



## **IMPROVEMENT SERVICE ONLINE TOOLKITS REVIEW**

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## **i. Summary of Key Points**

The following details a number of the key points from this review:

- A user survey was carried out to gather feedback and opinions on four toolkits offered by the Improvement Service during 2007-09:
  - Leadership Toolkit
  - Stepping Stones to Improvement
  - Diagnostic Pathway Toolkit
  - Continuous Improvement Toolkit
- The feedback from these surveys was collated and, in conjunction with quantitative data (user statistics), was used to provide the findings and lessons learned detailed in the report.
- The majority of the 32 councils in Scotland have users using at least one of the four toolkits.
- Generally, those who are making use of the toolkits are positive in their comments and are finding them helpful. However, the number of actual users in comparison to potential users is low.
- Users are accessing the toolkits to support them in a number of activities, including personal development, looking for information on a specific task, designing learning interventions, and to remind themselves of particular processes/procedures.
- Of the 60 registered users of the Leadership Toolkit, 25 councils are represented. The most popular topic is Leadership, and users have a strong interest in the topics with a strategic and organisational development focus.
- Of the 401 registered users of the Stepping Stones to Improvement Toolkit, 31 councils are represented. The most popular topic is Change Management, but users are engaging with both the strategic and interpersonal topics.
- There are 412 registered users of the Diagnostic Pathway Toolkit. The reaction to this toolkit was, generally, favourable, but there were issues highlighted about a lack of practical 'how to' material and the 'search' facility not returning detailed enough results.
- With open access, there is no requirement to be a registered user of the Continuous Improvement Toolkit. Due to platform changes made by the supplier, there have been a number of issues with tracking usage of the toolkit and this needs to be addressed going forward. There was limited response to the user survey which might suggest a lack of engagement. In terms of content, some feedback (including some from people working in the NHS) indicated that it was an impressive collection of resources and praised the intent. A usability review undertaken informally by students of the University of Edinburgh's MSc in E-Learning concluded that it was a useful collection of resources though improvement could be made to the navigation and to processes for explaining and updating content.

- There is a general lack of awareness of the existence of the toolkits amongst potential user communities. Additionally, users seem unsure of how the toolkits can support them in their job roles (e.g. they are being used for 'one-off' projects, when there is a lot of material to support everyday tasks and activities). This tends to indicate a need for a greater focus on promotional activity in connection with any future toolkit provision.
- Users are becoming increasingly sophisticated in terms of their expectations of online tools. When they are presented with a generic 'one size fits all' toolkit, they may not be as responsive to it if they cannot see evidence that it has been customised for them and their needs in some way.
- In any future toolkit provision activity consideration should be given to whether user engagement could be increased by offering individual councils customised versions of the toolkits, to allow them to add their own content and information.
- Future toolkit provision should undergo a detailed scoping process and thorough testing with a pilot group before full launch (where this is appropriate).
- It could be valuable for the Improvement Service to form a toolkits' working group to establish working practices in this area and to agree details of how any toolkits should be scoped, produced or procured, maintained and sustained.

*NB. Although much of the report is written in the present tense as the review was conducted during late 2008 and early 2009, the one year pilot of the Leadership and Stepping Stones toolkits finished on 31 March 2009. The other two toolkits are still available to users.*

## **1. Background**

This report provides details on a review commissioned by the Improvement Service to contribute to decisions concerning support toolkits that are made available to its audience/users.

The review was undertaken by \*goodpractice, who provided and/or hosted three of the Improvement Service toolkit offerings covered in the review:

- Leadership Toolkit
- Stepping Stones to Improvement
- Diagnostic Pathway Toolkit

All three of these toolkits are evaluated as part of this report. A fourth toolkit – the Continuous Improvement Toolkit – was developed by the user community through the Customer First Programme and is hosted by Stirling Internet. This toolkit is also reviewed in this report.

With the exception of one, all councils have members of staff registered for at least one of the toolkits reviewed in this report. Given this level of council representation, this report's scope in terms of soliciting usage data, user evaluation and feedback can be considered to provide useful evidence to inform any future toolkit provision undertaken by the Improvement Service.

### **About the Improvement Service**

The Improvement Service was founded in 2005 with the purpose of supporting improvement in the efficiency, quality and accountability of public services in Scotland through the provision of advice, consultancy, project management, and support for the learning and sharing of knowledge.

The Improvement Service is governed by a partnership Board comprising the Convention of Scottish Local Authorities (COSLA) and the Society of Local Authority Chief Executive (SOLACE).

### **About \*goodpractice**

\*goodpractice is a provider of online toolkits aimed at leadership, management, human resources (HR), and learning and development communities. Founded in 2000, the organisation has an extensive client base in both the public and private sectors.

## **2. Review Objectives**

The review was undertaken to:

1. Gather and evaluate user feedback on the following four toolkits, which are currently made available to staff and Elected Members in Scottish local government by the Improvement Service:
  - Leadership Toolkit
  - Stepping Stones to Improvement
  - Diagnostic Pathway Toolkit
  - Continuous Improvement Toolkit
2. Consider the usage statistics for each of the toolkits.
3. Consider the following elements of the toolkits (including user feedback):
  - content
  - access
  - features
  - relevance
  - ongoing requirements
4. Provide consideration of possible improvement to existing toolkits, sustainability issues, potential requirement for any new toolkit(s) and relevant issues to inform any future decision-making on this area of provision.

### **3. Methodology**

In undertaking this review, the following methodology was employed:

1. The scope and objectives of the review were determined by the Improvement Service and \*goodpractice.
2. A desk research exercise was undertaken in order to understand the purpose, content, functionality and other parameters of each of the toolkits.
3. User surveys were produced for each of the four toolkits being evaluated. These surveys were made available to users on 21 October 2008, and remained open until 31 December 2008.
4. User data using \*goodpractice's bespoke reports facility and Google Analytics was produced.
5. Further user evaluation was conducted using bespoke written and telephone interviews.
6. A feedback exercise of the Continuous Improvement Toolkit was undertaken by University of Edinburgh students studying for the MSc in E-Learning.
7. User and participant data and feedback was analysed by \*goodpractice.

## 4. Leadership Toolkit

### Purpose

The Leadership Toolkit is provided by \*goodpractice. It offers online tools and resources to support managers and leaders who are responsible for strategic planning and decision-making at a senior level. Additionally, it is also used by staff members in positions junior to the toolkit's target audience who are looking to develop and progress their roles.

The toolkit was launched to users in April 2008. Its content is not bespoke to the Improvement Service, but it is branded with the organisation's colours and logo, as shown below:

The screenshot shows the homepage of the Improvement Service Leadership Toolkit. At the top left is the 'is. improvement service' logo. The main header area has a blue background with 'leadership toolkit' text and a search bar. A navigation menu includes 'Welcome', 'Resources', 'Bookmarks', 'My Profile', 'Administration', and 'Feedback'. The 'Resources' section is active, listing various topics like Career Management, Change Management, Coaching and Mentoring, etc. The main content area features a 'Welcome' message, a description of the toolkit, and a list of 26 topic areas. A call-to-action box asks users to complete a survey. Contact information is provided at the bottom.

### Content

Content in the Leadership Toolkit is split into 27 core leadership and management topics:

Career Management	Diversity	Personal Performance
Change Management	Emotional Intelligence	Planning and Decision-Making
Coaching and Mentoring	Finance Fundamentals	Project Management
Communication – Interpersonal	Internal Consultancy	Recruitment and Induction
Communication – Organisational	Knowledge Management	Strategic HR
Corporate Social Responsibility	Leadership	Strategy

Creativity and Innovation	Negotiation and Influencing	Talent Management
Customer Focus	Partnership Working	Teams
Developing People	Performance Management	Work-Life Balance

Within these topics, content is then sub-divided into 'themes' so that relevant resources can be found quickly. These themes offer a choice of two content options:

- **Theory.** Resources that provide users with information to develop their understanding of subjects, concepts and ideas, e.g. leading thinking articles, synopsis of core models and strategies, examples of best practice etc.
- **Practice.** Tools that help users to apply this understanding in the workplace, e.g. exercises, templates, diagnostic tools, checklists etc.

Content is updated on average three times per year. These are major updates, the most recent being in October 2008 when approx 110 resources were added to existing topics, and a brand new topic, Partnership Working, was made available.

Updates to content are determined by a combination of client feedback and research undertaken by a team of in-house \*goodpractice editors. All content is produced by these editors.

### Access

The Leadership Toolkit can be accessed via the 'Toolkits' section of the Improvement Service's website. Users are required to register for the toolkit, and they are authorised access to it by having their email address validated.

Users do not have to access the toolkit via the Improvement Service site. They can bookmark the login page (which has a 'Remember Me' password functionality) and access the resource directly from there.

### User Statistics

As of 10 December 2008, there are 60 registered users for the Leadership Toolkit (excluding Improvement Service staff). These users are broken down into the following councils:

Council	No of Users
Aberdeen City Council	1
Angus Council	1
Argyll and Bute Council	1
Comhairle nan Eilean Siar	2
Dumfries and Galloway Council	2

<b>Council</b>	<b>No of Users</b>
Dundee City Council	1
East Ayrshire Council	2
East Dunbartonshire Council	1
East Lothian Council	3
East Renfrewshire Council	3
Edinburgh Council	4
Falkirk Council	1
Fife Council	2
Glasgow City Council	5
Highland Council	5
Midlothian Council	2
North Ayrshire Council	6
North Lanarkshire Council	1
Orkney Islands Council	3
Perth and Kinross Council	2
Scottish Borders Council	3
South Ayrshire Council	1
South Lanarkshire Council	2
West Lothian Council	1
Other	5

**24 out of 32 councils have users accessing the Leadership Toolkit.**

User statistics from the period 1 May 2008 to 10 December 2008 are as follows (statistics do not include Improvement Service staff):

- Total number of logins: 161
- Total number of resources viewed as web pages: 204
- Total number of resources downloaded as RTF or PDF files: 338

These downloads and logins can be broken down into the following topics:

<b>Topic</b>	<b>View Online</b>	<b>Download</b>	<b>Topic</b>	<b>View Online</b>	<b>Download</b>
Career Management	3	15	Knowledge Management	1	2
Change Management	14	26	Leadership	51	65

Topic	View Online	Download	Topic	View Online	Download
Coaching and Mentoring	12	2	Negotiation and Influencing	4	20
Communication - Interpersonal	6	2	Partnership Working	0	0
Communication - Organisational	5	3	Performance Management	12	11
Corporate Social Responsibility	2	11	Personal Performance	12	2
Creativity and Innovation	1	1	Planning and Decision-Making	22	37
Customer Focus	13	18	Project Management	3	13
Developing People	1	1	Recruitment and Induction	0	0
Diversity	7	1	Strategic HR	5	0
Emotional Intelligence	6	25	Talent Management	3	30
Finance Fundamentals	5	0	Teams	8	9
Internal Consultancy	2	1	Work-Life Balance	6	43

The most popular topics were:

1. Leadership
2. Planning and Decision-Making
3. Work-Life Balance
4. Change Management
5. Talent Management

The fact that these were the most popular topics is significant, as it confirms that the community using the toolkit has a stronger interest in topics that have a strategic or organisational development focus.

This was further reflected in some of the comments made in the user survey (detailed below), including:

*"Benchmarking and HR measurement seem to be quite prevalent in local government at the moment. Therefore, it would be helpful if there was readily available benchmarking information on HR indicators."*

For the period 1 May 2008 to 10 December 2008<sup>1</sup>:

- Total number of pages viewed: 326
- Number of page views: 2,253
- Unique page views: 1,270
- Average time spent on a page: 40 seconds
- Percentage of visits that did not progress beyond login or welcome screens: 33.73%

That almost 34% of visits did not progress beyond the login or welcome screens is not entirely unexpected. Often, users click on links to investigate what is on offer to them. If they then have to register to go further, many may decide to come back and go through that process at a more convenient time.

This figure is still a significant percentage of overall page visits, however. The overall user experience of going from the Improvement Service Toolkits page, to the toolkit login page, and then to the first page of the toolkit itself is rather text heavy. This is possibly off-putting to a number of users, as the perception could be that there is rather a lot to get through even before the front page is reached. It is worth considering moving the bulk of the explanation text to the toolkit itself, perhaps to a 'How to Use This Toolkit' section.

