

Partnership Checklist

Purpose of the Checklist

The Statement of Ambition published by the Scottish Government and COSLA, sets out high expectations for community planning and puts the process at the core of public service reform. The Community Empowerment [Scotland] Act 2015 sets out new statutory duties for Community Planning Partnerships [CPPs] and partners.

The Partnership Checklist has been developed to support CPPs to critically review their 'fitness for purpose' in achieving shared outcomes.

The checklist is aimed specifically at CPPs Boards. There is also a specific checklist aimed at CPP thematic groups [e.g. groups focused on a specific theme such as Community Safety, Health Improvement, Lifelong Learning] and also by neighbourhood or local level partnership groups.

The purpose of the Checklist is to:

- Assess views on the effectiveness of current partnership arrangements and how well the partnership meets the challenges of the 'outcomes approach'; and
- Identify areas where there may be scope for improving the operation of the partnership and the impact it has.

The checklist acts as a 'can opener' for identifying potential areas for improvement in the partnership, which are identified through a follow-up workshop.

Focus of the Checklist

The areas that the checklist focuses on are derived from research evidence and good practice concerning what makes for effective, outcome-focused partnership working. This includes the Statement of Ambition, the Accounts Commission's Key Lines of Enquiry in their CPP audit framework and more recently the Community Empowerment [Scotland] Act 2015.

The checklist leads partnerships to explore the following areas:

1. Community Engagement & Participation
2. Use of Evidence
3. Focus on Outcomes
4. Leadership & Relationships
5. Governance
6. Accountability
7. Use of Resources
8. Performance Management and Reporting
9. Impact

Practical Use of the Checklist

Stage 1

Normally following a brief awareness session, the checklist is issued as an electronic survey to all members of the partnership that is being reviewed. The survey should be completed by each individual involved in the partnership.

The checklist contains 65 statements and should take approximately 1 ½ - 2 hours to complete. The checklist leads respondents through a sequence of statements relating to partnership working. Respondents are asked to rate the extent to which they agree/disagree with each statement.

Each statement in the checklist should be completed against the undernoted scale:

Strongly Disagree	Disagree	Agree	Strongly Agree	Don't Know

The 'Don't Know' option should be used when the respondent feels they do not have sufficient information about the particular statement to enable them to make a judgment.

At the end of each section there are two comments boxes – one requires you to provide details of evidence that supports your views on how the partnership is performing in relation to the issues covered by the section and the other requires you to provide further details of how you think the partnership can improve in relation to the areas covered by the section. You will not be able to proceed through the Checklist without providing input to the comment boxes.

All checklist responses are anonymous and non-attributable.

Stage 2

The checklist findings are analysed and a short report is compiled summarising the responses and key points for discussion.

The report will be used as the basis for facilitating a structured workshop with the partnership. The workshop should typically take a maximum of 3 hours. The purpose of the workshop is to give the partnership an opportunity to discuss the strengths and issues emerging from the checklist and to support them to agree and prioritise appropriate improvement actions to further strengthen the partnership.

Stage 3

The workshop will last a maximum of 1 ½ hours and will focus on the development of an Improvement Plan, which will cover the following areas:

- The issues that can be improved upon
- The actions that will be undertaken to address these issues

- Lead responsibilities for driving the actions
- Timescales for implementing the actions
- Resources required to drive the improvement
- Overall impact the improvement/s will make

Public Service Improvement Framework (PSIF)

In addition to the Partnership Checklist, we have also developed a PSIF CPP Thematic Framework. This is a more operationally focused self-assessment framework. For further information please contact psif@improvementservice.org.uk

1. Community Engagement & Participation

1. The partnership has effective engagement mechanisms for understanding the needs of individuals and communities.
2. Input from individuals and communities influences the Local Outcomes Improvement Plan, the activities undertaken and the way that activities are delivered.
3. The partnership has effective mechanisms for communicating with key stakeholders/ individuals/communities.
4. The partnership is taking all reasonable steps to secure the involvement in community planning of any community body which it considers able to contribute to it. In particular, the CPP is having regard to community bodies which represent those communities experiencing socio-economic disadvantage.
5. Each partner has made a strong and clear commitment to how it will work with other CP partners in further strengthening community engagement in Community Planning and how it will use its resources in support of this.

Thinking about the issues covered in this section:

A. Please provide positive examples of good practice of how the partnership is performing in relation to Community Engagement & Participation.

