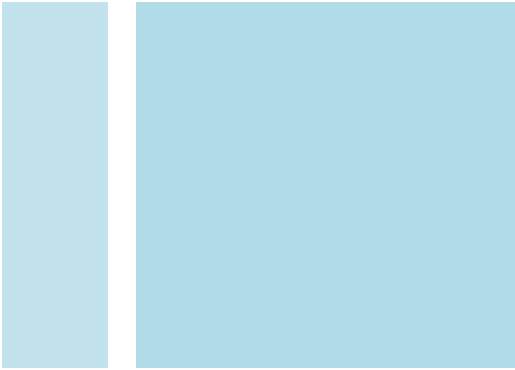


# Quality Management in Local Authority Educational Psychology Services



Self-evaluation toolkit



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Self-evaluation toolkit

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<sup>1</sup> *Review of Provision of Educational Psychology Services in Scotland*, published by SEED 2002.

# Introduction

## *Introduction*

- 1.1 The toolkit has been developed by the profession and the two training universities of Dundee and Strathclyde to support self-evaluation. Educational psychologists from across Scotland, representing all professional levels, have been directly involved in the consultation and development of this document.

The toolkit has been designed to provide a more detailed look at self-evaluation. It outlines a systematic approach for educational psychology services to use when evaluating the effectiveness with which they deliver their services.

Evidence produced through the use of this or other evaluation models can contribute to overall evaluations. For example, evidence produced through the use of models such as Charter Mark can contribute to evaluations made using measures and indicators within this framework and vice versa. Many services in the past have used the *Psychological Service Quality Assurance Performance Indicators*. The new framework has built on previous models and taken account of recent developments relating to quality assurance.

## *The process of self-evaluation*

- 1.2 The process of self-evaluation helps services to:

- recognise the positive impact their work has on stakeholders for example, children and young people, parents, families, educational staff and partner agencies;
- highlight levels of service which need to be maintained or where improvement is needed and where they should be working to achieve excellence;
- identify what they can do to make things better for stakeholders; and
- inform stakeholders about the quality of services in the area.

The process of using self-evaluation for improvement is based around three key questions:

*How are we doing?*

*How do we know?*

*What are we going to do now?*

The following provides more detailed information about how a service might go about answering these three questions.

## *How are we doing?*

- 1.3 Practitioners have always reflected on the quality of the services they provide. By working together to gather information to evaluate the impact of services, educational psychologists can come to a shared view of how well they are doing and how they can make things better. To ensure the quality of provision is maintained and improved, service staff also need to evaluate how effectively services are delivered and managed, and how well they plan for improvement.

Making such evaluations is dependent on a shared understanding between service providers and stakeholders of what constitutes high-quality outcomes and processes. The quality and performance indicators in this document set out to support the development of such an understanding by all those concerned with delivering or evaluating educational psychology services. Answering the question *How are we doing?* requires services to summarise their impact on external and internal stakeholders, and indeed the community as a whole.

#### *How do we know?*

1.4 Self-evaluation involves:

- a **broad view** of performance across the **six high-level questions**
- a **closer look** at particular aspects of work.

#### *Forming a broad view*

1.5 Practitioners within a particular service can use the quality indicators to form a **broad view** of quality across their service. Using evidence that has been gathered in the normal course of their work, they can identify broad strengths and weaknesses. This will enable them to make an immediate evaluation of areas of major strength, or areas where more attention is required.

#### *Taking a closer look*

1.6 Often it may not be manageable or even helpful to try to evaluate every aspect of the service in an in-depth way at the same time. In order to have a greater understanding of the effectiveness of particular aspects of practice, managers and practitioners can take a **closer look** at them. The stimulus to take a **closer look** could derive from a range of issues that includes:

- the decision of a small group of practitioners to follow up a particular issue or area on which they have been working in order to find ways to evaluate and improve what they are doing;
- an area of priority identified during the broad view of self-evaluation;
- a national priority or a local improvement objective;
- a survey of the views of stakeholders in an area;
- the outcomes of an inspection or inquiry; and
- research findings which have implications for the quality of the service.

This means that specific groups of practitioners can also carry out self-evaluation by asking themselves focused questions such as:

- How are educational psychologists contributing to improving outcomes for children and young people looked after and accommodated by the local authority?
- How well is the service complying with legislation and responsiveness to guidance and codes of practice?

It could also focus on specific themes by asking such questions as:

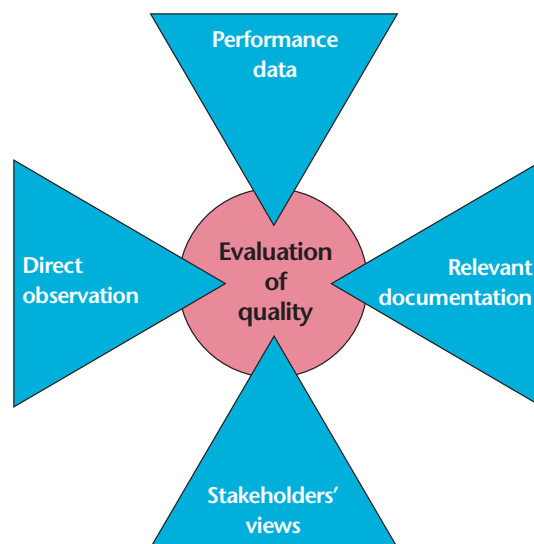
- How well does the service consult with children and young people, and take account of their views in the delivery of the service?
- How effectively do educational psychologists work in teams?

By encouraging practitioners to structure their discussion of, and reflection on, their work, the quality and performance indicator framework can support improvement by individuals and teams as well as at operational and managerial levels.

### *How do we gather evidence?*

1.7 There are a number of sources of evidence which can inform a service about how well the needs of stakeholders are being met and what differences are being made. By using a range of indicators and sources of evidence, an holistic view of quality can be determined. There are four key sources of evidence from which evaluations can ultimately be made. These are:

- performance data
- relevant documentation
- stakeholders views and feedback
- direct observations of practice.



1.8 These sources of evidence are complementary. A single source may not provide enough evidence to enable a reliable or robust evaluation to be made. The principle has been tried and tested over many years by independent external evaluators and entails the scrutiny of one source of evidence, backed up by another and corroborated by other lines of enquiry. An example would be an evaluation based on an analysis of the educational psychology service development plan, the implementation of which was then fleshed out in discussion with senior educational psychology staff and further



corroborated in discussion with stakeholders such as parents, carers and families. Through such a process of robust self-evaluation it would be possible to monitor the outcomes of putting policy into practice, and, by doing so, evaluate the benefits of policy in meeting the needs of stakeholders.

***Performance data***

- 1.9 Examples of performance data would be statistical information relating to local and national objectives.

***Relevant documentation***

- 1.10 Examples of relevant documentation could be a statement of the service's vision, values and aims, service development plans, standards and quality reports.

***Stakeholders' views***

- 1.11 Information can be collected systematically when stakeholders are accessing and using a service, or at the end their involvement with a service. Services should also have procedures for surveying stakeholders' views using questionnaires or focus groups.
- 1.12 Whatever approach is used, gathering information from stakeholders is an essential part of the self-evaluation process. Without it, services will find it very difficult to understand the impact of their work on stakeholders. It is almost impossible to answer the high-level questions with any degree of confidence without including the views of stakeholders.

***Direct observation***

- 1.13 The educational psychology service is embedded and managed within local authority systems and delivers its statutory functions within that local context. The service works collaboratively to support and empower others to improve outcomes for stakeholders. This approach is supported by evidence-based practice that recognises the effectiveness of a process of collaborative, contextual assessment and intervention.
- 1.14 To measure the impacts and outcomes of the involvement of the service, it is necessary to consider the relationships the service has and the context in which its services are delivered. The impact of the service is concerned with the immediate and current experiences of stakeholders: it has a focus on customer service. Outcomes are longer-term and largely statistical measures relating to improvement programmes and achievement data. Outcomes are concerned with the service's success in achieving its objectives and also its contributions to the education authority's objectives.
- 1.15 The service operates at the different levels of delivery – on behalf of the individual, school/provision, local authority or within a national context – at different times. For example, with regards to individual case work, sometimes the service will be in direct contact with a child or young person and, at other times, the service will work through a parent or teacher to improve outcomes for children and young people. The impact of the psychological service can be direct or indirect. The work of the service can be directly observed in a range of contexts as illustrated opposite:

|  | <b>Individual</b>   | <b>Family</b>   | <b>Educational Provision</b>   | <b>Authority</b>  | <b>National</b>   |
|--|---|---|--|---|---|
| <b>Consultation and Advice</b>               | Individual discussions, contributions to individualised educational plans, or co-ordinated support plans. | Home visits, parent and review meetings.  | Joint working with staff, provision of advice on programmes, contributions to strategic planning and policy advice.  | Contributions to strategic planning on behalf of senior managers.   | Contributions to strategic planning at a national level.  |
| <b>Assessment</b>                            | Observation of a range of assessments in different contexts.  | Observation of parent/child interaction.  | Contributions to school's assessment policy and procedures.  | Contributions to the authority's assessment policy and procedures.  | Contributions to national assessment policy and procedures.   |
| <b>Intervention</b>                          | Observation of implementation of behaviour management programmes and therapy sessions.                    | Observation of, and assistance with, the implementation of a joint action plan developed for use at home and school.  | Observation of, and contributions to, whole-establishment interventions (e.g. anti-bullying strategies, playground behaviour, raising attainment), assessment arrangements for candidates with disabilities and/or additional support needs, curricular innovation/initiatives, supporting specialised college placements. | Observation of, and contributions to, authority-wide interventions (e.g. raising attainment, alternatives to exclusion, promoting social inclusion, promoting resilience, resource allocation). | Observation of, and contributions to, national interventions (e.g. anti-bullying strategies enhancing achievement, citizenship programmes, promoting social inclusion). |
| <b>Professional Development and Training</b> | Observation of training for a young person with additional support needs.                                 | Observation of participation in design, implementation and evaluation of staff training, dissemination of evidence-based practice to groups of parents or carers. | Observation of participation in design, implementation and evaluation of staff training, dissemination of evidence-based practice in single or groups of educational provision.  | Observation of participation in design, implementation and evaluation of authority wide staff training initiatives, and dissemination of evidence-based practice.                               | Observation of participation in design, implementation and evaluation of national staff training initiatives and dissemination of evidence-based practice.              |

|   | <b>Individual</b>   | <b>Family</b>  | <b>Educational Provision</b>  | <b>Authority</b>  | <b>National</b>   |
|---|---|--|---|---|---|
| <b>Research and Strategic Development</b> | Evidence of, and participation in, design, implementation and evaluation of action research projects involving individual children. | Evidence of, and participation in, design, implementation and evaluation of action research projects involving parents, carers and families (e.g. person-centred planning approaches). | Evidence of, and participation in, design, implementation and evaluation of action research projects in single or groups of educational provision (e.g. promoting positive peer relationships). | Evidence of, and participation in, design, implementation and evaluation of authority wide action research projects (e.g. early intervention, strategies raising attainment). | Evidence of, and participation in, design, implementation and evaluation of national action research projects (e.g. restorative practices, video interactive guidance). |

