It needs to be delivered with a phased approach focusing first on implementing elements as set out at 4.1.

4.3.4 we seek to evaluate our performance framework.

4.3.5 the Improvement Service, Community Planning Outcome Improvement Profile (Appendix 2) could be a way to strengthen high-level outcome indicators and benchmark against other community planning partnerships.

4.4 Work is also being undertaken to develop a Joint Strategic Needs Assessment to support future service planning. The findings will help identify population needs and priorities for action and could then be used to inform a decision about how the existing activity and reporting that is part of the wider partnership can be better aligned to provide assurance that activity is being undertaken to meet priority population needs in the most efficient way.

5.   Next Steps and Timing

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5.1 To deliver the new performance framework by September 2024. We propose the following dates for agreement:

5.1.1 Initial Assessment and Planning (1-2 months): Formation of a project team made up of statutory partners and others interested in the delivery of the LOIP, assessment of existing practices, mapping of data, stakeholder engagement and promotion and development of a forward plan.

5.1.2 Framework Development (3-4 months): Establishing outcome indicators, designing templates, developing delivery plans, setting SMART targets, and collecting feedback to evaluate effectiveness.

5.1.3 Full Implementation (Ongoing): Rolling out the framework, establishing a review process, monitoring progress, and ensuring alignment with national and local objectives.

5.2 This structured approach seeks to address current challenges in performance management within the community planning family, aiming for a coherent and integrated framework that enhances the effectiveness and accountability of community planning efforts.

6. Contact

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Edinburgh Partnership Pefromance Framework

This performance framework describes how performance will be monitored for the Local Outcome Improvement Plan (LOIP). It provides guidance and tools for everyone involved in the oversight and delivery of the LOIP. To be effective the performance framework must be more than defining indicators. It should describe the structure within which the indicators will be considered and outlines how decisions will be made based on the information collated and analysis of the wider landscape.

This framework consists of three elements:

Indicators framework

Monitoring framework

Reporting Framework

Strategic Performance Framework
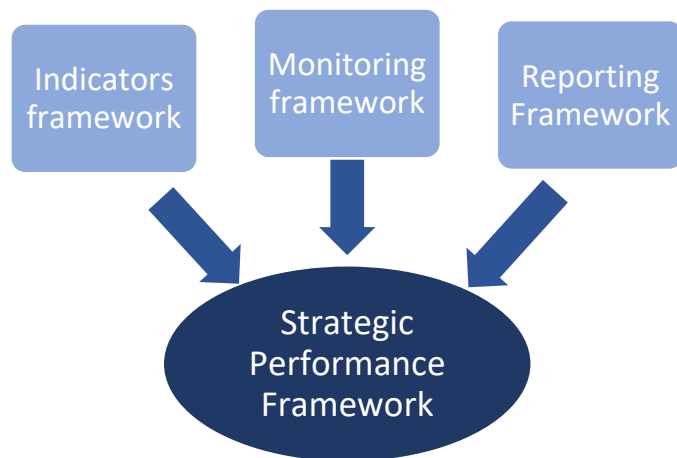
Indicators
- The suites of indicators used to monitor performance at each level

Monitoring framework
- Timetabling and governance

- Identifying areas of good practice and areas for

  improvement

Reporting framework
- The reports considered at which groups

- The responsibility for writing those reports

Reporting framework

Within the LOIP, under the three priorities, the initial high-level actions and possible measures are shown. Workstream leads will develop detailed actions, timescales and key measures to support each of the priority areas that demonstrate how change is taking place for each priority, forming the basis of the performance framework. Different reports will be generated for scrutiny at different levels such as:

Action plans

Detailed action plans (Appendix A) relating to the actions under each of the three priorities will allow monitoring of the partners' activity and progress towards achieving shared goals. Actions will be developed throughout the life of the LOIP so only the next set of actions to be undertaken to progress each priority will be shown. Lead officers will be identified for each action and they will be responsible for reporting on progress.

The modelling template (Appendix B) should be used to assist in the development of actions under each priority. This template details what is to be done, what resources are available for these actions, and identifies the short and long term impacts these actions are aiming at achieving. This template should be used each time a new set of activities are developed to ensure the link between the activities and the longer-term outcomes are considered before implementation.

A final part of the development of actions should be the identification of output and outcome measures. These measures should be clearly linked to the actions and will allow for the monitoring of the impact of actions as they are implemented.

