

A report by the Scrutiny and Audit Committee

Benchmarking – Do we have the tools for effective assessment?

August, 2013

SAC Report No. 23

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SUMMARY

This report sets out the process, conclusions and recommendations of the 23rd investigation undertaken by Aberdeenshire Council's Scrutiny and Audit Committee, into "Benchmarking – do we have the tools in place for effective assessment?"

The Committee, having considered the questions originally set in the terms of reference for the investigation, the evidence provided by witnesses and included in the documents submitted for its consideration, believes that Aberdeenshire does have the tools in place for effective benchmarking assessment. Processes, procedures and systems are in place, the old established comparisons augmented by modern computer databases. Officers in their day-to-day management roles compare themselves to others, both those who are achieving, and those whose performance may be failing, to learn from their mistakes and apply good practice as appropriate. Exploring differences as well as similarities can add value to the consideration. Whilst benchmarking is not performance management, it should be informed by it and may be measured against it.

What needs greater development is the method of sharing any benchmarking outcomes with elected members, to inform their decisions on resource allocation and priority policies. Rather than the raw figures which may lead to the generation of meaningless league tables, it is important that the stories behind the figures be investigated and reported where appropriate.

The Committee is aware that work is going on to develop this at present, and that this situation is not unique to Aberdeenshire; with the recent publication of the Scottish Benchmarking Project outcomes, other councils are also considering how best this may be used.

The Committee would recommend the undernoted be considered:

1. That underpinning any consideration of benchmarking activity, there should be a caveat that any information should be obtainable at a reasonable cost, whether in terms of pure finances or staff resource time, related to the importance of having the information and the active consideration of any actions required following that consideration;
2. That no formal programme of benchmarking across the services be established, but that seeking performance comparisons be part of managers' on-going tools of assurance in looking for potential improvements;
3. That formal benchmarking should have well identified and clear objectives – not be considered an end in itself. Performance information should be subject to scrutiny by managers in first instance, to consider in context;"
4. It is acknowledged that the Council already undertakes a substantial amount of formal benchmarking. This is not always effectively demonstrated and so this apparent gap in information needs to be addressed. Consideration should be

given to improving ways of reflecting benchmarking assessments to members, whether via written reports, seminars, or service presentations;

5. Informal benchmarking already takes place between officers and their peers, in matters submitted for committee consideration. Processes should be established to ensure that this is properly reported to members, for example by including a formal section in a committee report where appropriate;
6. That the reports produced by benchmarking organisations such as the Association of Public Sector Excellence (APSEⁱ) and the Scottish Housing Best Value Network (SHBVNⁱⁱ), be reported formally to Committee for consideration, as is done with Audit Scotland's national reports;
7. That officers should be free to consider comparisons with other organisations and authorities, even if these lie outwith the family groupings suggested by the Local Government Benchmarking project;
8. That looking for meaningful comparisons with private sector organisations be encouraged wherever possible;
9. That Officers be aware of the potential for identifying opportunity cost and its possible application in reaching informed decisions on how best to allocate resources and shape policy priorities;
10. That whilst member access to Covalent is welcomed, it should remain an officer tool, this should not replace the need for officers to report explanations in context, not just the current exception reports;
11. That officers seek opportunities wherever appropriate, in the normal course of business, to advise members of how well, or otherwise, the Council is performing, or perceived to be performing;
12. To welcome on-going work to refine the performance information provided to area committees and to recommend that performance information be provided at a local level wherever possible;
13. To accept that where benchmarking takes place, comparisons with areas and function outside Aberdeenshire may have greater relevance than comparisons within Aberdeenshire;
14. That there be closer interaction with local members in advising them of any local actions arising, or proposed, from consideration of performance information;
15. That care be taken not to create comparison league tables in terms of inputs; the focus should be on outcomes as what matters is what is achieved, with explanations where differences may, or may not, be present;
16. That consideration be given on how to demonstrate, by means of an audit trail, the role played by both formal, and informal, benchmarking in deciding whether to maintain, or alter, existing policies and practices, and resource allocations;

17. That the Council acknowledge that one single model of benchmarking will not work for all council operations, and accepts that different approaches will be valid for different functions;
18. That consideration be given to supplementing, potentially on an area by area basis, the qualitative and quantitative data already available, by looking at existing reporting via the Council's Customer Contact Centre and the new "improving the Customer Experience" (iCE) project as a live, real-time, customer satisfaction feedback tool;
19. That the SOLACE Local Government Benchmarking Project's planned work to further validate data used for comparisons, and expand the range of information sourced across councils, be welcomed, as this will strengthen the data provided;
20. To welcome moves to automate the sharing of information and the automatic transfer of information between systems, to minimize both duplicated effort in manually transferring data from one system to another, and reduce the capacity for human error in the additional handling of the data;
21. That consideration be given to utilising chief officers and employees annual reviews, to demonstrate, where appropriate, the benchmarking activity that they have undertaken to improve service outcomes; and
22. That officers look at the Open Data concept in Aberdeenshire.

1. INTRODUCTION

1.1 The Scrutiny and Audit Committee

1.1.1 Within Aberdeenshire Council's Scheme of Delegation, the Scrutiny and Audit Committee is empowered to:

- Review the effectiveness of Council policy implementation and Council service delivery and to identify potential improvements;
- Undertake an annual programme of reviews; and,
- Make recommendations regarding improvements to the performance of Services.

1.1.2 In carrying out its reviews, the Scrutiny and Audit Committee is able to:

- Call upon any officer of the Council or Chair/Vice-chair of the Council's committees to give evidence or provide written reports, as appropriate; and,
- Call upon expert witnesses or members of the public to give evidence, where necessary.

1.1.3 The Committee operates according to the following principles of working:

Deliberative	Outward-looking
Investigative	Inclusive
Open	Influencing
Evidence based	Proactive
Transparent	Flexible
Accountable	Non-partisan
Responsive	

1.2 This investigation

1.2.1 The Scrutiny and Audit Committee, at its meeting on, agreed that an investigation be undertaken into "Benchmarking – do we have the tools in place for effective assessment?" The work began on 21 January, 2013, with evidence sessions continuing till 26 June, 2013. Consideration of the evidence and the drafting of this report continued into August, 2013.

1.2.2 The Committee chose to accept the topic for a variety of reasons. There was a concern, raised by Audit Scotland, that benchmarking could not be seen to be demonstrated to the elected members in Aberdeenshire; the issue was therefore an action point in terms of the Aberdeenshire Improvement Plan. It was also expected that the SOLACE/ Improvement Service exercise to replace and update, as fit for purpose, Statutory Performance Indicators, would report in summer 2012. This national launch of the revised Local Government Benchmarking was delayed till March, 2013. This has impacted

on the assessments which have been possible in terms of this investigation. In addition, in topic scoring considerations in Autumn, 2012, several suggestions on benchmarking and performance information related topics were submitted for Committee consideration. This made the topic a priority for action.

At the outset, it was agreed that the purpose and objectives of the investigation should be to consider:-

- How does Aberdeenshire currently benchmark the services it provides?
- How can some services benchmark and not others?
- How to identify targets to benchmark? How do we know we could be better?
- Do we have the expertise to benchmark?
- How do other Councils benchmark?
- How best to present appropriate benchmarking information to members, and how do other councils manage this?
- How do we ensure all services benchmark the same way so there is consistency across reporting, and how do other councils do this?
- How do Aberdeenshire's benchmarks compare to those of other, comparative councils?

The detailed brief for the Committee's investigation is attached as Appendix A.

- 1.2.3 It has been agreed that the Scrutiny and Audit Committee should appoint independent external experts to assist with its investigations where appropriate. For this investigation, it was determined that there would be no added value in such an appointment.

2. How the investigation was progressed

The Committee undertook a range of different activities to enable it to carry out this investigation.

2.1 Documentation

- 2.1.1 A range of background documentation was provided to the Committee at the commencement of the investigation. This included information from both within and outwith Aberdeenshire Council:

Internal documentation:-

1. Reports to Policy and Resources Committee, and Service Committees on Service Plan Performance Monitoring and Statutory Performance Indicators:
 - (a) Service Plan Report to Infrastructure Services Committee – 31 May, 2012;

- (b) Service Plan Report to Education, Learning & Leisure Committee, 7 June, 2012;
 - (c) Service Plan Report to Social Work & Housing Committee, 14 June, 2012;
 - (d) Service Plan Report to Policy & Resources Committee, 21 June, 2012 –Chief Executive; and
 - (e) Service Plan Report to Policy & Resources Committee, 21 June, 2012 - Corporate Services.
2. Public Performance Report 2011/12.
 3. Strategic Priorities 2007- 2012 Performance Review – Report to Policy and Resources Committee 9 June, 2011.
 4. Aberdeenshire Assurance and Improvement Plan, Update 2012- 2015.
 5. How good is our council self evaluation, 2011/12.
 6. Report to Infrastructure Service Committee– March 2013 - Update on customer engagement and benchmarking activity within Infrastructure Services.

EXTERNAL DOCUMENTATION-

7. Audit Scotland – “Using Cost Information to Improve Performance – Are You Getting It Right?”
8. Audit Scotland –“Managing Performance: are you getting it right?” October, 2012
9. Audit Scotland – “A Manager’s Guide to Benchmarking.”
10. Audit of Best Value and Community Planning – June, 2008.
11. Society of Local Authority Chief Executive (SOLACE) report on Benchmarking - overview.
12. Scottish Parliament’s Local Government and Regeneration Committee – 10th Report 2012: Report on Public Services Reform and Local Government: Strand 2 – Benchmarking and Performance Measurement Moving Forward: Benchmarking in Scotland
13. Covalent: How do I...View, use and report benchmarking Data?
14. Covalent: How do I....Set up PI groups, charts and reports?
15. Association for Public Sector Excellence (APSE) reports:
 - (a) Measure for Measure: Using Performance Information in Tough Times (December, 2012)
 - (b) Achieving Excellent – An Elected Member Guide to Performance Management

- (c) Benchmarking for Success
- 16. Planning Performance Framework
- 17. Moray Council Committee Reports: Extracts

Websites:-

Aberdeenshire Council – performance pages
www.aberdeenshire.gov.uk

Association for Public Sector Excellence
<http://www.apse.org.uk>

Scottish Housing Best Value Network (SHBVN)
<http://shbvn.org.uk/>

The Society of Chief Officers of Transportation in Scotland
<http://www.scotsnet.org.uk/>

The National Policy Planning Framework
<https://www.gov.uk/government/policies/making-the-planning-system-work-more-efficiently-and-effectively/supporting-pages/national-planning-policy-framework>

SOLACE – Society of Local Authority of Chief Executives, Local Government Benchmarking Project
<http://www.improvementservice.org.uk/benchmarking/>

2.2 Witnesses and evidence gathering

2.2.1 Members of the Committee met a cross-section of Aberdeenshire Council officers. The Committee sought their views on whether the Council had the tools it needed for the effective assessment of benchmarking. Officers interviewed included: the Chief Executive, the Directors of Corporate Services, Education, Learning & Leisure, Housing & Social Work, and Infrastructure; Area Managers; the Performance Manager; Heads of Service from Property and Facilities Management, Planning and Building Standards, Roads and Landscaping, Central Procurement, and Legal and Governance; the Chief Accountant and Senior Accountant. The full list of Aberdeenshire Council staff who appeared as witnesses during the investigation is given in Appendix B. The Committee also heard from Cllrs Jim Gifford and Martin Kitts-Hayes, as Leader and Depute Leader of Aberdeenshire Council.

2.2.2 Individuals with relevant expertise from a wide range of organisations were invited to give evidence to the Committee. Amongst those who appeared before the Committee were: Mark McAteer (Improvement Service); Mark Bramah and Debbie Johns of APSE; Carol Calder of Audit Scotland; Angela Currie of the Scottish Housing Best Value Network; Cllr. Gordon MacDonald of The Moray Council; Martin Murchie, Aberdeen City Council; the Corporate

Policy Unit Manager and Performance Management Officer of The Moray Council; and the Head of Policy and Performance and Head of Internal Audit, Highland Council. A full list of the external witnesses interviewed during the investigation is given in Appendix B.

- 2.2.3 In the document, witnesses will be referred to by their names – details of their titles can be found in Appendices A and B.
- 2.2.4 Full details of the evidence given to the Committee by witnesses can be made available on request.