The other consideration is that the welcome page itself may not be clear enough in terms of highlighting benefits to users, and could be reworked to be more explicit in terms of what it offers.

(It is worth noting, however, respondents to the user survey – detailed below – did not, in the main, have any issues with the registration and login process.)

### **User Feedback**

An online survey was produced to collect user feedback. This survey was made available from 21 October 2008 until 31 December 2008.

Total Starting Survey: 7 (12% of total users)
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Total Completing Survey: 4 (57.1% of those starting survey)
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A detailed breakdown of the responses can be found in Appendix 1. The responses from this survey are summarised below:

- Most respondents knew of the toolkit from visiting the Improvement Service site or through the Improvement Service e-newsletter.
- It was felt that the promotion of the toolkit was pitched correctly, but it could be promoted more fully via induction sessions for new

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<sup>1</sup> Please note that, due to a technical issue, these statistics do not take into consideration August 2008's usage. These statistics also take into consideration usage by Improvement Service staff.

recruits, feature pieces in Improvement Service newsletters/e-shots, a presence on council websites, and corporate newsletters.

- Most respondents found the toolkit visually appealing, considered it easy to navigate, and thought its structure was right.
- All respondents used the toolkit monthly or less frequently. It features all of the resources that they would expect to find, and most felt these resources offered enough support.
- The Change Management topic was considered the most helpful, according to respondents, with Performance Management also scoring well. The Finance Fundamentals topic was considered the least helpful.
- The most popular additional features that respondents would like to see offered on the toolkit were links to other useful sites, and information on learning and development opportunities. No respondent said they would like to see news stories featured on the toolkit.
- The most popular uses of the toolkit were support when preparing for a piece of work, and help with a development area.
- Most respondents said that using the toolkit saved them time on research and personal development.

Follow-up written questionnaires to discuss with individuals points they made in the initial questionnaires were issued in December, but these did not generate any additional responses of note.

## 5. Stepping Stones to Improvement

### Purpose

Stepping Stones to Improvement is provided by \*goodpractice. It offers online tools and resources to support front-line managers and those with responsibility for day-to-day workplace challenges. Additionally, it is also used by staff members in positions junior to the toolkit's target audience who are looking to develop and progress their roles.

The toolkit was launched to users in April 2008. Its content is generic and is not bespoke to the Improvement Service, but is branded with the organisation's colours and logo, as shown below:

The screenshot shows the 'Stepping Stones to Improvement' website. At the top left is the 'is' logo for 'Improvement service'. The header includes a search bar and a 'Logout' button for 'Emily Squire'. A navigation bar contains links for 'Welcome', 'Resources', 'Bookmarks', 'My Profile', 'Administration', and 'Feedback'. The main content area is titled 'Welcome' and 'Stepping Stones to Improvement'. It explains that the toolkit contains sets of information and tools on essential management topics. A sidebar on the left lists 15 core management topics: Change Management, Communication, Customer Focus, Delegation & Empowerment, Developing People, Finance Fundamentals, Leadership, Performance Management, Personal Performance, Planning & Decision Making, Project Management, Recruitment & Induction, Strategy, Teamworking, and Work-Life Balance. A call-to-action box on the right says 'We want to know what you think about this toolkit. Click here to take our user survey.' The footer includes copyright information for '© 2008 Good Practice Ltd' and links to 'Terms & Conditions' and 'Privacy Statement'.

### Content

Content in Stepping Stones to Improvement is split into 15 core management topics:

Change Management	Finance Fundamentals	Project Management
Communication	Leadership	Recruitment and Induction
Customer Focus	Performance Management	Strategy
Delegation and Empowerment	Personal Performance	Teamworking

Within these topics, content is then sub-divided into sections that address various 'needs', e.g. 'I want to hold a development discussion'. These needs offer a choice of two content options:

- **Knowing.** Resources that tell users what they need to know, and why they need to know it, e.g. 'how to' guides and short articles.
- **Doing.** Tools that help users to apply this knowledge in the workplace, e.g. exercises, templates, diagnostic tools, checklists etc.

Content is updated on average three times per year. These are major updates, the most recent being in October 2008 when approximately 80 resources were added to existing topics.

Updates to content are determined by a combination of client feedback and research undertaken by a team of in-house \*goodpractice editors. All content is produced by these editors.

### Access

Stepping Stones to Improvement can be accessed via the 'Toolkits' section of the Improvement Service's website. Users are required to register for the toolkit, and they are authorised access to it by having their email address validated.

Users do not have to access the toolkit via the Improvement Service site. They can bookmark the login page (which has a 'Remember Me' password functionality) and access the resource directly from there.

### User Statistics

As of 10 December, there are 401 registered users for the Stepping Stones to Improvement toolkit (excluding Improvement Service staff). These users are broken down into the following councils:

Council	No of Users
Aberdeen City Council	10
Aberdeenshire Council	9
Angus Council	4
Argyll and Bute Council	7
Clackmannanshire Council	4
Dumfries and Galloway Council	22
Dundee City Council	3
East Ayrshire Council	45
East Dunbartonshire Council	6
East Lothian Council	6

<b>Council</b>	<b>No of Users</b>
East Renfrewshire Council	11
Edinburgh Council	9
Falkirk Council	3
Fife Council	30
Glasgow City Council	12
Highland Council	21
Inverclyde Council	3
Midlothian Council	4
Moray Council	4
North Ayrshire Council	16
North Lanarkshire Council	23
Orkney Islands Council	3
Perth and Kinross Council	13
Renfrewshire Council	6
Scottish Borders Council	5
South Ayrshire Council	10
South Lanarkshire Council	11
Stirling Council	6
West Dunbartonshire Council	9
West Lothian Council	48
Western Isles Council	2
Other	36

**31 out of 32 councils have users accessing the Stepping Stones to Improvement toolkit. Of these councils, all have at least two registered users.**

User statistics from the period 1 April 2008 to 10 December 2008 are as follows (statistics do not include Improvement Service staff):

- Total number of logins: 454
- Total number of resources viewed as web pages: 870
- Total number of resources downloaded as RTF or PDF files: 1270

These downloads and logins can be broken down into the following topics:

<b>Topic</b>	<b>View Online</b>	<b>Download</b>	<b>Topic</b>	<b>View Online</b>	<b>Download</b>
Change Management	123	151	Personal Performance	97	142
Communication	99	107	Planning and Decision-Making	64	64
Customer Focus	59	53	Project Management	27	101
Delegation and Empowerment	15	44	Recruitment and Induction	20	46
Developing People	36	94	Strategy	32	67
Finance Fundamentals	22	38	Teamworking	98	112
Leadership	97	139	Work-Life Balance	21	38
Performance Management	65	74			

The most popular topics were:

1. Change Management
2. Personal Performance
3. Leadership
4. Teamworking
5. Communication

These results are quite interesting as they show that the user community is using the toolkit to support them equally on strategic topics (Change Management and Leadership), as well as interpersonal ones (Teamworking and Communication).

The popularity of Personal Performance is significant, as it highlights that users have a strong interest in self-development and self-improvement, which is the focus of that particular topic. In conjunction with the popularity of Leadership, this suggests that users could be looking to use the toolkit to help them to progress from a management to a leadership role.

For the period 1 May 2008 to 10 December 2008<sup>2</sup>:

- Total number of pages viewed: 578
- Number of page views: 5,700
- Unique page views: 3,601
- Average time spent on a page: 47 seconds
- Percentage of visits that did not progress beyond login or welcome screens: 43.76%

As highlighted in the Leadership Toolkit section, a high percentage of visits not progressing beyond the login or welcome screen is not, in itself, unexpected. The reasons outlined in the previous section (users showing an initial interest in what is available, users wishing to register to a more convenient time etc.) could equally apply here. In direct comparison to the Leadership Toolkit, about 10% more are abandoning their visits in the initial stages. It should be pointed out, however, that this toolkit has generated significantly more traffic to it, so it should be expected that the number is higher.

The percentage, however, is rather high and does suggest that there has been a failure to 'hook' potential users. A redesign of the login/welcome screen should be undertaken to get users to register and then have the benefits of using the toolkit sold to them upfront. As suggested in the Leadership Toolkit section, the bulk of the explanatory information could be stored on the toolkit itself in a 'How to Use This Toolkit' section.

### **User Feedback**

An online survey was produced to collect user feedback. This survey was made available from 21 October 2008 until 31 December 2008.

Total Starting Survey: 56 (14% of total users)
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Total Completing Survey: 36 (64% of those starting survey)
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A detailed breakdown of the responses can be found in Appendix 2. The responses from this survey are summarised below:

- Most respondents knew about the toolkit via the Improvement Service website, e-newsletter, or through a colleague.
- The majority of respondents felt that the promotion of the toolkit was right. However, some commented that they were not aware of the toolkit until a colleague mentioned it to them, or they were alerted to it by this survey.
- Ideas for further promotion of the toolkit included placement on council intranets, internal 'train the trainer' sessions, leaflets, and posters.

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<sup>2</sup> Please note that, due to a technical issue, these statistics do not take into consideration August's usage. These statistics also take into consideration usage by Improvement Service staff.

- Most respondents found the toolkit visually appealing, considered it easy to navigate, and thought its structure was right.
- Most respondents used the toolkit monthly or less frequently. A small number use it on a weekly basis.
- Although the majority of respondents said the toolkit features all of the resources that they would expect to find, and most felt they offered enough support, some stated that it needed more tailoring for a public sector audience, including a localised contact for each council. Some respondents did highlight specific content they would like to see included, such as:

*"Specific information/support for partnership working, as this is the current dominant paradigm for the public sector."*

*"My own particular preference would be for more information on local authority housing finance."*

- The Change Management topic was considered the most helpful, according to respondents. Customer Focus, Recruitment and Induction, and Work-Life Balance were considered the least helpful. (It should be noted that only a small number of respondents answered this question.)
- The most popular additional features that respondents would like to see offered on the toolkit were links to other useful sites, and information on learning and development opportunities.
- A high percentage of respondents have tried using the toolkit to help them with a problem, prepare for a particular piece of work, or support a development area, and have achieved positive results.
- Most respondents said that using the toolkit saved them time on research. Several others also found it saved them time on personal development, supporting their team/colleagues, and tackling issues and challenges.
- When asked to give details of how the toolkit had helped them, respondents offered a wide range of examples including:

*"Used the Teamworking topic to help with a team building day with a support team."*

*"[Used Change Management] during a service restructure to research how to manage change effectively with regard to involving employees."*

*"I have found Project Management a useful refresher when starting new projects."*

*"[I have used] the exercises and diagnostics in training interventions."*

*"The toolkit allowed me to assist in the research of a particular problem regarding recruitment and induction. It clarified procedures for me."*

Follow-up written questionnaires to discuss with individuals points they made in the initial survey, were issued in December. A full breakdown of these comments is listed as part of Appendix 2.

A summary of the main points is provided below:

- Some respondents have access to the Ashridge Virtual Learning Resource Centre, available through IDeA, which is aimed at a similar audience as Stepping Stones to Improvement.
- A wiki would be considered useful as it would provide users with the opportunity to build their own resource and share knowledge. However, some did question that there might be issues getting people to participate.

*"I suggested a wiki because it represents that unique way in which knowledge can be built."*

- There would appear to be a strong link between the toolkit and its potential for both self-development and developing others in the minds of respondents. Responses to the survey highlight several direct references to learning and development activities, including:

*"I use the toolkit to research information for ILM guided learning workshops, and for handouts, individual and group exercises and diagnostics which support the indicative content and learning outcomes specified [for the qualification]."*

*"The way in which I have made most use of the resources is on training courses – exercises to focus groups on subject areas, and the diagnostic tools are helpful to clarify 'where are we now?'."*

- Numerous ideas for related links were suggested, but these were either very specific (e.g. information on running a Housing Revenue Account), or very general (e.g. links to the Plain English Campaign).

## 6. Diagnostic Pathway Toolkit

### Purpose

The Diagnostic Pathway Toolkit was implemented to support the Diagnostic Pathway projects being undertaken by Scottish councils during 2007/2008.