Below are links to some step to step guides to modelling actions and developing indicators:

- NHS a practical guide
- Health Scotland simple guides
- Evaluation Support Scotland support guides

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<u>Regular performance reports</u>

These will detail progress towards achieving the outcomes (Appendix C). They include updates on actions, milestones, case studies and wider factors influencing progress to give a clearer picture on how the priorities are being achieved. These reports will be the responsibility of the lead officers for each priority area. These reports will:

- Show accountability and impact of progress
- Provide an opportunity to share learning
- Identify barriers or challenges to be addressed
- Provide opportunity for discussion of overlap between priorities

The LOIP delivery group will be responsible for considering these reports on a quarterly basis and agreeing ways to address issues and support action progress. These reports will form the basis for the annual progress report to the Edinburgh Partnership Board.

<u>Annual Progress Report</u>

The LOIP delivery group will be responsible for submitting an annual report to the Edinburgh Partnership Board. This report will summarise progress with actions and the impact on short term outcomes. The impact on individuals will also be covered by the inclusion of case studies within this report, where appropriate.

This report will also cover how these actions might have influenced the longer-term outcomes. When considering the longer-term outcomes, information on the impacts of other external factors, where known, should be included. These factors may include decision made at a local, regional, national and international level such as strategic priorities, new legislation, and taxation and benefit rate changes. The inclusion of this wider landscape should help to explain why local impact through actions are not reflected in changes to high level outcomes.

The aim of this report is to:

- Show accountability and impact of progress
- Provide an opportunity to share learning

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- Raise barriers to be addressed
- Opportunity for inclusion in wider landscape discussion

The report will have the following sections:

- Here's what you need to know section (giving overview of performance and issues
- What was planned to be done
- What was done
- What difference was made – with evidence (output and outcome measures, life experience stories)
- Challenges and changes - anything found helpful in achieving outcomes and any barriers
- Learning for the future - anything learnt about how to do the work and unexpected outcomes

This report is expected to fulfil the legislative requirement for each Community Planning Partnership to report back progress on the LOIP to their communities on an annual basis.

Exception Report

If barriers to progress are identified at any time which cannot be resolved by the LOIP delivery group and needs consideration at a strategic level, an exception report (Appendix D) will be submitted to the next Edinburgh Partnership Board meeting for discussion. This should reduce delays in progress as strategic decisions can be made when issues are identified rather than when issues are considered as part of the annual performance reporting.

External scrutiny

Additional performance reports will be created to ensure compliance with external scrutiny and audit requests around the LOIP.

These requests may focus only on community planning activity, or include partnership working and community planning as part of a wider scope (such as the annual review of Local Authority performance reporting Audit Scotland undertakes each year which includes community planning performance as part of the scope). The reports outlined above form a suite of reports that can then be used by partners within their own governance structures. Additional reporting structures are shown in Appendix E.

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Monitoring Framework

Monitoring performance is more than looking at measures, it's about understanding the reasons behind the level of performance achieved and then agreeing changes when necessary. The following cycle will be used to progress performance.

Plan: set aims and visions based on intelligence

Do: plan actions in detail and implement

Monitor: monitor progress of actions and collect appropriate data

Review: review what the monitoring is telling you.

The Edinburgh Partnership, through the LOIP, sets out their vision for reducing poverty and inequality in Edinburgh by working together.

The LOIP delivery group will oversee the development of the detailed plans under the three priorities and monitor progress with actions. The delivery group may delegate the development and delivery of actions to other groups in the Edinburgh Partnership governance structure where appropriate such as when there is overlap between the LOIP priority and the other group's core remit. This should promote joined up thinking and ensure actions for different strategies are more co-ordinated. However, the delivery group will remain accountable for the LOIP delivery overall.

The review stage is where decisions are taken on the back of the monitoring in place. These discussions should acknowledge where action is progressing as expected, and ensure continued commitment to progressing the agreed actions. However, when progress has stalled or having a negative impact on the outcomes, it is at this stage that decisions to change actions or stop them is taken and new actions are decided. These reviews continue to focus on achieving the longer term aims. Throughout the life of the plan, both the Edinburgh Partnership Board and the LOIP delivery group will review progress through regular reporting and agree further actions as required.

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One aspect of performance that also needs to be considered is the wider landscape in which the LOIP actions are implemented into. When reviewing progress, other factors which impact on the longer-term outcomes must also be considered before decisions taken to stop or change the actions being implemented.