3. HOW DOES ABERDEENSHIRE CURRENTLY BENCHMARK THE SERVICES IT PROVIDES?

- 3.1 The Committee heard from Dr Gore, that, as part of a Scottish Government inquiry into public sector reform, launched in September, 2011, benchmarking had been considered. It was seen as an important part of delivering reform. The inquiry examined the work that had taken place over the last few years in relation to the development of benchmarking and comparison performance data as a cost measurement, using empirical data. In September 2012, benchmarking was endorsed as an important tool which Councils should be using. The Government planned to question selected Councils directly on their progress each year. This was another driver to considering benchmarking across the Council.
- 3.2 The Committee heard initially from Dr Gore and Mrs Roe regarding the current situation in terms of benchmarking in Aberdeenshire Council. Dr Gore suggested that benchmarking was fundamentally a means for the Council of comparing itself with other organisations. This could cover a whole range of factors. To date, benchmarking had largely been used to measure cost comparisons and costs of different services or functions. Although there was a real desire to be able to compare quality, this was more difficult to achieve using “traditional” performance indicators. Aberdeenshire Council carried out a range of activities that could be termed benchmarking, but this was not comprehensive, or consistent, across the Council.
- 3.3 Dr Gore explained the national context of benchmarking, rooted to a great extent in Audit Scotland’s activities. This identified benchmarking as a key activity that Councils should be undertaking, if they want to demonstrate that they are delivering Best Value. There was a consistent message across all of Audit Scotland’s Best Value Framework and the tool kits they promote, as well as their two recent publications, “Managing performance: are you getting it right?” and “Using cost information to improve performance.” Audit Scotland saw benchmarking as important to support challenge and improvement, for the effective and efficient use of resources, and for an embedded customer focus.
- 3.4 Aberdeenshire’s approach to benchmarking, along with that of every other Council, was scrutinised annually as part of the Shared Risk Assessment, and the Annual Audit, now undertaken by Deloitte, as external auditors. Dr Gore reported that in the most recent Best Value 2 assessment, Audit Scotland’s initial feedback was that they were very content with the work that the Council was undertaking in relation to performance management. However, concerns had been voiced that benchmarking, linked to Performance Management, was not always reported to members in a way that would assist with decisions on policy review and the allocation of resources.

- 3.5 Dr Gore reported that Audit Scotland effectively highlighted the importance of benchmarking through their statutory requirement for all councils to submit statutory performance indicators on an annual basis. However, the suite of Audit Scotland statutory indicators, determined by them, sometimes with input from professional associations such as COSLAⁱⁱⁱ had regularly generated concern about whether they were measuring things that matter. Mr Gray gave an example of a previous measure which was meaningless; “The Council has to report its dangerous buildings response. We meet the 100% target of within four hours – but the building could still fall down before any action is taken. What is therefore being measured and compared?”
- 3.6 In January, 2013, Audit Scotland had published the Statutory Performance Indicators Direction for the coming financial year. Dr Gore reported that this saw the old statutory performance indicators replaced by new, nationally agreed measures, worked on by SOLACE and The Improvement Service, in collaboration with all 32 Scottish Councils, over the last few years. These revised, statutory PIs strove to be more realistic and also aimed to ensure that benchmarks were being measured in the same way across all councils.
- 3.7 Dr Gore advised the Committee that there was apprehension in both Solace and COSLA on the implications of publishing the new benchmarking data. In Scotland, compared with England, there were previously very few formal league tables comparing councils’ performance, apart from School Attainment outcomes in Education. However, it was inevitable that people would draw comparisons when cross-organisational information was published, and a concern that league tables would be created. This had led to delays in publication of the agreed measures, because of the need to set some context for the information. The SOLACE benchmarking indicators had been referred to as “can openers”, but it was hoped that despite any difficulties or challenges, they would help councils look at how their delivery compared with others and facilitate looking in more detail, and at greater depth, to explain these. In some cases, it was clear that the differences would relate to geography, or to socio-economics factors, and a narrative could explain what might otherwise seem glaring differences. In other instances, differences would merely reflect the choices that different councils had made about where to invest resources, or make a priority for action.
- 3.8 Dr Gore advised the Committee that the new measures, expected to be published before the end of the current financial year, would be based on 2011/12 benchmarking data. She explained that, in looking across so many different organisations, it would always be the case that information would always be about a year to eighteen months behind in performance comparisons.

- 3.9 Mrs Roe explained that the proposed SOLACE benchmarking indicators were based on information entirely in the public domain and which, in some cases, had already been in the public domain for 4 or 5 months. The Improvement Service had worked with Councils to pull the existing information together in a way which would help people make comparisons and direct challenges in a more constructive manner. Some of the new indicators were reiterations of the previous SPIs promoted by Audit Scotland. Whilst other indicators, such as the cost per school place per pupil, had never been previously published in the new format, the information could be found in the Local Financial Return that every local authority in Scotland produced.
- 3.10 Completing the landscape of the national context of benchmarking was a range of benchmarking groupings or organisation which existed for specific professional disciplines. Dr Gore spoke of the CIPFA^{iv} series of value for money indicators for finance and human resources; The Society of Information Technology Managers (SOCITM) in terms of information technology; Scottish Housing Best Value Network (SHBVN) which focused on Council Housing and other social housing providers. She spoke of APSE, (The Association for Public Sector Excellence,) which made comparisons across technical, front-line services, concentrating on things like litter picking, street cleaning, waste, school meals, roads, and building maintenance. The Scottish Community Care Benchmarking Network focused on a whole systems approach to Community Care, involving the partners such as the Scottish Government Joint Improvement Team and the Community Health Partnership. Within Aberdeenshire Council, the appropriate services or operations were able to benefit from the comparable indicators generated by these organisations with focused remits.
- 3.11 Dr Gore explained that within this national context, Aberdeenshire Council officers recognised the importance of benchmarking, but sometimes an assessment of conflicting priorities needed to be balanced; officers sometimes felt that measuring how well they were doing was an unwelcome distraction from actually carrying out their given tasks. Aberdeenshire's commitment to performance management, its decision to fund and resource assessing performance and providing the necessary training and tools was beginning to embed in the organisation's culture as it was increasingly recognised as important.
- 3.12 Whilst, to date, the Council had not adopted a consistent, or comprehensive, approach to benchmarking in all areas, it often would be undertaken when services or policies were reviewed, or improvements sought. Dr Gore referred to work recently undertaken in relation to the processing of planning applications, where national comparisons were made, based purely and simply on quantity and speed, regardless of the quality of the service given, or workload and staffing levels. The limit of benchmarking in relation to planning

applications had historically been the number of applications received, and the percentage of these determined within the expected two months period. No reference had been made to benchmarking the quality of the development that was then delivered on the ground. Furthermore, there could sometimes be a concern that not everybody was measuring the same thing in the same way; confidence needed to be nurtured. “We trust our own data and need to have confidence in that produced by others – the SOLACE exercise can assist in this”.

- 3.13 Dr Gore reported that there were some of the classic areas where, on a regular basis, benchmarking activity was carried out in order to review performance, predominantly on quantitative data, including, and probably majoring on, cost. In entering into contracts, benchmarking requirements to demonstrate value for money was now a prime focus, with the Heads of Central Procurement and Property and Facilities Management reporting regularly to committees on how Aberdeenshire’s approach compared to other local authorities and, increasingly, local private sector comparators. Whilst the model used made comparisons between different contractors, on different jobs, it gave Aberdeenshire, as an organisation, the opportunity to measure not only how its own services were performing, but also the ability to demonstrate to contractors any areas of potential improvement for their operation. The expertise of these officers in using benchmarking, and sourcing “soft” benchmarking, was, as yet, Dr Gore believed, an underused resource for other officers. “Soft” benchmarking, or “market testing”, was about finding out what other organisations might charge for providing services, and what the quality of that service would be. This approach could, however, generate concerns that comparative exploration was a precursor to outsourcing services. It could be purely a benchmarking initiative to make comparisons and say, “what could we be doing differently?”
- 3.14 Dr Gore advised members that currently, other than the information reported via Covalent, a new database system to record and report performance management, the extent of benchmarking carried out was very much at the discretion of the head of service, or service manager, for specific functions. Whilst there was not a consistent approach, there had been some very positive outcomes. Similarly, there was no formal protocol regarding the use of the benchmarking groups; this was largely at the discretion of the people involved and the information was not routinely shared with colleagues or elected members.
- 3.15 One area where benchmarking was currently used as a matter of course was in the production of the Council’s annual Public Performance Report, where the Council’s Performance Indicators were published, as required by Audit Scotland. Mrs Roe advised the Committee that in the Public Performance Report, Aberdeenshire’s rankings, of where the authority sat in relation to other

local authorities, was included so that residents could have a sense of comparison. What was not currently included, and was expected to develop as the process evolved, was a dialogue about “what does it actually mean?”, and specifically, “what does it mean in terms of our local priorities”, leading to an assessment of the steps required to improve.

- 3.16 While the main impetus for improvement lay in each service, Dr Gore explained that Aberdeenshire’s commitment was further demonstrated by the corporate resource of the Performance and Improvement Team, which offered support and help to all the services. Ownership remained in the source functions as one of the key parts of benchmarking was the need to understand in detail where improvements were needed and how they might come about. Whilst the Performance and Improvement Team would not have that detailed knowledge, as a team it could offer support for those others who understood the business well. For example, in developing the Council’s new iCE (improving the Customer Experience) strategy, a key role of the team was to look at how other companies, and providers, managed their customer experience, increasingly online. Consideration of how they did it, what were their outcomes, what were their costings, and what was their volume of contact were assessed. Comparisons on how that might work for the Council were made and used then to suggest some of the ways to progress the Channel Shift strategy for the Council as a whole.
- 3.17 Mrs Roe also spoke of improvement events such as KDI, (Kaizen for Daily Improvement,) where services were supported in looking elsewhere for good practice and lessons which might be applied. She explained that the Performance Team’s support focused on ensuring that relevant information was available to the service managers. This might refer to league tables and drawing attention to where council operations sat, and how they sat, compared to the Scottish average. This allowed services to consider, seeing where they were, “where does that fit with my priorities?”, or “how do I want to move on from here?” The approach needed further development as Mrs Roe felt there was not yet enough guidance available for managers and performance staff. This should include: what they could do with benchmarking, how to do it, who they could involve in it, the “what do I now do with this sort of information?” and the “where can we take it?” As part of moving on from the SOLACE work, when published, the Performance Team would start to develop advice notes to assist improvement, building the support available to managers to help them take benchmarking comparisons forward.
- 3.18 Mr Whyte advised members of the corporate support his officers had received in preparing to embed and extend the culture of benchmarking. “The KDI team have been working with all Heads of Service to identify what we benchmark, how we benchmark and when we benchmark. Alan Morris is our Service Plan

Officer and Tim Curtis (Senior Improvement Officer) has been working with us on the key areas of benchmarking and improvement.”

- 3.18 Dr Gore and Mrs Roe spoke of the performance improvement framework, where the Aberdeenshire Performs Framework sat under the Scottish Government National Performance Framework which provided the strategic context to improve performance. Self-evaluation was now taking place, using the “How Good Is Our Council?” assessments, with the wider picture based on the “plan, do, check, and act” cycle. Within the checking and acting stages, benchmarking consideration was being built in as one of the pieces of the toolkits for managers. The “How Good Is Our Council” guidance asked “have you gone away and looked at how you are doing compared to others?”, and “is this an area of importance to you?” The guidance contained links to organisations which were good at benchmarking and could provide with advice and support, including both the Improvement Service, and Quality Scotland.
- 3.19 In respect of the comparisons currently used within Property and Facilities Management, the Committee heard from Mr Whyte that benchmarking was pursued primarily with other local authorities. For certain areas of operation, the service also benchmarked with private sector developers and commercial businesses who were more like Aberdeenshire in terms of context, (north east Scotland location and economic pressures,) than similar organisations elsewhere in Scotland which were not under such stresses. Various bodies were used assist with benchmarking, such as RICS (Royal Institute of Chartered Surveyors), CIPFA for asset management, and APSE for looking at performance across the Service. RICS was, Mr Whyte felt, a good source of comparative information: “They have weighting on their tender price index and they benchmark information on financial costs”. Officers accessed the Scottish Government’s Schools Directorate for benchmarking condition and suitability data for the school estate. The Office of Government Commerce Gateway Process had been adopted in order to ascertain best practice.
- 3.20 Mr Whyte advised members that although the main focus was in benchmarking against Scottish authorities, his officers also looked at English local authorities, mostly for the schools programme. “When we benchmark with English authorities, it is with the individual authorities rather than England as a whole. To compare this, we would weight it by time and geographical factors since construction prices in Aberdeenshire are 5% higher than elsewhere.” This information required to be caveated by the fact that there was a different set of criteria for building schools in England, with different space standards and leading to different costs – the information could not be taken at face value. In terms of specific projects, the Property and Facilities Service would look at other Councils carrying out similar works, looking to share best practice. The most recently example had seen correspondence with South Lanarkshire, East Lothian and East Ayrshire councils on school-building projects.