The Toolkit was launched to users in December 2007. It is a completely bespoke offering, created specifically for these projects. A screen shot is shown below:

The screenshot shows the homepage of the Diagnostic Pathway Toolkit. At the top left is the 'is improvement service' logo. The main header area is dark blue with the text 'diagnostic pathway toolkit' and a search bar. A navigation menu includes 'Welcome', 'Resources', 'Forums', 'Bookmarks', 'My Profile', 'Administration', and 'Feedback'. Below the menu, a 'You are in: Welcome' breadcrumb is visible. The main content area is divided into a left sidebar for 'Resources' (listing Background & FAQs, Stage 1-4, and Leading Practice) and a main 'Welcome' section. The 'Welcome' section features a title 'Diagnostic Pathway Toolkit', a descriptive paragraph, and a call-to-action button: 'We want to know what you think about this toolkit. Click here to take our user survey.' Below this is a graphic of a winding path with four circular markers representing the stages: 'Getting Started' (green), 'Gathering Information' (purple), 'Identifying Opportunities' (blue), and 'Moving Forward' (orange). The 'Diagnostic Pathway Improvement Service' logo is positioned below the path. At the bottom, a paragraph states: 'It is a comprehensive, yet intuitive resource, divided into four key stages. The Diagnostic Pathway is designed to help you:' followed by a bulleted list of four objectives.

### Content

The core content in the Diagnostic Pathway Toolkit is split into four sections, reflecting the four stages of the pathway:

- **Getting Started** – helps users to set the foundations for a successful project.
- **Gathering Information** – helps users to establish a review across their organisation.
- **Identifying Opportunities** – helps users to agree and prioritise opportunities and identify potential project partners.
- **Moving Forwards** – helps users to raise awareness of agreed opportunities, and engage others in next steps.

Within each of these sections are sets of templates and guidance materials, which assist users in completing deliverables within the Diagnostic programme.

In addition to these four core sections, there are additional sections for background information and frequently asked questions, and leading practice.

### **Access**

The Diagnostic Pathway Toolkit is accessed via a login screen. Users register to gain access to the site through the Improvement Service or their council's dedicated project manager.

### **User Statistics**

As of 10 December 2008, there are 412 registered users of the Diagnostic Pathway Toolkit (excluding Improvement Service staff). User statistics from the period 1 December 2007 to 10 December 2008 are as follows (statistics do not include Improvement Service staff):

- Total number of logins: 3,712
- Total number of resources viewed as web pages: 3,174
- Total number of resources downloaded as RTF or PDF files: 7,746

These downloads and logins can be broken down into the following sections:

<b>Section</b>	<b>View Online</b>	<b>Download</b>
Background and FAQs	554	696
Section 1: Getting Started	628	721
Section 2: Gathering Information	842	1,440
Section 3: Identifying Opportunities	447	1,847
Section 4: Moving Forward	192	1,687
Leading Practice	511	1,355

For the period 1 May 2008 to 10 December 2008<sup>3</sup>:

- Total number of pages viewed: 650
- Number of page views: 16,631
- Unique page views: 11,586
- Average time spent on a page: 1 minute, 2 seconds
- Percentage of visits that did not progress beyond login or welcome screens: 16.91%

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<sup>3</sup> Please note that, due to a technical issue, these statistics do not take into consideration August's usage. These statistics also take into consideration usage by Improvement Service staff.

The percentage of users not progressing past login/welcome screen on this toolkit is significantly lower than that of the Leadership or Stepping Stones to Improvement toolkits. This suggests the 'hook' had been established (namely, a direct link to a project), which prompted users to investigate further.

### **User Feedback**

An online survey was produced to collect user feedback. This survey was made available from 21 October 2008 until 31 December 2008.

Total Starting Survey: 26 (6% of total users)
---

Total Completing Survey: 17 (65% of those starting survey)
--

A detailed breakdown of the responses can be found in Appendix 2. The responses from this survey are summarised below:

- Most respondents found the toolkit visually appealing, and the set-up and registration process straightforward.
- Although the majority of respondents said they found it easy to find what they were looking for, a large percentage (42.9%) said they did not. Reasons for this included:
  - several documents using the same slides
  - reference not made on the documents as to where they are located
  - missing reference numbers
  - duplication of documents
  - the volume of material on offer
  - search facility not returning specific enough material

Users made the following comments about navigation:

<i>"Searching for documents became difficult, especially as references are not made ON the documents as to where they are located. Version numbers are also missing, requiring frustrating scans through documents to check if they are up to date."</i>
--

<i>"So much material, not always easy to find."</i>
---

<i>"Found it difficult to find a document more than once. If I found a useful document on one occasion, I couldn't find it when I went looking for it a second time."</i>
---

- Most respondents agreed that the structure of the toolkit was correct, but some offered suggestions on how this could be improved:
  - removing or amalgamating some documents that have little information on them
  - ensuring that all slides have accompanying notes
  - more guidance in terms of what each resource is, why it is relevant and how it could be adapted.

- Many respondents used the toolkit on a weekly basis, with an equal amount using it less frequently than a monthly. (Possibly because their project had come to an end when they completed the survey.)
- Although the majority of respondents said the toolkit features all of the resources that they would expect to find, and most felt they offered enough support, a significant proportion (22%) felt differently. The main reason given for this is that there wasn't enough practical 'how to' guidance contained, and the toolkit seemed like a collection of resources that *could* be useful. A lack of case studies was also cited as a reason for the toolkit not being as useful as it could be.

*"The toolkit contains lots of documents (felt like a general dump of stuff that might be useful) but very little 'how to', e.g. what is a target operating model? How do I go about developing one? [There was little] guidance on hints/tips/pitfalls to avoid – it didn't feel like the knowledge objects/documents connected."*

- The Getting Started section was considered the most helpful, with Identifying Opportunities the least helpful section. The forum facility was also flagged as being unhelpful, but some respondents remarked that it worked well in the early stages when people were getting to grips with the project.
- The most popular additional features that respondents would like to see offered on the toolkit were links to other useful sites and news stories.
- A high percentage of respondents have tried using the toolkit to help them with a problem, prepare for a particular piece of work, and help with a development area, and have achieved positive results. However, a reasonably high percentage of respondents said that they tried the toolkit for these activities and the result was negative. The weakest area was using the toolkit to help with a problem – 23% said this did not work.
- Most respondents said that using the toolkit saved them time on research. A low percentage (14%) said it helped them tackle issues and challenges.
- When asked to give details of how the toolkit had helped them, respondents stated that it helped them at the start of the project, and with research and information. Benchmarking and understanding how other councils were approaching things were also widely mentioned.
- It was felt by one respondent that the toolkit itself was based too much on the work of consultancies and the gathering of ideas and opinions, rather than basing decisions or resources on factual evidence.

Follow-up written questionnaires, designed to discuss with individuals points they made in the initial questionnaires, were issued in December. A full breakdown of these comments is listed as part of Appendix 3. The main point coming from these additional responses reiterated that users

would like to have more practical guidance and examples of work that has been undertaken to help with their own knowledge and understanding.

## 7. Continuous Improvement Toolkit

### Purpose

The Continuous Improvement Toolkit was developed to support continuous improvement in councils and their partners. It provides tools and resources to staff who face the challenge of improving service delivery.

The toolkit is one of the products of the significant Customer First Programme, which as one element of its work, encourages councils to share best practice processes with each other. Initial work on the toolkit itself pre-dates the existence of the Improvement Service, and began in 2004/5. It was launched in July 2007.

efficiency | quality | accountability

continuous improvement toolkit

Start Here:

is. improvement service

Establish & Approve 1    Check 'As Is' 2    'To Be' Design 3    Plan Change 4

Post Project Review 9    Project Closure 8    Implement Change 7    Training & Support 6    Develop Solution 5

Click any of the buttons on the route map to view the tools and templates for each stage.

The toolkit may be used in different ways depending on how experienced and competent you are in project management or managing change. It cannot hope to provide you with all the skills you need. The Route Map is intended to give an overview of the stages in a typical change project, though what you actually need to use will vary depending on the scale of the project. In some instances, specialist software programmes are required to view certain of the tools and templates. For more info please see the [user guide](#)

Last Modified On: 04/11/2008

### Production

The Continuous Improvement Toolkit was scoped by a project team consisting of representatives from various councils, with Aberdeen City Council being the lead council.

Each council contributed ideas to ensure the toolkit was a worthwhile collection of tools and templates. Other alternatives, e.g. CD Rom, were considered before it was decided that the resource should be an online toolkit as this option allowed for wider access and would be quicker to update.

The toolkit was created by an external company, Different Voice. Before launch, the toolkit underwent various incarnations before its current look and format was decided upon. This has not changed since its original launch date.

It is currently hosted by Stirling Internet.

### **Access**

Initial access to the Continuous Improvement Toolkit is through the 'Toolkits' page of the Improvement Service website. Users can bookmark the toolkit's front page so that it can be directly accessed.

The toolkit is completely open access for users with no requirement for registration of for usernames or passwords.

### **Content**

Content for the Continuous Improvement Toolkit is a combination of bespoke written material and external links to selected content. The content was sourced by subject matter experts from various councils.

The content is divided into a series of nine generic stages that are required to successfully implement a continuous improvement project. These nine stages are presented as a 'route map' to denote that continuous improvement is a continuous looped journey. Within these nine stages, the user then has to select from a further sub-stage, before being presented with an alphabetical list of tools and resources.

The quality control exercise for the toolkit's content consisted of the project team undertaking a detailed mapping and scoping exercise to ensure each stage had relevant content.

A small number of project team members have editing privileges that allows them to upload or edit content.

The content has not had a significant update or refresh since its initial launch. An audit of external links on the Toolkit to ensure that they are still functioning has not been undertaken.

### **Usage Statistics**

It has not been possible to obtain detailed user statistics for the toolkit, due to a software update made at the network centre on the site's shared server. Stirling Internet have advised that they can use Google Analytics for future statistics.

Usage reports were available between September 2007 and October 2008. However, these showed that the toolkit went from serving 460 sessions and 10,114 hits in November 2007 to no sessions served or hits in any subsequent month. It is extremely unlikely that this is an accurate reflection of the toolkit's usage, and is more probably the result of a malfunctioning report functionality.

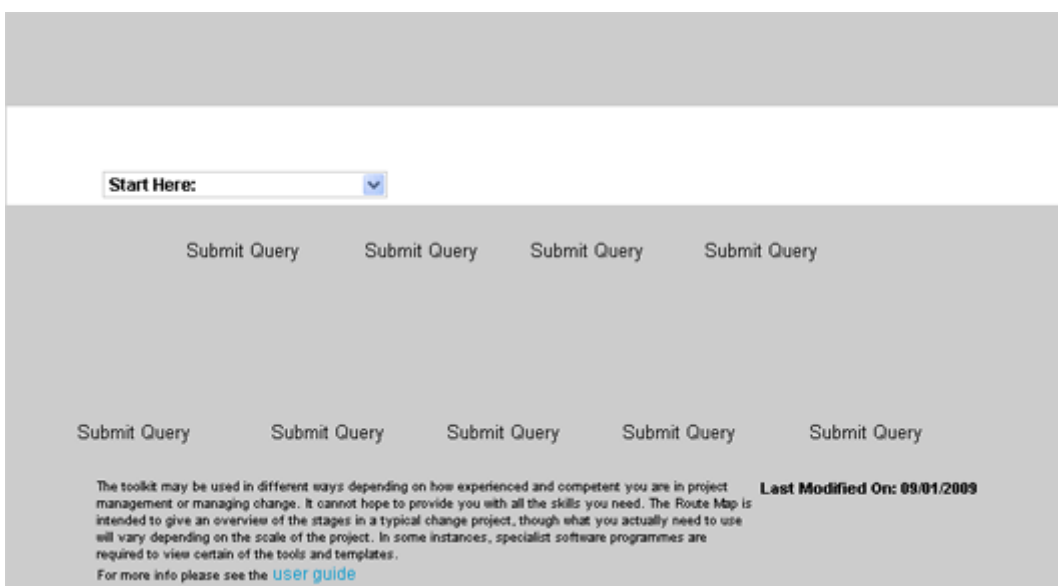
## Feedback

An online survey was produced to collect user feedback. This survey was made available from 21 October 2008, and when it was closed on 31 December 2008 there had been only one response to it.