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Indicators Framework

A range of different types of indicators will be used to monitor progress with the LOIP. Performance reporting of all these different types of information should allow the Edinburgh Partnership Board to have informed discussions about what is working and what is not. It is expected that the output and medium-term performance indicators will be changed during the life of the plan as actions are completed. Case studies and outcome indicators will be monitored throughout the life of the plan.

Case studies

These are not actual measures but are about bringing the plan to life. By including real life stories/case studies into the performance monitoring discussions, the partnership is ensuring that the 'voices of real people most impacted by poverty and inequality' are a part of decision making.

These stories can be used to inform both:

- the identification and development of actions
- the real impact of those actions on people's lives.

Ongoing gathering of people's experiences is required to achieve the partnership's aspiration to keep real life stories at the heart of their decision making.

Long term outcome indicators

These are the long-term changes in people's lives the plan is trying to achieve. They should be stated so that the direction of change is clear.

These are the indicators which highlight the aspirations of the Edinburgh Partnership Board – around reducing poverty and inequality. However, due to the complex interrelationship between factors, these indicators are those where it is hardest to define a direct link between them and the actions undertaken.

Through the analysis undertaken when developing the priorities, the actions agreed are expected to make a difference in people's lives and contribute to shifting these longer-term outcomes. However, there will be many other factors also working on shifting these outcomes.

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Medium term indicators

These are local outcomes that can be delivered within or over a couple of years. They should link directly to the specific activity undertaken to deliver the aims of the LOIP and will reflect the impact on the families and individuals supported through the joint working. These are the short/medium changes that are achieved through the actions implemented. These indicators will be useful to ensure that the actions are impacting in the ways expected.

Output measures

These indicators are measures of the activity undertaken and will mostly focus on the process/procedural changes implemented. These are the indicators where progress should be shown over the short term.

Target setting

Target setting will be considered for all the measures identified. However, targets will only be put in place where it is appropriate. This will be determined by two main factors:
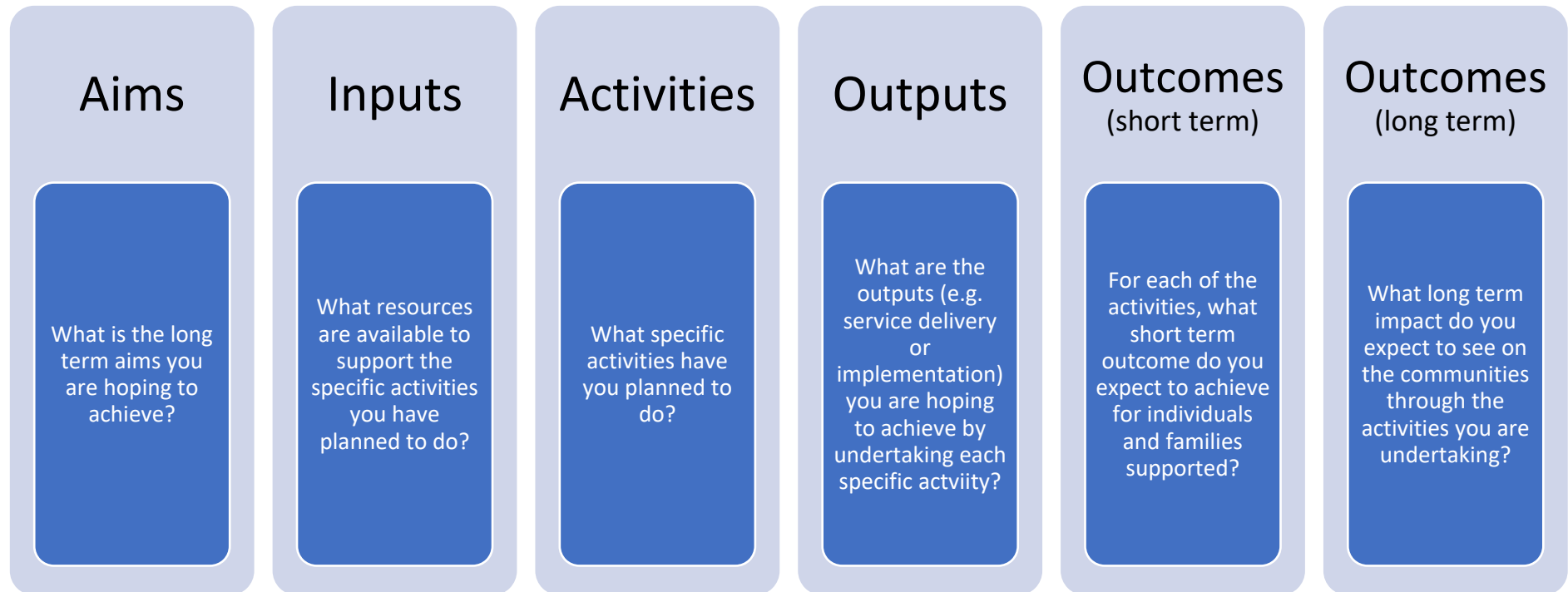
- *Direct link between action and indicator*
  Where there is a clear causal link between the measure and the action a target can be set. Where there are multiple actions all impacting on a single indicator (e.g. the longer-term outcomes), so that each action contributes to the change in the measure, the ability to set meaningful targets is less achievable.
- *Type of measure*
  Target setting is easier for numeric indicators and harder for 'perception' indicators. Regardless of the type of measure, the direction of change should be clearly stated.