3.21 Dr Gore advised members that in the Customer Communication and Improvement section, the design and print unit had benchmarked their pricing model against external businesses to make sure that they were competitive and comparable with what was available outside the Council. The Communications Team regularly benchmark a range of data with other Councils right across the UK. Other parts of the section worked to support benchmarking at a corporate level; they made comparisons from locally collected customer feedback, the residents surveys, topic specific consultations and related this to the results of the national Scottish Household Survey. In addition, they took lead responsibility for co-ordinating issues around the external assessment of the Council through Best Value 2 and they coordinated and monitored responses to the Aberdeenshire Improvement Plan. In Human Resources and Organisational Development, benchmarking took place against a whole range of human resources indicators, both nationally and against comparative authorities, considering matters such as organisational numbers, turn over and length of service, the age structure of the Council's staff, sickness absence, the number of women in senior posts, the cost of HR functions, and other indicators around health and safety, and occupational health and welfare. Dr Gore highlighted benchmarking on how training and development was delivered as area where additional work might be undertaken. The Council's Information Technology function benchmarked through officers' professional involvement in the Society of IT Managers (SOCITM), and through surveys in terms of quality of service, cost, and projects. Internal benchmarking was also generated by surveying satisfaction levels as well as against other Councils in terms of how the ICT service was seen. Procurement, Dr Gore advised, reported annually to the Scrutiny and Audit Committee on the procurement capability assessment, an external inspection, undertaken across the local authority, health and higher education sectors by Scotland Excel. Each organisation was assessed against nine different areas of procurement activity, with a range of measures in relation to each of those nine areas, comparing across all 32 local authorities. These results were also reported to the Public Procurement Reform Unit, chaired by the Scottish Government Minister, Nicola Sturgeon. Members were advised that, over the last four years this quality assessment had taken place, Aberdeenshire had been judged consistently as at the head of all Scottish local authorities. Within the Finance Team, the Revenues Section benchmarked with other councils on collection rates for council tax and water and business rates, whilst the Benefits Services benchmarked nationally in relation to the average time for processing new claims and to process changes in circumstances. This last area was one which had been reported regularly to the Scrutiny and Audit Committee. Members were advised that the Corporate Finance Team benchmarked against other local authorities on a number of indicators and that although the Accountancy Team did not currently pursue benchmarking, this was another area to look at in terms of how useful it would be. Internal Audit was a difficult area for

benchmarking; although some consideration had been given, through the Directors of Finance Group, there were concerns that some of the current indicators were not meaningful, measuring the inputs rather than outputs, or outcomes. Dr Gore reported this as an area of on-going development work.

3.22 Mr Johnson suggested that, within his service, there was a range of well embedded and understood benchmarking, working with professional associations and external inspectorate to make comparisons. Officers in Housing exploited the benefits of membership of the Scottish Housing Best Value Network to consider Aberdeenshire's performance with the help of a critical friend, or on the platform of shared debate with peers. The role of the Housing Regulator and the requirement for housing providers to report annually allowed access to data from housing associations with which the Council could compare itself. His service benefitted from having its own Improvement Board which reported to the Council Improvement Board chaired by the Director of Infrastructure Services.

4. HOW CAN SOME SERVICES BENCHMARK MORE EASILY THAN OTHERS?

- 4.1 Dr Gore spoke of the ease with which some services were able to generate performance information on which to benchmark. The long established processes for reporting Local Financial Returns to the Scottish Government, or the informed consideration of nationally collected statistics by benchmarking organisations such as APSE, SHBVN, and CIPFA, allowed staff used to recording and reporting across a common basis for comparisons. For some services, bound by council-specific policies and procedures, there might be difficulty in identifying relevant comparators with whom meaningful benchmarking might be pursued. There could often be benefit in looking to make comparisons with the obviously different, as well as the blatantly similar, as lessons could still be learnt from looking at the whole picture of a different approach. Dr Gore suggested that officers also needed to be more confident in going to other organisations, to expand benchmarking beyond that with other councils or public sector bodies, and possibly to include soft market testing. This skill was currently being developed, but there was a need to create confidence to go and make comparisons without feeling that any weaknesses might be exposed. This required mutual trust, or respect, to be established between the different organisations and there was also a need to know what questions to ask to assist subjective assessments.
- 4.2 Mrs Wiles cited the work undertaken by the Council's lawyers, in supporting the application of the Council's policies, and those supporting Planning Gain and Development Control, as areas where it was difficult to find directly relevant comparators. In contrast, Committee Services and the Registration Service had been able to undertake a degree of benchmarking and had good comparators with which to work. Most of her service's benchmarking was undertaken through SOLAR^v - the Society of Local Authority Lawyers and Administrators in Scotland. All 32 local authorities in Scotland were members of this group, which had established a Best Practice Sub-Group about 18 months ago, triggered by an Audit Scotland pilot in 2010. Under this umbrella, there were a number of smaller groups operating, focusing on matters such as licensing, Freedom of Information and conveyancing.
- 4.3 As Aberdeenshire was a diverse area, with a higher than average rural population, Mrs Wiles advised members that examples of the resulting range of legal work would differ significantly from a more urban area. There was a difficulty in finding appropriate performance indicators to ensure that the diversity was properly reflected; the more so since legal services were often involved in such a qualitative area of work. The Committee heard that, for example, it could be problematic to reflect the actual amount of work involved in one particular outcome, such as freeing a child for adoption, or pursuing a permanency order. However work through SOLAR, involving ten local

authorities, to take place in August 2013, would include expansive questionnaires, the feedback from which would allow Legal and Governance to identify meaningful comparators with whom to work for these areas of operation. “We are looking to find an authority which does things in a similar way, so that we can see what they do better than us, and therefore learn from that – and vice versa.” Developing contacts with Perth and Kinross, an authority with similarities to Aberdeenshire, and where Aberdeenshire had established good connections, had led to current efforts to comparing supportive work done for both Social Work departments. This, Mrs Wiles reported, was at an early stage; “We have not arrived at the point where we can start to carry out comparisons and set ourselves any meaningful targets”.

- 4.4 Mr Gray welcomed the recent Planning Performance Framework as a great source of benchmarking consideration for his service. From consideration of it, his service had discussed with those performing better, and those performing less well, differences and similarities in processes and approaches. He advised members that lessons had been shared from discussions with those deemed to be performing less well than Aberdeenshire, as one such council’s approach to supportive IT had been considered to be beneficial to Aberdeenshire’s route to improving its performance. “We discussed staffing and alternative IT systems with East Ayrshire, Dumfries & Galloway, Moray and Falkirk – and we learnt something from each of those Councils, even if they were seen to be performing at a less successful level than Aberdeenshire had attained. As yet, this process of going to compare and speak to other authorities is not completely embedded, but it’s the type of approach we are pursuing.”
- 4.5 In looking across the range of operations under Planning and Building Standards, Mr Gray explained to members that, for some parts of the service, there were statutory timings and targets which made it easier to compare, such as development control matters. In other areas; it was harder to assess, let alone make comparisons. Mr Gray used the example of the Deeside Way, a public walkway which he felt had a fantastic impact on the area and could, theoretically, be compared to Fife’s Coastal Paths. He challenged the members as to how the impact of the two paths could be assessed: “Is it the paths themselves, exercise opportunities, tourists and visitor numbers, or trade at Bed & Breakfasts and restaurants along the route? Local businesses generally seem to do well along such routes. It’s clearly a good project to bring money into the economy.” How could a quantitative, let alone a qualitative, assessment, be made on such projects?
- 4.6 Mr Gray suggested that the bi-annual Aberdeenshire Design Awards could be considered one area where a local comparison on the quality of planning application determinations could be made, by looking at the eventual buildings at the end of the process.

- 4.7 Dr Gore suggested that there were certain areas where it would be neither easy, nor appropriate, to benchmark. If what was being done was truly unique to Aberdeenshire, or involved a very few members of staff, consideration would need to be given as to the respective value of attempting to undertake benchmarking, given the resource implications in carrying out comparisons.
- 4.8 The Committee heard from Mr Whyte that even in areas where benchmarking appeared to have been well embedded, there could be local and time-specific circumstances which might mitigate against ease of participation. “It can be difficult to strike the balance...you absolutely have to deliver the service, first and foremost. For the cleaning service, we (previously) used APSE indicators to see what was happening there and we found that our costs were too high. Aberdeenshire did not complete an APSE return this year...we were too busy.” Mr Whyte assured members that whilst the team recognised the importance of participating, this was something that had to be managed within the Service.
- 4.8 Mrs Nicol explained that in educational terms, the scrutiny externally by the Scottish Government through a large number of returns and assessments meant that this side of the service was well-used to data collection through processes which had been around for a very long time. Matters were not so well developed in other areas of the service: “The further you move away from the formal Education sector, the less there is in place.” Mr Weir stressed that these inspections were less easily applied to qualitative assessments, but that the trend for external agencies to rely on self-assessment was driving the development of in-house resources to progress this. Challenges to the individual establishment’s self-assessment were initially undertaken by the Service’s Quality Improvement Officers, who might also be a resource to support assessment techniques. This type of analysis and national collection of information was now being applied to the other learning communities, outwith formal education establishments, so whilst benchmarking was less well developed, it was not impossible, for these areas of operation.
- 4.9 From Mr Johnson, the Committee heard that in some ways it was easier to benchmark Housing Services, compared to the Social Work Service. This was partially because of the comparability issue. The nature of the Housing Service in many local authorities meant that although the quality and the context might differ, even when the councils provided a certain service by outsourcing there were easier comparisons. In Social Work, the way the service was delivered could be very different across councils. This made it harder to find true comparisons. In addition, dealing with individual client needs made it hard to find like-for-like comparators, without breaching confidentiality, and many of these would be qualitative, rather than quantitative, meaning consideration would only be possible in terms of

generalisations. These comparisons were also open to questions of validity, as so much of the resources were allocated according to individual need, within the stated council policy; an approach which differed greatly across councils. The specific pressures for different authorities according to their demographics also needed to be considered in any comparison exercise. Nevertheless, Mr Johnson was assured that officers were empowered to actively consider any comparisons, regardless of source, to evaluate their current operations and look for lessons which could be learnt, or good practice applied.

5. HOW SHOULD WE IDENTIFY TARGETS TO BENCHMARK? HOW DO WE KNOW WE COULD BE BETTER?

- 5.1 As part of the lead service briefing, Dr Gore spoke of more structured approach to council improvement activity, including specifically Kaizen, or KDI, work. Governance was structured through the Improvement Programme Board and the Service Improvement Boards, where proposals for improvement activity could be prioritised in terms of identifying areas of greatest need. This did not mean that resources might not continue, or even increase for activities at which the Council was already assessed to be performing well, with demonstrable customer satisfaction. But if there were areas that seemed to be performing less well, whilst identified as a Council priority, then almost certainly the resources would be directed to the area deemed to be of greatest need. It was important not to take the eye off the ball of potential greater improvements, but when resources were constrained, it was important to put those resources to where they might have the greatest effect. Dr Gore believed that benchmarking represented a useful tool for evidencing the prioritisation of improvement works.
- 5.2 Both Dr Gore and Mrs Roe spoke of the family groupings, which were used by both benchmarking groups, and organisations such as CIPFA and Audit Scotland, as a potential source of comparisons which could indicate areas for improvement. Whilst SOLACE guidance on which authorities were in the same families was clear, the potential to go into another local authority, outwith the common family, and talk to them, should not be overlooked. For a very specific piece of service delivery, Aberdeenshire Council might be more like an authority that would not automatically appear an obvious match. Assurances were given that flexibility in discussions about improvements would continue to be exercised by officers.
- 5.3 It was stressed that the very raw data on where Aberdeenshire was ranked in Scotland, for example, in terms of number of swimming pools per 1000 population, was only a numerical comparison with all 31 of the other Councils in Scotland. This led to occasional “apples with pears” comparisons on first glance, and should not be used, in an over-simplistic way, to identify targets for improvement. However officers considered that those Scottish rankings could be useful as prompts to consider, “if that is where we are, what do we need to do in order to improve our ranking?” With some areas of operation, it may be a very straight forward case of “there is nothing we can do, it’s just the nature of Aberdeenshire that puts us there”. As an example, Dr Gore referred to the cost of refuse collection per household. This would always be expensive in a place like Aberdeenshire, which needed to support collections from dispersed rural areas and was bound to be high by comparison with, for instance, Aberdeen City where the geography was very compact and in which they did not have to go very far in order to collect waste. Looking behind the

figures could, in some circumstances, provide a defence of performance which the headline comparisons might not. Therefore there were dangers in some of the rating values, which underlined why the family groups were so important, in comparing councils with similar characteristics. Another caveat in relation to looking at ranked figures was that with 32 councils, someone would always be placed at 32nd out of 32. Dr Gore suggested that, in some instances, the difference between ranking 1st and 32nd might not be significant. Targets should not be set from headline comparisons without considering the context of, and the narrative behind, the differing operations. Following this assessment, the Committee heard from Mr Archer an illustration of where rankings were deceptive – and should not be considered in isolation. Aberdeenshire was reported as one of the fifth or sixth slowest Planning Services in Scotland for the administration of Planning Applications. However, customer satisfaction had been assessed, in the same time period, as being 85%. The next stage for the service was to consider costs for outcomes. If the cost came out as average, or even below average, then a customer satisfaction rate of 85% would be considered satisfactory, especially if, adding the 5% who reported that they were “not bothered”, that means 90% of customers felt the service provided was acceptable. On that basis, the consideration might mean that perhaps the Council did not need to change anything. “Maybe as an organisation we would say, we will happily still be fifth, or sixth, slowest, because we are getting a quality outcome and our customers out there are, generally, happy.”