To generate feedback for this review, therefore, the toolkit was shown to University of Edinburgh students studying for an MSc in E-Learning. They were asked informally for their opinion in terms of look and feel, navigation, and usability. Although they do not make up the toolkit's target audience, they were also asked to have a look at the content to provide a perspective on this as some have experience of working the public sector.

Below is a summary of the points they made about the toolkit:

- The navigation is somewhat complex. A Flash demonstration would help users get a sense of how it should be used.
- The route map, while positively received, does give the impression that users will be guided through a process. However, the toolkit quickly becomes a list of alphabetical tools and templates, with limited metadata regarding what they are for or how they could be used. Further metadata or graphical representation of what the tool is and why it is helpful would be a worthwhile addition. This is particularly true for links to external websites.
- There was an impression that the toolkit may not conform fully to good practice in terms of accessibility guidelines. For example, the stages on the route map are drawn directly onto the image, and are not hard coded onto the page. Visually impaired users using a screen reader would not be able to navigate successfully as a screen reader cannot pick up details on an image. Removing the images from the front screen to establish what a screen reader has to work with reveals that a great deal of the core navigation information is removed:



- The multiple drop-down navigation system received mixed views.

- The lack of a search facility is disappointing and, for many, is a much needed function.
- Certain sections are still unpopulated. (Although, the toolkit text itself does highlight this.)
- Some external links have now expired and users are taken to a blank page.
- In terms of content, most (including some from the NHS) felt that it was an impressive collection of resources and praised the intent. However, it was questioned whether it was necessary to have the Improvement Service logo on top of the templates, when most users will probably just want to replace it with their own council's logo.

## 8. Key Findings

The responses to the user surveys are, generally, positive and highlight that the toolkits are worthwhile resources. However, the relatively low usage flags that the potential benefits are not being relayed successfully to their target audiences.

This is likely to be due to a number of issues including the following:

### i. Lack of awareness of the toolkits and promotional activity

Many respondents to the online surveys made the point, either directly or indirectly, that there was not a great deal of awareness about the toolkits which were being made available by the Improvement Service. When potential users are notified of its existence, the reaction is usually positive.

*"The reaction of the delegates [shown the Toolkit during training sessions] is one of pleasant surprise at the amount of material available to them, and the feedback is that many actively use the facility."*

Survey respondents listed a range of reasons why they knew about the toolkits, but it is clear that overall awareness is lacking. Some ideas for improving this awareness include:

- More visually appealing presentation of the 'Toolkits' page on the Improvement Service website. (See separate entry below for details.)
- Email shots, or entries on the Improvement Service e-newsletter, that are targeted towards a specific issue that is currently happening in local government, linking the issue to a resource in one of the toolkits. For example, if it is time for annual performance reviews in most councils, then a link to resources in the Performance Management topic could be included.
- Creating an awareness pack that could be issued to new starts at councils during their induction sessions.
- Running workshop sessions at councils based on resources from the toolkits, e.g. a change management or strategy workshop.
- Placing links/information about the toolkits on individual council intranet sites.
- Discussing the benefits of the toolkits with learning and development departments of individual councils to establish where they could be used to support their learning interventions.
- 'Train the trainer' sessions in councils, with the intention that these trainers roll-out the toolkits to staff, and become internal 'champions'.
- Being specific in marketing literature regarding how the toolkits can support users in their role, e.g. producing posters or leaflets that give an example of how a particular toolkit could be used.

- Informing attendees at Improvement Service events about the toolkits by distributing marketing literature, or running a short presentation of their features and benefits.

## **ii. Presentation of the 'Toolkits' page on Improvement Service site**

The placement of the toolkits on the Improvement Service site could be improved. Currently, they sit as a text-based list, which runs over two pages. When selecting a link for a particular toolkit, users are often presented with a dense wall of text, with the link to access the toolkit itself buried at the bottom. Nowhere are users encouraged to bookmark the front pages of the toolkits so that they are stored in their favourites folder.

A graphic-based approach, consisting of a relevant image alongside a meaningful strapline to hook users, would be more appealing. Links to holding information pages could sit beside these images though it is important that the text presented is short and to the point. Links to the toolkits themselves should be at the top of the page, along with a prompt to bookmark them for future access.

## **iii. Lack of individual customisation**

Users are becoming increasingly sophisticated in terms of their expectations of online tools. When they are presented with a generic 'one size fits all' toolkit, they may not be as responsive to it if they cannot see evidence that it has been customised for them and their needs in some way. This is particularly pertinent if the users are also using the [Communities of Practice](#) platform, which promotes engagement and knowledge sharing using an online application that enables user facilitation and generation of content.

This point is validated to some extent by users providing considerably more detailed feedback on the Diagnostic Pathway Toolkit, which was created to support a specific project. This sense of integration clearly promoted a sense of engagement, which a generic toolkit would struggle to match if it is presented in its 'off-the-shelf' format.

The toolkits that offer general resources (i.e. the Leadership, Continuous Improvement, and Stepping Stones to Improvement toolkits) might benefit from having individual "editors" per council. These editors could source and upload council-specific content to give the toolkits a sense of ownership and relevance. This, in turn, should boost usage within individual councils and also engagement with the toolkits.

Suggestions for how the toolkits could utilise bespoke content were, indirectly, highlighted in the user survey:

*"Users should be reminded to contact their human resources, learning and development, training areas etc. to obtain practical advice, support and information as to how best to apply this knowledge."*

This kind of information could be provided on the toolkits themselves, rather than prompting users to find this 'offline', to supplement the generic resources.

There are considerations regarding sourcing these local 'editors' and there may be costs involved in terms of up setting up the toolkits to allow this degree of personalisation. It may also place an over-reliance on individuals' goodwill and there is clear evidence that this wanes over time and suffers from individuals having to strike a balance so as to meet their core, day-to-day obligations. However, for example, including a few council-specific resources and/or having a council's logo alongside the Improvement Service's would likely make a difference to a user's perspective.

#### **iv. Audience unaware of how the toolkits can be used**

Given the potential size of audience for the toolkits, the usage of the generic toolkits is relatively low. This is likely because the potential user group was not given a sense of the value of the toolkits. The promotional activities outlined above would provide some kind of resolution to this, but from the survey responses it is clear that this user group perhaps prefers to have benefits specifically illustrated to them.

Case studies and examples of the tools and resources being used on the individual toolkits would help with this. It would be advisable, however, if these examples and studies were based on the individual councils.

The survey responses highlighted that people are using the Leadership and Stepping Stones toolkits for various purposes, e.g. research, general information, supporting learning and development interventions, helping with workplace tasks etc. Each of these activities is entirely appropriate, and it is important that users understand that the toolkits can support a variety of circumstances. The steps outlined under potential promotional activities section would help with this.

#### **v. Ease of use, and look and feel**

In the main, there was positive feedback on the design concepts and general look and feel of all of the toolkits reviewed.

However, feedback on availability or effectiveness of search and adequacy of metadata was not quite so positive. This was particularly true in the case of the Diagnostic Pathway Toolkit and the Continuous Improvement Toolkit. Feedback highlighted that good search functionality and clear, consistent navigation are crucial. Additionally, for similar projects of this nature, better content metadata and more specifically targeted keywords should be used so that the resources returned from a search are appropriate. It was also emphasised that accessibility issues should be addressed right from the start.

#### **vi. Frequency of use**

It was not possible to obtain detailed user statistics for the Continuous Improvement Toolkit. It would be advisable to undertake a detailed evaluation of this toolkit using a group of council staff who make up its target audience. This should address any issues with the toolkit, e.g. lack of awareness, the navigation, content not appropriate etc.

Setting up Google Analytics on the Continuous Improvement Toolkit so that regular user statistics can be obtained should be arranged as soon as possible.

Although the Leadership and Stepping Stones toolkits are being used, most users access them fairly infrequently on a monthly basis. The resources in these toolkits are designed to be of help with everyday tasks and activities, not just special projects. If toolkit use is to be encouraged, it is clear that issues of customisation and promotion specifically highlighting the toolkits' features and benefits must be addressed early on.

Use of the Diagnostic Pathway Toolkit was clearly tied to stages of the project and to promotional activities by the project team.

### **vii. Maintenance considerations**

Updating and ongoing maintenance of the Leadership and Stepping Stones toolkits are the responsibility of \*goodpractice. User statistics are also produced as part of the service agreement between \*goodpractice and the Improvement Service.

As noted above, however, even for these toolkits to find their true audience there needs to be a degree of customisation. This creates its own maintenance issues in terms of creating bespoke sites, training editors etc. These are often short-term issues – once the initial set-up process has been established, user engagement will often be the only ongoing maintenance consideration.

All toolkit offerings should go through regular audits (e.g. quarterly, six monthly etc.) to ensure that they remain useful and relevant to the target audience. The Diagnostic Pathway Toolkit is currently being reviewed as part of the Improvement Service's Improving Together project.

There are existing maintenance issues with the Continuous Improvement Toolkit. The lack of user statistics is a concern that should be addressed as soon as possible. Without this information it is impossible to ascertain what is working on the toolkit and what is not. Additionally, empty sections and the inclusion of broken external links should also be rectified.

### **viii. Understanding of user requirements**

It is important that, going forward, the Improvement Service ensures that development time is built in so that toolkits undergo a thorough scoping process, and are delivered, promoted and sustained effectively. There is a sense from user feedback that both the Continuous Improvement and Diagnostic Pathway toolkits, while having an overall structure, do not make it easy for individuals to find the content they are looking for.

Providing one toolkit to serve all councils may be an issue here, some resources may be more relevant for some councils than for others. This means that there is the potential to have a lot of content that is not relevant or meaningful for some users, coupled with some that is too generic for others.

Having a high proportion of generic content in itself is not an issue – the principles of many tasks, activities, issues and challenges are the same regardless of internal processes. But, as outlined above, if there is no evidence of personalisation then users may perceive the toolkit as a whole as too generic.

Work could be undertaken with individual councils to help them understand the potential of the toolkits, what they could be used for, and discuss customisation opportunities. It should not be a requirement to develop bespoke toolkits per council. Products such as the Leadership, Stepping Stones to Improvement and Continuous Improvement toolkits could provide the foundations for a more customised approach with individual councils.

#### **ix. General points**

- Effort should be put into highlighting the “unique selling points” of toolkits and making them distinctive. The user surveys provide some evidence that people were confused regarding which toolkit they were discussing. For example, making the look of the sites more distinct could be a simple solution to this.
- All possible channels should be used to promote toolkits. For example details about them could be posted on relevant [Communities of Practice](#) . This would involve engaging on some level with users of the communities, and highlighting that the toolkits are available and could be an active support to the communities that are being set-up.
- Having individual usernames and passwords does not appear to be a barrier to using these kinds of resources. Most sites or web browsers have automatic ‘remember me’ functions which mean that logging in is often not required. If this did appear to be causing a problem for potential users, then applications that allow users to have a single digital identity across the internet could be considered, for example, [Open ID](#).

## **9. Suggested Next Steps and Lessons Learned**

In terms of moving forward from this report, the following points represent next steps that could be considered, and summarises lessons learned which should inform future activity in this area.

### **General**

- If a decision is taken to continue with the toolkit subscriptions piloted during 2008, then a meeting should take place between the Improvement Service and \*goodpractice to discuss the customisation options for the Stepping Stones to Improvement, and Leadership toolkits. This meeting could also discuss how \*goodpractice can support the Improvement Service in terms of ongoing promotional activities that will help to embed the toolkits with target users.
- If the subscriptions are continued, the Leadership and the Stepping Stones to Improvement toolkits should be rebranded to have stronger welcome pages to encourage further investigation, and looks that make them more distinct from each other.
- Detailed user statistics should be produced to determine the usage of the Continuous Improvement Toolkit. Following this, the toolkit's project group should meet to discuss its redevelopment in light of the feedback suggested in section 7, or to establish if a new offering or a different approach is required.
- Rather than developing toolkits in isolation, an internal working group could be set up within the Improvement Service to take forward customisation of current, and development of future, toolkits. By having activity focussed in this way, group members can establish firm working practices and benefit from each others' experiences. This working group could agree details of how the toolkits would be scoped and produced, and who would take ownership of monitoring their usage and user feedback.
- Work could begin to engage directly with councils to establish the toolkits that they would like offered to them. Responses could be a case of customising existing toolkit offerings, developing new ones, a combination of both, or looking at alternative options.
- The 'Toolkits' page on the Improvement Service website should be reworked to make it less text heavy, and more visually appealing.