Any target setting must be based on an analysis of what is achievable so that the target set is challenging but realistic. Targets should also be cognisant of targets within other plans

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Outcome	Narrative

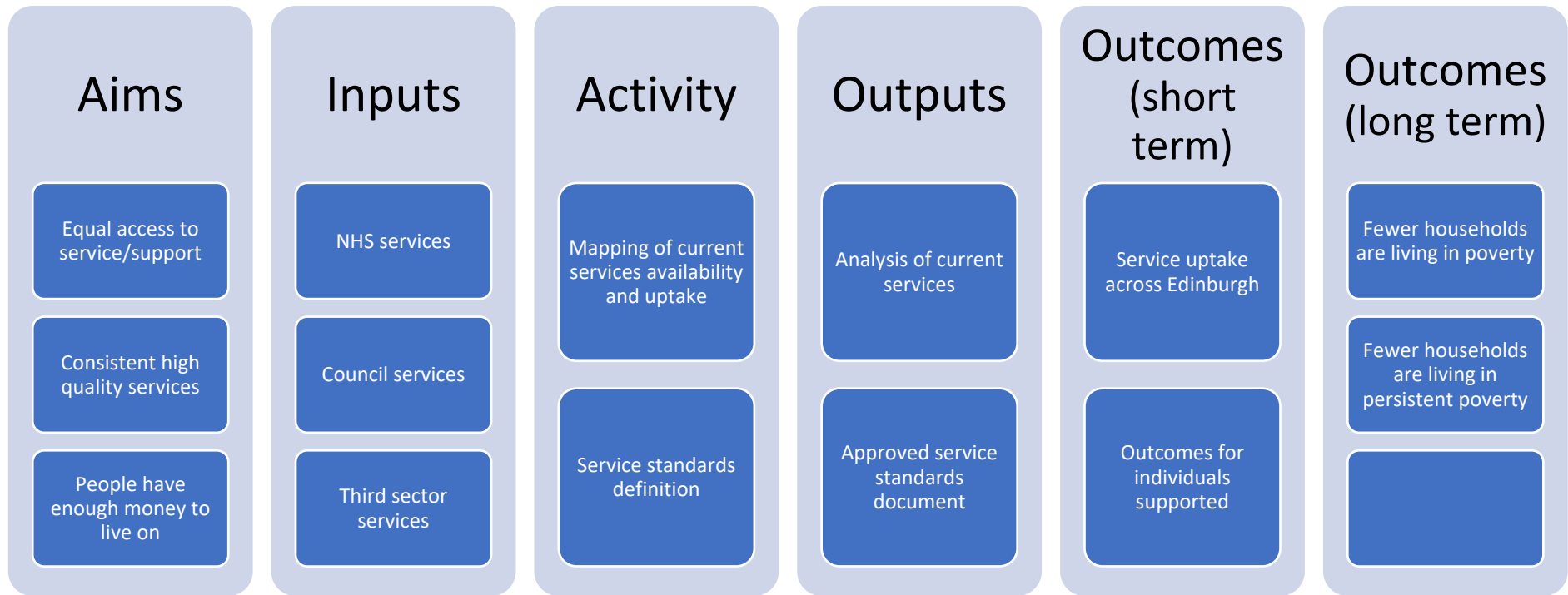| Action	Lead	Partners and Resources	Milestone	Issues/Constraints	Due Date	Completed	Performance monitoring