- 5.4 Benchmarking family groups were also expanded beyond the SOLACE groupings when specific services were considered, and this could be down to the level of considering the performance of individual educational establishments, for example. The Committee heard from Mrs Walker that it was often more appropriate to compare Peterhead and Fraserburgh Academies’ performance to those of urban Glasgow, rather than to academies elsewhere in Aberdeenshire, which were not subject to the same pressures.
- 5.5 Mr Archer spoke of the use of professional organisations and discussions from benchmarking groups, as a stimulus for officers to consider where comparisons with others might trigger targets for improvement. It was stressed that this should only happen once a detailed exploration of common and differing factors, including resource allocation and political priority, had been undertaken. He also suggested, as did his colleagues, that targets should be set to increase performance – there should be no satisficing, or doing just enough to be acceptable, to get by. Even when performance was deemed good, if it were not best in class, services would not rest on their laurels; consideration would continue be given to whether further improvement could be attained, and the cost at which this could be achieved.

- 5.6 Mr Gray echoed that, while improvement should always be considered, there would come a point at which the cost to achieve only minor incremental improvement would not be palatable – especially if that resource could be directed to areas in greater need of resourcing improvement. Mr McKay stressed that the cost of improvement at the higher ranges of scale was more for a lesser demonstrable improvement than in the earlier stages of any improvement activity.
- 5.7 All officers spoke of the other triggers which might lead to the identification of targets for improvement, rooted in customer feedback surveys, repeated complaints about specific areas of operation, or residents' surveys. Members, as individuals as well as in formal committees, were also a deciding factor in identifying areas for improvements and accepting targets for improvements.
- 5.8 Mr Archer reiterated that targets should not automatically be set to mimic the processes and attainments of those comparators considered to be performing best; "It doesn't mean to say that the best practice that's out there will suit this organisation and these services; that can often be the case. To find best practice, and we will do that, may not necessarily be the right answer. It's something to look at, but don't just assume that best practice will give you what you want in Aberdeenshire in a particular service." There might also be concerns with complacency if a function were perceived to be doing well. Mr Archer thought that, in all cases, stretch targets, but ones which could be realistically achieved, should be considered. It was crucial to be self-aware in setting targets.
- 5.9 Dr Gore spoke of the importance of targets being reviewed on a regular basis, and at the very least, annually. If they were consistently being met, without apparently too much effort, then it was up to the managers initially, and potentially members thereafter, to consider whether they were appropriate, challenging, or not challenging. It might not always be a good thing to meet, or surpass a target, because this might lead to an inappropriate focus on something relatively easy – a tick box exercise. Or you might end up putting too much effort into one particular issue to the detriment of something else. It was crucial, she felt, to look at the whole picture and it was the responsibility of managers, in the first instance, to make sure that the targets were appropriate. Dr Gore stressed that one of the reasons why Service Plans and service performance indicators were submitted to the policy committees was to give members the opportunities to ask, "Is this really challenging?"
- 5.10 In respect of Housing, Mr Johnson spoke of being prompted to consider targets through looking at the annual reports from the Scottish Housing Regulator, the work of the Scottish Housing Best Value Network, the Association of Directors of Social Work, and outputs from external assessments by the Care Inspectorate and the HMIE. These comparisons

applied to different facets of his service. Even when a function was perceived as performing well, Mr Johnson felt officers would never complacently say “we are leading the field, so we put our feet up.” He believed that there was always a natural imperative to compare yourself with your peers and want to keep ahead of the game. However, he suggested that there was also a natural tendency to look at the areas in which the Council needed to improve and do better, and that tended to be where officer time was spent. Mr Johnson cautioned members, “At some point, there has to be a view as to what extra value can we add by spending investment in the areas that need work, without taking our eyes off the ball in those areas that are doing really well.”

- 5.11 Long term assessments from previous years’ feedback in terms of complaints and customer comment were often used in Housing and Social Work to guide what the targets might be from one year to the next. These would change over time, Mr Johnson suggested. Officers also had to be aware of where there were statutory targets to be met. All of these issues, the impact on resources, and the context of Council priorities, would require to be considered in setting targets.
- 5.12 In discussion with the Committee, Cllr Gifford advised members that he would expect targets to be set by benchmarking itself; “Benchmarking encourages level improving, monitoring and working towards achieving those targets and continuing the process. It is just another one of the tools in continuous improvement - benchmarking against other departments and other organisations to see where you are currently, and see where you want to be.” Cllr Kitts-Hayes echoed this: “The standard has to be the best that can be achieved, given the amount of resources and current technology. You can always improve the standard and consider a way of doing it; but in terms of benchmarking, you have to identify what is the best in class, if you like, and that should be the standard to which you aim.”
- 5.13 Mr Bramah suggested that areas for improvement might be identified in looking at the annual reports, on specific topics, generated by his organisation. These allowed a good framework for starting to consider benchmarking, primarily in areas of importance to each individual authority. From considering what you did, and comparing it with others, potential targets might be identified. These could then be set and assessed in terms of resource implications, potential benefit, or improvement, if there was the will to do so, either at officer, or elected member, level.
- 5.14 In a similar way to Mr Bramah, Mrs Currie proposed that targets should become self-evident from considering your own performance and seeing where that sat amongst others undertaking the same actions. She felt that her organisation was a platform from which housing providers, meeting regularly to explore matters of mutual concern, could identify peers with whom to compare, and from whom to learn, within a secure context of mutual trust and willingness to work together in practice exchange forums. In addition,

Mrs Currie believed that the visits to individual councils by her officers afforded participating local authorities the benefit of a “critical friend”. This role could assist in identifying and setting targets as appropriate, as well as supporting self-assessment work, by highlighting potential areas for action, thrown up by tracking changes in annual responses, or being able to set a particular council’s performance in the context of others who may, or may not, be doing the same thing, in the same way, for the same reasons.

6. DO WE HAVE THE EXPERTISE TO BENCHMARK?

- 6.1 In some areas, it was very clear that officers had the expertise, supported by appropriate systems, to benchmark. The pooling of corporate resources and sharing in-house of the expertise of these officers in using benchmarking, and in particular for sourcing “soft” benchmarking, was, as yet, Dr Gore believed, an underused resource. There was consensus amongst the Service Directors that staff were encourage to benchmark, and that the ability to do so should be a day-by-day operational tool for managers, not necessarily applied for special occasions of major service review or extreme budget pressure.
- 6.2 Mrs Walker, Director of Education, Learning and Leisure advised members that education officers, long used to the comparisons required by attainment reporting and published HMIE inspections, were well accustomed to exploiting benchmarking opportunities. For other parts of her service, where a more qualitative approach was needed, work to establish processes and support officers in making the assessments was on-going. Mrs Nicol, Communities and Partnership Manager, reported that areas of community development were currently being explored to see where officers might make assessments.
- 6.3 Mr Archer was confident that across the wide range of his service’s functions, officers’ instinct to benchmark and compare, both formally and informally, by speaking with peers, either locally, at professional group meetings, or in visits to explore how they did what they did, could be demonstrated. Some were more adept than others, but the culture and expectation were being grown, with appropriate training and support. Some functions, such as Property, had developed its own assessment for capital projects, and were able to draw comparisons for specific categories of work from standards extracted from a national assessment of building costs.
- 6.4 The Committee heard from Mr McKay that he would expect his officers to pick up the phone and question their colleagues regularly, with conversations stimulated by the best performance, the most improving performance, and also, on occasion, the failing performance of others as reported. Mr McKay stressed that asking why outcomes were not as expected could help increase awareness of things which should be avoided.
- 6.5 Housing officers made great use of both the reports of the Scottish Housing Best Value Network in analysing performance, and also the shared platform of discussion amongst peers, with local events, and information accessible online. This nurtured the development of benchmarking expertise, Mr Johnson reported. Within this network, access to shared debate with registered social landlords, housing associations, was a benefit which allowed comparisons on a wider basis than just local government. He was confident that staff felt empowered to explore whatever benchmarking comparisons

they chose, as they chose in the daily operation of their management, and were confident in their ability to do so.

- 6.6 Mr Gray spoke of the development work his service had undertaken with the Improvement Teams, to address concerns about the operational efficiency of planning teams in looking at processing planning applications in the various areas of Aberdeenshire. “Two or three years ago, it was all about delivery of service – we tried, for 18 months, to drive performance up – but it’s not always possible to benchmark, drive-up performance, and deliver a service all at the same time. This is where the role of Improvement Officers became important, as we used Kaizen for Daily Improvement (KDI) for each of the six area planning teams to drive up performance”. He reported that some permanent resources had been needed to continue to drive this improvement through: “We seconded a full-time person with responsibility for undertaking this work which was a huge benefit and as a result, the improvement activity delivery sped up ten-fold. It was necessary to take some-one from “their day job” to make this difference. We needed that resource to solve a particular problem; asking officers to find a “better, more effective way” on top of the pressures of their day job was simply too much.” In this way, skills and expertise were being developed in-house.
- 6.7 Mr Weir spoke of the role of Quality Improvement Officers in Education, Learning and Leisure, as an in-house resource to cascade an awareness of self-assessment and benchmarking across educational establishments. Mrs Walker spoke of making available, within Aberdeenshire schools, the self-assessments and HMle inspection reports; “Other schools can read about good practice, what are the self evaluation statements that are described, particularly How Good is our School, see where it is full of benchmarks and learn. They are, if you like, a “pocket benchmark”, you can take with you into a school...we encourage schools...to see where they can make positive comparisons.”
- 6.8 Mr Innes referred to the experience he, and his team, had developed in making benchmarking comparisons, not just across public sector bodies who were also members of Scotland Excel, but with private firms in the north east. These operated under the same economic pressures as the Council. He had been initially concerned there might be a lack of engagement, on the grounds of commercial sensitivity. Instead, Mr Innes had found them surprisingly open. He reported that the private sector should not be assumed to be naturally further ahead in its practices; in many ways he found Aberdeenshire Council to be ahead of many of the oil and gas companies. “They were very open to knowledge transfers, sharing documentation, and giving advice, so this proved to be a very useful exercise. I plan to look at other sectors in time and hope to receive the same sort of response. I think there are opportunities there, not just for procurement, but for many other sections to learn from.

Finance, legal and HR could similarly benefit if they were willing to make the contacts.” His experience in successfully engaging with non-public sector colleagues was developing and could be used by other services in attempting similar engagement.

- 6.9 Mr Innes reported to Committee that being assessed to be in the top three performing authorities in Scotland had the effect of making your expertise sought after, as a good practice model, by those who were not performing at the same level. The approaches made by other public sector bodies seeking to learn from Aberdeenshire was, he felt, indicative of perceived competence.
- 6.10 From the Performance Manager, Mrs Roe, the Committee heard of the corporate resource and guidance which could assist colleagues in developing, or establishing benchmarking processes, based on Performance Management. Covalent, a recently purchased database system which could record and report performance information, was being supported by the Performance Team as services learned how to input and maintain information which could then be interrogated or displayed in different ways, to best suit the inquirer. Work on ensuring that a supporting narrative for the data reported was in place, and the identification of a responsible officer to respond to further queries, was continuing as the new system was being shaped to match Aberdeenshire’s specific needs.

