

PUBLIC SERVICE BOARD – 4 MARCH 2008 LAA PERFORMANCE MANAGEMENT SYSTEM

ITEM PSB6

1. Introduction

Strong local performance management arrangements have been a key underpinning to much of the improvement delivered by local government in recent years and provides a strong basis for moving forward in partnerships. It is ultimately the responsibility of the County to ensure that suitable arrangements are in place for the LAA as a whole, although these arrangements need to be understood and owned by all members of the partnership.

Evidence about the effectiveness of local performance management arrangements will be considered by the inspectorates in making judgments as part of the Comprehensive Area Assessment. Robust local performance management arrangements should cover effective collection and use of local management data. It needs to be timely, of an appropriate quality, captures the views of local people and can be shared between partners.

The Public Service Board identified the acquisition and implementation of a transparent and robust performance management system, which will provide LAA information for all partners, as a priority action to be completed by April 2008.

This paper outlines the assessment process used to select a suitable system and recommends that the Public Service Board agree to proceed with the acquisition of the preferred solution.

2. Requirements

2.1 The specific requirements of the project were identified as follows:

- Facilitate the analysis and reporting of performance and risk information, so that it can be used to improve performance.
- Enable partners to view add and edit performance and risk information using web technology.
- Have the potential to link to other key processes.
- Have the potential to link, directly or indirectly, to key data sets.
- Be capable of managing information securely.

PUBLIC SERVICE BOARD – 4 MARCH 2008

LAA PERFORMANCE MANAGEMENT SYSTEM

- Be capable of meeting inspection requirements in terms of data quality.
 - Be capable of publishing the information to the general public.
- 2.2 The project team felt that the system should have the capacity for future growth and the capability to deal with additional reporting requirements as required by the introduction of the Comprehensive Area Assessment (CAA) and the new National Indicator Set (NIS). Risk management has a more important role within this framework.

3. Initial Assessment

- 3.1 The project team reviewed the current performance management systems used by Local Authorities.

Eight possible options were identified:

These were:

- PerformancePlus
- CorVu
- PbViews
- Triangle
- Covalent
- Spar.net
- Business Objects
- Oxfordshire County Council ICT internal approach.

- 3.2 Three options were rejected at this initial stage:
- 3.3 Covalent had been seen by representatives of the project team and was not of the same calibre as the other options available. Therefore it was rejected at this stage.
- 3.4 Business Objects is an industry standard reporting tool which is already used within the County Council. ICT met a representative of Business Objects but it was decided this option did not have a tool or a product which would meet our business requirements.

PUBLIC SERVICE BOARD – 4 MARCH 2008 LAA PERFORMANCE MANAGEMENT SYSTEM

- 3.5 The option of an approach being developed by ICT Services was also withdrawn as ICT did not wish to pursue this option.

4. Technical Assessment

- 4.1 Prior to short listing for functional assessment, each of the remaining solutions was vetted to ensure that it was based on technology and an infrastructure capable of being supported by Oxfordshire ICT Services. Potential products were also assessed for accessibility (in terms of the Disability Discrimination Act) either at this stage or the shortlist stage. This took place in September and October 2007.
- 4.2 As a result of the technical assessment, the following options were not considered further.
- 4.3 Triangle and Spar.net were not regarded as being robust enough from a technical viewpoint. Spar.net failed to demonstrate an adequate level of accessibility.
- 4.4 The remaining three options, PerformancePlus, PbViews and CorVu, went forward to the next stage.

5. Functional Assessment

- 5.1 This stage involved assessing whether these systems were capable of delivering what was required for LAA reporting. They were assessed around a number of work scenarios looking at how the system could be used in practice, for example, accessibility of the system to partner organisations; report generation; and risk management fundamentals.

Seven scenarios were used, each with a range of specific questions against which the assessment was carried out.

- 5.2 A broad assessment of each system was also carried out as to the potential for future growth as required. Consideration was also given to each system's capacity to cope with future change, for example, the expansion of the LAA or partnership reporting requirements.

