

**Performance Management Framework
for Scottish Borders Council's oversight of
the Integrated Sport and Culture Trust**

March 2016

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1) Purpose

This Performance Management Framework (PMF) enables Scottish Borders Council (SBC) to monitor the progress that the Integrated Sport and Culture Trust (referred to as “the Trust”) is making towards the achievement of the outcomes required as part of the Service Provision Agreement (signed on 1st April 2016). It provides SBC with the assurance that robust systems are in place to monitor performance and focus on continuous improvement.

The framework allows SBC to demonstrate how the Trust contributes to addressing the priorities identified with Community Planning partners (and currently defined within the Single Outcome Agreement*) and within the SBC Corporate Plan**.

*http://www.scotborders.gov.uk/info/691/council_performance/1351/single_outcome_agreement

** www.scotborders.gov.uk/corporateplan

In addition, the PMF addresses the finding and recommendations made by SBC’s Internal Audit Section in its report dated 16 Sep 2014 around weaknesses in the Council’s arrangements for monitoring and reporting the performance of Borders Sport and Leisure Trust (who will become “the Trust”) and would therefore be required whether or not additional services were being moved to Trust.

2) Performance Management

Effective performance management is critical to the success of any organisation, including Local Authorities and those with whom it contracts. It provides a framework to achieve aims/objectives and promotes the continuous improvement of services provided to the public, including services provided by a Trust or other body. In the Accounts Commission’s series of reports “How Councils Work” (2011), it states that while they can choose who is responsible for the delivery of services (e.g. in-house, arms-length organisation, trust etc.), Councils remain accountable for how public money is spent and the quality of services delivered.

Local Authorities that are recognised as having good performance management in place demonstrate the following characteristics:

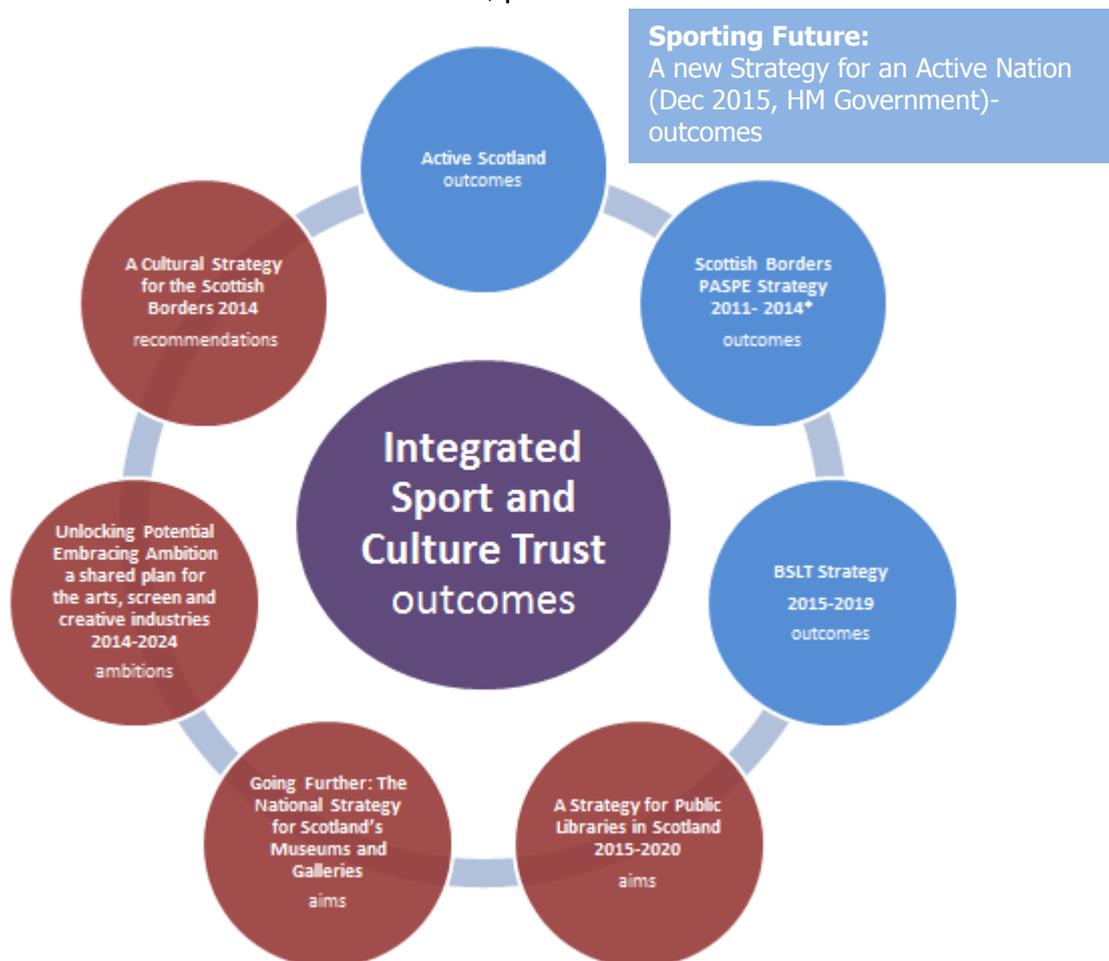
- A focus on community priorities, based on facts about customer and citizen need;
- A strong shared vision of what the organisation is trying to achieve, which is effectively communicated within the organisation and with partner;
- Robust and effective planning systems linked to the allocation of resources (including business and financial planning);
- Clear measures demonstrating the impact of delivery;
- Effective systems for addressing areas of underperformance and for implementing improvement actions;
- Accountable staff empowered to act within a clear managerial framework.