7. HOW DO OTHER COUNCILS BENCHMARK?

7.1 Aberdeen City Council

- 7.1.1 The Committee were advised by Mr Murchie of the range of activities undertaken in respect of benchmarking in Aberdeen City Council. This included membership of benchmarking organisations, such as CIPFA, SOCITM, (a group for IT managers,) and ALARM (for risk management). The Council was also involved, with Glasgow, Dundee and Edinburgh, in a City Benchmarking group. It was a member of APSE, covering the services which used to be subject to competitive tendering, (such as highway maintenance, street lighting and catering,); and a participant in the Scottish Housing Best Value Network. In addition to these formal groups, the Education Department worked closely with comparator schools and City's Legal Services officers collaborated with colleagues through SOLAR.
- 7.1.2 Mr Murchie advised members that the statistics and information from all of the bodies or links cited above provided the City Council with data to feed through to the various departments to assist them in gauging performance, both internally, and against other local authorities. "We use data every day and we feed this into our business planning, so this illustrates the point that there is something in every service."
- 7.1.3 It was essential, he reported, to be assured that that there was a process in place where people could question, 'Do I understand my service?', 'Do I know whether the service standards that we have set are actually what our customers are telling us are important?', 'Do I know how we compare with others?' and 'Do I know how I am managing my resources?'. Mr Murchie felt that these questions should be able to be answered in terms of decisions taken, and also that it was crucially important to communicate these outcomes to members.
- 7.1.4 Within Aberdeen City Council, a culture of benchmarking was becoming embedded; but even before the recent SOLACE Local Government Benchmarking Project, Mr Murchie would have expected all managers to be aware of performance management; "As a manager, you want to become involved for the right reasons. You want to understand, compare and improve - and the motivation for this is obvious. On the other side of this, you can see why people may become defensive if this is imposed on them, without being given a complete overview of the positive elements that benchmarking can bring. There is an organisational culture aspect here that I, as a manager, have to explain to employees and assure them that it is not about apportioning blame. It is about understanding, leading to improvement."
- 7.1.5 Mr Murchie felt that benchmarking should be possible across all areas of council activity, unless the authority was alone in providing the specific

service. However, he advised the Committee that he did not think a single model could be applied; there were many different models of comparison. What should be applied should be the most appropriate for each occasion.

- 7.1.6 In progressing outcomes generated from benchmarking, Mr Murchie indicated that there were two parts to target setting. The first was to understand what your baseline was; this could be gauged from past performance. The second came from trend analysis, which could suggest if future performance were likely to move in a particular direction. Before targets were adopted, it was important to consider the resources available, what customers were saying about the service, and any other projects which were operational at the same time. Mr Murchie felt all these factors were needed for making an intelligent decision about what a reasonable, deliverable, challenging target should be.

7.2 The Moray Council

- 7.2.1 Cllr MacDonald, Bridget Mustard, and Louise Marshall spoke of the importance of benchmarking as a tool for managers to progress their projects. It was a means, from the Council's point of view, to give a view on whether projects were going to plan, an indication of how the Council was performing and whether tax payers were being given value for money, allowing Moray to compare how they rated against other Councils.
- 7.2.2 Cllr MacDonald advised members that benchmarking was crucial for the competent operation of his Audit and Performance Review Committee and was something that had been used for a long time, along with other available tools, to gauge the success of what the Council was doing.
- 7.2.3 Mrs Marshall reported that some departments, such as Housing, had been carrying out benchmarking for a number of years and were involved with benchmarking networks, where ideas and results were shared and discussed. Not all departments were at the same level of benchmarking proficiency, but operated at varying levels. Where the expertise of departments like Housing had been shared throughout the different Services, this had a very positive effect. For other services, such as Planning and Education, statutory duties placed upon them generated a great awareness of the implications of benchmarking. Members were advised that different services used benchmarking information in different ways. Cllr MacDonald suggested that part of the role of the Audit and Performance Review Committee members was to bring the whole Council round to this way of thinking.
- 7.2.4 Mrs Mustard referred to statutory performance indicators, which had been recorded for years, but had not really been used for any particular purpose. Three years ago it was decided that they should go to the Audit and Performance Review Committee. The Committee's approach was to ask officers, for those services in the bottom quartile, to explain why they were

there. In the first and second years of this approach, the reporting was variable, but Mrs Mustard explained that by the third year, service investigations had begun and detailed explanations were starting to come through. She believed that this was the starting point, from which improvements could then begin.

- 7.2.5 Despite the attention now paid to performance by the Audit and Performance Committee, Mrs Mustard reported that benchmarking still seemed largely compartmentalised and was used mostly as management information. Although all services had the opportunity to benchmark, “It is not often noted in committee reports and the results are not publicised in any way.”
- 7.2.6 To further embed a culture of expectation of benchmarking, Cllr MacDonald felt it was important that Councillors did not take every opportunity to criticise officers if results were not going well, and also celebrated success and improvement. Members needed to understand the barriers officers face in contemplating improvements. Consideration of benchmarking was a two-way process, advised Mrs Mustard; it was also important that officers did not respond to challenges by saying results would be better if more money were made available.
- 7.2.7 Benchmarking had been included as a requirement in the Moray Council service plans. The next step would be to alert the Corporate Management Team to the ranking of the different services, and functions, to ascertain which were doing well, or not so well. To challenge internal services, peer reviews of first and second tier management would be carried out. Mrs Mustard advised of the aim to get benchmarking initiated in areas such as customer service. Although there was no timetable for this work, the Council were keen to get this moving.
- 7.2.8 Mrs Marshall indicated that once benchmarking results had been fed into the service plans, any areas of weakness could be identified. These areas were then fed into the service improvement plans. Performance Officers were to become involved at the stage prior to this, to know what services were doing so that it could be reported more formally and regularly to the service committees. Over the next year, it was intended to introduce more structure into the reporting of benchmarking; this would increase better understanding of who does what and when, so that if an auditor were to ask questions, there would be answers available.
- 7.2.9 One positive outcome of looking at benchmarking had seen the Moray Council able to realise an opportunity cost by diverting resources from a function which was operating at an extremely high level of customer satisfaction, but at a cost, by amending the specification for that function. Despite the reduction in resourcing, customer satisfaction remained at a level

with which the Council were content. It was not always necessary for an authority to be the top performing, but rather it was important to operate making best use of resources, to deliver to a standard acceptable to its communities, in line with determined council priorities.

7.3 The Highland Council

- 7.3.1 Members were advised that in Highland, benchmarking was promoted corporately as one of the tools available for the Council to continuously improve. One of the ways in which Highland were taking that forward was through their adoption of the Public Service Improvement Framework as a model of self-evaluation. Within that model, benchmarking was encouraged. Secondly, the Council was involved in the SOLACE Benchmarking Project, recently completed. Mrs McDiarmid felt that this project had given benchmarking work, previously approached sporadically in particular functions across the Council, a new emphasis.
- 7.3.2 Mr Rose spoke of his role in regard to benchmarking the Internal Audit function. For his own section, the CIPFA benchmarking checks were applied on an annual basis, and this was found to be quite useful. The results were reported to the Scrutiny and Audit Committee every year. Benchmarking organisations were also used as sources of information, to complement the CIPFA Code of Practice, and pick up any areas where the Council was seen as non-compliant. An action plan was agreed to respond to any areas of non-compliance determined.
- 7.3.3 In addition, the Audit Scotland national report, "Using cost information" had been remitted to a sub-group of the Council's Scrutiny and Audit Committee, the Scrutiny Working Group, for consideration. The Working Group had been working through that report and, in particular, considering in detail, the report's appendices. This had been progressed through meeting with the various Services and comparing what Highland did in terms of best practice suggested in that report.
- 7.3.4 Mrs McDiarmid suggested to the Committee that there had been a bit of confusion between benchmarking and indicators, with assumptions made that having an indicator set was, in itself, benchmarking. She considered that looking at comparative indicators should tell you where you might want to go, and what to have a look at, what you should benchmark, and with whom. However, she felt that the real benchmarking came from considering the practices, and the processes, that were in place to give the results which were turned into indicators. Its purpose was to see how you might improve, or do things better or in a different way, particularly when compared with other authorities operating within a similar context. Dismissing comparisons with authorities which looked very different on the surface was not always

appropriate; Mrs McDiarmid believed that “There are always lessons which can be learnt, from the different as well as the more obviously comparable.”

- 7.3.5 Since the new SOLACE Indicators were being established, Highland Council had been encouraged to reconsider their approach to benchmarking, and had worked to identify which of those indicators required additional scrutiny. Mrs McDiarmid advised the Committee that there were 10 main indicators where it was felt the Council could benefit from finding out what other Councils were doing, to look for improvement. For some of those indicators, Aberdeenshire would be used as a comparator, to find out how Aberdeenshire was providing some of its services and carried out its work. Before this could take place, there was, she reported, a need to clarify how accurate the reported data was for Highland and the other Councils which collected data.
- 7.3.6 It was reported that it was hard to give a comprehensive answer on existing benchmarking. Service Managers were very much encouraged to look at initiating improvement in their own field, and not to check with the corporate team on whether, or not, it would be appropriate to do so. Through the Public Service Improvement Framework about 15 formal assessments of different services in the Council had already been undertaken. In the majority of those assessments, there was a need for further benchmarking and work to be done.
- 7.3.7 Mr Rose agreed that, whilst some benchmarking definitely took place, the Council was not good at reporting on the results of those exercises. He considered that there were some good benchmarking groups, particularly the Association of Public Services Excellence (APSE), which reports against 14 service areas, including catering, cleaning, highways, and refuse collection, which produced national reports of which, he believed, better use could be made.
- 7.3.8 A barrier to effective benchmarking was whether or not benchmarking was possible. Mrs McDiarmid spoke of a Public Service Improvement Framework Assessment, which sought to evaluate the Council’s ward management function. This was an area where comparative authorities could not be identified; as far as they knew, nobody else had a ward management function like theirs – there was no one to compare to on a similar basis.
- 7.3.9 It was not felt appropriate to concentrate overmuch on the recent Local Government Benchmarking Project as the sole source of improvement. Mrs McDiarmid advised the Committee that there were other methods to understand performance. For example, a Council might look at its performance information over time, looking at trends, looking at what customers told you about performance, and considering the context of any on-

going policy reviews. Mrs McDiarmid stressed that all of this would rely on more than just analysing comparative data from other authorities.

- 7.3.10 Whilst there was no single approach to benchmarking in Highland Council, Mrs McDiarmid felt that, in principle, benchmarking should be applied consistently. However, the actual processes followed might not be exactly the same on each occasion. Similarly, the model of benchmarking could come from a number of places. One could be looking at the SOLACE indicators; another could be how councils met the Public Service Improvement Framework model. “We need to be clear about what our performance is and how we measure it. We need to be benchmarking with organisations that use the same definition, then go on try and understand what the processes are behind outcomes reported for that definition.”
- 7.3.11 Mr Rose referred to the elements in benchmarking across services, which Highland Council managed through a quarterly performance reporting system, where each service reported its performance through the Chief Executive. This allowed the Council to look corporately and make cross-service comparisons in terms of common issues such as sickness absence, or the payment of invoices. Mr Rose felt that this was a more tangible form of internal benchmarking, with officers having more assurance that the same methods of recording and assessing performance had been applied.
- 7.3.12 There were areas where it was felt that benchmarking might prove less easy than in others, primarily where no comparators were discernable. In addition to the ward management function, Mrs McDiarmid spoke of the move towards integrated services with NHS Highland for older people and for children. This had moved responsibility for adult care, in its entirety, to the health board, with child care transferred to the local authority. All Adult Social Workers had been transferred to the Health Service and the NHS child care staff had been transferred to the Council. As no other Council had, as yet, moved in this direction, it would be difficult to benchmark performance for the integrated services.
- 7.3.13 Mrs McDiarmid counselled against setting targets purely as a result of benchmarking experience. What was needed was to look at how services were currently performing, and determine how they needed perform, but to bridge that gap by deciding what kind of new action and resources were needed to get there. “You should only set targets that are realistic. That doesn’t mean that they can’t be ambitious, but they need to be resourced, and they need to be managed.”

8. HOW IS IT BEST TO PRESENT APPROPRIATE BENCHMARKING INFORMATION TO MEMBERS, AND HOW DO OTHER COUNCILS MANAGE THIS?

- 8.1 In the lead service briefing to the Committee by Dr Gore and Mrs Roe, it was acknowledged that the current system did not fully meet the expectations of members about what performance information they wished to have presented; neither did it provide a consistent approach to how all and any forms of benchmarking activity might be presented to councillors, to inform their consideration of policy reviews and resource allocations, as well as consider improvements. There was discussion of the potential to make available publicly more performance information, and allow members, and the communities of Aberdeenshire, to make their own assessments. Officer details might be included so that it was clear to whom any queries should be addressed.
- 8.2 Dr Gore indicated that one of the challenges in benchmarking was understanding where it was appropriate, useful or necessary to benchmark; there was no point in benchmarking for benchmarking's sake; the only benefit in doing it would be to make sensible use of the information gathered. There had been significant changes, over the years, to which areas of service and performance had been benchmarked – and the reasons for the work being undertaken. Dr Gore felt that there had been many indicators which had been somewhat meaningless, measuring statistics that did not mean anything and led to no actions. “Let's not count things for the sake of counting them, but identify what we want to know.” The challenge of confidence was to determine what was appropriate, at the appropriate time and officers needed to understand when it made sense to, as well as when it made sense not to, benchmark. Benchmarking would be appropriate for different services at different times, or may not be relevant at all.
- 8.3 The recent acquisition of Covalent, as a recording and reporting database of performance management, was a new route for members to be able to access up-to-date information, at their convenience, and not necessitate waiting for specially organised seminars on areas of performance, or the regular consideration of exception reporting. As all Scottish Local Authorities were subscribed to the service, this was also another means to access national information as a source for comparisons. Mrs White, in her demonstration of the system's capacity to the Committee, reported that the membership was wider than the councils, and that, by mutual agreement, it might be possible to access other, non-council, information. All Aberdeenshire members had access to the system, and had been offered training on how best to interrogate the information to provide useful information; this meant that live, real time information could be obtained at their convenience. Again, this was an area where outputs could be

customised to suit Aberdeenshire's needs. Mr Mackenzie suggested that the more members became familiar with the processes and able to access information, the more it would be possible for formal consideration to be focused on areas of concern, whether at area or policy committee. This, he felt, would be a better application of officer time in supporting members' understanding of performance.