[Empty dashed box for response A]

B. Please provide further details of how the partnership can improve its approach to Community Engagement & Participation.

[Empty dashed box for response B]

2. Use of Evidence

6. The partnership has developed and agreed a common understanding of local needs and opportunities.
7. Each partner has a strong and unambiguous commitment to how they will work with other CP partners to share data and information to further strengthen the local evidence base which is the bedrock that helps define the core priorities of the CPP.
8. Agreed priorities and outcomes in the Local Outcomes Improvement Plan reflect the key challenges of the area identified through the CPP's data analysis and community engagement activity.
9. The partnership has a good understanding of the distribution of positive and negative outcomes across its area, including information relating both to inequalities (e.g. education, income, health) and the range of equalities groupings (e.g. age, race, gender).
10. The partnership draws upon research and evaluation evidence to inform its understanding of which activities demonstrate the impact of their agreed actions on delivering the LOIP and represent good value for money.

Thinking about the issues covered in this section:

A. Please provide positive examples of good practice of how the partnership is performing in relation to the use of evidence.

B. Please provide further details of how the partnership can improve its use of evidence.

3. Focus on Outcomes

11. The partnership has a clear statement in the Local Outcomes Improvement Plan of the outcomes it is focusing upon (i.e. the difference that it ultimately aims to make in the community) and individual partners understand their respective responsibilities for achieving these outcomes.
12. The partnership has undertaken some level of contribution analysis/logic modelling to clearly identify the activities/tasks needed to achieve its outcomes and any related factors likely to influence them resulting in a clear delivery plan.
13. The partnership has identified and agreed which localities/communities and/or client groups it will prioritise in relation to reducing inequalities in outcomes.
14. The partnership has identified priority outcomes for these communities
15. The partnership actively encourages innovation and discussion around the best ways to achieve Local Outcomes Improvement Plan outcomes.

Thinking about the issues covered in this section:

A. Please provide positive examples of good practice of how the partnership is performing in relation to the focus on outcomes.

B. Please provide further details of how the partnership can improve its focus on outcomes.

4. Leadership & Relationships

16. The partnership has strong and effective shared leadership.
17. Partners work effectively together to achieve and agree and shared purpose.
18. Partnership meetings take place within a positive spirit of transparency, openness and trust.
19. There is strong collective leadership to facilitate the shift to early intervention and prevention with the partnership encouraging the redesigning of service delivery models and interventions.
20. The key organisations that can contribute to achieving the partnership's Local Outcomes Improvement Plan are involved and contribute appropriately and there is no obvious partner missing.
21. Elected members of the local authority are engaged in the leadership of the partnership and scrutinising performance.

Thinking about the issues covered in this section:

A. Please provide positive examples of good practice of how the partnership is performing in relation to Leadership & Relationships.

B. Please provide further details of how the partnership can improve its approach to Leadership & Relationships.

5. Governance

22. The partnership has appropriate structures and processes to support shared, effective decision making.
23. The partnership has a vision and strategic direction which partners are committed to.
24. Partners have discussed and formally agreed their respective roles and responsibilities in relation to the partnership and delivery of the Local Outcomes Improvement Plan.
25. All partners have agreed to a conflict resolution mechanism.
26. The partnership is an effective mechanism for addressing issues that cut across different thematic areas and for avoiding 'siloed' or duplicated working by thematic groups.
27. Each partner organisation regularly attends partnership meetings, ensuring continuity as much as possible.
28. The individuals involved in the partnership are sufficiently empowered and influential to significantly advance the key issues.
29. The partnership has an effective mechanism in place for managing collective risks, which is regularly reviewed.
30. The local authority, NHS Board, HIE, Police Scotland and the Scottish Fire and Rescue Service understand their new governance duties to facilitate Community Planning and take all reasonable steps to ensure the partnership operates effectively.

A. Please provide positive examples of good practice of how the partnership is performing in relation to the partnership's governance.