### **Production of Bespoke Toolkits**

- The Improvement Service could establish channels to ascertain what toolkit needs are required by local authorities. This could be done by running regular surveys, holding focus group discussions, conducting interviews with individuals in various councils, or looking at various forums or user groups to see what issues are prevalent.
- In developing any new "products" , a thorough analysis exercise of a toolkit proposal should be undertaken to determine if there is large demand for it, or if it is too exclusive to be of use to a larger audience.

- If a proposed toolkit is thought to be feasible, the following needs to be considered:
  - A clear idea of the toolkit's overall purpose.
  - What content is needed to meet that purpose.
  - What is needed to produce the content (e.g. does it have to be written, is it already available etc.), and who will produce it.
  - The best structure to hold the content.
  - An understanding if one toolkit will meet the needs of the whole target audience, or if there will be the need for bespoke versions.
  - A decision on the best supplier to build and maintain the toolkit.
  - If the content will be required to be updated regularly.
  - A realistic launch date.
  - Suitable promotional activities to launch and then embed the toolkits.
  - Identification of a suitable pilot group to gather feedback.
  - Evaluation of the user feedback.
  - Redevelopment of the toolkit as a result of user feedback.

- When developing a bespoke toolkit, there are three main issues to consider:

**1. Scope.** It is recommended that members of the target audience are involved in the scoping process. It is important, however, that these are from as large a demographic as possible, to ensure that it is not just one voice from a community that is dictating content. There is then a danger that the toolkit becomes too specific to be of use to a general audience.

The main point to consider, once the scope has been carried out, is if the toolkit is potentially too unwieldy. If there is too much information, users may consider it unmanageable to navigate or may feel overwhelmed. Similarly, if too much content is left off, the toolkit may not prove as useful as it needs to be.

It has to be established if one toolkit is enough to support the scope, or if creating separate ones for individual audiences/subjects is a better idea. Launching the toolkits to a pilot group, following a thorough analysis exercise, should help to ensure that the scope is right.

In terms of scoping the actual content, it should be remembered that many users want to have practical 'how-to' information alongside the theory.

**2. Accessibility.** It is essential that users are able to easily access the toolkit. To do this, they need know of its existence and know how to access it. Access should be as simple as possible – if a username and password are needed, then a 'remember me' option for a user's computer to store this information should also be included.

The format the content is presented in is also a strong consideration. As far as possible, users should be given a choice of how they want to receive their content, e.g. view online, download as a different format, print the page, zip the content to folders etc. For sites that are expected to be updated regularly, it is a good idea to include an RSS feed option.

Another factor to be aware of is ensuring that the content is accessible to all who need it, including making sure that those with disabilities are not excluded because the toolkit has not been set up correctly. For example, images are not tagged with a description of what they are, navigation or interactive elements are too small for physically impaired users to be able to use them effectively etc.

**3. Sustainability.** Whatever toolkit solution is developed, it is important that this is then manageable to maintain. The key thing to establish is if an idea is feasible in terms of the support required to implement and progress it. For example, if the content needs to be updated regularly, are there the resources available to do this? If interactive elements are being considered, such as a forum, will someone be available to moderate these to ensure that content is appropriate? Additionally, a robust support contract should be established with any supplier to ensure problems are quickly fixed.

### **Engaging with Suppliers**

- Involving potential suppliers as early as possible in a toolkit scoping process is strongly recommended. Suppliers can often draw on their experience to suggest functionality that works best for certain situations or highlight content needs. They are often able to offer an objective viewpoint on what is best for the toolkit. Establishing a relationship right from the start means that both the Improvement Service and the supplier are more likely to be working towards shared aims and objectives.
- If an 'off-the-shelf' toolkit is being purchased from a supplier, the Improvement Service should establish ongoing support and customisation options before agreeing to buy. It is important that as much flexibility as possible is provided by a supplier, as audience demands and expectations may change.
- The Improvement Service should determine the services that could be offered to them by suppliers as part of their arrangement.
- At least one party within the Improvement Service should be the main liaison for each supplier, and should take ownership for managing the engagement and checking information provided by them, for example usage data.

## Appendix 1: Leadership Survey User Survey Responses

### i. Questions on Launch and Promotion

#### Q: How did you first hear about the Leadership Toolkit?

Response	Response %	Response Count
Visit to Improvement Service website	40.0%	2
Improvement Service e-News letter	40.0%	2
Direct mailing	0%	0
Through a colleague	20.0%	1

*Answered Question: 5*

*Skipped Question: 2*

#### Q: Do you feel that the promotion of the toolkit was right, e.g. pitched at the right level, gave an accurate picture of content, highlighted how it will support you in your role?

Response	Response %	Response Count
Yes	100.0%	5
No	0%	0
No opinion	0%	0

*Answered Question: 5*

*Skipped Question: 2*

#### Q: How else do you think the toolkit could be promoted?

**Response Count** 4

#### Comments

Making sure that all relevant new recruits are aware of the Improvement Service and the website when they commence employment.

Newsletter.

Continue to remind people on newsletter and other IS publications that it exists

On council intranet sites, corporate newsletters, in salary slips etc.

*Answered Question: 4*

*Skipped Question: 3*

## ii. Questions on Access, Navigation and Structure

**Q: Did you find the set-up, registration and login process for the Leadership Toolkit straightforward? If no, please highlight why.**

<b>Response</b>	<b>Response %</b>	<b>Response Count</b>
Yes	80.0%	4
No	20.0%	1
No opinion	0%	0

*Answered Question: 5*

*Skipped Question: 2*

**Q: Do you find the toolkit visually appealing? If no, please highlight why.**

<b>Response</b>	<b>Response %</b>	<b>Response Count</b>
Yes	100.0%	5
No	0	0
No opinion	0	0

*Answered Question: 5*

*Skipped Question: 2*

**Q: Do you find the toolkit easy to navigate, e.g. easy to find what you are looking for, and to find your way back to the first page etc.? If no, please highlight why.**

<b>Response</b>	<b>Response %</b>	<b>Response Count</b>
Yes	100.0%	5
No	0%	0
No opinion	0%	0

*Answered Question: 5*

*Skipped Question: 2*

**Q: Do you think the structure of the toolkit (topics in alphabetical order, topic content separated into themes, themes split into two sections) is appropriate? If no, please suggest how you would like to see the toolkit structured.**

<b>Response</b>	<b>Response %</b>	<b>Response Count</b>
Yes	100.0%	5
No	0%	0
No opinion	0%	0

**Other Comments**

A few links to additional resources, information etc would be useful.

*Answered Question: 5*

*Skipped Question: 0*

**iii. Questions on Content**

**Q: How frequently do you use the Leadership Toolkit?**

<b>Response</b>	<b>Response %</b>	<b>Response Count</b>
Daily	0.0%	0
Weekly	0.0%	0
Monthly	60.0%	3
Less frequently	40.0%	2

*Answered Question: 5*

*Skipped Question: 2*

**Q: Does the toolkit contain all of the resources that you would expect to find? If no, please detail any additional resources you think should be included, and why you think they would be a worthwhile addition.**

<b>Response</b>	<b>Response %</b>	<b>Response Count</b>
Yes	100.0%	5
No	0%	0
No opinion	0%	0

**Other Comments**

Generally I think there is scope for further topics to be added. I would also suggest that it is regularly updated to reflect current thinking on HR/Leadership theories and practise.

*Answered Question: 5*

*Skipped Question: 2*

**Q: Do you think that the toolkit resources offer sufficient support? If no, please detail specific areas where you think more support is needed.**

<b>Response</b>	<b>Response %</b>	<b>Response Count</b>
Yes	80.0%	4
No	20.0%	1
No opinion	0.0%	0

**Other Comments**

I have only recently started using the toolkit, but based on my experience so far, there appears to be a limited number of topics currently available.

Users should be reminded to contact their Human Resources, Learning & Development, Training areas etc to obtain practical advice, support & information as to how best apply this knowledge.

*Answered Question: 5*

*Skipped Question: 2*

**Q: Do you think that the toolkit resources are well laid out and easy to read? If no, please detail why.**

<b>Response</b>	<b>Response %</b>	<b>Response Count</b>
Yes	100.0%	5
No	0%	0
No opinion	0%	0

*Answered Question: 5*

*Skipped Question: 2*

**Q: Which toolkit topics have you found most helpful and why? You may select more than one.**

<b>Response</b>	<b>Response %</b>	<b>Response Count</b>
Change Management	100.0%	4
Coaching and Mentoring	25.0%	1
Communication - Interpersonal	0%	0
Communication - Organisational	0%	0
Corporate Social Responsibility	0%	0
Creativity and Innovation	0%	0
Customer Focus	25.0%	1
Developing People	25.0%	1

Diversity	0%	0
Emotional Intelligence	25.0%	1
Finance Fundamentals	25.0%	1
Internal Consultancy	0%	0
Knowledge Management	0%	0
Leadership	50.0%	2
Negotiation and Influencing	0%	0
Performance Management	75.0%	3
Personal Performance	25.0%	1
Planning and Decision-Making	50.0%	2
Project Management	25.0%	1
Recruitment and Induction	25.0%	1
Strategic HR	0%	0
Strategy	25.0%	1
Talent Management	0%	0
Teams	25.0%	1
Work-Life Balance	0%	0

### Other Comments

I work in Learning and Development and these topics are currently areas where we deliver training on or are likely to deliver training on.

*Answered Question: 4*

*Skipped Question: 3*

**Q: Which toolkit topics have you found least helpful and why? You may select more than one.**

<b>Response</b>	<b>Response %</b>	<b>Response Count</b>
Change Management	0%	0
Coaching and Mentoring	0%	0
Communication - Interpersonal	0%	0
Communication - Organisational	0%	0
Corporate Social Responsibility	50.0%	1
Creativity and Innovation	0%	0
Customer Focus	50.0%	1
Developing People	0%	0
Diversity	0%	0

Emotional Intelligence	0%	0
Finance Fundamentals	100.0%	2
Internal Consultancy	0%	0
Knowledge Management	0%	0
Leadership	0%	0
Negotiation and Influencing	0%	0
Performance Management	0%	0
Personal Performance	0%	0
Planning and Decision-Making	0%	0
Project Management	0%	0
Recruitment and Induction	0%	0
Strategic HR	0%	0
Strategy	50.0%	1
Talent Management	0%	0
Teams	0%	0
Work-Life Balance	50.0%	1

*Answered Question: 2*

*Skipped Question: 5*

**Q: Apart from leadership/management topics, are there any additional features you would like to see included in the toolkit? You may select more than one.**

<b>Response</b>	<b>Response %</b>	<b>Response Count</b>
Blog	40.0%	2
Wiki	20.0%	1
News stories	0.0%	0
Sector information	40.0%	2
Links to other useful sites	80.0%	4
Learning and development opportunities	60.0%	3
Other (specified below)	0.0%	0

**Other Comments**

Benchmarking and HR Measurement seems to be quite prevalent in Local Government at the moment, therefore it would be helpful if there was readily available benchmarking information on HR indicators.

Encourage use of learning forums to share and swap ideas etc.