- 8.4 There was discussion of what level of information should be presented at area, as well as policy committee level. Officers agreed that these committees would have different interests, but explained that for some areas of operation, it would be difficult to provide valid information on an area basis. Mr Archer indicated that his initial consideration of service delivery would be across Aberdeenshire as a whole, not in looking to compare operations in Buchan on Environmental Health matters, for example, with those in Kincardine and Mearns. "As a service, there should be a generic approach to food hygiene inspection and infectious disease complaints, Health & Safety complaints, whatever it may be, so it would quite difficult to dismantle that to an area dimension. There needs to be good management within the service and my role as leader is to ensure that there is an Aberdeenshire-wide approach as to how things are done." He believed that the most useful interaction with the area committees on performance and performance management, which includes the benchmarking aspect, should be a round table discussion of the highlights and the lowlights of service provision in each area; considering "what are the higher priorities; and what are we doing, as the service, to tackle those". This approach would include managing the performance of individual officers within that area. Ideally, any issues would be addressed within the service by officers, before it became a matter for the attention of members.
- 8.5 In terms of presenting benchmarking information to members, a concern expressed by Audit Scotland and raised in Aberdeenshire Performs, the Committee heard from Mr Archer that he was to report to the Infrastructure Services Committee in March 2013 on a programme of benchmarking activities for the year. This would be the first time such a focused report would have been submitted for members' consideration. Other reports on service plans might have referenced benchmarking considerations, and policy reviews should explain any comparisons with how others were doing similar things differently had shaped recommendations for changed approaches. The focused report, linked to customer engagement reporting would, in Mr Archer's opinion, give the service an evidence base to say, "we asked our customers and they said..." and thereafter "show how, and why, we've changed things as a result." The programme, for the next 12 months, would not apply in every area of the service, because it would not be appropriate, but its contents were wide-ranging enough to be able to return to committee

by the end of the year, with a comprehensive, service-related, benchmarking process which could then be examined.

- 8.6 Dr Gore advised the Committee that she felt that Corporate Services was different to the other services, because, with the possible exception of Licensing, only limited services were delivered on an area basis. Any reports on that activity would more appropriately be reported to the appropriate Licensing Board, than to Area Committees, because the boundaries were different. The extent to which Corporate Services currently presented any reports on management information on an area basis was very limited, purely and simply because of the nature of the business.
- 8.7 For Housing and Social Work, Mr Johnson suggested that benchmarking was more appropriately considered on a trans-Aberdeenshire level, but this had to be squared with the valid interest of local members in how services were delivered in their area, as compared to Aberdeenshire as a whole, or even as compared to one of the other areas of Aberdeenshire. Not all service returns could be easily disaggregated to area level – this was easier if related to a specific delivery establishment – a care home, for example, as opposed to care at home. Sometimes the differing needs of the area were reflected in what looked like inconsistencies in resource or outcome. He felt that members should be assured that officers at management level would recognise these differences, and be able to explain the differences, and what action was proposed, to area committees. Mr Johnson stressed that performance responsibility rested in senior management, and whilst area members might wish to see trends across Aberdeenshire, or a particular trend, concerns should be able to be addressed before reaching member consideration.
- 8.8 Round-table discussions with area committee members was a more effective way of debating matters of concern, Mr Johnson felt, than focusing on performance management reports which often did not demonstrate the full context of issues. Staff resources needed to be directed effectively, and in a wide ranging service it was unlikely that a single officer would be able to answer every question raised by members at an area committee, even with the new process of asking members to submit queries in advance in order that the attendance of a fully briefed officer might be achieved. It was impossible to know in advance what issues the discussion at committee might highlight and so these were hard to support appropriately. He suggested that a regular briefing for area committees with senior officers might be an effective way to complement the regular service update reports submitted to formal committee meetings. In terms of the reports generated by Covalent, Mr Johnson felt that there were times when the mechanics of when information was released, or collected, gave only a very short time to ensure that the full commentary was in place for members' consideration. "I think that

quite often for the Committee, some of the commentary will give you the full story, some will tell you part of a story, and ideally I want something that allows the quality of information to be absolutely right first time.”

- 8.9 Mr Mackenzie advised members that consideration of what could be reported on locally was actively being pursued by management team. Whilst it seemed obvious that some operational matters could be reported, he felt it was crucial to find out what was important to cover; did members want to know how performance was, and what it should, or could, be on all issues? Mr Mackenzie gave assurances that the dialogue with members as to what they would like to see reported would continue. He cautioned that it could not be done for every area committee, or even quarterly, but suggested that this might be done annually, or every six months. Mr Mackenzie understood from a political point of view the drive to be able to compare across areas, but stressed the dangers of taking information out of context. “I think what you do need to know is that, in terms of the service you get, it is as good as it can be, within the context; as opposed to if somebody in another area...is getting a better service than you are. It may be because there is a bigger need there, which leads to a greater allocation of resources.”
- 8.10 Echoing Mr Mackenzie’s concerns that the current reporting to area committees was not what the members had expected, or wanted, the Committee heard from Messrs Allan, Milne and White that councillors were unhappy about the constraints of available experienced officers in the areas to explain what was happening in the exception reporting. As statistics used to be one of the most successful things reported to inform the area committees, the area managers felt there was a great need to be sure, not only that the information was there, but also that the supporting narrative explanation was provided. Mr Allan reported that, in Marr, members seemed satisfied with the current reports, containing both the data and, importantly, supporting narrative. Mr White’s concern was lack of assurance that the exceptions were being reported vigorously and of comprehensive explanations, in some cases, where exceptions were recorded.
- 8.11 Area Managers welcomed the increasing use, by some services, of Service Seminars which had allowed local members, with appropriate staff support, to look at performance management and drill down through a lot of problems. This approach shared more information than would be gained by just looking at the exception reporting in Covalent. It was felt that this method of discussion had been particularly useful, most of all for the new Councillors, who were learning for the first time what Services were actually doing. The Area Managers expressed their wish that this approach be repeated.
- 8.12 In terms of what could validly be reported at an area level, Mr Allan commented: “Some things can be compared and some things probably don’t

compare easily. There's lots of information, potentially, about how we deliver our Roads Service, how we deliver Property/Technical information, all of which is valid and useful. There will be statistics about homelessness and so on. All of these things allow some comparison...[but] it is the drilling down to what lies behind that information that's really important." Concerns were expressed by all three Area Managers about the difficulty in obtaining that detailed level of information relevant to each area and issue. For some issues, data from community planning partners might be used to address any shortfall in Council-gathered information, although obviously this would relate most specifically to partnership activities in common. Mr Milne commented that early decisions were needed: "We need to try to identify what we want to measure - determine what's legitimate and appropriate to measure, and how we can gather the data. I think that's quite an important next step for the services to take."

- 8.13 The Area Managers suggested that there were already sources of information which could be used for targeting reports to area committees in terms of benchmarking, specific to each area but also, in some case, inter-area. This was the information from the complaints / comments database and the feedback system. That produced information on what people complained about, or otherwise commented on, and was reported back to Area Managers. Some matters arising from this information were considered by the Area Management Team. To be more effective, additional information as to why the complaint was noted, upheld, or not upheld, would be required. There was potential to learn from the accumulation, or trend, of these reports over time, which could be more widely exploited.
- 8.14 The Committee heard from Mr Howell of the scope of the new, "improving the Customer Experience" (iCE) project and what it was intended to deliver. Given that a main focus was the facilitation of different customer interfaces, questions were asked as to whether there were any plans to collect and analyse any feedback responses from customers; working in real time with current users of the service. This would be more directly focused than either the Council's own residents survey, or the national Scottish Household Survey which was deemed to have significant flaws in its representative validity and range. Mr Howell advised that there might be a potential application for using iCE to gather more information about overall levels of satisfaction with the transactions that take place through it. It would certainly be possible, although some functions would already be collecting and analysing the same information from different sources and reporting to their own performance groups. At the very least, the potential to use the by-product, by adding a further dialogue with customers, could be considered. This might allow an additional pool of information which could be interrogated at both a service, and an area, level, and reported appropriately to committee.

- 8.15 Cllr Kitts-Hayes advised the Committee that he would like to see more area reporting: "I was disappointed that we stopped reporting on area statistics. I would like to see that comparison, so we would get this information on an area level ...to relate to very specific area indicators." He felt that this was a prime area where the local member's knowledge of local circumstances could be best applied in scrutiny of performance, if given the option. Without appropriate officer representation, however, Cllr Kitts-Hayes felt that "you can't challenge if there's nobody there to speak with, and without challenge, you can't scrutinise." Cllr Gifford felt that performance information should be reported, where possible, at both area and policy committee level.
- 8.16 Mrs Watt explained to the Committee her belief that an ideal structure would be to lead from the top with systematic benchmarking processes, undertaken in a planned rotation. Aberdeenshire benchmarking was not consistent and concise at present, but work could be done to build on existing useful reference material, such as "How Good is your Council?" as a basis to consider improvement. There should be processes already in place to challenge performance and it should be possible to find this in most areas of Council operation. Contract and market comparisons should be included, as well as customer satisfaction, (possibly in the form of surveys,) quality and cost measures. To gather a reasonable range of data, it would be useful to benchmark against other authorities, as well as other bodies such as health boards, and the fire and rescue, and police services. The indicators used should be meaningful and make sense in that context. They must also be able to be verified.
- 8.17 The Committee heard from Mrs Calder that there were three main areas which her organisation would wish to see demonstrably considered by members in respect of benchmarking; the first was the on-going comparison of performance indicators that managers would undertake on a routine basis, just to check their services were doing well, tracking against previous performance and comparing externally; the second would be the Council's consideration of the outputs from the benchmarking groups, where different services and professions shared information and benchmarked through formal groups meeting periodically; and the third, the more specific, service review related exercises that councils undertook, whether it was a particular issue, such as under-performance, or the review of delivery models. For each of these approaches, a method should be found to reflect the consideration for members' scrutiny, or to inform their decisions. It was the action taken thereafter which was critically important, Mrs Calder suggested; "In terms of Audit Scotland's interest, we would look to see whether councils are achieving Best Value in their benchmarking activity, by looking at what the impact of benchmarking has been. We are less interested what process, or benchmarking group, you used, but we would want to see what has changed

as a result of that exercise. Benchmarking is not an end in itself; it is a means to an end.”

- 8.18 Mrs Calder did not see the benefit in having a programme, or plan, of benchmarking across all activities; “in the early days of Best Value, councils used to have a review program with every single service, covered over four years, in a rota. There is a danger that you think of benchmarking in the same way, but it should be where you need to do it.” She felt that not all services should be benchmarking all the time; it was necessary to look at the cost benefit analysis of benchmarking, to be sure any activity was worth it, and this was another aspect which Audit Scotland would wish to see openly and transparently in council operations. “If you are embarking on a big exercise to benchmark a service, we would ask why you are doing it and what are you trying to achieve”.
- 8.19 Commenting on the currency of information reported to inform benchmarking, Mrs Calder provided reassurance about using data that might be 18 months, or so, out of date. The required processes to collect and validate data could not be avoided, and it was perhaps more important to monitor trends. She believed that concern generated in a council from data reported to the Scottish Government, to her own organisation, or to benchmarking bodies such as the Improvement Service, APSE, and the Scottish Housing Best Value Network, should already have been identified – and action determined to address – by managers, as part of their day to day awareness of performance. Also, reports to committee on aged data should include a narrative explanation of what had subsequently taken place.
- 8.20 The Committee also heard from Mark McAteer on the issue of data used in the Local Government Benchmarking Project. “We are becoming a lot tighter on data management, quality and robustness for comparative purposes. We are not looking for data perfection because you will never get that. As long as it is good enough for the purposes of asking intelligent questions, then it’s good enough to be used for benchmarking. To get 100% accuracy would cost more than the work generated, but the important point is that it is robust enough.” He was aware of the challenges in sourcing data which was relevant on an area level and accepted the political imperative to do so. He reported how hard it could be to identify the median in looking for an area-type analysis. Using an example such as a school, Mr McAteer suggested the building focus made it relatively easy to identify the bulk of associated costs; this was not so easily achieved with a mobile workforce, if you could not easily analyse where a person actually spent their time, and therefore the cost attached to that. “We know there are significant differences across communities in Aberdeenshire, and sometimes it can be easier to find the average rather than the median which can be quite hard to quantify because

of the nature of the service and the type of workforce required to deliver that service.”