***What are we going to do now?***

1.16 It is important, when undertaking any form of self-evaluation, to keep focused on the end purpose, which is improving outcomes for stakeholders. The answer to, *What are we going to do now?* must therefore always be a plan for action, which will make a positive difference to the stakeholders who use the service.

***Planning for improvement***

1.17 Effective and robust self-evaluation provides a strong basis for good planning. Such planning for the service takes place within the framework of the authority’s strategic and operational plans. The service will have its own improvement plan or equivalent. Self-evaluation can support these planning processes and ensure that plans are built on robust, evidence-based knowledge of the quality of impact and outcomes. The results of the planning will then be made publicly available in the standards and quality report.

***Action for improvement***

1.18 Whether, and how, the outcomes of self-evaluation are reported depends on the purpose and the level of the work done. The purpose of reporting should help decision-making about how to make future improvements, and also inform stakeholders.

1.19 The following examples outline a range of reports which result from self-evaluation activity.

- A service decides to find out the views of young people who have been directly involved with its work. A group of young people are selected to be part of this project. Parental permission is sought before the young people are approached by the service. Permission and agreement are also sought directly from the young people. A series of focus groups with young people in various establishments takes place. A list of ten key questions are used in the focus groups. The results of the questions are analysed. The findings are used to improve the guidelines for direct involvement with young people. The service also feeds back the results of the evaluation to the stakeholders involved and other interested parties.

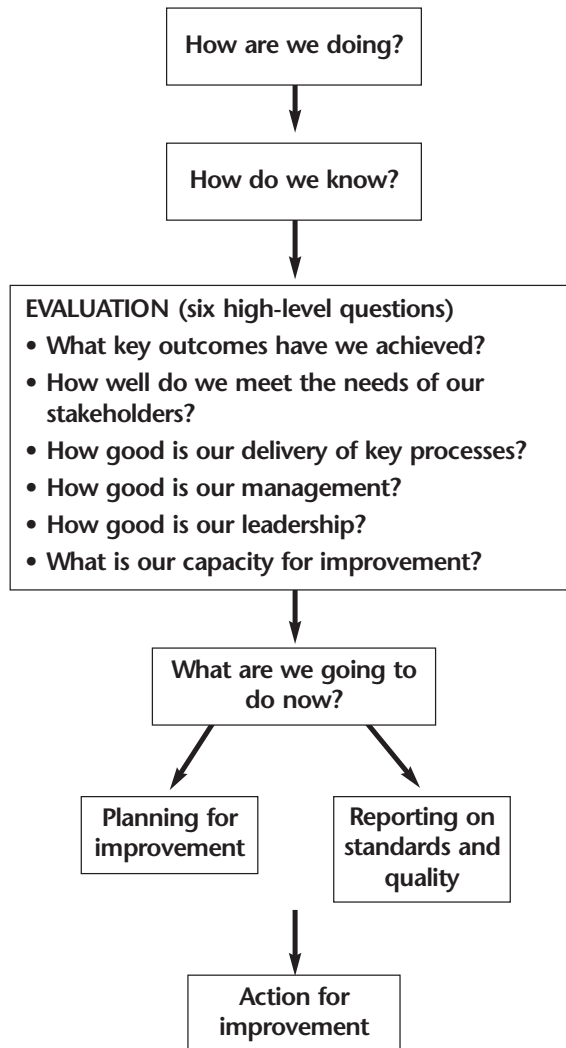
- A service decides to evaluate the contribution it makes to multi-agency meetings and to explore the impact a pilot collaborative approach has on children and their families. This is done using focus groups including education staff, parents and children. Questionnaires are also sent out to all schools. As a result of a positive self-evaluation, the service uses the approach across the whole service. The service also feeds back the results of the evaluation to the stakeholders involved and other interested parties.
- A service evaluates its contribution to national and local authority priorities by building these priorities into its development plan. It takes feedback from all stakeholders, including education service management, on the tasks achieved and quality of the input provided by the service to a range of local authority working groups and initiatives. The service publishes impacts and outcomes in its yearly standards and quality report.

1.20 As a service works across a wide range of stakeholders, meeting the needs of stakeholders can involve a number of professional and user groups. It is important, therefore, that the outcomes of self-evaluation and plans for improvement feed into the appropriate planning structures. Depending on the work undertaken, the outcomes may result in priorities being included in future plans. The following list gives some examples:

- individualised educational programme for a child or young person;
- support service or school development plan;
- plan at cluster or neighbourhood level;
- local health improvement plan;
- education authority improvement plan; and
- children's services plan.

1.21 Whatever the planning structure(s) for taking forward improvement, it will help if a manageable number of priorities is selected for which a service can identify specific, achievable, measurable and time-bound targets. Even where a service can see how improvements can be made across a number of aspects, the service may wish to focus on those of greatest concern. It will make more impact on stakeholders if a manageable number of priorities are taken forward effectively. In some cases, small changes in practice identified by practitioners can have a significant positive impact for many different stakeholders. It is not always necessary for self-evaluation to result in major changes or reviews of practice. Often these changes are part of day-to-day professional working which focuses on continuous improvement.

1.22 The process of self-evaluation as described above is summarised by the following diagram.



The toolkit has been designed to support educational psychology services and practitioners in addressing these questions. In the first column headed *How are we doing?* questions have been developed by the profession to explore this theme. In the second column headed *How do we know?* examples of four main sources of evidence, have been outlined:

- performance data;
- relevant documentation;
- stakeholders' views and feedback; and
- direct observation.



Part A  
Support for self-evaluation



## Part A – Support for self-evaluation

What key outcomes have we achieved?

(KEY AREA 1: KEY PERFORMANCE OUTCOMES)

PI 1.1 Improvement in performance

### Themes:

- Performance data and measures showing trends over time
- Performance against national, local authority and psychological service aims, objectives and targets

### Key Features

This indicator evaluates continuous and sustainable improvement against national and local objectives such as those contained in the authority's Children's Services Plan. Examples of performance data and measures might include measurable outcomes from the authority's strategic and operational plans.

Performance will also be measured against objectives within the services improvement plan. It will include the contribution of the educational psychology service in meeting local targets for education and care in the Children's Services Plan and other plans. Examples of this could include:

- achievement of targets for children and young people;
- improvements following service reviews relating to Best Value; and
- outcomes of research and development initiatives which have had an impact on the learning and wellbeing of children and young people.



| HOW ARE WE DOING?  | HOW DO WE KNOW?  | WHAT ARE WE GOING TO DO NOW?   |
|--|--|--|
| <p><b>1.1.1 Performance data and measures showing trends over time</b></p> <p>What performance data are collected by the service?</p> <p>In what way is continuous improvement measured by the service?</p> <p>In what way are positive trends and standards of performance measured against appropriate benchmarks and comparative data?</p> <p>What outcomes have been achieved and how are they evidenced?</p> <p>To what extent does the service development plan link with the authority improvement plan?</p> <p>How are service staff involved in authority steering and planning groups?</p> <p>Is service documentation coherent with the authority documentation and does it demonstrate the service's impact on authority priorities?</p> | <p>Some examples of appropriate sources of evidence are given below. However, they are not considered to be comprehensive or prescriptive.</p> <p>This PI looks at statistics which are published in a number of different documents. Information can also be collected by looking at evidence used for other indicators.</p> <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• Performance targets from the service plan, Best Value improvement plan and local authority service plan indicate positive trends over time.</li> <li>• Evaluation of service performance data in relation to national and local objectives including the number of entries in a local authority plan requiring action by the service.</li> <li>• Improving trends for:             <ul style="list-style-type: none"> <li>– achievement/attainment levels</li> <li>– looked after<sup>1</sup> children and young people</li> <li>– children and young people with additional support needs</li> <li>– inclusion.</li> </ul> </li> <li>• Reduced trends for:             <ul style="list-style-type: none"> <li>– exclusions</li> <li>– outwith authority placements.</li> </ul> </li> <li>• Other service data which may demonstrate continuous improvement in service delivery include:             <ul style="list-style-type: none"> <li>– service uptake times (from request to first contact)</li> <li>– reduction in complaints/increase in compliments</li> </ul> </li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• positive trends and standards of performance indicate a high level of continuous improvement;</li> <li>• performance data are collected by the service; and</li> <li>• continuous improvement is measured by the service.</li> </ul> <p><b>We will:</b></p> |

<sup>1</sup> The term 'looked after' in this report includes all children looked after or looked after and accommodated by the council.