*Answered Question: 5 / Skipped Question: 2*

#### iv. Questions on Impact

**Q: Please select the answers below that best describe your experience of using the Leadership Toolkit.**

	<b>Tried this and achieved positive results</b>	<b>Tried this but have had no results yet</b>	<b>Tried this and it didn't work</b>
I have used the toolkit to help with a problem.	0.0% (0)	100.0% (2)	0.0% (0)
I have used the toolkit to prepare for a particular piece of work.	100.0% (4)	0.0% (0)	0.0% (0)
I have used the toolkit to help me with a development area.	100.0% (2)	0.0% (0)	0.0% (0)

*Answered Question: 4*

*Skipped Question: 3*

**Q: As a result of using the toolkit, have you saved time on (you may select more than one):**

	<b>Response %</b>	<b>Response Count</b>
regular workplace activities	25.0%	1
research	100.0%	4
personal development	100.0%	4
supporting my team/colleagues	50.0%	2
tackling issues and challenges	25.0%	1

*Answered Question: 4*

*Skipped Question: 3*

**Q: Can you give an example of when you have used the toolkit to help you with a workplace challenge?**

**Response Count**

3

**Selected Comments**

Revisiting the fundamentals of change management.

Managing conflict within a team.

An area within the Council was looking to hold a teambuilding event and the toolkit was used to identify specific objectives and activities.

*Answered Question: 3*

*Skipped Question: 4*

**Q: Can you give an example of when you have used the toolkit to build your knowledge and understanding?**

**Response Count**

3

**Selected Comments**

Refresher of financial terms.

Change management theory

I currently deliver a management development programme and the toolkit is excellent for up to date information on leadership and management issues and thinking.

*Answered Question: 3*

*Skipped Question: 4*

**Q: Do your colleagues use the toolkit? If no, please detail why in the box below (if known).**

**Response**

**Response %**

**Response Count**

Yes

50.0%

2

No

0%

0

Don't know

50.0%

2

*Answered Question: 4*

*Skipped Question: 3*

**Q: Have you and a colleague ever collaborated using the resources in the toolkit? If yes, please give details in the box below.**

**Response**

**Response %**

**Response Count**

Yes

0%

0

No

100%

4

*Answered Question: 4*

*Skipped Question: 0*

## **v. Additional Comments**

**Q: Do you have any further comments that you would like to make about Stepping Stones to Improvement?**

### **Comments**

I think it is excellent that IS have made both the Leadership and Management Toolkits so widely available. The challenge now is to encourage people to use it.

It's an extremely valuable resource and should be communicated to as many people as possible. The down side to this is that people then don't have enough time (due to work demands) to fully utilise the information contained in the toolkit.

*Answered Question: 2*

*Skipped Question: 5*

## Appendix 2: Stepping Stones to Improvement User Survey Responses

### i. Questions on Launch and Promotion

#### Q: How did you first hear about Stepping Stones to Improvement?

Response	Response %	Response Count
Visit to Improvement Service website	32.6%	15
Improvement Service e-News letter	28.3%	13
Direct mailing	10.9%	5
Through a colleague	28.3%	13

#### Other Comments

Web search for improvement material.  
 Received an email about this survey.  
 EAC intranet site  
 Council intranet site  
 The Council's Employee Development Scheme.

*Answered Question: 46*

*Skipped Question: 10*

#### Q: Do you feel that the promotion of the toolkit was right, e.g. pitched at the right level, gave an accurate picture of content, highlighted how it will support you in your role?

Response	Response %	Response Count
Yes	73.6%	39
No	11.3%	6
No opinion	15.1%	8

#### Other Comments

Was not aware of existence of toolkit until asked a colleague for advice and was forwarded a link.

As news of the pilot did not get through to ourselves in Organisational Development then the promotion was not effective.

The toolkit is further promoted at in-house training and development events.

Was unsure how it could support me in my role.

*Answered Question: 53*

*Skipped Question: 3*

**Q: How else do you think the toolkit could be promoted?**

**Response Count**

23

**Selected Comments**

Would it be possible to advertise on organisation's intranet?

short sessions in regional areas about practical applications

Direct to SW Training/Learning and Development Teams to promote within organisations

Targeting service managers

only found it by chance. Some direct promotion to staff within Local Authorities may be useful. Perhaps by email.

Via Regional Improvement Agencies?

posters in the offices of relevant organisations

Leaflets distributed through appropriate Council departments and disseminated to relevant staff.

More widespread promotion but in particular targeted at OD teams who could then publicise throughout the Council

Perhaps at different forum e.g. SOCITM meetings, SOLACE seminars. As "additional learning" links in Improvement Service reports?

*Answered Question: 23*

*Skipped Question: 33*

**ii. Questions on Access, Navigation and Structure**

**Q: Did you find the set-up, registration and login process for Stepping Stones to Improvement straightforward? If no, please highlight why.**

<b>Response</b>	<b>Response %</b>	<b>Response Count</b>
Yes	89.1%	41
No	4.3%	2
No opinion	6.5%	3

**Other Comments**

Rather complex password

A few problems logging on first time, but subsequently no problem (despite unmemorable password!)

Although it does say that you need to register I initially thought that my existing registration details would suffice. It doesn't really make clear that you need to re-register specifically for the tool kit.

*Answered Question: 46*

*Skipped Question: 10*

**Q: Do you find the toolkit visually appealing? If no, please highlight why.**

<b>Response</b>	<b>Response %</b>	<b>Response Count</b>
Yes	76.1%	35
No	4.3%	2
No opinion	19.6%	9

**Other Comments**

Clear, easy to read, information in chunks, easy to navigate

Needs more diagrams embedded in the text. Links between articles and to other useful websites

Well laid out and easy to understand with subject areas defined at a good level.

*Answered Question: 46*

*Skipped Question: 10*

**Q: Do you find the toolkit easy to navigate, e.g. easy to find what you are looking for, and to find your way back to the first page etc.? If no, please highlight why.**

<b>Response</b>	<b>Response %</b>	<b>Response Count</b>
Yes	86.4%	38
No	6.8%	3
No opinion	6.8%	3

**Other Comments**

Wasn't always easy to find my way back and between.

I think the search facility could be refined.

It was unclear at first how to access further resources - I learned by discovery.

It did take some time to discover where "additional resources" were posted.

*Answered Question: 44*

*Skipped Question: 12*

**Q: Do you think the structure of the toolkit (topics in alphabetical order, topic content separated into themes, themes split into two sections) is appropriate? If no, please suggest how you would like to see the toolkit structured.**

<b>Response</b>	<b>Response %</b>	<b>Response Count</b>
Yes	82.2%	37
No	6.7%	3
No opinion	11.1%	5

### Other Comments

Did not always find the link between the sectioned content evident.

The layout of the topics are rather confusing at times

As a trainer, it is helpful to be able to quickly review resources which may inform a development session.

Easy to find way around and access information quickly.

*Answered Question: 45*

*Skipped Question: 11*

### iii. Questions on Content

#### Q: How frequently do you use Stepping Stones to Improvement?

Response	Response %	Response Count
Daily	0.0%	0
Weekly	7.0%	3
Monthly	44.2%	19
Less frequently	48.8%	21

*Answered Question: 43*

*Skipped Question: 13*

#### Q: Does the toolkit contain all of the resources that you would expect to find? If no, please detail any additional resources you think should be included, and why you think they would be a worthwhile addition.

Response	Response %	Response Count
Yes	59.5%	25
No	9.5%	4
No opinion	31.0%	13

### Other Comments

Examples of best practice

Quality Tools i.e. Fishbone diagrams etc

Couldn't find anything on Innovation - an important subject for transformation.  
More tailoring for local government - some of the strategy material is aimed at private sector.

Very comprehensive list of subject areas and nothing that appears to be missing.

If possible it might be good to highlight other management methods but I hasten to add most of the basics are here

*Answered Question: 42*

*Skipped Question: 14*

**Q: Do you think that the toolkit resources offer sufficient support? If no, please detail specific areas where you think more support is needed.**

<b>Response</b>	<b>Response %</b>	<b>Response Count</b>
Yes	59.5%	25
No	9.5%	4
No opinion	31.0%	13

**Other Comments**

Contain signposts to further resources which people can follow if they need or want to.

In my opinion they provide sufficient support for an individual to get a good grasp of the topic and to research other links (thru find out more) if required.

It is only one source of this type of information that I use - I would not rely totally on the toolkit for this type of information

Good use of referencing and signposting but perhaps a more localised contact specific to a particular organisation.

*Answered Question: 42*

*Skipped Question: 14*

**Q: Do you think that the toolkit resources are well laid out and easy to read? If no, please detail why.**

<b>Response</b>	<b>Response %</b>	<b>Response Count</b>
Yes	85.0%	34
No	5.0%	2
No opinion	10.0%	4

**Other Comments**

The English is appalling. The topics should be written in Plain English to make them less academic, quicker and easier to understand and so more likely to be used by our managers.

No easy way to print sub-topics all at once (e.g. if you wanted to print everything on strategy).

*Answered Question: 40*

*Skipped Question: 16*

**Q: Which toolkit topics have you found most helpful and why? You may select more than one.**

<b>Response</b>	<b>Response %</b>	<b>Response Count</b>
Change Management	60.0%	21
Communication	42.9%	15

Customer Focus	20.0%	7
Delegation and Empowerment	14.3%	5
Developing People	37.1%	13
Finance Fundamentals	14.3%	5
Leadership	31.4%	11
Performance Management	40.0%	14
Personal Performance	28.6%	10
Planning and Decision-Making	17.1%	6
Project Management	17.1%	6
Recruitment and Induction	11.4%	4
Strategy	34.3%	12
Teamworking	28.6%	10
Work-Life Balance	17.1%	6

**Other Comments**

Relevant to my current task - helped fill gaps in my own knowledge about what managers need to know/do to be effective.

These are the topics I am concentrating on at the moment.

These subject areas have been particularly relevant to my current work but I have no doubt that I will access all subject areas at some point.

Basically, these were the areas that I needed some information/support at the time. I tend to dip in and out, as required.

Currently leading working group on work related stress.

*Answered Question: 35*

*Skipped Question: 21*

**Q: Which toolkit topics have you found least helpful and why? You may select more than one.**

<b>Response</b>	<b>Response %</b>	<b>Response Count</b>
Change Management	0.0%	0
Communication	0.0%	0
Customer Focus	40.0%	4
Delegation and Empowerment	0.0%	0
Developing People	20.0%	2
Finance Fundamentals	20.0%	2
Leadership	0.0%	0
Performance Management	0.0%	0

Personal Performance	0.0%	0
Planning and Decision-Making	0.0%	0
Project Management	0.0%	
Recruitment and Induction	40.0%	4
Strategy	0.0%	
Teamworking	0.0%	
Work-Life Balance	40.0%	4

**Other Comments**

Personal preference/experience, no particular issues with the material.  
 There is nothing I have come across which was unhelpful.  
 I have found all of the topics helpful.  
 Chartermark has been replaced with Customer Service Excellence - updated info would have been more useful.

*Answered Question: 10*

*Skipped Question: 46*

**Q: Apart from leadership/management topics, are there any additional features you would like to see included in the toolkit? You may select more than one.**

<b>Response</b>	<b>Response %</b>	<b>Response Count</b>
Blog	13.3%	4
Wiki	16.7%	5
News stories	20.0%	6
Sector information	30.0%	9
Links to other useful sites	73.3%	22
Learning and development opportunities	50.0%	15
Other (specified below)	6.7%	2

**Other Comments**

Quotes and anecdotes.  
 I'd like to see information in more specialised subjects. My own particular preference would be for more information on local authority Housing finance.  
 Depends on how much work is being put into the editorial and moderation of blog and wiki.  
 Case studies or experts in the topic would be helpful.  
 Specific information/support for PARTNERSHIP WORKING as this is the current dominant paradigm for the public sector.  
 Get most of this from other sites. Wiki idea is interesting. Have completed an MBA 2 years ago I recognise a lot of the material, but other material could be added in a wiki way.

This would allow benchmarking and promotion of best practice and assist in the information sharing process.