Central to demonstrating these characteristics is having a systematic approach to monitoring performance, a core part of being able to demonstrate that public money is being used wisely (known as “best value”). Even when not directly delivering services itself, SBC must ensure that:

- Performance, including financial performance, is systematically measured and reported across all areas of activity;
- Performance information is accurate, up to date and rigorously monitored;
- Performance information is reported publicly in accordance with the Council’s statutory duty under the Local Government Act 1992 (specifically in relation to the publication of information).

3) Strategic Context for the work of the Integrated Trust

There are a number of key strategies that have influenced the outcomes that SBC wishes the Trust to work towards, presented below:



Sport/Physical activity strategies	*Within the 2015 Partnership Agreement (SBC, BSLT and Sport Scotland), it was specified that the Scottish Borders Physical Activity, Sport and Physical Education (PASPE) Strategy would be reviewed and agreement should be reached about who will lead this.
Culture/arts strategies	

These strategies contain a mix of *outcomes, aims, ambitions* and *recommendations* and are presented in the table below:

Sport / Physical activity strategies	Culture / arts strategies
<p>Active Scotland Outcome 2015:</p> <ul style="list-style-type: none"> • We encourage and enable the inactive to be more active • We encourage and enable the active throughout life • We develop physical confidence and competence from the earliest age • We improve our active infrastructure- people and places • We support wellbeing and resilience in communities through physical activity and sport • We improve opportunities to participate, progress and achieve in sport 	<p>A Strategy for Public Libraries in Scotland 2015-2020- aims:</p> <ul style="list-style-type: none"> • Reading, literacy and learning • Digital inclusion • Economic well-being • Social well-being • Cultural creativity • Excellent public services
<p>Scottish Borders Physical Activity, Sport & Physical Education (PASPE) Strategy 2011-2014 outcomes:</p> <ul style="list-style-type: none"> • Promoting Wellbeing through Physical Activity- Increase participation in purposeful physical activity; Develop lifelong habits of physical activity • Developing Facility Provision & Community Access - Borders Communities have access to local facilities/high quality innovative facilities • Sustaining & Developing Coaches/Leaders & Volunteers- High quality networks to support coaches and volunteers, More qualified coaches and volunteers • Supporting Thriving Clubs & Organisations - increased club membership • Creating Athlete Potential – pathways and structures • Physical Education- increase participation in PE 	<p>Going Further: The National Strategy for Scotland’s Museums and Galleries, 2012- aims:</p> <ul style="list-style-type: none"> • Maximise the potential of our collections and culture • Strengthen connections between museums, people and places to inspire greater public participation, learning and well-being • Empower a diverse workforce to increase their potential for the benefit of the sector and beyond • Forge a sustainable future for sector organisations and encourage a culture of enterprise • Foster a culture of collaboration, innovation and ambition • Develop a global perspective using Scotland’s collections and culture
<p>BSLT Strategy 2015-2019- outcomes:</p> <ul style="list-style-type: none"> • More children participating in active play opportunities with BSLT • More people, in all stages, participating in regular physical activity with BSLT • More people participating directly in sport or in the delivery of sport, supported or led by BSLT 	<p>Unlocking Potential Embracing Ambition a shared plan for the arts, screen and creative industries 2014-2024- ambitions:</p> <p>We want Scotland to be a country where:</p> <ul style="list-style-type: none"> • Excellence and experimentation across the arts, screen and creative industries is recognised and valued • Everyone can access and enjoy artistic and creative experiences • Places and quality of life are transformed through imagination, ambition and an understanding of the potential of creativity • Ideas are brought to life by a diverse, skilled and connected leadership and workforce • Scotland is a distinctive creative nation connected to the world.

Sporting Future: A new Strategy for an Active Nation, Dec 2015 (HM Government)- outcomes:

- physical wellbeing
- mental wellbeing
- individual development
- social and community development
- economic development.