|  |   |  |
|--|---|--|
|  | <ul style="list-style-type: none"> <li>– year-on-year improvements in stakeholder satisfaction</li> <li>– benchmark data with comparative services.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>• The service advice to the authority reflected in education department documentation and demonstrating improved understanding of areas of good practice and identification of areas for development.</li> <li>• Evidence that the authority personnel are involved in or consulted about key initiatives within the service as shown in minutes of staff meetings and joint development days and mail feedback from education management.</li> <li>• Development plan; local authority improvement plan; integrated children’s services plan; minutes of joint meetings; education committee reports.</li> </ul> <p><b>Examples of stakeholders’ views</b></p> <ul style="list-style-type: none"> <li>• Evidence from feedback provided by local authority senior management.</li> <li>• Statistical evidence from other agencies of stakeholders’ views.</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>• Staff are operating within the objectives contained within the service’s plan, as evidenced through: <ul style="list-style-type: none"> <li>– observation of practitioners upholding service and authority priorities</li> <li>– greater engagement in appropriate local authority working parties.</li> </ul> </li> </ul> |  |
|--|---|--|

| HOW ARE WE DOING?   | HOW DO WE KNOW?  | WHAT ARE WE GOING TO DO NOW?   |
|---|--|--|
| <p><b>1.1.2 Performance against national, local authority and service aims, objectives and targets</b></p> <p>To what extent does the service contribute to meeting national and local targets, for example in social justice and inclusion?</p> <p>In what ways does the service contribute to and uphold the statutory procedures for children and young people, for example, with regard to additional support needs legislation?</p> <p>How is the service involved in giving advice to the authority?</p> <p>To what extent is the authority satisfied with the quality of service delivered?</p> <p>In what ways is there evidence of partnership working with the authority?</p> | <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• Evaluation of service contributions to local authority service plan objectives and targets.</li> <li>• Evaluation of service plan targets in relation to local authority service plan objectives and targets.</li> </ul> <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>• Evidence of feedback gathered from focus groups, interviews with individual stakeholders, and so forth.</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>• Staff are operating within the objectives contained within the service's plan as witnessed through:                             <ul style="list-style-type: none"> <li>– observation of practitioners upholding service and authority priorities</li> <li>– greater engagement in appropriate local authority working parties.</li> </ul> </li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• service performance information demonstrates success against both local objectives and, where appropriate, national objectives;</li> <li>• the service contributes to meeting the aims, objectives and targets of the authority; and</li> <li>• The service makes a contribution to the statutory procedures for children and young people with additional support needs.</li> </ul> <p><b>We will:</b></p> |

What key outcomes have we achieved?

(KEY AREA 1: KEY PERFORMANCE OUTCOMES)

PI 1.2 Fulfilment of general statutory duties

**Themes:**

- Financial performance
- Compliance with legislation, and responsiveness to guidance and codes of practice

**Key Features**

Evaluation of financial performance will be based on financial data and measures derived from local Best Value reviews, and from the authority budget construction and management systems.

Compliance with statutory requirements relates to legislation and codes of practice such as the *Education (Additional Support for Learning) (Scotland) Act 2004* and the *Standards in Scotland's Schools etc. Act 2000*.

| HOW ARE WE DOING?   | HOW DO WE KNOW?   | WHAT ARE WE GOING TO DO NOW?   |
|---|---|--|
| <p><b>1.2.1 Financial performance</b><br/>How robust are procedures for monitoring and regulating service budget?<br/>To what extent do financial procedures take account of service and authority priorities?<br/>To what extent do best value reports indicate that the service is operating within a sound Best Value regime?</p> <p><b>1.2.2 Compliance with legislation, and responsiveness to guidance and codes of practice</b><br/>To what extent is the service compliant with its statutory duties?<br/>In what ways are statutory duties articulated within the service?<br/>What internal procedures are in place to ensure effective implementation of statutory duties?</p> | <p>Some examples of appropriate sources of evidence are given below. However, they are not considered to be comprehensive or prescriptive. This evidence applies to both themes of the PI.</p> <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>Trends in service responses to:                             <ul style="list-style-type: none"> <li>financial reporting and budgetary review</li> <li>requests for statutory advice</li> <li>formal requests for statutory assessments.</li> </ul> </li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>Service policy and procedures</li> <li>Best Value report or equivalent</li> <li>Internal financial audit</li> <li>Service reports, best practice guidelines including child protection and protocols for responding to requests from the Reporter</li> <li>Local authority documentation</li> <li>Standards and quality report.</li> </ul> <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>Evidence of feedback gathered regarding financial performance and compliance with legislation.</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>Staff are observed as operating within parameters prescribed by Best Value and upholding their statutory duties.</li> <li>Through relevant service meetings, feedback and training are provided to staff regarding financial management and upholding their statutory duties.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>the service has robust financial procedures which take account of service and authority priorities;</li> <li>the service operates within an effective Best Value framework;</li> <li>identified duties are embedded in:                             <ul style="list-style-type: none"> <li>the service's vision, values and aims</li> <li>service practice guidelines</li> <li>service development plans</li> <li>standards and quality reports;</li> </ul> </li> <li>key statutory duties and responsibilities are developed as part of a service evaluation policy framework; and</li> <li>an appropriate and comprehensive range of documentation is kept.</li> </ul> <p><b>We will:</b></p> |

How well do we meet the needs of our stakeholders?

(KEY AREA 2: IMPACT ON STAKEHOLDERS)

QI 2.1 Impact on children and young people

**Themes:**

- Quantitative and qualitative data that demonstrate the extent to which children and young people are:
  - included and participating
  - achieving and attaining
  - progressing.
- The extent to which children and young people report that the support they had received from the service contributed positively to their educational experiences and enabled them to become:
  - successful learners, confident individuals, responsible citizens and effective contributors
  - safe, nurtured, healthy, achieving, active, respected and responsible and included.

**Key Features**

This indicator relates to the impact of the service on children and young people, focusing in particular on their current and recent experiences. Some examples of appropriate sources of evidence are given below, however they are not considered to be comprehensive or prescriptive.

The first theme draws on quantitative and qualitative data and evidence gathered from direct observation, documentation and discussions with stakeholders. Examples may include:

- levels of exclusion from school;
- the extent to which the needs of children and young people are met. These children and young people include those from the lowest-performing 20%, those who are looked after by the authority and those children and young people from minority ethnic and gypsy/traveller families. Performance will be indicated by the achievement of individual targets for learning and the acquisition of social skills particularly at the time of transition;
- achievement of customer service awards such as Charter Mark;
- correspondence and contact with the service, including complaints and compliments and the way these have been managed;
- access to the service, including innovative approaches to encouraging involvement; and
- evidence from HMIE inspection reports relating to specific aspects such as the quality of support for learning and achievement.

The second theme deals with the views as reported in responses to questionnaires, surveys, focus groups and in unsolicited comments. These responses provide evidence of the extent of stakeholder satisfaction with the service and may cover aspects such as:

- attitudes to involvement with the service;
- engagement in informal and formal contact with the service which enables children and young people to achieve their full potential, keep themselves healthy and themselves and others safe;
- the extent to which they feel valued and supported by service staff; and
- opportunities to express their views in terms of shaping services, setting personal objectives and influencing planning for their future.

Evaluation should take both themes into account to produce a considered view of the overall impact on children and young people.

| HOW ARE WE DOING?  | HOW DO WE KNOW?  | WHAT ARE WE GOING TO DO NOW?   |
|--|--|--|
| <p><b>2.1.1 The extent to which children and young people are included and participating</b></p> <p>How are the views of children and young people included in the delivery, evaluation and planning of the service?</p> <p>How are the views of children and young people taken into account when developing service leaflets and other publicity material?</p> <p>How are children and young people included and encouraged to participate in service delivery?</p> <p>How good is the access for children and young people to a wide range of educational psychology services?</p> <p>How clear, informative and accessible is service information and literature produced for children and young people?</p> <p>To what extent do children and young people express high levels of satisfaction with the service?</p> <p>To what extent do children and young people report that they feel valued, included and able to influence planning for their future?</p> <p>Is the service appropriately responsive to feedback and complaints from children and young people?</p> <p>To what extent does the service achieve satisfactory resolutions to complaints from children and young people?</p> | <p><b>Some examples of appropriate sources of evidence are given below. However they are not considered to be comprehensive or prescriptive.</b></p> <p><b>Examples of performance data:</b></p> <ul style="list-style-type: none"> <li>• Number of written or reported complaints and compliments received.</li> </ul> <p><b>Examples of relevant documentation:</b></p> <ul style="list-style-type: none"> <li>• Service evaluation documentation, development planning, complaints procedures, service handbook and information leaflets, Best Value reports, standards and quality reports, case file notes, outcome from service focus groups and general feedback on service delivery.</li> </ul> <p><b>Examples of stakeholders' views:</b></p> <ul style="list-style-type: none"> <li>• Evidence obtained from children and young people through questionnaires, focus groups and consultation meetings.</li> </ul> <p><b>Examples of direct observation:</b></p> <ul style="list-style-type: none"> <li>• Observation of focus groups, consultation with children and young people, and direct and indirect work with children and young people.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• the service can evidence impact on the education and life experiences of children and young people;</li> <li>• children and young people have access to a wide range of services;</li> <li>• clear and helpful information on the service is provided;</li> <li>• children and young people are included and actively participate in services to meet their needs;</li> <li>• children and young people express high levels of satisfaction with the service;</li> <li>• children and young people report that they feel valued, included and able to influence planning for their future;</li> <li>• the service is responsive to feedback and complaints from children and young people; and</li> <li>• the service achieves satisfactory resolutions to complaints from children and young people.</li> </ul> <p><b>We will:</b></p> |



| HOW ARE WE DOING?  | HOW DO WE KNOW?   | WHAT ARE WE GOING TO DO NOW?  |
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| <p><b>2.1.2 The extent to which children and young people are achieving and attaining</b><br/>                     How does the service support education provision and care establishments to help raise the achievement and attainment of children and young people?</p> <p>To what extent is the service involved in local authority initiatives which aim to raise the achievement and attainment of children and young people?</p> <p>In what ways does the service contribute to the vision for Scotland's children?</p> | <p><b>Examples of performance data:</b></p> <ul style="list-style-type: none"> <li>• Number of children and young people with additional support needs (ASN) in mainstream schools, demographic shifts from specialist placements to mainstream, not in education, employment or training (NEET) statistics, and looked after and accommodated (LAAC) statistics.</li> </ul> <p><b>Examples of relevant documentation:</b></p> <ul style="list-style-type: none"> <li>• Self-evaluation documentation, service development planning documentation, information leaflets and service handbook, Best Value reports, quality standards and quality reports, minutes of strategy meetings, relating to achievement and attainment, case file notes, project write-ups and published papers.</li> </ul> <p><b>Examples of stakeholders' views:</b></p> <ul style="list-style-type: none"> <li>• Evidence from children and young people obtained from questionnaires, focus groups and consultation meetings.</li> <li>• Establishment responses to surveys on the impact of the service on the lives of children and young people.</li> <li>• Evidence from parent and carer surveys, questionnaires and focus groups.</li> <li>• Feedback from local authority managers on relevant issues.</li> </ul> <p><b>Examples of direct observation:</b></p> <ul style="list-style-type: none"> <li>• Consultation meetings, collaborative meetings and direct work with children and young people.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• the service contributes to the raising of attainment and achievement across the authority for all children and young people.</li> </ul> <p><b>We will:</b></p> |

