Developing and Running a Performance Management System: Do’s and Don’ts

Here are a few key guidelines for developing and running a performance management system:

- **DO think about target setting**: Performance management data needs to be compared with something. Before you start, think about what you expect the service to deliver. The business case could provide some guidelines, OR you could benchmark against other councils who are doing well. In the worst case, you can compare against historical performance, eg: last quarter, or last year.

- **DO get the performance management system in place from the start**: Collecting data from the start of a service, or from the start of the pilot, enables you to build up a baseline. You can then compare performance over time, and hopefully demonstrate improvements. It is just as critical that the pilot phase is managed robustly through performance monitoring, analysis and scoping as it is for the fully operational service. The pilot phase provides a unique opportunity to set up the right performance management system for the longer term.

- **DO focus on information that helps operational management**: It is important to focus on information that is actually useful to you and your colleagues and that allows you to improve operational management. Resist the temptation to have too many measures. Focus on the key ones and ensure that they are a good mix of outcome and process measures. Consider measures that you are not capturing within your current processes. Decide what you need to report on to effectively manage the performance of the service and capture the information to produce the reports.

- **DO build data collection into your daily processes**: It is important that data collection for performance management is built into your daily processes, to avoid creating additional, time consuming tasks, delays and potential inaccuracies. Review your systems and forms to ensure that they are capturing the raw information to produce the management information you need. For more information see Systems and Forms.

- **DO avoid a time lag between data collection and analysis**: Obviously, quality of data is critical to performance management. However, so is timeliness. A time lag between data collection and analysis can mean a time lag between problems occurring within the service and effective problem resolution.

- **DON’T just report performance – review and address issues**: In addition to performance reporting there must be a strong performance review system. The key measures must be reviewed regularly at management meetings and, if targets are
not being met, analyse why not and take corrective action. The performance reports should form the basis of management decision-making for the service. Some common issues are:

- **Changes in the intake profile**: There may be an increase or decrease in the mix of hospital discharges and community intake, or large variations at area office levels. While this might be because of general reasons, it might be worth making sure that the service is getting all the service users who could benefit from re-ablement.

- **Increase in people leaving the re-ablement service and returning to hospital**: This could be a symptom of problems in hospital related to incorrect discharge. It might be worth taking this up with your Health colleagues so that use of your service is maximised for those it can help most.

- **Big difference in volumes**: This might indicate problems in interface processes between intake and your team. If you investigate, there might be simple issues which you can resolve.

- **A large number of ‘service user outcomes not met ’ category**: This might be because the wrong expectations are being set, or because there is a training need which needs to be addressed.

- **Average weeks much higher than 6 weeks**: Could be because of delays in review, OR lack of commissioned provider capacity, OR the homecare re-ablement team being used as an in-house homecare provider, e.g: for end of life care.