A Cultural Strategy for the Scottish Borders 2014- recommendations:

- Communicate- database, online presence, exchange ideas, co-operate, gather, tourism promotion
- Connect- cultural forum, executive body, integration within SBC, cross border collaboration, access to specialist expertise
- Value- share achievements, demonstrate social and economic return, enhance sector visibility, cultural tourism, support quality, cultural diversity
- Empower- work with other regional and national agencies, CPP, involve young people, better access to cultural spaces, develop leadership

4) Local context and outcomes required

The Community Planning and SBC corporate context is presented below:

Scottish Government	
Purpose:	to focus Government and public services on creating a more successful country, with opportunities for all of Scotland to flourish, through increasing sustainable economic growth.
Underpinning this purpose are the <u>16 national outcomes</u> . Key national policies and strategies then support the achievement of these outcomes	
Scottish Borders Community Planning Partnership (CPP)	
Priorities:	Grow our Economy; Reduce Inequalities; Maximise the impact from the low carbon economy
Underpinning these 3 priorities are a ranges of partnership plans and strategies that support the CPP to deliver against national priorities e.g. Integrated Children and Young People’s Plan 2015 – 2018	
Scottish Borders Council	
Vision:	<i>We seek the best quality of life for all the people in the Scottish Borders, prosperity for our businesses and good health and resilience for all our communities</i>
SBC has 8 corporate priorities that support the achievement of this vision (http://www.scotborders.gov.uk/corporateplan).	

The work of the Integrated Sport and Culture Trust should support Scottish Borders Council and the Scottish Borders CPP to delivery against its priorities, deliver on its statutory requirements (e.g. around Children and Young People) and enhance quality of life for residents of the Scottish Borders.

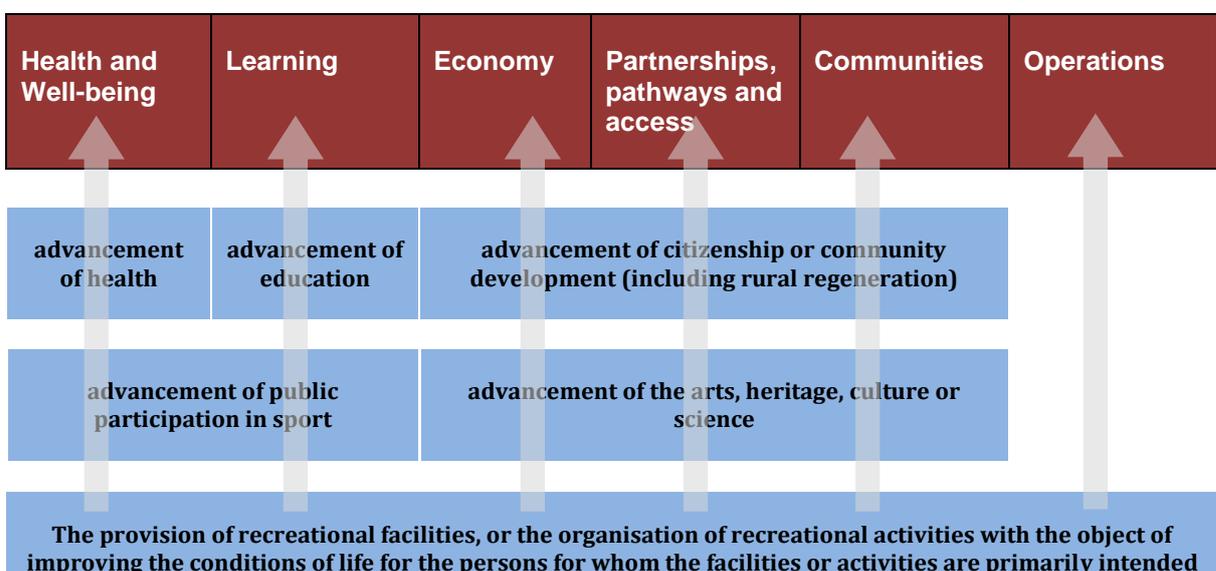
Outcomes required

The Integrated Sport and Culture Trust, through its Service Provision Agreement with the Council, shall work towards achieving the following outcomes:

Improved mental and physical health and wellbeing for people of all ages with a focus on inclusion	Enhanced learning opportunities, training and experiences with a particular focus on reducing inequalities	Increased economic benefits to the Scottish Borders through high quality sport and cultural services and events, and support to creative micro-businesses and organisations	Enhanced partnerships, pathways and access to a wide range of services and activities within facilities and communities (including structures for talent development)	Stronger communities through involvement in service planning, delivery and participation	Increasingly effective operations and creative approaches to income maximisation across the Trust whilst maintaining appropriate quality and standards
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The framework presented within this document should ensure that SBC can see how effectively the Trust is working towards these outcomes (through a combination of quantitative and qualitative reporting) but will give the Trust sufficient latitude to run their business appropriately, and maintain their independence which is a requirement for continued charitable status with the Office of the Scottish Charity Regulator (OSCR).