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| <p><b>2.1.3 The extent to which children and young people are progressing</b></p> <p>To what extent is the service involved in establishment and authority initiatives which aim to ensure appropriate progression for children and young people?</p> <p>How effectively does the service support children and young people at times of transition?</p> <p>What impact does the service have on the educational and life experiences of children and young people?</p> <p>What are the levels of satisfaction experienced by the children and young people being supported by the service?</p> | <p><b>Examples of performance data:</b></p> <ul style="list-style-type: none"> <li>Local authority centrally-held data on achievement and attainment.</li> </ul> <p><b>Examples of relevant documentation:</b></p> <ul style="list-style-type: none"> <li>Service evaluation documentation, service development planning documentation, complaints procedures, service handbook and information leaflets, Best Value reports, and standards and quality reports.</li> <li>Authority and establishment development plans, standards and quality reports, specific policy reports, authority guidelines, published papers, documentation from specific initiatives and projects and case file notes.</li> </ul> <p><b>Examples of stakeholders' views:</b></p> <ul style="list-style-type: none"> <li>Views of schools and other children's services establishments, local authority managers, agencies and other stakeholders.</li> <li>Views of children and young people obtained through questionnaires, focus group meetings, interviews, formative/dynamic assessment feedback and self-reporting to schools and parents.</li> </ul> <p><b>Examples of direct observation:</b></p> <ul style="list-style-type: none"> <li>Service, local authority and multidisciplinary meetings, visits to schools and other children's services establishments and direct work with children and young people.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>the service is involved in authority and establishment initiatives which aim to ensure appropriate progression for children and young people;</li> <li>the service supports children and young people at times of transition; and</li> <li>the service has an appropriate impact on the educational and life experiences of children and young people.</li> </ul> <p><b>We will:</b></p> |
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How well do we meet the needs of our stakeholders?

(KEY AREA 2: IMPACT ON STAKEHOLDERS)

QI 2.2 Impact on parents/carers and families

### Themes

- Quantitative and qualitative data that demonstrate the extent to which parents/carers and families are:
  - treated equally and fairly
  - satisfied with the quality of service
  - included and engaged in planning and decision-making.
- Extent to which parents/carers and families report that they are:
  - treated equally and fairly
  - satisfied with the quality of the service
  - included and engaged in planning and decision-making.

### Key Features

This indicator relates to the impact of the service on parents and carers and seeks to obtain their views of the quality of service received by their children, with a particular focus on their current and recent experiences. Some examples of appropriate sources of evidence are given below, however, they are not considered to be comprehensive or prescriptive.

The first theme draws on quantitative and qualitative data and evidence from direct observation, documentation and discussions with other stakeholders. Examples may include:

- evidence of involvement in planning in relation to their children;
- evidence of involvement in decision-making in relation to their children;
- attendance at family-group conferences and joint assessment team meetings;
- the extent to which the needs of parents, carers and families are met;
- correspondence and contact with the service, including enquiries, complaints and compliments and the way these are managed;
- access to services, including innovative approaches to encouraging involvement; and
- evidence from HMIE inspection reports which relate to parents and carers.

The second theme deals with the views of parents and carers as reported in responses to questionnaires, surveys, focus groups and in unsolicited comments. These responses provide evidence of the extent of their satisfaction with the service and may cover aspects such as:



- access to, and contact with, service staff;
- involvement in planning and decision making on behalf of their children in both informal and formal contexts;
- the quality and range of services provided;
- the extent to which they feel valued and supported, and are treated fairly, equally and with respect; and
- opportunities to express their views, shape services, and influence outcomes for their children.

Evaluation should take into account both themes and result in a considered view of the overall impact on children and young people.

| HOW ARE WE DOING?  | HOW DO WE KNOW?  | WHAT ARE WE GOING TO DO NOW?  |
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| <p><b>2.2.1 The extent to which parents, carers and families are treated equally and fairly</b><br/>                     To what extent are parents and carers respected and treated equally and fairly?</p> | <p>Some examples of appropriate sources of evidence are given below. However, they are not considered to be comprehensive or prescriptive.</p> <p><b>Examples of performance data:</b></p> <ul style="list-style-type: none"> <li>• Number of complaints received and satisfactory resolutions.</li> <li>• Number of compliments and positive comments received.</li> </ul> <p><b>Examples of relevant documentation:</b></p> <ul style="list-style-type: none"> <li>• Evaluation documentation including service development documentation, complaints procedures and information leaflets, service handbook, best value reports, standards and quality reports, case record files and records of meetings with parents.</li> </ul> <p><b>Examples of stakeholders' views:</b></p> <ul style="list-style-type: none"> <li>• Evidence obtained from parent, carer and family surveys, questionnaires, focus groups and consultation meetings.</li> <li>• Response to surveys gauging the impact of the service on parents, carers and families.</li> <li>• Evidence from parent surveys, questionnaires and focus groups.</li> <li>• Feedback from local authority managers on relevant issues.</li> </ul> <p><b>Examples of direct observation:</b></p> <ul style="list-style-type: none"> <li>• Observation of parent, carer and family focus groups, consultation meetings, collaborative meetings and direct working.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• parents and carers are respected and treated equally and fairly.</li> </ul> <p><b>We will:</b></p> |

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| <p><b>2.2.2 The extent to which parents, carers and families are satisfied with the quality of service they receive</b></p> <p>To what extent are parents, carers and families satisfied with the quality and range of service provided?</p> <p>How clear, informative and accessible is service information and literature produced for parents and carers?</p> <p>In what ways does the service respond to complaints and achieve satisfactory resolutions?</p> | <p><b>Examples of performance data:</b></p> <ul style="list-style-type: none"> <li>• Number of complaints received and satisfactory resolutions.</li> <li>• Number of compliments and positive received.</li> </ul> <p><b>Examples of relevant documentation:</b></p> <ul style="list-style-type: none"> <li>• Outcomes from focus group meetings, structured interviews, questionnaires, case file records and feedback from establishment questionnaires and surveys.</li> </ul> <p><b>Examples of stakeholders' views:</b></p> <ul style="list-style-type: none"> <li>• Views of parents and carers, local authority managers and partner agencies.</li> </ul> <p><b>Examples of direct observation:</b></p> <ul style="list-style-type: none"> <li>• Observation of staff performance at service, local authority and multidisciplinary meetings.</li> <li>• Feedback from visits to schools and other provisions offering children's services.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• parents, carers and families are satisfied with the quality and range of service provided;</li> <li>• clear, informative and accessible service information and literature are produced for parents, carers and families;</li> <li>• the service responds to complaints and achieves satisfactory resolutions; and</li> <li>• mechanisms are in place to seek the views of parents, carers and families in relation to both service delivery and their experience of the service received.</li> </ul> <p><b>We will:</b></p> |
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| HOW ARE WE DOING?  | HOW DO WE KNOW?  | WHAT ARE WE GOING TO DO NOW?   |
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| <p><b>2.2.3 The extent to which parents, carers and families are included and engaged in planning and decision-making in regard to their children.</b></p> <p>To what extent are parents, carers and families included and engaged in planning and decision-making with regard to their children and young people?</p> <p>To what extent do parents, carers and families participate in appropriate meetings and forums with the service?</p> <p>To what extent do parents, carers and families respond positively to planned opportunities for support?</p> <p>To what extent are parents, carers and families kept informed with up-to-date information about their children and young people?</p> | <p><b>Examples of performance data:</b></p> <ul style="list-style-type: none"> <li>• Number of stakeholders who turn up to relevant meetings.</li> </ul> <p><b>Examples of relevant documentation:</b></p> <ul style="list-style-type: none"> <li>• Authority policy on parent, carer and family involvement in planning for their children and young people learning.</li> <li>• Service vision, values and aims, service development plan, complaints procedures and information leaflets, service handbook, best value reports and standards and quality reports.</li> </ul> <p><b>Examples of stakeholders' views:</b></p> <ul style="list-style-type: none"> <li>• Evidence from parent, carer and family surveys, questionnaires, focus group meetings and feedback on direct service involvement.</li> <li>• Provision responses to surveys on the impact of the service on parents, carers and families.</li> <li>• Evidence from parent surveys, questionnaires and focus group meetings.</li> <li>• Feedback from local authority managers on relevant issues.</li> </ul> <p><b>Examples of direct observation:</b></p> <ul style="list-style-type: none"> <li>• Observation of parent, carer and family focus group meetings, consultation and collaborative meetings.</li> <li>• Direct work with parents, carers and families.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• parents and carers are included and engaged in planning and decision making with regard to their children;</li> <li>• parents and carers participate in appropriate meetings and forums with the service;</li> <li>• parents and carers respond positively to planned opportunities for support;</li> <li>• parents and carers are kept informed with up-to-date information about their children and young people;</li> <li>• parents, carers and families participate in the planning and reviewing of the services received by their children and young people; and</li> <li>• there is effective communication with parents, carers and families in relation to their children and young people</li> </ul> <p><b>We will:</b></p> |

How well do we meet the needs of our stakeholders?