PUBLIC SERVICE BOARD – 4 MARCH 2008 LAA PERFORMANCE MANAGEMENT SYSTEM

- 5.3 Each supplier was invited to deliver a two-hour presentation based on the seven scenarios. The audience invited to the presentations comprised of the Chairman of the PSB and performance and ICT specialists.
- 5.4 Each supplier was given the high-level information around each of the scenarios and a two-hour presentation slot. The audience invited to the presentations consisted of the project team, the Chairman of the PSB and Performance representatives.
- 5.5 After the presentations the systems were assessed as follows:

PerformancePlus

A good system with no weaknesses identified. It was seen as having a strong capacity for future growth that would not limit how the system could be used. Inphase, the company responsible for PerformancePlus, demonstrated a good understanding of how the LAA process worked.

CorVu

A good system with one minor weakness identified. This was how it could handle risk management.

PbViews

An acceptable system with one significant weakness identified as to the ability to manage risk.

- 5.6 The project team reviewed the assessment work and rated the systems as follows:

1. PerformancePlus
2. CorVu
3. PbViews

At the suggestion of the Chairman of the PSB, Inphase, as the preferred system provider at the functional review stage, were asked to provide hands-on access to PerformancePlus to allow further testing.

PUBLIC SERVICE BOARD – 4 MARCH 2008 LAA PERFORMANCE MANAGEMENT SYSTEM

This further assessment was to test the suitability of the system for LAA reporting by actual use of the system by the project team. This also provided an opportunity for representatives from partner organisations to view the system.

- 5.7 During the site testing, consideration was given to system structure, data entry and reporting.

Representatives from Oxford City Council, South Oxfordshire District Council, West Oxfordshire District Council, Oxfordshire PCT and the Learning and Skills Council saw demonstration of the system during this phase.

- 5.8 The system was well-received and no problems were identified as part of this assessment.

6. Financial Cost

We have reviewed the indicative costs for each of three options at the functional assessment stage. This covered the provision of the system, appropriate licence numbers, implementation support, user training and ongoing maintenance.

Based on this PerformancePlus provided the most competitive price for an LAA reporting system.

The final cost for PerformancePlus will be depend on the number of licences purchased and level of training provided. This will be agreed after consultation with members of the Oxfordshire Partnership. The ceiling cost for this system remains £75,000 as previously allocated by the PSB and we are confident that costs will be contained within this budget.

7. Feedback from users

- 7.1 Visits were paid to Buckinghamshire and Shropshire County Councils, both of whom use PerformancePlus for their LAA reporting process.

They spoke of the positive impact that adopting PerformancePlus has had on managing performance for the LAA by providing a more focussed approach to those areas that needed management attention.

PUBLIC SERVICE BOARD – 4 MARCH 2008 LAA PERFORMANCE MANAGEMENT SYSTEM

The ability to easily look at performance below the County level was also important in the successful adoption of this system.

Both Councils were positive on the ongoing support Inphase provided in terms of resolving problems, as well as planning for significant changes in how Councils manage performance, such as the implementation of CAA and NIS.

- 7.2 There was broader communication with other users of the system who reiterated the strong support that was provided and the commitment that Inphase has to local authority performance management.

8. Implementation Plan

- 8.1 As stated in the introduction, the acquisition and implementation of the system was identified as a priority action to be completed by April 2008.

- 8.2 Development of PerformancePlus for LAA reporting will be carried out by the project team. This will be supported by a user group which has representatives from the Oxfordshire Partnership.

- 8.3 The role of the project will be to ensure that:

- We have the right people trained to use the system.
- We have clarity of responsibility for the provision of LAA data.
- We have clearly communicated the purpose and the changes that the performance management will bring.
- We provide enhanced reporting on the LAA to focus on how we manage and improve our performance.

- 8.4 The objective is to have PerformancePlus implemented to report on the LAA in quarter 1 2008/2009.

9. Recommendations

- 9.1 The project team recommends that the Board approve the acquisition of PerformancePlus for LAA reporting.

- 9.2 The project team recommends that the Board approve and support the implementation plan given above.