The outcomes required by SBC allow the Integrated Trust to work towards its charitable status and as such, its charitable aims. All the charitable purposes that have been applied for through the Office of the Scottish Charity Regulator (OSCR) are considered to support fully the outcomes required from this contract. These are shown below, in blue, and linked to the outcomes:



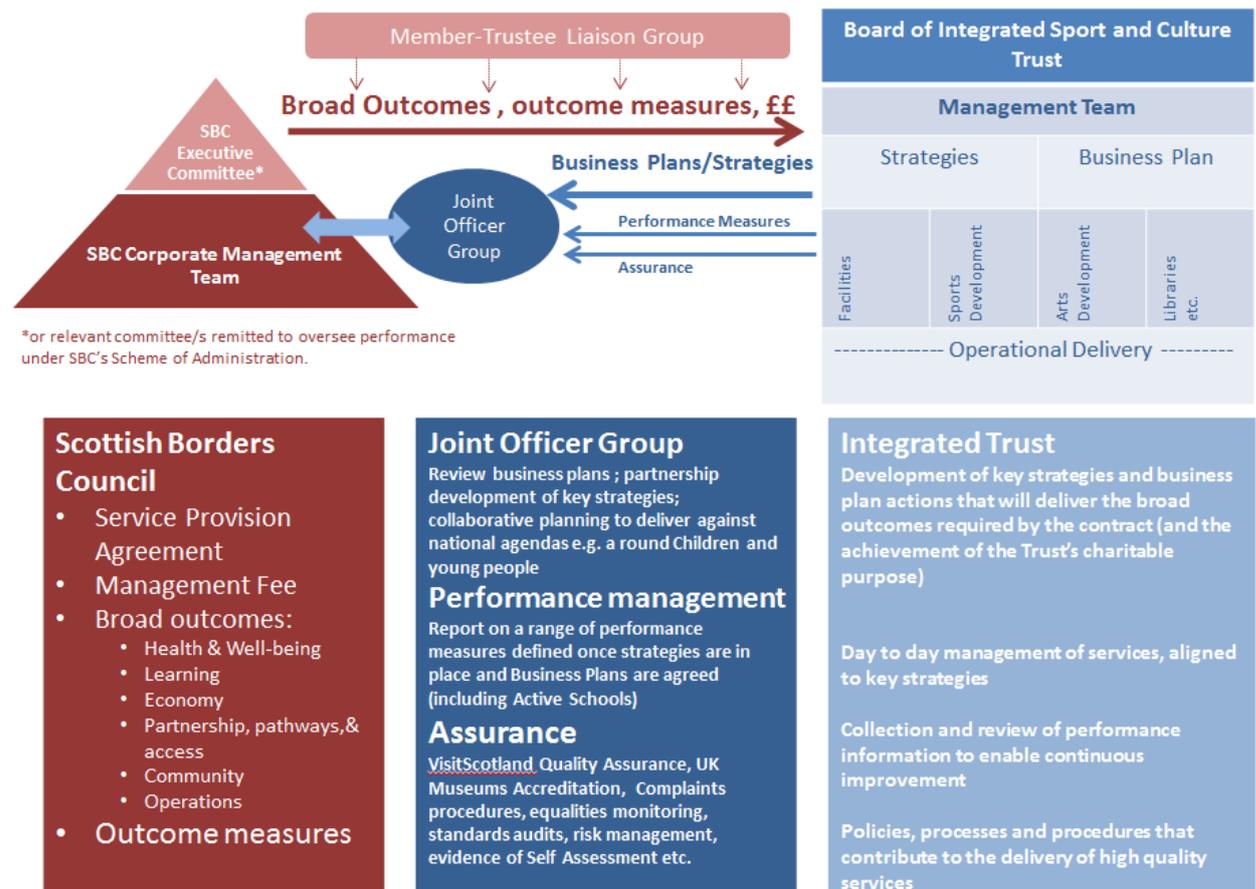
5) Monitoring and Reporting to Scottish Borders Council

The purpose of monitoring and reporting, when using the public money that SBC is accountable for, is to:

- ensure delivery of the outcomes specified within Section 4 of this framework, and demonstrate that value is being added by the Service Provision Agreement;
- demonstrate, over time, improvement in areas where weaknesses have been identified;
- evidence achievement of best value, that can be reported publicly.

Regular reporting should promote accountability and provide reassurance to SBC that the work being undertaken by the Trust, under the terms of the Service Provision Agreement, is improving or maintaining performance.

The following diagram defines the relationship between SBC and the Trust in the context of performance management:



Scottish Borders Council

The broad outcomes required of the Trust have been defined by SBC and are required as part of the Service Provision Agreement (for which a management fee is received). The broad outcomes are accompanied by a set of high level outcome measures (Annex 1). This range of high level outcome measures, which will evolve over time, will allow SBC's Corporate Management Team (CMT) and Executive Committee (or relevant committee/s remitted to oversee performance under SBC's Scheme of Administration) to monitor the high level progress that is being made.

As well as this *quantitative* performance information, it is important to capture qualitative information about the value that is being added to the Scottish Borders by the work of the Trust and for this purpose, case studies should be used. This has been used very successfully as part of Falkirk Community Trust's performance reporting and can be used as part of ongoing awareness raising and publicity as well as to provide evidence of the achievement of outcomes. The Trust is asked to submit 2 short case studies each year (including photographs where possible and appropriate) as evidence under each of the 6 outcomes. These will feed into the twice yearly reporting to Executive Committee and initial ideas are proposed in Annex 1.