B. Please provide further details of how the partnership can improve its governance.

6. Accountability

31. The partnership's Local Outcomes Improvement Plan is clearly reflected in the strategic and operational plans of my own organisation.
32. The partnership's Local Outcomes Improvement Plan is clearly reflected in the strategic and operational plans of the other key partners.
33. The partnership 'adds value' to the partners' individual contributions to the Local Outcomes Improvement Plan.
34. Partners effectively communicate decisions of the partnership within their own organisation.
35. Partners play an active role together in agreeing, monitoring and taking action to improve local outcomes.
36. The individuals involved in the partnership offer constructive criticism and regularly challenge each other and the partnership as a whole to 'do more' in achieving the Local Outcomes Improvement Plan outcomes and to improve.
37. The partnership's accountability arrangements are clear, understood and implemented by all partners.
38. The partnership holds individual partners to account for their performance and contribution to the Local Outcomes Improvement Plan.

Thinking about the issues covered in both these sections:

C. Please provide positive examples of good practice of how the partnership is performing in relation to the partnership's accountability.

D. Please provide further details of how the partnership can improve its accountability.

7. Use of Resources

39. The partnership knows what resources (financial, staff, assets) are deployed locally.
40. The partnership has undertaken an analysis of what it spends on local services and activities and how this contributes towards its agreed outcomes.
41. Partners realign resources in order to better deliver early intervention and prevention approaches.
42. Partners commitment to the Local Outcomes Improvement Plan is reflected clearly in the resource allocation processes/ decisions made by my organisation (including decision making about resource reductions).
43. The partnership's Local Outcomes Improvement Plan is reflected clearly in the resource allocation processes/ decisions made by other partners' organisations (including decision making about resource reductions).
44. The partnership is fully empowering public service managers to use collective resources to encourage innovation in service/partnership design to meet expected outcome improvements expressed in the LOIP.
45. Partners have identified and prioritised the skills required for effective partnership working within their senior and middle management.
46. Partners have identified opportunities to develop their workforces jointly.
47. Partners contribute such funds, staff and other resources as the CPP considers appropriate to improve local priority outcomes.

A. Please provide positive examples of good practice of how the partnership is performing in relation to how the partnership uses its resources.

[Empty dashed box for providing positive examples of good practice]

B. Please provide further details of how the partnership can improve its use of resources.



8. Performance Management and Reporting

48. The partnership can clearly articulate its collective performance expectations on the necessary steps to reduce inequalities in and between local communities.
49. There is a clear performance reporting linkage between individual partner organisations, thematic partnership groups and the CPP Board.
50. The partnership has effective arrangements to evaluate its own performance.
51. The LOIP clearly expresses what the partnership understands improvement will look like locally and is ambitious in driving appropriate service/ partnership working to achieve its ambitions.
52. The long-term improvements in outcomes that the partnership is seeking to achieve over the next decade (as set out in the Local Outcomes Improvement Plan) are supported by immediate outcomes, indicators and targets against which progress can be measured in the short and medium term.
53. There is an efficient and robust system in place for recording progress made towards the achievement of outcome targets.
54. The performance information considered by the partnership is timely, relevant and provides a good measure of progress towards the desired outcomes and key time specific targets.
55. Partnerships are tracking progress in realising the improvements they seek through the development and sharing of segmented population information - for example by population groups, older/younger people, and different local areas.
56. The partnership actively uses performance information to facilitate constructive strategic discussion and, where required, to instigate corrective action in order to address under-performance against key targets.
57. Performance management arrangements of the partnership are aligned with partners' performance management arrangements.
58. The partnership benchmarks information with other partnerships.
59. There is a publicly available, easy to understand, public performance reporting which demonstrates progress (including successes and failures) of the Local Outcomes Improvement Plan, and is clear about the difference the CPP is making to improve the lives of local people.

a. Please provide positive examples of good practice of how the partnership is performing in relation to how the partnership manages and reports performance.



b. Please provide further details of how the partnership can improve its performance management and reporting.

[Empty dashed box for response]

9. Impact

60. By working together, the partnership has delivered improvements which could not have been delivered by individual organisations.
61. The partnership has made demonstrable progress against the targets and objectives contained within the Local Outcomes Improvement Plan.
62. Each partner has made a strong and clear commitment to work with other CP partners to evaluate the impact of using joint resources in supporting the CPP to improve outcomes.
63. The partnership is making progress in closing the gap around inequalities in outcomes within its own area.
64. The key focus of the partnership's activities is upon addressing the root causes of the issues it has prioritised.
65. There is evidence that the partnership's actions around redesigning service delivery models are facilitating the desired shift to early intervention and prevention and are having an impact.

A. Please provide positive examples of good practice of how the partnership is performing in relation to how the partnership understands the impact it is making.

B. Please provide further details of how the partnership can improve its impact.

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