*Answered Question: 30*

*Skipped Question: 26*

#### **iv. Questions on Impact**

**Q: Please select the answers below that best describe your experience of using Stepping Stones to Improvement.**

	<b>Tried this and achieved positive results</b>	<b>Tried this but have had no results yet</b>	<b>Tried this and it didn't work</b>
I have used the toolkit to help with a problem.	<b>64.7% (11)</b>	35.3% (6)	0.0% (0)
I have used the toolkit to prepare for a particular piece of work.	<b>65.5% (19)</b>	34.5% (10)	0.0% (0)
I have used the toolkit to help me with a development area.	<b>69.2% (18)</b>	30.8% (8)	0.0% (0)

*Answered Question: 32*

*Skipped Question: 24*

**Q: As a result of using the toolkit, have you saved time on (you may select more than one):**

	<b>Response %</b>	<b>Response Count</b>
regular workplace activities	16.1%	5
research	80.6%	25
personal development	38.7%	12
supporting my team/colleagues	41.9%	13
tackling issues and challenges	41.9%	13

*Answered Question: 31*

*Skipped Question: 25*

**Q: Can you give an example of when you have used the toolkit to help you with a workplace challenge?**

**Response Count**

14

**Selected Comments**

Managing Change and Performance Management

I have found the project management a useful refresher when starting new projects

Used the resources to prepare an interview question

Mainly as a refresher to make sure I had considered the appropriate techniques for the projects I am working on.

Used the Team Working topic to help with a team building day with a support team. Used the Team Working topic to help with a team building day with a support team.

Helped in the preparation of recruitment and selection of member of staff.

During a service restructure to research how to manage change effectively with regard to involving employees (rather than just the process side of change)

Required information to present information to colleagues as part of a consultation process.

exercise and diagnostics to use in training interventions.

preparing induction programme for managers

Delegation issues within team

The toolkit allowed me to assist in the research of a particular problem regarding recruitment and induction. This clarified procedures to me.

*Answered Question: 14*

*Skipped Question: 42*

**Q: Can you give an example of when you have used the toolkit to build your knowledge and understanding?**

**Response Count**

14

**Selected Comments**

As part of research in undertaking assessments for Diploma in Management

Background information and current thinking on subjects I have been developing for training programmes

preparation for a course

Finance fundamentals. Also highlighted issues/benefits for management colleagues in accessing this kind of resource when they need it.

Used the resources to review approach to performance management

One of my objectives was to document a business change methodology for the team so I referred to the toolkit when I was working on this.

I was developing a new Learning & Development strategy and used the Strategy topic.

Again, to build my knowledge on change management.

Developing own skills in a new job, balancing my own work and life.

Check of leadership and motivation skills.

Answered Question: 14

Skipped Question: 42

**Q: Do your colleagues use the toolkit? If no, please detail why in the box below (if known).**

<b>Response</b>	<b>Response %</b>	<b>Response Count</b>
Yes	17.6%	6
No	14.7%	5
Don't know	67.6%	23

**Selected Other Comments**

Not within middle management, do not know about senior management. I am promoting it through the SW managers induction programme which I am developing

Lack of awareness of the site.

Answered Question: 34

Skipped Question: 22

**Q: Have you and a colleague ever collaborated using the resources in the toolkit? If yes, please give details in the box below.**

<b>Response</b>	<b>Response %</b>	<b>Response Count</b>
Yes	12.1%	4
No	87.9%	29

**Selected Other Comments**

Working together to research a subject for a development programme we were delivering.

Reviewed resources with a colleague for the purposes of SW managers' induction.

Telling / asking colleagues about useful starting points for developing training interventions.

Answered Question: 34

Skipped Question: 22

## **v. Additional Comments**

### **Q: Do you have any further comments that you would like to make about Stepping Stones to Improvement?**

#### **Selected Comments**

I thought this was an excellent resource and, in my opinion, unrivalled in its relevance and comprehensive approach.

I think the service needs some more publicity.

It looks very interesting and could provide very useful support to our leadership and management development programme. Also it could help support our competency framework.

Very useful tool for accessing information and advice.

*Answered Question: 12*

*Skipped Question: 44*

## **Follow-Up Written Questionnaire Responses**

### **What other resources do you use?**

- The other website that I use to get similar information is the Ashridge Virtual Learning Resource Centre, available through IDEA.GOV.

### **What other features would you like to see on the Toolkit?**

- I would see a wiki or social bookmarking feature as being open, but with mediators to prevent abuse or inappropriate material.
- I think that links would be useful but I'm afraid that I can think of any particular sites that I could suggest. However, I think that the most useful information would be case studies of how the learning had been applied in real situations.
- The reason I suggested Wiki because it represents that unique way in which knowledge can be built. However, I do appreciate that it is early days and perhaps not the best site for this sort of development. I still think that reference sites can use this sort of approach. The learning and development suggestion is not an original thought but one brought from England and my use of the Improvement and Development Agency IDeA website. They have a very useful link to Ashridge Management Guides and I was wondering if a similar tie-in with one of the Scottish Business Schools could produce something similar for local authority managers. More wishful thinking I suppose - because this would cost big time!!
- The comment about links to other sites was made in a general, rather than Local Authority context, so, for example, a toolkit item on effective communication might provide a link to the Plain English website, or a finance item may refer to Audit Scotland, etc. Similarly with sector information, this would be whatever was appropriate to the topic in hand.

### **How do you promote the Toolkit?**

- We promote the toolkit to delegates by demonstrating how to navigate the toolkit and how to register as an individual and encourage them to use the site for research when producing assignments or for pre-course reading material. The reaction of the delegates is one of pleasant surprise at the amount of material available to them and the feedback is that many actively use the facility – although I am unable to quote percentages.

### **How do you use the Toolkit?**

- I use the toolkit to research info for ILM guided learning workshops and for handouts, individual and group exercises and diagnostics which support the indicative content and learning outcomes specified by ILM for the individual units of the qualifications for which we are approved, i.e. L2 Team Leading and L3 First Line Management. Accessing the toolkit for pre-course work for delegates can contribute towards the recommended guided learning hours specified by ILM for each individual unit of their qualifications.
- The way in which I have made most use of resources on training courses is probably exercises to focus groups on subject areas. I often find that diagnostic tools are helpful to clarify “where are we now and where do we want to be”, before expanding discussion within groups. Also, many people will want to reflect on topics, and the factual Overview and Leading Thinking tools are most helpful for this.

### **What material would you like to see on the Toolkit?**

- Examples of Strategic and Operational Plans, Learning and Development Plans, Appraisal forms / toolkits, Communication Plans, etc. would all be welcome.
- I think that e-learning packages, details of external courses & training manuals would all be useful but I accept that it could be expensive to produce all this from scratch. As for subject areas, what I would really like to see is more information on finance and accounting rules relating to running an HRA (Housing Revenue Account) and information on the day-to-day implications of working within HRA rules.

### **General Comments**

- I tried to run an online project in the dark distant past at the Audit Commission and I am now involved albeit tentatively in setting up a Communities of Practice site relating to benchmarking (or lack of it) in Scottish Social Services. I realise this is early days for many online toolkits but my biggest gripe with local government officers (oddly enough) is participation. Or doing, to keep it simple. The simple and probably the most apposite analogy is, of course, your toolkit in the garage at home. Now most of my friends, colleagues

and relatives have toolkits in the their garages that their dads and granddads could only dream of, however, I know only two who can actually use more that 10% of the tools properly (and these are tradesman to start with). Equally although they are plenty of managers aware of toolkits such as this (mainly because I tell them) I remain to be convinced that more than a small proportion use them (and use them effectively).

## Appendix 3: Diagnostic Pathway User Survey Responses

### i. Questions on Access, Navigation and Structure

**Q: Did you find the set-up, registration and login process for the Diagnostic Pathway Toolkit straightforward? If no, please highlight why.**

Response	Response %	Response Count
Yes	90.5%	19
No	4.8%	1
No opinion	4.8%	1

*Answered Question: 21*

*Skipped Question: 5*

**Q: Do you find the toolkit visually appealing? If no, please highlight why.**

Response	Response %	Response Count
Yes	81.8%	18
No	4.5%	1
No opinion	13.6%	3

*Answered Question: 22*

*Skipped Question: 4*

**Q: Do you find the toolkit easy to navigate, e.g. easy to find what you are looking for, and to find your way back to the first page etc.? If no, please highlight why.**

Response	Response %	Response Count
Yes	52.4%	11
No	42.9%	9
No opinion	4.8%	1

#### **Selected Comments**

I have not found it easy to find what I am looking for due to several documents using the same slides.

Searching for documents became difficult, especially as references are not made ON the documents as to where they are located. Version numbers also missing, requiring frustrating scans through documents to check if up to date.

The duplication of documents submitted to the site caused confusion.

So much material not always easy to find

found it difficult to find a document more than once i.e. if I found a useful document on one occasion, I couldn't find it when I went looking a second time.

It is difficult to find the areas you are interested in - search is too simplistic  
 Search facility was rather poor- too many results presented in a not very useful way. Things were difficult to find- not always clear why things were saved where they were.

*Answered Question: 21*

*Skipped Question: 5*

**Q: Do you think the structure of the toolkit (in stages, then in subsections) is appropriate? If no, please suggest how you would like to see the toolkit structured.**

<b>Response</b>	<b>Response %</b>	<b>Response Count</b>
Yes	85.7%	18
No	4.8%	1
No opinion	9.5%	2

**Other Comments**

However, I think some pruning of the information would be useful. There are often a number of documents which tell me very little, having no accompanying notes. The slides alone do not explain very much. Particularly for officers new to such a project.

The basic structure made sense but to be properly useful the toolkit needs to have a lot more in terms of guidance e.g. for each knowledge object, what is it? why should I look at it (i.e. relevance)? how do I adapt what is there to fit my organisation's needs, etc

The high level structure worked well - related to the stages of the project which was good.

It was ok but could have been much better and more intuitive

*Answered Question: 21*

*Skipped Question: 5*

**ii. Questions on Content**

**Q: How frequently do you use the Diagnostic Pathway Toolkit?**

<b>Response</b>	<b>Response %</b>	<b>Response Count</b>
Daily	5.3%	1
Weekly	42.1%	8
Monthly	10.5%	2
Less frequently	42.1%	8

*Answered Question: 19*

*Skipped Question: 7*

**Q: Does the toolkit contain all of the resources that you would expect to find? If no, please detail any additional resources you think should be included, and why you think they would be a worthwhile addition.**

<b>Response</b>	<b>Response %</b>	<b>Response Count</b>
Yes	55.6%	10
No	22.2%	4
No opinion	22.2%	4

**Other Comments**

Perhaps links to authorities who have used the toolkit would also be helpful or helpful contacts who are using the toolkit would be useful.

The crucial link between using the diagnostic FTE and qualitative data in some useful way and identifying areas to improve has been missing through this whole project. Consultancies have been lost as to what to do with the data (which explains the reason they are able to gain significant additional consultancy time). Therefore, the toolkit has pretty much been relegated to time consuming method of asking council staff "what would you like to change?" Evidence based decisions using a toolkit is sadly the greatest and most important omission of this whole project. In the end, the diagnostic toolkit may look and sound great, but it has become pretty much redundant. However, in a wider sense, the sharing of useful documentation that councils are developing and using has been very good.

Although some of the PowerPoint presentations were informative, many could have benefited from more notes for each slide.

The toolkit contains lots of documents (felt a bit like a general dump of stuff that might be useful) but very little "how to". e.g. what is a target operating model? How do I get about developing one? Guidance on hints/tips/pit falls to avoid or linkage - it didn't feel like the knowledge objects/documents connected.

Think more links to other websites should be added e.g. case studies etc

There were a lot of duplicated documents (certainly if the search results were anything to go by). There was a lack of guidance documents.

*Answered Question: 18*

*Skipped Question: 8*

**Q: Do you think that the toolkit resources offer sufficient support? If no, please detail specific areas where you think more support is needed.**

<b>Response</b>	<b>Response %</b>	<b>Response Count</b>
Yes	55.6%	10
No	27.8%	5
No opinion	16.7%	3

**Other Comments**

For the reasons given earlier. Slides alone explain very little. That there is often duplication of slides and slides which on their own make little sense are aspects of the resources I find unhelpful.

Again, the main issue is that the diagnostic toolkit does not provide evidence to help decide on change direction. The rest of the documentation depends on the ability of the diagnostic to do this - i.e., what use is material on Workshops, when it is not clear what workshops would be the most effective to run?