Based largely on information collected within services on a regular basis, a range of reports will be required at various points throughout the year. These high level reporting requirements, including statutory returns, have been detailed in Annex 2, and in relation to Public Performance reporting, within Section 7 of this document.

Joint Officer Group

A Joint Officer Group (membership and remit to be specified within the Service Provision Agreement) will be key to:

- ensuring that the outcomes required are addressed by considering a range of performance measures and engaging in discussions on how services can best be developed, using the resources available to both SBC and the Trust e.g. staff, premises, external funding etc. and Community Planning partners. (New performance measures will, from time to time, be developed to accompany new initiatives, jointly funded projects etc. and will help the Trust to evidence success/impact and influence future service delivery);
- Reviewing performance and financial information on a quarterly basis;

- reviewing business plans (including financial plans) on an annual basis, ensuring that appropriate high level actions that will contribute to the achievement of the outcomes are included (including for Active Schools). This should include improvement actions, based on audit/inspection, accreditation recommendations and any self-assessment undertaken;
- developing key strategies in partnership to ensure that national agendas are addressed effectively (for example around Getting it Right for Every Child (GIRFEC)) and that community planning priorities are worked towards.

Assurance on various aspects of service delivery will also be provided to the Joint Officer Group (see Section 6).

Integrated Trust

Within the context of the Service Provision Agreement, the Trust, which has its own management and operating structure, will decide *how* the outcomes are best achieved. Evidence of *how* the Trust is working towards these outcomes should be clear within the Trust's key strategies and business plan (to be submitted to SBC on an annual basis (as specified within the Service Provision Agreement)).

How performance is managed at a detailed service level, to ensure a focus on high quality services and continuous improvement is the business of the Trust. The Council expects that detailed performance information is presented to the Trust's management team on a regular basis and then to the Integrated Trust's Board on a quarterly basis.

Performance information should be robust and auditable at any time by the Council, who may undertake planned and unplanned service monitoring visits, giving four weeks' notice of a planned visits but reserves the right to make unplanned, unannounced visits.

These service monitoring visits shall be led by Officers of the Council. The frequency and notice of visits shall be determined by the Council at its sole discretion.

Subject to the provisions of the Data Protection legislation, the Trust shall ensure that Council staff are granted access to all information held by the Contractor which is relevant to the delivery of the Full Services.

Reporting

Reports that are taken to the Trust’s Board will be shared and discussed at the Joint Officer Group four times a year.

High level measures from within these reports will then be shared with SBC’s Corporate Management Team and Executive Committee twice yearly and reported publicly.

Proposed calendar of reporting is shown below:

April	May	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
	Trust Board	Joint Officer Group <u>Q4 data</u>		Trust Board	Joint Officer Group <u>Q1 data</u>		Trust Board	Joint Officer Group <u>Q2 data</u>		Trust Board	Joint Officer Group <u>Q3 data</u>
						SBC to indicate Budget for following year		Initial Business Plan discussions		Finalised SBC Budget	Finalised Business Plan for coming financial year
						Business Planning					
						----->					
	Member-Trustee Liaison Group			SBC Exec (Q3 & 4 data)	Member-Trustee Liaison Group				Member-Trustee Liaison Group	SBC Exec (Q1 & 2 data)	
		Annual return: CIPFA Libraries		Annual return: LGBF		Annual return: CIPFA Culture	Annual return: CIPFA Archive				

It is proposed that going forward, reporting adheres to this calendar as closely as possible and will be confirmed by the Joint Officer Group towards the end of each financial year.

Reporting will involve a combination of **high level performance measures**, **financial performance measures**, **qualitative information** and **assurances that robust processes are in place** to ensure the achievement of best value.

SBC uses the “Covalent” performance management software which offers the functionality required to effectively monitor performance and drive improvement. It also uses “infographics” and commentary to ensure as full a picture as possible is presented. The Council’s Corporate Performance and Information Team will work with the Trust to ensure that outcome measures are presented in a way that is consistent with current reporting to the Executive Committee, linked to SBC’s Corporate Priorities.

Member-Trustee Liaison Group

In addition to the regular meetings outlined above, a Member-Trustee Liaison Group will meet three times a year to discuss strategic direction, future priorities, and commissioning, as well as raising any concerns about the service delivery and /or the partnership. The membership and remit of this group is specified within the Service Provisions Agreement and will provide an opportunity for Elected Members to engage with the Trust on Culture/Sport matters outwith Executive and out with the Trust's Board.

6) Assurance

Improvement through self-evaluation

Self-evaluation is central to the continuous improvement process. It is the basis for planning for improvement, for action to improve and for reporting on standards and quality.

Culture, Sport and Library services are encouraged to use the following frameworks to get to know themselves well and identify the best ways to improve services for individuals and communities. The Trust will be expected to demonstrate that self-assessment is being undertaken and is linked to business planning.