- 8.21 Mrs Calder also advised members that there was no one best way to advise councillors on benchmarking: “I am not suggesting that you would need a formal report in all cases. I think that what you would need, as an elected member, is to understand what the level of performance is; how does that compare with others; what do we need to improve; and when are we going to do it by? When you have seen all that, and you have an improvement plan in place, the questions become; did that happen; did it change, and was the change what we expected; did it change things for the end user?” These were the discussions she would expect to see reported to the area, or policy, committees after the more formal benchmarking exercises. There was also, she felt, a real benefit in informal sessions to allow officers to discuss specific area performance issues and benchmarking considerations with members.
- 8.22 Mrs Calder spoke of her experience as a member of the local authority network for Aberdeenshire, and also overseeing the targeted Best Value audit in 2012; “We often have to make judgements based on very sparse information. In this case, we don’t know if you are benchmarking; we don’t know if you have got a culture of improvement. The reason we don’t know is because when we look at the performance reports submitted to elected members, when we look at your scrutiny reports, when we look at your public performance reports, we don’t get a sense of what you are doing. When we look at your performance management reports, we can see that data comes in, data comes out at the other end. What we cannot quite see is how that loop then closes, and change happens, or what the impact is....You could be doing an awful lot of benchmarking, but you need to be open about it. You are not showing us through your performance management how you are using, collecting, learning from, and applying it.” This, Mrs Calder suggested, was what should be highlighted in reports, not the facts of what was done and what was found. This proposed that summaries might be included in performance reports produced by services, narrating what had been done in terms of on-going benchmarking, perhaps with the Local Government Benchmarking Project, or the more established groups such as APSE, the Scottish National Housing Best Value Network, or other relevant collectives, to report that there had been conversations and that things had changed.
- 8.23 Mr Murchie reported that benchmarking was included in reports to the appropriate Aberdeen City Council committee, at the appropriate time, most commonly in the regular updates to members on business plan progress, or in the context of service reviews and policy consideration. It was a mixed approach, he advised members, with three main routes for reporting to members. Firstly, service specific benchmarking metrics were integrated to performance reports. For example, housing would include some metrics,

which were part of the benchmarked set of the Best Value Network, in each performance report cycle. The target should, in part, derive from comparators; contextual analysis should refer to the performance of others. Secondly, there would be service specific reports, outwith the standard performance reports, based on, or including, benchmarked data. An example of this was the annual report on risk management submitted to members which, in addition to covering issues on risk arrangements, known risks and related issues, also included detail of the benchmarked Risk Maturity Model. Finally, Mr Murchie explained that members would receive consolidated reports which focused on a benchmarked, corporate data set, whether it was all the SPIs, the Solace report, or Benchmarked Cities report. Here officers would show, where possible, Scottish averages, the City's specific ranking and consider related issues.

- 8.24 In the Moray Council, performance and benchmarking was the specific focus of the Audit and Performance Review Committee, which held services to account for the assessments of performance, focused previously on the Statutory Performance Indicators, now replaced by those agreed in the Local Government Benchmarking project. A general concern was expressed by Mrs Mustard: "Benchmarking seems largely compartmentalised and is used mostly as management information. It is not often noted in committee reports and the results are not publicised in any way."
- 8.25 In Highland Council, there were varied ways of reporting benchmarking to committees. One fell under the remit of the Scrutiny Working Group, looking to apply good practice as detailed in the Audit Scotland report, "'Using cost information"; another related to reporting to members the outcome of service reviews undertaken through the Public Sector Improvement Framework. Apart from that, reporting was sporadic.

9. IS IT REASONABLE FOR ALL SERVICES TO BENCHMARK THE SAME WAY SO THERE IS CONSISTENCY ACROSS REPORTING, AND HOW DO OTHER COUNCILS DO THIS?

- 9.1 While all officers agreed in principle that it ought to be possible to undertake some kind of benchmarking, it was stressed across many threads of evidence given that consistency would be hard to achieve, if even possible. Mr Whyte felt it would not be profitable to seek to find a single model. While it was right to ensure – and be able to demonstrate - the wise application of public spending, the approach to benchmarking should vary as appropriate. He gave members illustrations of different types of improvement spend where benchmarking would follow different paths: From the Scrutiny and Audit Committee’s 2007 investigation on publicly available toilets in Aberdeenshire, further condition surveys were done, improvements made, and a new strategy adopted. In 2012, Aberdeenshire Council had won Loo of the Year. “We spend £1M on public toilets per year, but the cleanliness of these can impact on whether, or not, visitors will return to that particular town... We spend £500,000 per year on catering and looking at this, our action was that it would be sensible to go with another provider. Every area is important and we have to take this seriously.”
- 9.2 Mr Archer thought that the basics should be the same across the board; at its heart, benchmarking was about looking at services, comparing, asking, “Can you do that with anything other than present output” and making that decision. “It’s what you do, and how you relate to some of the different aspects of each service would be different”. He felt that after that, it would be down to the particular service, the staff, and the management to consider, “are we just looking at money in this case?”, “is it about resources?”, “is it about the outcome?”, and “how are we going to measure that outcome?”
- 9.3 Dr Gore suggested to the Committee that, whilst no single method of benchmarking could be validly established across all Council activities, there needed to be a framework within which benchmarking might be undertaken. It was entirely appropriate that some functions and parts of services be given appropriate flexibility to be more entrepreneurial and innovative in their approach to this. There also required to be an awareness of the purpose; officers needed to be answerable to somebody about why they were collecting particular pieces of information and what they were going to do with it.
- 9.4 The Committee was advised by Mr Mackenzie that, in principle, there should not be any areas that could not be benchmarked. He cautioned that it was important to be sure that a benchmarking industry was not being created. “It has to be something which is tailored specifically around what the Council wants to see as its strategic objectives. Therefore, it’s the delivery of those

strategic objectives that become important, not just making an industry of benchmarking. So we need to consider what are the most important things that we are doing, and how do we improve on those - that should be where we look to on benchmarking.” However the Chief Executive did not believe that there would be a single benchmarking approach across the Council, as benchmarking was needed both at the highest level, and also in operational elements which underpinned this. There had to be room in that for different approaches, chosen in discussion with elected members as appropriate.

- 9.5 From the perspective of external audit, Mrs Watt suggested that whilst each service would be different, it would be important to have a unified approach to cover the Council as a whole. A corporate view was needed to share experiences.
- 9.6 In discussions with Mr Bramah the Committee heard of the potential to benchmark not just across Scotland, with the 32 council members of APSE, but draw comparisons with Wales, where often the same pressures and challenges were found. The information collated from annual reports, across a range of services, allowed a clear starting point for the consideration of benchmarking. Mr Bramah advised members that APSE, in addition to providing reports, would work closely with individual councils, if required, to facilitate the application of learning from the practices of others. He reported that the Society of Chief Officers of Transportation in Scotland, (SCOTS,) sourced some of its benchmarking data from APSE, based on an asset management approach. Any approach taken to benchmarking should be fit for purpose and appropriate to each circumstance – looking at data in isolation could be misleading. It was not a case of one size for all; what mattered was not the collated data, but what the individual councils did with the data, at an appropriate time; and how it informed their decision making, even if the ultimate decision was to accept and retain the status quo.

10. HOW DO ABERDEENSHIRE'S BENCHMARKS COMPARE TO THOSE OF OTHER, COMPARATIVE COUNCILS?

- 10.1 Mr Whyte reported to members evidence of external appreciation for the Council's approach to benchmarking. "An Audit Scotland report on capital expenditure was published and in the three areas of best practice identified, two were from Aberdeenshire."
- 10.2 It was often hard to benchmark benchmarks, as there were often differences in terms of resources that mitigated against making comparisons. Mr Whyte referred to CIPFA benchmarking on asset management, where a huge amount of information was held on a database system but this could be presented as a simple spreadsheet. From this, differences were clearly noticeable; whilst Aberdeenshire had a single, full-time officer focussing on how to improve the condition of buildings, Perth & Kinross Council had eight full-time officers, looking after half the number of assets.
- 10.3 Mrs Calder advised the Committee it was hard to compare benchmarking across Councils. Authorities applied a variety of approaches to benchmarking, some formally involving elected members, and others at officer/ manager level. Audit Scotland knew, from discussions with councils, that there was other benchmarking work on-going which was not reported formally to committees or, indeed, advised to members in briefing sessions. Aberdeenshire Council was not alone in being challenged to report more to its elected members; other councils were in the same position. There was no accepted best practice on how, and on what members should be involved and how this should be evidenced. Without this, it was impossible to make valid comparisons.

11. CONCLUSION

As part of its initial consideration, the Committee were briefed on existing performance management tools, including a session with Tricia White of Covalent, a recently purchased performance management system. It was clear that while Benchmarking was distinct from performance management, it also needed to be informed by both quantitative and qualitative evidence, both of which needed to be assessed and recorded through performance management tools.

Covalent was not the only structured tool available to officers in comparing Aberdeenshire's performance with that of other local authorities, in Scotland, nationally, and even inter-nationally. Members heard from officers of the various councils of the established benefit of Benchmarking groups such as the Association for Public Sector Excellence (APSE) and the Scottish Housing Best Value Network (SHBVN), and of peer consideration in bodies such as the Society of Chief Officers of Transportation in Scotland (SCOTS), and through the National Planning Framework^{vi}. Officers looked to find comparisons in the private sector, where direct comparisons could be made – both Purchasing and Property found more valid comparators in North East private firms, for example, which took account of the pressures of the local economy in a way that might be lost in a national comparison. Purchasing was also subject to annual national assessment in the formal Purchasing Capability Assessment. Informal discussions – officers lifting the phone, or going to visit, their peers to ask questions about performance outcomes, were also well established.

Comparisons at national level were also evidenced in the Local Financial Return, which every local authority in Scotland reported to Government.

It was clear that Benchmarking could become an industry in its own right, and was often hard to match to “doing the day job”, although Directors and Managers stressed that professional consideration of performance should be part of the on-going management assessment of what, how, and why, things were being done in Aberdeenshire. Methods were being developed to facilitate the automatic transfer of data from one system to another, eradicating the need for manual transfer, and minimising the capacity for error. The Committee heard of challenges in collecting and validating data, as not all data was collected, or reported, in the same format. This was an underlying concern expressed by most witnesses – how could assurance be given that the same things were being calculated, reported and compared across the different organisations?

Data verification and cleansing were crucially important; Mark McAteer of the Improvement Service, working on the recently released SOLACE Local Government Benchmarking Project, acknowledged that some of the data needed further development. For example, the use of the Scottish National Household Survey outcomes needed to be reconsidered, as it might be seen as not entirely representative, and came without guarantee that those interviewed were direct service users – but this was currently the single source of comparative qualitative feedback from residents of Scotland on the performance of their local authorities. Work was to be pursued in the coming year to seek other sources of the information, including developing consistency in the questions asked by some councils in their

residents' surveys, and encouraging those who did not currently seek such information to do so.

Members heard of the challenges of being sure comparisons were accurate – how to be sure that apples were being compared to apples, and not to pears. But the underlying stress was on looking at the information and context behind the reported figures. There were often explanations for the differences in performance which might relate to the expressed policies of the individual authority, or choices in resource allocations. In some instances, there might be merit in looking specifically to another operation which was completely different – apples with pears – to see if there was anything which might be learnt from that process. The need to compare not just with improving and better performing councils, but also to look behind the figures at those whose performance appeared to be struggling, or diminishing, was also equally valid as it might provide a reason for discarding a proposed line of action.

Trend data was also considered to be of vital importance – to show the outcome of the successful, or otherwise, application of a change in policy or procedure, allocation, or reduction in resources, or merely to set an over-time context which could address seasonal variations.