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Priority: xxxx

Aims	Inputs	Activities	Outputs	Outcomes (short term)	Outcomes (long term)
What is the long term aims you are hoping to achieve?	What resources are available to support the specific activities you have planned to do?	What specific activities have you planned to do?	What are the outputs (e.g. service delivery or implementation) you are hoping to achieve by undertaking each specific actviity?	For each of the activities, what short term outcome do you expect to achieve for individuals and families supported?	What long term impact do you expect to see on the communities through the activities you are undertaking?

Local/National factors

- What other factors may also impact on the long term outcomes you are trying to achieve?

(Example) Priority 1: Enough money to live on

Aims	Inputs	Activity	Outputs	Outcomes (short term)	Outcomes (long term)
Equal access to service/support	NHS services	Mapping of current services availability and uptake	Analysis of current services	Service uptake across Edinburgh	Fewer households are living in poverty
Consistent high quality services	Council services	Service standards definition	Approved service standards document	Outcomes for individuals supported	Fewer households are living in persistent poverty
People have enough money to live on	Third sector services				

Local/National factors

- Implementation of universal credit

LOIP quarterly progress report

Date of LOIP delivery group for consideration:
Lead officer:
Priority theme (priority 1, 2, 3 or strategic enabler):

Actions completed in the last quarter (since the last progress report)

Milestones expected to be achieved in the next quarter

Barriers/challenges (physical, partnership, financial etc)

Wider factors/influencers (i.e. legislative changes)

Case study examples – please complete for any examples of success/good practice that has been achieved to date under this priority

[ ]

For LOIP delivery group to complete

Date considered:

Is the priority on track? Y/N

Any decisions to be taken? (i.e. change of actions, escalation to the board etc)

[ ]

Feedback to lead officer (if any)

[ ]

LOIP exception report

Date considered at LOIP delivery group: Date of Edinburgh Partnership Board: Priority theme (priority 1, 2, 3 or strategic enabler): Lead officer:

Summary of actions completed to date

Reason for escalation to Edinburgh Partnership Board

Action required from the board

Wide Reporting Landscape

Improvement
Service
(CAPMF)

Enough
money to
live on

A good
place to
live

Scottish
Government
(SHIP)

CEC (Housing and
Economy Committee)
& the Business Forum,
(Economy Strategy)

Work,
learning
and
training

Scottish
Government
(Attainment,
School Leaver
Destination)

CEC (Housing and
Economy Committee,
SLA updates)