The two key public sector frameworks are summarised below:

How Good is our Culture and Sport

The aim of this publication is to support continuous improvement in culture and sport provision in local areas. A range of organisations provide services and activities for culture and sport in local areas. The principal target and user of the framework is the local authority, but it is recommended that local authorities should bring the framework to the attention of other service-providing organisations, e.g. those it commissions and its Community Planning Partners. Other organisations providing culture and sport are also encouraged to use the framework to self-evaluate their provision and its impact on the community. The framework for self-evaluation will assist their individual and, where appropriate, collective evaluation of the quality of their provision and in planning and implementing improvements in services.

http://www.educationscotland.gov.uk/inspectionandreview/Images/HGIOC&S%20-%20251012_tcm4-712897.pdf

How Good is our Public Library Service

This approach will enable public library services to demonstrate the impact which they have on individuals and communities, and how well the services meet the needs of users and the wider community. The evidence gathered during the process should clearly show outcomes which articulate and demonstrate the local authority's delivery of standards of cultural planning

activity and entitlements, involving local people, and other local government processes. Again, it is recommended that local authorities should bring the framework to the attention of other service-providing organisations.

Any data that is collected and reported should aim to provide a strong evidence base in support of these frameworks. For example, participation figures, especially amongst equality groups, will support health and well-being outcomes. <http://scottishlibraries.org/standards/hqiopls/>

Accreditation

The ongoing achievement of accreditation with various external bodies provides assurance to SBC that certain performance and quality standards are continuing to be met. For example, Visit Scotland accreditation for Museums and Galleries will ensure that standards in relation to visitor experience, customer satisfaction, accessibility etc. are being met and that ultimately, the outcomes will be achieved. The accreditations that are required to be maintained are covered within the Service Provision Agreement.

Accreditation feedback from, for example Museums and Galleries Scotland (MGS), may include improvement actions and the requirement for an annual report. The Joint Officer Group would expect to see improvement actions included within business plans.

Equalities Monitoring

As part of the Service Provision Agreement, and to fulfil its duties under the Equality Act 2010, SBC will require to review the Trust's Equality Policy and to receive annual employee monitoring reports, ensuring that the diversity that exists within communities is reflected in the Trust's workforce.

SBC will assist the Trust, in years 2 and 3 after transfer, to expand this monitoring to include reporting on accessibility, staff training and on monitoring the breakdown of service user characteristics (at least by age, gender and disability). This equalities reporting will form part of regular reporting to Executive Committee, and will be used by SBC when preparing its Equalities Mainstreaming report (required of public bodies under the Equality Duty).

Other Policies and Procedures

There are other policies and procedures that SBC will require to see as part of the Service Provisions Agreement, for example Complaints Handling Procedure, and around Freedom of Information.

The Joint Officer Group may, from time to time, ask to see performance information in relation to these, for example around % of FOIs responded to within specified timescale.

7) Public Performance Reporting (PPR)

The Accounts Commission now expects Councils to report a range of performance information publicly (including benchmarking) to demonstrate best value, including for the work of trusts and other alternative models of service delivery.

The Commission issues guidance each year, designed to enable councils to determine how best they present performance information for the year but the expectation is that performance information, including financial performance, should be presented in an understandable and easily accessible way. By using this PMF, the Trust will be able to assist the Council to fulfil its statutory duty under the Local Government Act 1992, in relation to the publication of performance information.

Benchmarking as part of PPR

The introduction of the Local Government Benchmarking Framework (LGBF), co-ordinated by the Improvement Service, requires Councils to include comparisons with other Local Authorities as part of their public performance reporting. The LGBF is made up of a range of data drawn from a range of already collected and validated sources e.g. Local Financial Return, CIPFA return etc., as well as 11 performance indicators retained from the old Statutory Performance Indicators, where information is provided by Councils. As part of the LGBF, there are a number of returns that the Trust will be required to make in August of each year (for the previous financial year):

- Number of attendances (pools)
- Number of attendances at Indoor sport and leisure facilities (excluding pools in a combined complex)
(Number of attendances refers to the total number of visits to the sport and leisure facilities, not the number of users)
- Number of visits to/usages of council funded or part funded museums
(Number of Visits refer to the total number of visits, not visitors)
- Number of visits to libraries (this refers to the number of visits to library services, not the number of users, and includes virtual visits)

Details of what is required for these indicators (known as the “metadata”) are available from the Corporate Performance Team at SBC. For all LGBF indicators, the Corporate Performance Team works with SBC’s Audit and Risk section and Finance team to ensure the accuracy of data submitted. It is expected that the same processes would be applied to the four indicators detailed above, prior to submission in August each year.

The Trust would also be encouraged to benchmark using other networks such as SPORTA, and to share this information with SBC and publicly about how it compares to others.

Annex 1: Proposed measures for reporting to SBC Executive Committee

The following tables present a range of measure that will be used during the first 2 years of the Integrated Trust. They will be reviewed and added to as appropriate.