(KEY AREA 3: IMPACT ON STAFF)

QI 3.1 Impact on staff

#### Themes:

- Quantitative and qualitative data that demonstrate the extent to which staff:
  - are motivated, confident and valued
  - improve their practice through training, development activities
  - have positive experiences of the quality of support from central services and partner agencies
  - work effectively in teams
- Extent to which staff report that they:
  - are motivated, confident and valued
  - improve their practice through training, development activities
  - have positive experiences of the quality of support from central services and partner agencies
  - work effectively in teams

#### Key Features

This indicator relates to the impact of the service on those who are managed within the service, as well as their views of the quality of service within the authority. It considers the level of ownership by staff in the targets set by the service and their active involvement in service development. It includes the extent to which the service supports staff to continue their professional development which reflects both their personal and professional as well as service goals. It looks for any opportunities that exist within the service for leadership and career development for individual staff members. It also looks at team working and at any opportunities that are available to develop as a service team. Finally, it examines the quality of support which the service receives from central services.

Examples of appropriate sources of evidence are given below. They are considered to be neither comprehensive nor prescriptive.

The first theme draws on quantitative and qualitative data and evidence from direct observation, documentation and discussions with stakeholders. Examples may include:

- rates of attendance at meetings and forums;
- rates of participation in career review;
- rates of participation in training and development and qualifications gained;
- rates of response to consultation;



- evidence of involvement and empowerment;
- the extent to which the individual support needs of staff are met;
- achievement of awards such as Scotland's Health at Work and Investors in People;
- access to services, including innovative approaches to encouraging involvement;
- levels of absence, turnover and recruitment;
- recognition schemes; and
- benchmarking data.

The second theme deals with the views of staff as reported in response to questionnaires, surveys, focus groups and in any unsolicited comments received. These responses may provide evidence of the level of staff satisfaction and may cover aspects such as:

- the quality and range of services provided by the authority;
- career review;
- career development;
- training and development, including leadership training, work shadowing and secondments;
- peer and line management relationships, including team working;
- the extent to which staff feel valued and supported and are treated fairly, equally and with respect;
- conditions of work, facilities and services; and
- communication and opportunities to express their views and to shape and improve education services.

Evaluation should take into account both themes to produce a considered view of the overall impact on staff.

| HOW ARE WE DOING?   | HOW DO WE KNOW?  | WHAT ARE WE GOING TO DO NOW?  |
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| <p><b>3.1.1. The extent to which staff are motivated and meaningfully involved in the development of the service?</b></p> <p>How well do staff understand the vision, aims and values of the service?</p> <p>To what extent do staff respect and share these vision, aims and values?</p> <p>What are the levels of staff retention and absence? How is flexible working facilitated?</p> <p>What evidence is there that staff are motivated, empowered, confident and valued by the service?</p> <p>What mechanisms are in place to promote staff involvement and to address issues that present barriers to them feeling motivated, empowered, confident and valued?</p> <p>How effective is the service's standards and quality report in terms of addressing staff motivation and confidence?</p> <p>What evidence is there of innovative practice recorded in service, authority and agency reports?</p> <p>To what extent does feedback from staff indicate satisfaction with the quality and range of services provided?</p> | <p>Some examples of appropriate sources of evidence are given below. However, they are not considered to be comprehensive or prescriptive.</p> <p><b>Examples of performance data:</b></p> <ul style="list-style-type: none"> <li>Evidence of involvement and empowerment of staff, from absence, turnover and recruitment returns, attendance patterns at meetings, participation in continuing professional development (CPD) activities and staff appraisal, achievement awards and any additional qualifications gained.</li> </ul> <p><b>Examples of relevant documentation:</b></p> <ul style="list-style-type: none"> <li>This could be found in individual staff review records, self-evaluation data, service development plans, Best Value reports, standards and quality reports, the service handbook, and minutes of staff meetings.</li> </ul> <p><b>Examples of stakeholders' views:</b></p> <ul style="list-style-type: none"> <li>Staff views as reported in questionnaires, surveys, interviews, meetings and focus groups.</li> <li>Unsolicited comments on the quality and range of services provided.</li> <li>Career development, career review, peer and line management relationships, including team working, involvement in shaping and owning the service's vision, value and aims.</li> <li>Communication, in particular opportunities for staff to express their views and to influence the shape and delivery of the service.</li> </ul> | <p><b>To ensure that staff:</b></p> <ul style="list-style-type: none"> <li>are motivated, meaningfully involved in the service and professionally satisfied;</li> <li>are appropriately deployed, engaged and feel valued across the service;</li> <li>are enabled to deliver services of high quality;</li> <li>have low-absence and high-retention levels;</li> <li>are willing to work flexibly to meet agreed targets;</li> <li>have a well-developed and shared sense of the service's vision, values and aims; and</li> <li>are regularly consulted by service managers on all aspect of the service.</li> </ul> <p><b>We will:</b></p> |

| HOW ARE WE DOING?   | HOW DO WE KNOW?   | WHAT ARE WE GOING TO DO NOW?   |
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| <p><b>3.1.2 The extent to which staff improve their practice and leadership skills through training, development activities and opportunities within and beyond the authority</b></p> <p>To what extent are staff well prepared for future leadership responsibilities?</p> <p>What are the opportunities for career development and access to CPD?</p> <p>What are staff's views on the relevance of CPD to professional practice?</p> <p>To what extent do staff report that they are supported to improve their practice through an established system of training and development activities?</p> <p>What is the evidence that staff are improving their practice through an established system of training and development activities?</p> <p>Do staff report that they are being challenged to improve?</p> <p>To what extent do staff report that their own professional goals are supported by the service?</p> | <ul style="list-style-type: none"> <li>Information provided by service impact surveys, questionnaires and focus groups.</li> </ul> <p><b>Examples of direct observation:</b></p> <ul style="list-style-type: none"> <li>Observation of the performance of staff in service, authority and multi-agency meetings, and through focus and working groups across a broad range of settings.</li> </ul> <p><b>Examples of performance data:</b></p> <ul style="list-style-type: none"> <li>Staff meet agreed targets, established through annual appraisal, for CPD activities.</li> <li>Extent of opportunities for staff to undertake leadership roles with the service and authority, and to participate in work shadowing career development and appraisal.</li> <li>The effectiveness of staff who take on leadership roles.</li> <li>Quality of contribution to service, authority and multidisciplinary working groups.</li> <li>Secondments to service, authority or Scottish Executive roles.</li> </ul> <p><b>Examples of relevant documentation:</b></p> <ul style="list-style-type: none"> <li>This could include CPD records, staff appraisal records, self-evaluation documentation, service handbook and development planning documentation, Best Value report, minutes of development and staff group meetings.</li> </ul> | <p><b>To ensure that staff:</b></p> <ul style="list-style-type: none"> <li>are well prepared for future leadership roles;</li> <li>have good opportunities to become involved in secondments, project and wider programme activities;</li> <li>have good opportunities for career development and are able to participate in a clearly understood and accessible CPD activity programme; and</li> <li>consider that service developments effectively support their performance and contribute to developing their professional competence.</li> </ul> <p><b>We will:</b></p> |

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| <p>To what extent do staff report that they are given opportunities to develop leadership skills and to participate in national forums, as appropriate?</p>   | <p><b>Examples of stakeholders' views:</b></p> <ul style="list-style-type: none"> <li>• Staff views as reported in questionnaires, surveys, interviews, meetings and focus groups.</li> <li>• Unsolicited comments on training and development opportunities including training for leadership.</li> </ul> <p><b>Examples of direct observation:</b></p> <ul style="list-style-type: none"> <li>• Observation of staff performance at authority and multi-agency meetings and working groups, quality of CPD activities, annual appraisal and supervision.</li> </ul>   |   |
| <p><b>3.1.3 The extent to which staff have positive experiences with regard to the quality of support from central services and partnership agencies</b></p> <p>To what extent do staff report positively about the support provided by central services?</p> <p>To what extent do staff have positive working relationships with partnership agencies?</p> | <p><b>Examples of performance data:</b></p> <ul style="list-style-type: none"> <li>• The quality of responses to staff and service requests.</li> <li>• The extent of high quality support from partnership agencies.</li> </ul> <p><b>Examples of relevant documentation:</b></p> <ul style="list-style-type: none"> <li>• Minutes and correspondence on relevant matters between the service, central services, and partner agencies.</li> </ul> <p><b>Examples of stakeholders' views:</b></p> <ul style="list-style-type: none"> <li>• Staff views reported in questionnaires, surveys, interviews, meetings and focus groups.</li> <li>• Unsolicited comments on the quality of support from central services and partner agencies, examples of success or difficulty and areas for celebration or improvement.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• staff have positive experiences regarding the quality of support from central services and partner agencies.</li> </ul> <p><b>We will:</b></p> |

| HOW ARE WE DOING?   | HOW DO WE KNOW?  | WHAT ARE WE GOING TO DO NOW?   |
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| <p><b>3.1.4 The extent to which staff work effectively in teams</b></p> <p>How confident are staff in their ability to carry out their duties and engage in effective teamwork at all levels?</p> <p>In what ways has the application of best value principles influenced partnership working?</p> <p>To what extent do staff report that they feel involved and a part of</p> <ul style="list-style-type: none"> <li>• the service team</li> <li>• subgroups within the service</li> <li>• authority, multidisciplinary and establishment groups?</li> </ul> <p>What is the evidence that staff work effectively in</p> <ul style="list-style-type: none"> <li>• the service team</li> <li>• subgroups within the service</li> <li>• authority, multidisciplinary and establishment groups?</li> </ul> | <p><b>Examples of performance data:</b></p> <ul style="list-style-type: none"> <li>• Evidence of performance outcomes regarding innovative approaches to encouraging staff involvement and developing teamwork.</li> </ul> <p><b>Examples of relevant documentation:</b></p> <ul style="list-style-type: none"> <li>• This might include the following: self-evaluation and service development planning documentation, evaluation of the contribution of team work to improving outcomes for children and young people, best practice guidelines on team working, service handbook, Best Value reports, standards and quality reports, minutes of service development and staff meetings, authority and establishment development plans.</li> </ul> <p><b>Examples of stakeholders' views:</b></p> <ul style="list-style-type: none"> <li>• Staff views reported in questionnaires, surveys, interviews, meetings and focus groups.</li> <li>• Unsolicited comments from staff on how involved they feel in the service.</li> <li>• The effectiveness of teamwork within the service and engagement with authority, multidisciplinary and establishment groups.</li> <li>• Establishments' responses to surveys on impact of service on children, young people and families. Evidence from parent surveys, questionnaires and focus groups, feedback from children and young people and feedback from authority managers on relevant issues.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• there is effective teamwork at all levels;</li> <li>• staff are actively involved in a range of service, authority and multidisciplinary working groups;</li> <li>• involvement adds to a sense of corporate ownership of the service's vision, aims and goals; and</li> <li>• staff are confident in their ability to carry out their duties and engage in effective teamwork at all levels.</li> </ul> <p><b>We will:</b></p> |

