

HM Treasury

Public Expenditure System

PES (2006) 18 Annex A

20 December 2006

Secretariat: 020 7270 5985

[Revised 8 January 2007. Revisions in brackets]

Summary assessments of progress

In order that judgements on final outturn against all PSA targets can be made on a consistent and comparable basis, departments are asked to include a short summary phrase when they report their **final assessment** against a target. (This phrase is in addition to the wider reporting against the target.) Departments should exercise their own judgement about which phrase to use from the list given below.

TERM	USAGE
Met	Target achieved by the target date – must not be used before the target end-date unless there is no possibility at all of subsequent slippage
Met-ongoing	For older open-ended targets where the target level has been met and little would be achieved by continuing to report the same information indefinitely (in using this term it should be made clear that a final assessment is being given)
Partly met	Where a target has two or more distinct elements, and some – but not all – have been achieved by the target date
Not met	Where a target was not met or met late
Not known	This should only be used where it was not possible to assess progress against the target during its lifetime or subsequently – explanation should be given and reference made to any subsequent targets covering the same area

Once a target has been finally assessed in this way, departments are not expected to continue to report against the target. For this reason departments should be clear that the term used represents an accurate and final assessment which will not be susceptible to revision, eg because further information relevant to the target has yet to be collected or analysed.

Departments **[must]** also use standard terms if summarising progress against **ongoing** targets. The following list offers a number of options.

TERM	USAGE
Met early	Only to be used in circumstances where there is no possibility of subsequent slippage during the lifetime of the target
Ahead	If progress is exceeding plans and expectations
On course	Progress in line with plans and expectations
Slippage	Where progress is slower than expected, eg by reference to criteria set out in a target's Technical Note
Not yet assessed	Eg a new target for which data is not yet available

[Departments are encouraged to use the above terms. Different categories of assessment to those provided above may be used, but the categories that the department employs and the criteria used for selecting each category must be set out clearly, e.g. in a table similar to the one above, and departments should give consideration to assessing targets on a consistent basis throughout the Spending Review period. Departments may apply traffic-light assessments, but as with the overall assessments, the traffic-light ratings for joint targets should be consistent between the relevant departments.]