Biennial Outcome Measures (from Scottish Household Survey)	Scottish Borders 2014	Scotland 2014	Difference	Short term trend (2 years)	Long term trend (2007/8)
Cultural engagement by adults in the last 12 months	91%	91%	0	↑	↑
Participation in cultural activities in the last 12 months (excluding reading)	50%	50%	0	n/a	n/a
Participation in cultural activities in the last 12 months (including reading)	80%	79%	1	n/a	n/a
Participation in sport and exercise (excluding walking) in the last 4 weeks	48%	51%	3	↓	↓
Participation in sport and exercise (including walking) in the last 4 weeks	75%	78%	3	↓	↓
Satisfaction with cultural and sport facilities (service users in the past year only)*:					
Very/fairly satisfied	82%	87%	5	↑	↓
Very/fairly dissatisfied	8%	7%	1	▬	▬

*Some of these can be broken down by age, gender and long term physical/mental health condition
* local satisfaction surveys may be used to supplement this information when available*

Annual measures	Scottish Borders	Scotland	Difference	Short term trend (2 years)	Long term trend (2007/8)
Cost per attendance at sports and leisure facilities	£3.72	£3.68	4p	↓	↓
Cost per library visit	£4.60	£2.57	£2.03	▬	▬
Cost per museum and gallery visit	£6.02	£3.53	£2.49	▬	↓
Number of sites holding Visit Scotland "4 star" accreditation	3	n/a	n/a	▬	↑

Other annual measures	
Equalities	Employee monitoring Accessibility of facilities Service user equality monitoring
Finance	Management Accounts Income, expenditure, surplus/deficit, SBC subsidy per visit

Executive: Twice Yearly, under each of the 6 outcomes

(note that some indicators may support more than one outcome; most data will be collected quarterly within services)

Health and Well-being: suggested indicators	Lead
"Books on prescription"- number of issues	M Menzies (Library & Information Services Manager)
Number of "Book Bug" sessions run and participants	M Menzies
Housebound/home book- number of issues	M Menzies
Sport- participant visits (0-5 5-16 17-64 65+)	BSLT
Admissions to sports facilities <ul style="list-style-type: none"> • Pool • Other 	BSLT
BSLT (Live Borders) Membership	BSLT
Swim Borders Direct Debits	BSLT
Culture case studies suggested: Participant experience- improvement in health and well-being; Targeted events e.g. PACE	

+ **Active schools**- participant sessions (school year and gender), activity sessions, deliverers (e.g. volunteers, pupils), school club links

Learning	Lead
Number of young people participating in VOMO/Leadership programmes	S Garnsworthy (Creative Learning Manager)
Number of library visitors <ul style="list-style-type: none"> • for library use & non-library use (integrated sites) • virtual visits • active members 	M Menzies (Library & Information Services Manager)
Use of public networks in libraries <ul style="list-style-type: none"> • Availability • recorded usage 	M Menzies
Number of library based learning sessions (e.g. Get clicking, Get surfing) and participant numbers	M Menzies
Number of Museums & Galleries learning & outreach events and participant numbers	F Colton (Senior Museums Curator)
Number of Heritage Hub outreach events and participant numbers	P Brough (Archive Manager)
Culture case studies suggested: Youth sessions; Young people's progression stories i.e. into employment; Museum/heritage outreach	

Economy	Lead
Museums & Galleries: (including supported independents & Harestanes) <ul style="list-style-type: none"> • visitor numbers • sales income (including art commission) 	F Colton (Senior Museums Curator)
Heart of Hawick: <ul style="list-style-type: none"> • visitor numbers and sales income (including from business units) • film audience numbers and income • auditorium live event audience numbers and income 	S Taylor (Marketing and Operations Manager)
Heritage Hub visitor numbers	P Brough (Archive Manager)
Eastgate Theatre: <ul style="list-style-type: none"> • film audience numbers and income • live event audience numbers and income • sales income (café) 	Eastgate (through Partnership Agreement)
Number of creative businesses supported (CABN)	M Morrison (Creative Leader, CABN)
Culture case studies suggested: Exhibitions/events; Support for independent museums; CABN showcase events (partnership projects; workshops; participant experience); Support for Ancestral Tourism businesses	

Pathways, partnership, access	Lead
Number of Heritage Hub web visitors [Memory Bank, Blog, Voyage of the Vampire, Hubcat, Scran]	P Brough (Archive Manager)
Museums & Galleries- use of collections	F Colton (Senior Museums Curator)
Borders Live Touring: number of performances and audience numbers	S Garnsworthy (Creative Learning Manager)
Performing Arts Partnership: number of performances and audience numbers	S Garnsworthy
Number of Mobile Library users and issues	M Menzies (Library & Information Services Manager)
www.liveborders.org analytics	BSLT
Culture case studies suggested: Performing Arts Partnership / Borders Live Touring events; Customer experience e.g. mobile library	