In local government, the key was to provide elected members with the appropriate information for them to make informed decisions, and this needed to include some Benchmarking comparisons. Benchmarking as a topic for investigation had been promoted because of concerns levied by Audit Scotland that there was no evidence that members were advised of performance comparisons having been taken into consideration, when developing a new strategy, for example, or when considering the allocation of resources to established policies and procedures. Yet in evidence gathering, the Committee heard repeatedly of officers doing precisely this, both in terms of special consideration for new strategies, and in the day to day operation of their services. It was clear that a method for sharing this information with councillors should be developed.

Should a formal, cycle of Benchmarking be established for each service/ section/ action? Members heard from Deloitte that formal comparisons on a regular basis would be welcomed, but also considered the resource implications in doing so. It was suggested that rather than a formal rota, attention should be paid to specific aspects when they needed to be reconsidered, whether because of poor performance, increasing cost, or as an outcome from a change of policy direction. It was clear that there were benefits in making comparisons – on occasion, opportunities to reduce the cost of service, whilst still maintaining customer satisfaction and an acceptable level of performance, might occur, as, for example, members heard from Moray Council.

There needed to be consideration of the targets set in any benchmarking, to be sure that they were challenging, realistic and resourced. In particular, members heard that often to get the last few percentage points of “improvement” could have significant cost implications which needed to be actively considered in context. Was it always worthwhile to spend more if the level of service being provided met customer needs and applied the council approved policies and procedures?

Synonymous with Benchmarking, the Committee heard about the tendency to create league tables of performance. These had been a source of concern in the Solace Local Government Benchmarking exercise, and it was noted that context was all important – but often a message hard to get across to the public and press. Councils had expressed concern about the way in which the SOLACE Local Government Benchmarking outcomes were reported, with communication strategies being in place at both a local and national level. Yet a significant percentage of the information had already been in the public area, in a different format. Members considered whether more raw data might be made publicly available, considering that this was a national trend which it might be better to respond to in a pro-active manner. The open data might also address another issue raised by witnesses, that by the time data was verified on a national level, it was already out of date. Open data might allow quicker update, if not exactly live, data.

Context was also seen as important in terms of comparisons between the different areas of Aberdeenshire. All too often the performance information was hard to disaggregate to an individual administrative area, and when it was, tended to focus on services which delivered from dedicated staff or facility bases, not the actual service provided. More importantly, the information currently collected provided details of costs and resources, not necessarily the outcomes. Members were clear that the cost to provide a particular service in Peterhead might be significantly different from providing the same service in Banchory, for example, but that this should not be seen as relevant if the outcomes of that service provision were equitable across the areas. In the same way, it might cost more to provide secondary education in Banff & Buchan compared with Kincardine and Mearns – but this was a valid differential if the services provided were the same. Greater clarity on this matter would come if the performance reporting were focused on outcomes arising from the service provision and not the unit cost of provision.

Having considered the vast amount of evidence, from witness sessions, site visits and documents, the Committee believe that Aberdeenshire does, indeed, have the tools in place for benchmarking. There is no need for more systems, but, in demonstrating that there is “effective” benchmarking, there is a need for the information gathered being transparently reported to elected members, and considered and applied where strategies are being developed, or projects assessed.

Again, although the tools are in place, they are faulty if the data in them is out of date, or making inappropriate comparisons, without setting the proper context of the figures. To have more immediate information available on systems such as Covalent, open to scrutiny and interrogation by all members, is considered very helpful – but it should be for officers to draw out conclusions, and set the context, for any comparisons, based on their professional experience and judgement, not left to members to make their own assessments.

For some services, comparators are more easily identified than for others. In some areas of operation, the policy of the Council has dictated processes and procedures unique to the authority. Other services are already set up and able to provide the unit cost, or resource, implications along very specific actions; for these services, comparisons may more easily been identified. It is also felt that some areas of

council operation, mainly those which fall into the realms of qualitative, rather than quantitative assessment, are currently lacking the information to allow comparisons. Nevertheless, the Committee feel that it would not be appropriate to seek all services and areas of operation to report benchmarking in the same way, or even establish a formal programme of benchmarking review. None of the witness councils had identified a single way of dealing with reporting benchmarking consideration to members, so there were no obvious lessons to be learnt there. However, in order to achieve consistency across services, it is felt that some form of reporting whatever benchmarking has been possible, should be considered.

The original terms of reference for the investigation also suggested that comparisons of how Aberdeenshire's benchmarks relate to those of other, comparable, Councils, should be considered. The Committee feel that, without knowing the context of policy and resources within which each operation is undertaken, any comparison would not be helpful. Direct statistical comparisons, lacking the understanding of what lies behind the figures reported, can only generate an ill-advised, league table creating approach which is not constructive.

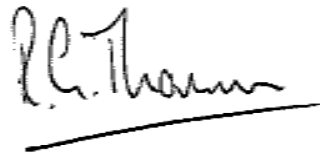
12. THANKS AND INVITATION FOR FEEDBACK

The Scrutiny and Audit Committee would like to record its appreciation of the cooperation and assistance it received from internal and external witnesses. The efforts of officers in seeking to ensure that services are delivered to the best of our resources, and be assured that any lessons learned from comparisons allowed by benchmarking their performance, furthers the Council's aims to be the best in Scotland.

Each investigation undertaken is a learning experience for the Committee. It would welcome any feedback or comments from participants or interested individuals on the investigation process and this report.

A handwritten signature in blue ink, appearing to read 'Gillian Owen', written in a cursive style.

Cllr Gillian Owen
Chairman, Scrutiny and Audit

A handwritten signature in black ink, appearing to read 'R. Thomson', written in a cursive style with a horizontal line underneath.

Cllr Richard Thomson
Vice-Chair, Scrutiny and Audit

INVESTIGATION BRIEF

Subject to be reviewed. –Benchmarking – do we have the tools in place for effective assessment?	Investigation No
Scrutiny and Audit Committee – Investigation Brief	
Purpose and objectives of investigation	
<ul style="list-style-type: none"> ○ How does Aberdeenshire currently benchmark the services it provides? ○ How can some services benchmark and not others? ○ How to identify targets to benchmark? How do we know we could be better? ○ Do we have the expertise to benchmark? ○ How do other Councils benchmark? ○ How best to present appropriate benchmarking information to members, and how do other councils manage this? ○ How do we ensure all services benchmark the same way so there is consistency across reporting, and how do other councils do this? ○ How do Aberdeenshire’s benchmarks compare to those of other, comparative councils? 	
Background papers	<ul style="list-style-type: none"> • Reports to Policy and Resources Committee, Service and Area Committees on Service Plan Performance Monitoring and Statutory Performance Indicators • Public Performance Report 2011/12 and Statutory and Local Indicators 2011/12 • Aberdeenshire Assurance and Improvement Plan, Update 2012-2015 • How good is our council self evaluation, 2011/12 • Audit Scotland – “Using Cost Information to Improve Performance – Are You Getting It Right?” • Audit Scotland –“Managing Performance: are you getting it right?” October, 2012 • Audit of Best Value and Community Planning – June, 2008 • Society of Local Authority Chief Executive (SOLACE) report on Benchmarking • Scottish Parliament’s Local Government and Regeneration Committee – Moving Forward: Benchmarking in Scotland
Witnesses to be invited to provide evidence	<p>EXTERNAL:</p> <p>The Moray Council</p> <p>Highland Council</p> <p>Aberdeen City Council</p> <p>The Improvement Service</p>

	<p>Audit Scotland</p> <p>Scottish Housing Best Value Network (SHBVN)</p> <p>Association for Public Sector Excellence (APSE)</p> <p>Chartered Institute of Public Finance and Accountancy (CIPFA)</p> <p>INTERNAL:</p> <p>Chief Officers – Chief Executive, Director of Corporate Services, Directors, Area Managers, Head of Finance, Performance Manager.</p> <p>Staff – officers who support, record and report benchmarking across the services</p>
Site Visits	APSE Conference and Exhibition, Aviemore, 8 May, 2013
Consultation process	n/a.
Trade Unions Contribution	n/a.
Project Team (officers)	Jan McRobbie, Corporate Services and Fiona Tweedie, Legal & Governance.
Other estimated costs	TBC.
External expert	N/A
Investigation Timetable	Spring/ summer 2013.

INVESTIGATION PROGRAMME AND WITNESSES¹ HEARD

DATE	ACTIVITY
21 January	<p style="text-align: center;">Lead service briefing</p> <p style="text-align: center;">Christine Gore, Director of Corporate Services, and Amanda Roe, Performance Manager</p>
7 February	<p style="text-align: center;">Covalent Briefing</p> <p style="text-align: center;">Trisha White (Covalent); and Amanda Roe, Performance Manager and Beth Reader, Performance Assistant</p>
18 February	<p style="text-align: center;">Evidence Gathering - Area Managers</p> <p style="text-align: center;">Les Allan (Marr), Douglas Milne (Garioch), and Chris White (Buchan)</p>
21 February	<p style="text-align: center;">Questions setting for forward sessions etc</p>
21 February	<p style="text-align: center;">Evidence gathering – Directors</p> <p style="text-align: center;">Christine Gore, Director of Corporate Services</p>
21 February	<p style="text-align: center;">Evidence gathering – Directors</p> <p style="text-align: center;">Ritchie Johnston, Director of Housing & Social Work</p>
28 February	<p style="text-align: center;">Evidence gathering – Directors</p> <p style="text-align: center;">Stephen Archer, Director of Infrastructure Services and Tim Curtis, Senior Improvement Officer, Infrastructure Services</p>

¹ Witnesses from Aberdeenshire Council, unless otherwise advised.

28 February	<p>Evidence gathering – Directors</p> <p>Maria Walker, Director of Education, Learning & Leisure, Wilf Weir (Head of Service (Resources), and Avril Nicol, (Communities & Partnership Manager)</p>
11 March	<p>Forward Planning</p>
11 March	<p>Benchmarking Evidence – Councillors</p> <p>Cllrs Gifford and Kitts-Hayes, Leader and Depute Leader</p>
13 March	<p>Benchmarking Evidence – Chief Executive</p> <p>Colin Mackenzie</p>
25 March	<p>Benchmarking Evidence – Head of Service</p> <p>Philip McKay, (Roads and Landscape)</p>
22 April	<p>Benchmarking Evidence – Property and Facilities Management</p> <p>Allan Whyte, Head of Service</p>
22 April	<p>Benchmarking Evidence – Legal & Governance</p> <p>Karen Wiles, Head of Service</p>
2 May	<p>Evidence gathering –SOLACE Local Government Benchmarking Project</p> <p>Mark McAteer, Director of Governance and Performance Management, the Improvement Service</p>
8 May	<p>Evidence gathering – APSE Seminar/ Exhibition</p>

	Mark Bramah, Depute Chief Executive and Debbie Johns
9 May	Evidence gathering – Aberdeen City Council Martin Murchie, Head of Performance Management and Quality Assurance
15 May	Evidence gathering – iCE (improving the Customer Experience) Craig Howell, Project Manager iCE
20 May	Evidence gathering –The Moray Council Bridget Mustard, Corporate Policy Unit Manager, Louise Marshall ,Performance Management Officer, Councillor Gordon McDonald , Chair of Audit and Performance Review Committee
22 May	Evidence gathering – Audit Scotland Carol Calder, Portfolio Manager
22 May	Evidence gathering - Scottish Housing Best Value Network Angela Currie, Director
22 May	Evidence gathering - Highland Council Carron McDiarmid, Head of Policy and Performance and Nigel Rose, Head of Internal Audit
23 May	Benchmarking Evidence - SOLACE Navigation Amanda Roe, Performance Manager and Dianne Steven, Performance Officer
27 May	Evidence gathering

	Robert Gray, Head of Planning & Building Standards
29 May	Evidence gathering –External Audit Karlyn Watt, Deloitte
3 June	Initial wrap
20 June	Consideration of Wrap 1 and new Wrap 2
20 June	Evidence gathering Craig Innes, Head of Central Procurement Unit
26 June	Evidence gathering – Local Financial Returns Ross Brennan, Chief Accountant and Andrew Johnson, Senior Accountant
3 July	Initial consideration of draft recommendations/ summary
19 August	Consideration of draft report

ENDNOTES

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- ⁱ APSE – The Association for Public Sector Excellence (<http://www.apse.org.uk>)
- ⁱⁱ SHBVN – The Scottish Housing Best Value Network (<http://shbvn.org.uk/>)
- ⁱⁱⁱ COSLA – The Convention of Scottish Local Authorities (<http://www.cosla.gov.uk/>)
- ^{iv} CIPFA – Chartered Institute of Public Finance and Accountancy (<http://www.cipfa.org/>)
- ^v SOLAR – The Society of Local Authority Lawyers and Administrators in Scotland
- ^{vi} The National Policy Planning Framework (<https://www.gov.uk/government/policies/making-the-planning-system-work-more-efficiently-and-effectively/supporting-pages/national-planning-policy-framework>)