Ultimately, the core of the toolkit (the diagnostic toolkit), collecting FTE and opinion based qualitative data does not support "change" workshops very well, nor help the credibility of recommendations further down the line. Essentially, the toolkit is a very long winded way of asking someone what they want to change (as the FTE data and interpretation of the processes serve very little use). These opinions are then kicked about again in a workshop then "validated". However, nowhere through these stages is hard data used to validate anything - it is all opinion based. Therefore, why not just release a massive staff survey? Effectively this reaches the same end at a fraction of the cost.

See previous comments - the toolkit needs to include more guidance on how to use/apply the knowledge objects.

However, even more examples of Councils' templates and actual experiences in carrying out the Diagnostics would be helpful.

Sometimes the resources were very theoretical - list of bullets with little context or introduction which was not always helpful.

Lack of guidance documents but this was in keeping with a lack of practical guidance from the IS so perhaps a bigger issue than the Toolkit itself

I accessed the toolkit daily in the early stages of the Diagnostic. At that stage there was far too much information and it was much too complicated without having the clarity which would have resulted in more consistent information for council's to share. I now access much less frequently, mainly to download Edinburgh's TOM's or business cases from other councils.

*Answered Question: 18*

*Skipped Question: 8*

**Q: Do you think that the toolkit resources are well laid out and easy to read? If no, please detail why.**

<b>Response</b>	<b>Response %</b>	<b>Response Count</b>
Yes	76.5%	13
No	5.9%	1
No opinion	17.6%	3

**Other Comments**

They're self explanatory, and I think this is an excellent way to start for Councils to be sharing information/ideas etc. However, this misses the point that the usefulness of the central tool under pinning all of this is questionable.

There were different versions of the same presentation. The toolkit would have benefited from an editor who could draw together similar documents and present them as a single link.

On the whole yes, however, sometimes there was a lot of information that didn't actually say a lot.

*Answered Question: 17*

*Skipped Question: 9*

**Q: Which sections/resources have you found most helpful and why? You may select more than one.**

<b>Response</b>	<b>Response %</b>	<b>Response Count</b>
Background and FAQs	46.7%	7
Stage 1: Getting Started	73.3%	11
Stage 2: Gathering Information	40.0%	6
Stage 3: Identifying Opportunities	46.7%	7
Stage 4: Moving Forward	40.0%	6
Leading Practice	46.7%	7
Discussion Forum	13.3%	2

**Other Comments**

I have yet to feel any section to be helpful.

Forum is essential - although not sure if it gets used much now. It helped understand other council's interpretations. "Getting Started" useful as any project team needs some initial direction to kick start the work quickly.

I have made less use of the toolkit since we appointed a DP project manager.

All equally useful at different times in the process. The discussion forum is a great idea for sharing lessons learned, etc.

We certainly actively used the whole toolkit - the discussion forum really worked in the early days, however, as people networked contact was made individually by e-mail rather than on the forum - which was perhaps a shame. Overall the sections and resources were very good - could perhaps have done with improved structure/indexing/grouping of documents within the sections - rather than a massive list of documents/resources.

As the project progress the toolkit became less useful.

*Answered Question: 15*

*Skipped Question: 11*

**Q: Which sections/resources have you found least helpful and why? You may select more than one.**

<b>Response</b>	<b>Response %</b>	<b>Response Count</b>
Background and FAQs	0%	0
Stage 1: Getting Started	0%	0
Stage 2: Gathering Information	11.1%	1
Stage 3: Identifying Opportunities	55.6%	5
Stage 4: Moving Forward	33.3%	3
Leading Practice	22.2%	2
Discussion Forum	66.7%	6

### **Other Comments**

There is no standard approach which means filtering through a number of examples, documents and basically end up with no clear assistance being gained from the information.

These are arguably the most important pieces of the toolkit and in my opinion have been practically useless. See my comments above re change direction etc.

Almost no useful information, guidance or help.

Not much real discussion of the elements I was interested in at the times I was interested. I never came to terms with the sense of long lists of opportunities arising from endless meetings. We were interested only in cross cutting issues, which would help managers to see their service in a new light, rather than long list of opportunities which managers could deliver themselves if they considered that they would make a significant contribution to the improvement of their own service.

Never had the need or time to use it.

*Answered Question: 9*

*Skipped Question: 17*

### **Q: Are there any additional features you would like to see included in the toolkit? You may select more than one.**

<b>Response</b>	<b>Response %</b>	<b>Response Count</b>
Blog	25.0%	3
Wiki	25.0%	3
News stories	58.3%	7
Sector information	25.0%	3
Links to other useful sites	66.7%	8
Learning and development opportunities	41.7%	5
Other (specified below)	8.3%	1

### **Other Comments**

Less documents and clearer information.

More practical information; examples of completed documents (in the case of some of the deliverables this would have been very useful); more documented decisions on issues from the IS.

*Answered Question: 12*

*Skipped Question: 14*

### iii. Questions on Impact

**Q: Please select the answers below that best describe your experience of using the Diagnostic Pathway Toolkit.**

	<b>Tried this and achieved positive results</b>	<b>Tried this but have had no results yet</b>	<b>Tried this and it didn't work</b>
I have used the toolkit to help with a problem.	69.2% (9)	7.7% (1)	23.1% (3)
I have used the toolkit to prepare for a particular piece of work.	84.6% (11)	0.0% (0)	15.4% (2)
I have used the toolkit to help me with a development area.	63.6% (7)	27.3% (3)	9.1% (1)

*Answered Question: 15*

*Skipped Question: 11*

**Q: As a result of using the toolkit, have you saved time on (you may select more than one):**

	<b>Response %</b>	<b>Response Count</b>
regular workplace activities	14.3%	2
research	71.4%	10
personal development	21.4%	3
supporting my team/colleagues	28.6%	4
tackling issues and challenges	14.3%	2

*Answered Question: 14*

*Skipped Question: 12*

**Q: Can you give an example of when you have used the toolkit to help you with a workplace challenge?**

**Response Count**

4

**Selected Comments**

At the start of the diagnostic phase the information held on the toolkit helped with the progress of the data gathering phase of the project.

Getting up to speed on particular issues & opportunities raised in diagnostic

The discussion forum section was used extensively for this during the initial data gathering stage of the project - checking what was in scope and what was not, how processes were being interpreted....

To look at examples of outline business cases.

Answered Question: 4

Skipped Question: 22

**Q: Can you give an example of when you have used the toolkit to build your knowledge and understanding?**

**Response Count**

9

**Selected Comments**

I found the toolkit extremely useful if understanding the approach to take regarding change and potential savings with a local authority setting. This widened my knowledge in this particular area, although I have not actually used it in a workplace setting.

Reading background material

Leading practice examples enabled me to expand on my knowledge and understanding.

Job descriptions for project manager and team.

Used the tool kit to look at other authorities information and compare with my own.

Benchmarking against other councils.

In advance planning for each stage. I liked the structure - it allowed us, as a Core Team, to look at what was coming next and prepare for the next steps while finalising the previous activities. Helped to keep things moving.

Currently with understanding how Edinburgh has tackles common themes.

To compare our council figures to other similar placed/sized councils.

Answered Question: 9

Skipped Question: 17

**Q: Do your colleagues use the toolkit? If no, please detail why in the box below (if known).**

<b>Response</b>	<b>Response %</b>	<b>Response Count</b>
Yes	61.1%	11
No	22.2%	4
Don't know	16.7%	3

**Selected Other Comments**

Limited time available therefore one person accesses on everyone's behalf

Colleagues have mainly used resources I produced, influenced by models in the toolkit.

Answered Question: 18

Skipped Question: 8

**Q: Have you and a colleague ever collaborated using the resources in the toolkit? If yes, please give details in the box below.**

<b>Response</b>	<b>Response %</b>	<b>Response Count</b>
Yes	25.0%	4
No	75.0%	12

**Selected Other Comments**

It has been necessary to discuss the resources with colleagues because the information has not answered our questions.

Sometimes it took more than one of us to locate a particular resource in the toolkit.

When we were comparing figures against other councils to use in a report.

*Answered Question: 16*

*Skipped Question: 10*

**iv. Additional Comments**

**Q: Do you have any further comments that you would like to make about the Diagnostic Pathway Toolkit?**

**Selected Comments**

There has obviously been a lot of work that has gone into the toolkit which I do not want to criticise. I wish there were similar kits available for other similarly shared national projects. Regarding the concept of sharing material across councils, I think it is excellent. However, the relevance of most of the material becomes questionable due to the reliance on Consultancies to make something useful happen in the "Identify Opportunities" stage. The gathered data practically becomes irrelevant due to it's inability to identify useful questions or focus on "what to do next" with the data that has been collected. Nationally, what seems to have happened in many cases is that each Council just pays a consultancy to run workshops in which subjective opinions are discussed with very little if ANY reference made to factual data from which conclusions are made. This stage then just becomes a subjective idea gathering and validation stage, which could have just been done in the first place. In my opinion, I think this project has been an extremely costly experiment which may have damaged the credibility of both the Improvement Service and that of project teams within councils who have had to adopt the methodology. It was a great idea, but very poorly executed.

If you were developing a toolkit now I wonder if it would be more cost-effective to use a community of practice on the IDeA web site?

As I used the Toolkit during my secondment to Glasgow City Council in the first half of 2008, recent examples of usage to quote are not really available now. However, I did find it most useful at the time.

The toolkit was very helpful. I appreciate that it is not easy to structure this type of resource - it was very beneficial and during design stage a similar toolkit will definitely be invaluable.

The biggest drawback of the toolkit for me was the search function - made locating a resource time consuming, to the point that we often abandoned the search rather than invest more time searching. Search results found too many documents. No way of filtering the results was problematic.

## **Follow-Up Written Questionnaire Responses**

### **What links to other sites do you think would have been useful to have on the Toolkit?**

- It would be good to have other sources of information (perhaps ones recommended by users) for each of the topics shown on the site. Obviously we can all Google a subject but if someone else has done the work for us or found a particular site useful it would be helpful to get that recommendation. For example for mobile working the [www.projectnomad.org.uk](http://www.projectnomad.org.uk) is helpful.

### **What kind of activity would you have liked to have taken place on the forum?**

- Additional discussions further developing ideas that originated from the various workshops and swapping ideas. This lack of use probably has more to do with the pressure on time from us (the users) rather than the design of the site!
- I think if the forum is to be ongoing it would need to change into the common "work streams" that councils are following. e.g. a "Procurement" forum etc. As I am not involved in any of the ongoing work, I cannot comment on what needs to go on these forum. As it currently stands, the forum is now redundant. I think the forum was useful in gaining other council's interpretation of the Improvement Service guidance. If the toolkit was truly able to help people get through the analysis independently of consultancies, I think the forum would have become more useful in gaining common opinion, understanding and even help in using the data. In this way it could also have been more of a collective learning experience for councils. As it stands, I'm not sure councils are any more "wise" from going through this process in the aggressive timescales.

### **Are there any tools that you think would have made benchmarking against other councils easier?**

- I think it was an excellent resource to use and as / when more council have data to publish, it will grow to be more useful. Instead of them being individual files that needed to be opened and searched, if the data could have been held in such a way as to allow a search on all of it at once that would have been helpful.

### **What additional material would you have liked to have in the Toolkit?**

- I think the toolkit needed more info on identifying how to use and interpret the data gained from the diagnostic (both quantitative and qualitative data). Basically, it needed to show how you get through the analysis bit, otherwise what was the point of the toolkit if you just need a consultancy to do this bit for you? As this detail was missing (and crucially how other authorities were drawing specific

conclusions or asking questions from data) it made the toolkit redundant. Due to this missing information consultancies were required to fill the gap - they effectively did not use anything in the toolkit to do the "analysis". I would have liked to have had some form of "walkthrough" from one or more authorities available in the toolkit, to understand what data they found, how this was interpreted and how this informed the next steps, finally leading through to final business case summaries. Basically any illustrative way of showing how to use the data would have been beneficial.

As I think I mentioned in my original feedback, I am not convinced consultancies were particularly using the data we had collected at all. They seemed to be using workshops to ask similar questions to the diagnostic in different ways - for example, using facilitation techniques to stimulate discussion. In the end, we could have just cut all of the diagnostic tool out of the process and just had an "ideas" workshop - or even just a survey for opinions.