Communities	Lead
Community Centres*: <ul style="list-style-type: none"> • Number of lets • Hours let • Income • Number of management committee members 	L Wood (Business Manager)
Public Halls*: <ul style="list-style-type: none"> • Number of lets • Hours let • Income 	A Scott (Community Venues Manager)
Culture: number of people volunteering for cultural services	All Cultural Services (CS)
Sport: number of active volunteers and volunteer coaches	BSLT
Case studies suggested: Public hall events; Management committee development/growth; Individual volunteer experience; Hall user group experience	

*develop reporting by 5 localities

Operations	Lead
External Funding gained and leverage (e.g. match funding)	All CS/BSLT
Projects and/or funding applications in development	All CS/BSLT
Standards Audit (Physical checks of buildings covering condition, cleanliness, staff presentation)- <i>currently used by BSLT</i>	BSLT
Energy Consumption : Energy used per sq m	BSLT
Customer Satisfaction: net promoter score - <i>currently used by BSLT</i>	BSLT
Quarterly management accounts	BSLT
Culture case studies suggested: External funding success; VisitScotland/Museums Galleries Scotland feedback	

Annex 2: High Level Performance Reporting requirements for Community Planning Partnership and SBC

Audience	Report	Frequency	Purpose / Content
Scottish Government	Local Outcomes Improvement Plan progress report (replacing Single Outcomes Agreement (SOA) update)	Annual	The Scottish Government required Community Planning Partnerships (CPP) to provide a SOA progress report in September of each year including PI results and local outcome narrative. However, this will now be replaced by an annual report on progress against the Local Outcomes Improvement Plan , a new requirement under the Community Empowerment Act and will include the community planning partnership's assessment of whether there has been any improvement in the achievement of each local outcome agreed as a priority for the Community Planning Partnership.
	Locality Plans: progress report	Annual	Under the Act (see above), each community planning partnership must prepare and publish a locality plan progress report each reporting year, setting out the community planning partnership's assessment of progress at a locality level. <i>Details are still to be confirmed by the Scottish Government.</i>
BSLT has recently joined the Board of the Scottish Borders Community Planning Partnership and as such will be required to prepare and publish an annual report setting out its progress in working towards specified local outcomes			
Scottish Government/Improvement Service	SPI return/Local Government Benchmarking Framework- <i>specific measures only</i>	Annual (end Aug)	Annual comparison report where Scottish Borders Council performance is compared with the other 31 Local Authorities in Scotland, against a range of performance measures. The measures are largely taken from returns already submitted to other bodies (SEPA, CIPFA etc.), combined with financial information from the Local Financial Return (LFR), but SBC is still required to make a separate return on 11 measure (including library, museum, and sport/leisure attendance/visit and cost figures)
CIPFA	Cultural Services	Annual (October)	An analysis of actual and estimated expenditure and income in Scotland on: sport, community recreation, parks and open spaces, arts, heritage and museums, tourism, libraries, archives, and other cultural activities. Non-financial information includes details on the number and size of facilities, and in the case of theatres, concert halls, exhibition spaces, arts centres, and museums and galleries, the number of events / performances / exhibitions and actual attendances.

Audience	Report	Frequency	Purpose / Content
	Public Libraries In Scotland	Annual (June)	Analysis of revenue expenditure and income; staffing levels; service points open to the public (including the number with access to online information); book stock and audio, visual and electronic stock; annual issues; inter-library loans; requests; enquiries and visits. Also includes details of agency services.
	Archive Service (Heritage Hub)	Annual (November)	A detailed analysis of local authority archive services, including: staff resources; access points; holdings and storage capacity; availability of resources to the public; use of resources and financial statistics.
Joint Officer Group	Quarterly performance report	Quarterly (June, Sep, Nov, March)	Based on the Integrated Trust's Board reports and the measures covered in Annex 1 , performance reports on the Trusts' delivery against the outcomes defined within the Service Provision Agreement including action being taken to maintain or improve performance. Review of key strategies and business plan once a year as part of these meetings.
Corporate Management Team (CMT)	Corporate Performance against Corporate priorities	Twice Yearly (June, Dec)	Performance reports on the Trusts' delivery against the outcomes defined within the Service Provision Agreement, including action being taken to maintain or improve performance.
SBC Executive Committee	Corporate Performance Against Corporate Priorities	Twice Yearly (Aug and Feb)	High level performance report on the Trusts' delivery against the outcomes defined within the Service Provision Agreement, including action being taken to maintain or improve performance. To include two case studies under each outcome.
Public Performance reporting	SB Connect	3 times a year	Provide public interest articles on Trust activity and performance, and relationship with SBC (take from Case Studies, as part of twice yearly reporting)
	Trust and Council Website	Ongoing	Council and CPP performance information is now co-ordinated through a revised performance page (www.scotborders.gov.uk/performance). This performance page will link to the Integrated Trust's website where its performance information will be published clearly, on a regular basis.

For more information on anything within this framework, contact the Corporate Performance Team on 01835 826542 or email performance@scotborders.gov.uk

You can get this document on audio CD, in large print, and various other formats by contacting the Corporate Performance Team.

In addition, contact the address below for information on language translations, additional copies, or to arrange for an officer to meet with you to explain any areas of the publication that you would like clarified:

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