Appendix 1 Performance Framework: Criteria for RAG assessment of progress/scoring for Corporate Delivery Plan updates- Guidance note.

This approach to performance and project management allows wide visibility, which is critical to the engagement and progress tracking of the actions set out in the plan. When this new framework and associated governance is fully embedded, we will be able to report openly on performance and achievement of outcomes.

2 assessment/scoring updates to RAG rate to reflect progress made:

1) **Achieving intermediate outcome** – this is based on movement towards achieving the intermediate outcome – i.e., the delivery of change and overall direction of travel on agreed metrics supporting evidence of change delivered.

2) **Delivery of activity** – this is based on whether delivery is on track, milestones met, specific activities achieved.

Scoring Criterion:

Achieving Intermediate Outcome measuring the delivery of change towards achievement of outcome:

- **Green** = metrics/measurable outputs show positive direction of travel & there is evidence of change/progress in line with what was planned for this reporting period
  - o Main objective/goals met with evidenced accomplishments/ successful achievement of intermediate outcome
  - o You could explain change achieved and impact on the resident/progress towards achieving desired outcome.

- **Amber** = metrics showing progress in the right direction, but activity or deliverables/desired change not yet achieved or behind planned schedule
  - o Some evidence of progress/accomplishments heading towards partial achievement of intermediate outcome
  - o You could explain change achieved and impact on the resident alongside partial progress towards achieving desired outcome.

Intermediate Outcome Not achieved
- **Red** = metrics not yet evidencing change or desired DOT (direction of travel), milestones not met, change not evidenced or activity not delivered in line with plan timescales
  - o There is a negative direction of travel overall and no evidence to support delivery of intermediate outcome or accomplishment related to deliverables as specified in CDP.
  - o You would struggle to explain change achieved and/or positive impact on the resident or progress towards achieving desired outcome.

- **Grey** =no update on change or measurables available at this stage

Delivery of activity measuring project activity:

- **Green**= **Project/activity on track**
  - o Delivery of project activity **on track** in specified timescale supported by evidence.
  - o All milestones met for the period being reported on

- **Amber**= **Project/activity slightly off-track/ behind plan**
  - Some progress made against objectives/ delivery outputs but Not as specified in plan/timescale or evidenced by metrics.
  - Not all milestones met for the period being reported on
  - There is a positive direction of travel overall and mitigation for project/delivery delays.

- **Red**= **Project/ activity not delivered as planned**
  - No real progress made since previous period and no evidence to support successful delivery of objective or goals in specified time.
  - Milestones not met or very few milestones achieved for the period being reported on

- **Grey** =no update on activity or measurables available at this stage, project has not started.

NB. Despite this framework being predicated on a subjective RAG assessment and holistic view of progress, the inclusion of hard metrics (where available) is critical to the evidence base and the assessment of overall progress. For this reason, it is important that the latest metric values are updated and the Direction of Travel column completed so that performance and trends in numerical form and against targets where applicable can be examined and challenged as part of the overall process.