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|  | <p><b>Examples of direct observation:</b></p> <ul style="list-style-type: none"><li>• Observation of authority, multidisciplinary and establishment groups.</li><li>• Observation of the contributions of service personnel for evidence of effective impact and outcomes.</li></ul> |  |
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How well do we meet the needs of our stakeholders?

**(KEY AREA 4: IMPACT ON THE COMMUNITY)**

**QI 4.1 Impact on the local community**

**Themes:**

- Quantitative and qualitative data that demonstrate the extent to which support services, educational provisions and the local community are:
  - involved in joint planning regarding service priorities
  - satisfied with the quality of the service provided
  - included and engaged with the service in wider developments.
- Extent to which support services, educational provisions and the local community report that they are:
  - supported by the service
  - satisfied with the quality of service provided
  - included and engaged with the service in wider developments.

**Key Features**

This indicator relates to the impact of the service on support services, educational provisions and the local community. It also relates to the views of staff regarding the quality of service received by children and young people, focusing in particular on their recent and current experiences. Some examples of appropriate sources of evidence are given below. However, they are not considered to be comprehensive or prescriptive.

The first theme draws on quantitative and qualitative data, and evidence from direct observation, documentation and discussions with other stakeholders. Examples may include:

- involvement in joint planning and quality assurance activities in relation to the priorities of the service;
- involvement in joint decision-making in relation to children and young people;
- attendance at conferences and joint assessment team meetings;
- correspondence and contact with the service, including enquiries, complaints and compliments and the way these are managed;
- access to a wide and comprehensive range of services, which is regularly monitored and reviewed; and
- evidence from HMIE inspection reports which relate to educational provision, child protection, and community learning and development.

The second theme deals with the views of representatives from the local community, heads of services and educational provision and their staff as reported in responses to questionnaires, surveys, focus groups and in unsolicited comments. These responses provide evidence of the extent of their satisfaction with the service and may cover aspects such as:

- the quality and range of services provided;
- examples of partnership working, planning and joint decision making on behalf of children and young people in both informal and formal contexts;
- the extent to which service and provision staff feel valued and supported, and are treated fairly, equally and with respect; and
- formal opportunities to express their views, shape services, and influence outcomes for children and young people.

Evaluation should take into account both themes to produce a considered view of the overall impact on children and young people.



| HOW ARE WE DOING?   | HOW DO WE KNOW?  | WHAT ARE WE GOING TO DO NOW?  |
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| <p><b>4.1.1 The extent to which support services, educational provisions and the local community are involved in joint planning regarding service priorities and supported by the service</b></p> <p>How are support services, educational provisions and the local community involved in joint planning regarding service priorities?</p> <p>In what ways are these services effective in meeting the needs of children, young people, families and education staff?</p> <p>How timely, clear and informative are written information and communication?</p> | <p><b>Some examples of appropriate sources of evidence are given below. However, they are not considered to be comprehensive or prescriptive.</b></p> <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>Self-evaluation information collated regarding the support service, educational provision and community staff satisfaction with the quality of service provided.</li> <li>Analysis of service level agreements with key stakeholder groups including, for example, behaviour support staff, youth workers, and multi-agency groups.</li> <li>Numbers of pupil support teams attended, the training sessions delivered, joint planning sessions for children/young people, research initiatives and project/group work undertaken.</li> <li>Analysis leading to evaluation of whether particular support services or educational provision are effective.</li> <li>Targets set through development planning and data collected in relation to targets met.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>Documents which evaluate the service's understanding of the range of different communities it may serve, and how its work integrates with work of colleagues from a range of disciplines.</li> <li>Relevant documents may include Education Plan, Integrated Children's Services Plan, documents</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>the service engages with others in decision-making activities to ensure that priority needs are met, particularly regarding socially excluded groups;</li> <li>collaborative working identifies and meets priority needs;</li> <li>there is a high level of engagement in relation to issues of local concern and wider policy;</li> <li>relevant services and members of community groups report that involvement of service has made a positive impact;</li> <li>support services, educational provision and local community staff feel supported by the service;</li> <li>the service is effective in meeting the needs of children, young people, families and support, educational provision and community staff;</li> <li>systems are in place to seek the views of stakeholders;</li> <li>a comprehensive range of services is offered;</li> <li>written information is timely, clear and informative;</li> <li>support, educational provision and community staff are involved in planning and decision-making for children, young people and families;</li> </ul> |

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|  | <p>supporting planning, notes from research, training, or other interventions.</p> <ul style="list-style-type: none"> <li>• Inspections of the educational functions of local authority (INEA) evaluations on the role of the service in supporting the authority to respond to the range of different communities it may serve (e.g. schools, youth work organisations).</li> <li>• Development plan, service practice guidelines, completed practice level agreements, menu of services offered, practice level agreement reviews notes from discussions with individual schools.</li> <li>• Documentation on evidence of formal negotiation with establishments and on effectiveness of service delivery.</li> </ul> <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>• Feedback from interventions with relevant services including schools, pre-school centres, community centres.</li> <li>• Service development plan, local authority improvement plan, practice level agreements, school development plans, published reports on specific initiatives, collation of the information from the above across the service, collation of information from questionnaires/focus groups.</li> <li>• Documentation regarding the breadth of work offered, the negotiated uptake by support services, educational provision and the process of evaluation.</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>• Observation of service work with key stakeholders including support staff, educational provision, and local community staff.</li> </ul> | <ul style="list-style-type: none"> <li>• there is active participation between the service and support, educational provision and community staff; and</li> <li>• the service is responsive to complaints and aims to achieve a satisfactory conclusion.</li> </ul> <p><b>We will:</b></p> |
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| HOW ARE WE DOING?   | HOW DO WE KNOW?  | WHAT ARE WE GOING TO DO NOW?   |
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| <p><b>4.1.2 The extent to which support services, educational provisions and the local community are satisfied with the quality of service provided</b></p> <p>How satisfied are support staff, educational provisions and the local community with the quality and range of services provided by the service?</p> <p>How responsive is the service to complaints?</p> <p>To what extent are satisfactory resolutions achieved?</p> <p>How clear and informative is service information and literature produced for support services, educational provisions and the local community?</p> | <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>Increased participation by (specified) community members in specific initiatives.</li> <li>Data on recognised achievements (e.g. National Qualifications) following specific interventions (e.g. training of foster carers so that they achieve recognised awards).</li> <li>Data from stakeholders involved in questionnaires/structured interviews.</li> <li>Percentages of response returns and collation of ratings across range of support services, educational provisions and the local community.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>Service plan, education plan, integrated children's service plan, community plan.</li> <li>Documents supporting inter-agency planning.</li> <li>Minutes of review meetings, indicating community dimensions to planning for additional support needs.</li> <li>Inputs to small community groups.</li> <li>Notes from research, training, or other interventions.</li> <li>INEA inspection reports, indicating service participation in authority strategies impinging on specific identified communities.</li> </ul> <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>Summary of the evaluations of stakeholders regarding policy statements in relation to joint working and practice level agreements.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>the service seeks feedback from support service, educational provision staff and from the local community and effectively responds to feedback;</li> <li>the service encourages opportunities for influence and representation by support, educational provision staff and the local community;</li> <li>the service engages in multi-agency training strategies to develop skills, abilities and confidence among users of children's services;</li> <li>the service ensures ongoing participation in Integrated Children's Service Plan development work, aimed at supporting support services, educational provision and the local community;</li> <li>the service collates documentation on responses to enquiries and complaints;</li> <li>the service collates responses to feedback from training;</li> <li>staff from support services, educational provision and the community consider that the services provided have made a positive impact on the motivation of and engagement of children, young people, families, disadvantaged groups and the community generally;</li> <li>support services, educational provision and community staff are involved in the service evaluation;</li> <li>support services, educational provision and community staff are satisfied with the quality and range of services provided by the service; and</li> </ul> |