Job Strategy Group
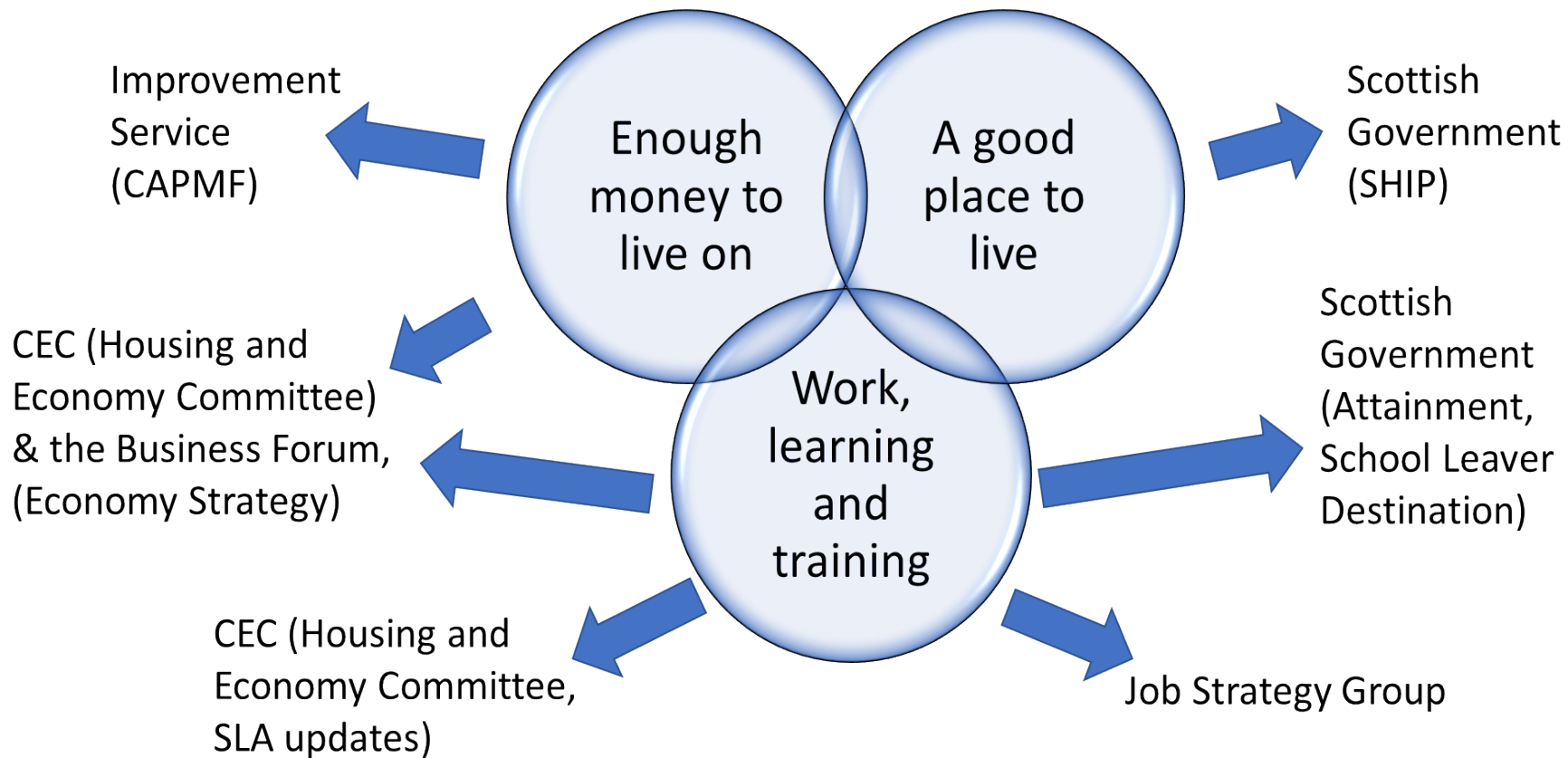
Appendix 2: Community Planning Outcome Improvement Service Profile Measures

Possible indicators from the [Improvement Service Community Planning Outcome Improvement Profile](#).

Theme	Outcomes	Measures
Early Years	• Children have the best start in life, so that they have equal opportunities to succeed. • Children are safe and nurtured, and have the life skills, confidence and opportunities to reach their potential. • Young people are ready for life and work.	• Percentage of babies at healthy birth weight • Body Mass Index (BMI) of Primary 1 school children • S4 tariff score • Percentage of school leavers in positive and sustained destinations • Percentage of 16-19 year olds participating in learning, training or work
Older People	• Older people are independent for longer and able to stay in their own homes as long as they wish.	• Emergency hospital admissions per 100,000 population (65+)
Employment and Economic Growth	**Outcomes** • Employment opportunities for all. • People have satisfying, secure and suitable work. • People live in a community with a thriving, expanding economy. • People have the means to support themselves and their families with a standard of living that enables	**Measures** • Employment rate • Median earnings for residents in local authority area who are employed • Percentage of population (aged 16-64) in receipt of out-of-work benefits • Percentage of children in poverty

	them to participate in society after paying all necessary bills.	• Survival of newly-born enterprises (3 year survival)
Safer and Stronger Communities	• People live in resilient, responsible and safe communities. • People in vulnerable circumstances are protected. • Community and public understand the role/place of public services. • People feel engaged and feel they can influence their community. • People do not feel isolated or lone	• Rate of recorded crimes per 10,000 population • Total dwelling fires per 100,000 population
Health and Wellbeing	• People live happy and healthy lives with a healthy life expectancy. • People who need care are supported to live independently and confidently. • Positive end of lif •	• Mortality rates per 100,000 for people aged under 75 in Scotland • Average score on the short version of the Warwick-Edinburgh Mental Wellbeing Scale (SWEMWBS) • Unplanned emergency hospital attendances
Environment	• People live in attractive, welcoming environments. People take pride in and look after their environment. •	• Carbon emissions per capita