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|   | <ul style="list-style-type: none"> <li>Structured mechanisms for routinely surveying opinions regarding the impact of educational provision in place for stakeholders.</li> <li>Feedback on achievements from external agencies.</li> <li>Views of specific community members on the impact of the educational psychology service in this area.</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>Observation of community participation in activities/planning.</li> <li>Evaluations of interactions within small community groups.</li> </ul>   | <ul style="list-style-type: none"> <li>the service is responsive to complaints and aims to achieve a satisfactory conclusion.</li> </ul> <p><b>We will:</b></p>  |
| <p><b>4.1.3 The extent to which support services, educational provisions and the local community are included and engaged with the service in wider developments</b></p> <p>Are support service, educational provision and community staff included and engaged with the service in wider developments?</p> <p>How involved are support, educational provision and community staff in multi-agency working with the service?</p> <p>How positive are support services, educational provision and the local community about the processes and procedures in place to plan, monitor and review service effectiveness?</p> | <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>Data on outcomes of work with groups at high risk of poor educational outcomes (e.g. looked after children).</li> <li>Data demonstrating integrated assessments and interventions targeted at children at high risk of poor educational outcomes.</li> <li>Data on inclusion of children with additional support needs in mainstream community children's facilities.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>Service leaflets, aimed at building public awareness.</li> <li>Minutes of review meetings, indicating community dimensions to planning of provision for children and young people with additional support needs.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>the service works collaboratively with support services, educational provisions and the local community to ensure that the needs of stakeholders are appropriately prioritised and met, particularly those groups considered to be at risk of social exclusion;</li> <li>the service plans, assesses and monitors progress with others within education authority;</li> <li>support services, educational provisions and the local community engage with the psychology service in relation to wider multi-agency and whole authority developments;</li> <li>the service plans activities in response to data on inequality in outcomes;</li> </ul> |

| HOW ARE WE DOING?   | HOW DO WE KNOW?   | WHAT ARE WE GOING TO DO NOW?  |
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| <p>How positive are support services, educational provision and the local community about their inclusion and involvement in the planning and development of the psychology service?</p> <p>How clear is the guidance in place to guide joint working with the service?</p> | <ul style="list-style-type: none"> <li>• Published articles in local press and council publications.</li> <li>• Inputs to small community groups.</li> <li>• Notes from research, training, or other interventions.</li> <li>• INEA inspection reports, indicating educational psychology service participation in authority strategies.</li> </ul> <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>• Research data on stakeholders' views.</li> <li>• Feedback on inclusion and engagement from specified groups.</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>• Observation at case conferences, joint support teams, in-service training and preventative approaches such as joint group work.</li> <li>• Observation of service participation in community activities.</li> <li>• Evaluations of inclusion and engagement by support services in partnership working.</li> </ul> | <ul style="list-style-type: none"> <li>• the service provides ongoing input to multi-agency training strategies, relevant to high-risk groups;</li> <li>• the service prepares responses to feedback from training, with regard to future needs;</li> <li>• the service plans activities in response to research and assessments;</li> <li>• the service can demonstrate that support service, educational provision and local community insights have led to new planning for a particular individual, new service partnerships or developments;</li> <li>• support service, educational provision and community staff are responsive to planned opportunities for multi-agency support with the service; and</li> <li>• the service seeks opinions from a range of service stakeholders regarding work to promote inclusion, social and cultural diversity.</li> </ul> <p><b>We will:</b></p> |

How well do we meet the needs of our stakeholders?

(KEY AREA 4: IMPACT ON THE COMMUNITY)

QI 4.2 Impact on the wider community

**Themes:**

- Evaluations of quantitative and qualitative data that demonstrate the extent to which the service:
  - encourages and supports creativity and innovation
  - learns from and adopts leading-edge practice
  - influences wider policy or practice
  - anticipates and responds rapidly and flexibly to change.

**Key Features**

This indicator focuses on the impact the service has on the wider community. It deals with the culture of the service in encouraging and supporting creativity and innovation, being proactive and open to new ideas. It is about being a service that deals positively with change. It also relates to the influence and impact of the service on wider developments.

The theme draws on quantitative and qualitative data from direct observation, documentation and discussions with stakeholders. Some examples of appropriate sources of evidence are given below. They are, however, not considered to be comprehensive or prescriptive. Examples may include:

- a range of innovative strategies and programmes that impact beyond the services delivered by the service;
- programmes that have their origins in national or international best practice;
- staff who have made major contributions to national developments; and
- anticipation of demographic or social changes with re-allocation of resources and services.

| HOW ARE WE DOING?  | HOW DO WE KNOW?   | WHAT ARE WE GOING TO DO NOW?   |
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| <p><b>4.2 The extent to which the service makes a positive impact on the community</b></p> <ul style="list-style-type: none"> <li>• To what extent does the service encourage and support innovation in the wider community?</li> <li>• To what extent does the service learn from and adopt leading-edge practice?</li> <li>• To what extent does the service influence wider national policy and practice?</li> <li>• To what extent does the service anticipate and respond rapidly and flexibility to change?</li> </ul> | <p>Some examples of appropriate sources of evidence are given below. However, they are not considered to be comprehensive or prescriptive.</p> <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• Number of articles written and published in national journals.</li> <li>• Number of national and international conferences attended.</li> <li>• Number of requests for talks, seminars and attendance on working groups.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>• Published articles in academic and other journals.</li> <li>• Service newsletters sharing new information with stakeholders and helping share new practice within the service team.</li> <li>• Input to national forums and working groups.</li> <li>• Involvement in national and international initiatives, for example, participation in national conferences and the Professional Development Programme (PDP).</li> <li>• Response to legislative and regulative changes.</li> </ul> <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>• Opinions collated from focus groups of service staff.</li> <li>• Data from questionnaires to authority staff, partner agencies and other educational psychology services.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• developments are included in future authority planning;</li> <li>• leading-edge practice is disseminated within the service and to stakeholders, as appropriate;</li> <li>• due consideration is given to time and resource management so that requests can be prioritised as necessary;</li> <li>• developments which will impact on the wider community are included in future service planning, and resources allocated; and</li> <li>• appropriate responses are made to issues raised by the authority and stakeholders.</li> </ul> <p><b>We will:</b></p> |

- Responses from other psychology services after visits to the service.

**Examples of direct observation**

- Observation of impact of training programmes developed by the service, including courses for the professional training of educational psychologists.



How good is our delivery of key processes?

(KEY AREA 5: DELIVERY OF KEY PROCESSES)

QI 5.1 Consultation and advice

**Themes:**

- Range and appropriateness of consultation and advisory services meet the needs of all stakeholders
- Staff skill, knowledge and expertise in consulting with and providing advice to stakeholders

**Key Features**

This indicator draws on quantitative and qualitative data from direct observations, discussions and documentation including individual case files. Some examples of appropriate sources of evidence are given below. However, they are not considered to be comprehensive or prescriptive. Examples may include:

- observing practice directly in the field;
- attendance at case reviews, and working groups;
- discussions with service staff and stakeholders;
- review of individual case files and other service documentation; and
- the use of case studies to determine service impact.

The second theme looks at the skills, knowledge base, and expertise of service staff in consulting with and providing advice to stakeholders across the authority. It will consider the range and frequency of guidance and training for staff in delivering highly effective consultation and advisory services.

| HOW ARE WE DOING?   | HOW DO WE KNOW?  | WHAT ARE WE GOING TO DO NOW?   |
|---|--|--|
| <p><b>5.1 The extent to which the service provides consultation and advice of a very high quality</b></p> <ul style="list-style-type: none"> <li>• Does the service have a policy statement on the nature of the consultation model(s) being used?</li> <li>• In which contexts will consultative approaches be employed? (e.g. in multi-agency meetings, advice to school staff, advice to parents)</li> <li>• Do all staff demonstrate well-planned and innovative approaches to consultation and advice?</li> <li>• How are stakeholders informed of the range of the approaches to consultation and advice?</li> <li>• How is feedback on impact and outcome obtained from stakeholders?</li> <li>• What evidence is there that regular and appropriate training takes place regarding the provision of consultation and advisory services?</li> <li>• What measures does the service take to ensure compliance with the requirements of the Data Protection Act, Freedom of Information Act, Disability Discrimination Act, Equal Opportunities legislation, British Psychological Society Code of Ethics and Conduct, etc?</li> <li>• What are the arrangements for review, taking account of stakeholders' views, best practice, service impact, outcome measures and BPS guidance?</li> </ul> | <p><b>Some examples of appropriate sources of evidence are given below. However, they are not considered to be comprehensive or prescriptive.</b></p> <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• Trends over time from feedback from stakeholders, illustrating improvement.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>• Service statement or guidelines on model(s) of service delivery involving consultation and advice.</li> <li>• Standardised paperwork or proforma are routinely used by educational psychologists to record consultation and advice provided.</li> <li>• Service level agreements outline the role of consultation and advice.</li> <li>• Service statement on the role of educational psychologists regarding systems, protocols, policies and advice to schools on children and young people not currently referred to the service.</li> <li>• Minutes of meetings where consultative input has been provided (e.g. working groups, advice to staff, multi-agency meetings, etc.).</li> <li>• Examination of records of visits to schools.</li> <li>• Information for stakeholders on the nature of consultation and advice.</li> <li>• CPD timetables demonstrate evidence of training undertaken.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• service policy on consultation and advice is reviewed and amended as appropriate;</li> <li>• service level agreements are updated annually or as agreed with stakeholders;</li> <li>• stakeholder feedback is collected, analysed, disseminated and used to inform future practice;</li> <li>• CPD opportunities are provided for all educational psychologists on the service's approaches to consultation and advice; and</li> <li>• information on approaches to consultation and advice is available to all stakeholders.</li> </ul> <p><b>We will:</b></p> |

| HOW ARE WE DOING? | HOW DO WE KNOW?   | WHAT ARE WE GOING TO DO NOW? |
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|                   | <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>• Collated feedback from stakeholders.</li> <li>• Information from focus groups of key stakeholders (e.g. head teachers, chairs of multi-agency meetings, support for learning coordinators, educational support services).</li> <li>• Information from children/young people and parents/carers on the perceived role and contribution of the educational psychologist who has provided consultation and/or advice.</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>• Observation of provision-based consultation meetings.</li> <li>• Appropriate use of observational schedules at multi-agency meetings.</li> </ul> |                              |

How good is our delivery of key processes?

(KEY AREA 5: DELIVERY OF KEY PROCESSES)

QI 5.2 Assessment

**Themes:**

- Arrangements and range of assessment services to meet the needs of all stakeholders
- Staff skill, knowledge and expertise in delivering appropriate psychological assessment

**Key Features**

This indicator draws on quantitative and qualitative data from direct observations, discussions and documentation including individual case files. Some examples of appropriate sources of evidence are given below. However, they are not considered to be comprehensive or prescriptive. Examples may include:

- observing practice directly in the field;
- discussions with service staff and stakeholders including partner agencies;
- attendance at case reviews, multidisciplinary meetings, working groups and training events;
- review of individual case files and other service documentation; and
- the use of case studies to determine service impact.

The second theme looks at the skills, knowledge base and expertise of staff undertaking assessment across the authority. It will consider the range and frequency of guidance and training for staff in delivering a highly effective psychological assessment.

| HOW ARE WE DOING?   | HOW DO WE KNOW?   | WHAT ARE WE GOING TO DO NOW?  |
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| <p><b>5.2 The extent to which the service provides assessment of a very high quality</b></p> <ul style="list-style-type: none"> <li>• Is there evidence of a clear strategy of assessment based on the vision and values of the service?</li> <li>• Is there a comprehensive range of assessment tools and delivery is well planned?</li> <li>• Does assessment take full account of the range of cultural and situational contexts of the child or young people?</li> <li>• Is assessment designed to impact at the least intrusive level of intervention?</li> <li>• Does the service work and train effectively in partnership with others to provide an integrated approach to assessment?</li> <li>• Does the service make a significant contribution to the development of the authority's policies and practices on assessment?</li> <li>• Does the service ensure that staff maintain and develop skills, knowledge and expertise in relation to assessment.</li> <li>• Is practice reviewed using systematic analysis of stakeholders' views, best practice, service impact and outcome measures?</li> <li>• What action does the service take to communicate its approach to assessment to all stakeholders?</li> <li>• What measures does the service take to ensure compliance with the requirements of the Data Protection Act, Freedom of Information Act,</li> </ul> | <p><b>Some examples of appropriate sources of evidence are given below. However, they are not considered to be comprehensive or prescriptive.</b></p> <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• Lists of assessment tools available and their dates for review.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>• Nature and range of assessment approaches employed by the service</li> <li>• The nature of feedback mechanisms to stakeholders on assessment findings and recommended actions.</li> <li>• A service handbook for all staff.</li> <li>• Information leaflets for children, young people and families and other stakeholders on the service's assessment framework.</li> <li>• Record of CPD activities related to assessment.</li> <li>• Statement or a certificate of competence in assessment.</li> <li>• Guidelines demonstrating compliance with the BPS code of practice for assessment and the Association of Scottish Principal Educational Psychologists (ASPEP)/Scottish Division of Educational Psychologists guidelines for assessment.</li> <li>• Records within case files.</li> <li>• Records of work and assessment.</li> <li>• Minutes of planning meetings.</li> <li>• Staff development and appraisal summaries.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• there is a regular review of policies and procedures on assessment;</li> <li>• policies and procedures on assessment are communicated with stakeholders;</li> <li>• there is a comprehensive range of assessment tools;</li> <li>• there are service guidelines on assessment which address issues of disability, equality and ethnicity;</li> <li>• CPD opportunities are provided for all staff on the service's approaches to assessment, taking account of stakeholders' views;</li> <li>• opportunities are available for multi-disciplinary training on assessment; and</li> <li>• service input and contributions are offered to develop the authority's policies and practice on assessment.</li> </ul> <p><b>We will:</b></p> |

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| <p>Disability Discrimination Act, Equal Opportunities legislation, British Psychological Society Code of Ethics and Conduct, etc?</p> | <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>• Annually (or at appropriate regular intervals) collated feedback from stakeholders.</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>• Observation of consultative/contextual assessment meetings.</li> <li>• Examination of case files.</li> <li>• Information from focus group of service staff to discuss assessment practices.</li> <li>• Attendance at multidisciplinary meetings where assessment information is shared to inform and support planning for a child or young person.</li> </ul> |  |
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## How good is our delivery of key processes?

### (KEY AREA 5: DELIVERY OF KEY PROCESSES)

#### QI 5.3 Intervention

##### Themes:

- Arrangements for advising, planning, delivering and evaluating intervention strategies to meet the needs of all stakeholders
- Staff skill, knowledge and expertise in planning and delivering effective psychological interventions

##### Key Features

This indicator draws on quantitative and qualitative data from direct observations, discussions and documentation including individual case files. Some examples of appropriate sources of evidence are given below. However, they are not considered to be comprehensive or prescriptive. Examples may include:

- observing practice directly in the field where appropriate;
- discussions with service staff and stakeholders including partner agencies;
- attendance at case reviews, multidisciplinary meetings, working groups and training events;
- review of individual case files and service documentation; and
- the use of case studies to determine service impact.

The second theme looks at the skills, knowledge base and expertise of staff advising, planning and delivering interventions across the authority. It will consider the range and frequency of guidance and training for staff in delivering and supporting the delivery of highly effective psychological interventions.

| HOW ARE WE DOING?  | HOW DO WE KNOW?   | WHAT ARE WE GOING TO DO NOW?   |
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| <p><b>5.3 The extent to which the service provides intervention of a very high quality</b></p> <ul style="list-style-type: none"> <li>• Does the service have systems to ensure compliance with the British Psychological Society Code of Ethics and Conduct in relation to practice in intervention?</li> <li>• Does the service have interventions which are appropriate, evidence-based, well-resourced and least intrusive?</li> <li>• Does the service employ a 'Plan-Do-Review' model in relation to intervention, which records process and outcomes?</li> <li>• Does the service operate an integrated approach to intervention which involves service users and other stakeholders?</li> <li>• Is the service involved in delivering training programmes to other agencies and stakeholders on effective approaches to intervention?</li> <li>• Do the service's approaches to intervention address issues of disability, equality and ethnicity?</li> <li>• What measures does the service take to ensure compliance with the requirements of the Data Protection Act, Freedom of Information Act, Disability Discrimination Act, Equal Opportunities legislation, British Psychological Society Code of Ethics and Conduct, etc?</li> </ul> | <p><b>Some examples of appropriate sources of evidence are given below. However, they are not considered to be comprehensive or prescriptive.</b></p> <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• Improved outcomes for children and young people.</li> <li>• Available statistics on referrals to specialist provision.</li> <li>• Reduction in the number of re-referrals to the service.</li> <li>• Statistics over time reflecting stakeholder satisfaction measures.</li> <li>• Evaluations from collated information arising from the 'Plan-Do-Review' model.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>• Published reports of outcomes of interventions (e.g. PDP annual publication, journal articles, conference presentations).</li> <li>• CPD logs.</li> <li>• Service development plan.</li> <li>• Records within case files.</li> <li>• Records of work/intervention.</li> <li>• Minutes of meetings.</li> <li>• Staff development and review summaries.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• there is a regular review of policies and procedures in regard to intervention;</li> <li>• there is a system in place for regularly updating and disseminating effective practice in regard to intervention;</li> <li>• there are service guidelines that address issues of disability, equality and ethnicity in relation to intervention;</li> <li>• CPD opportunities are provided for all educational psychologists on the service's approaches to intervention;</li> <li>• case files reflect a 'Plan-Do-Review' model; and</li> <li>• training is delivered to other agencies and stakeholders on effective approaches to intervention.</li> </ul> <p><b>We will:</b></p> |



| HOW ARE WE DOING? | HOW DO WE KNOW?  | WHAT ARE WE GOING TO DO NOW? |
|-------------------|--|------------------------------|
|                   | <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>• Evaluation feedback from provisions, parents, carers, children, young people, and other relevant stakeholders.</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>• Observation of planning meetings in relation to intervention (at casework, research, development or policy levels).</li> <li>• Presentations on effective interventions (e.g. at staff meetings, interest groups, etc.).</li> </ul> |                              |

How good is our delivery of key processes?

(KEY AREA 5: DELIVERY OF KEY PROCESSES)

QI 5.4 Professional development and training

**Themes:**

- Range and appropriateness of professional development and training to meet the needs of all stakeholders
- Staff skill, knowledge and expertise in planning and delivering effective professional development and training to stakeholders

**Key Features**

This indicator draws on quantitative and qualitative data from direct observations, discussions and documentation including individual case files. Some examples of appropriate sources of evidence are given below. However, they are not considered to be comprehensive or prescriptive. Examples may include:

- observing, where appropriate, practice directly in the field;
- discussions with service staff and stakeholders including partner agencies;
- attendance at case reviews, multidisciplinary meetings, working groups and training events;
- review of individual case files and other service documentation; and
- the use of case studies to determine service impact.

The second theme looks at the skills, knowledge base and expertise of staff advising, planning and delivering professional development and training across the service and the authority. It will consider the range and frequency of guidance and training for staff in delivering and supporting the delivery of highly effective professional development and training.

| HOW ARE WE DOING?   | HOW DO WE KNOW?  | WHAT ARE WE GOING TO DO NOW?   |
|---|--|--|
| <p><b>5.4 The extent to which the service provides professional development and training of a very high quality</b></p> <ul style="list-style-type: none"> <li>• Does the service have a system in place for mapping the identified needs of stakeholders to the training and professional development of individual staff members?</li> <li>• What opportunities does the service make available for individual members of staff to develop their presentation and training skills?</li> <li>• What opportunities does the service make available to individual members of staff for joint development of training activities with other agencies?</li> <li>• Does the service have a training portfolio?</li> <li>• Does the service have a database or resource bank of training materials?</li> <li>• What systems does the service have in place to ensure that any evaluation of the content, delivery and impact of training provided is made available to others?</li> <li>• What measures does the service take to ensure compliance with the requirements of the Data Protection Act, Freedom of Information Act, Disability Discrimination Act, Equal Opportunities legislation, British Psychological Society Code of Ethics and Conduct, etc?</li> </ul> | <p><b>Some examples of appropriate sources of evidence are given below. However, they are not considered to be comprehensive or prescriptive.</b></p> <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• Statistics available from training evaluation events that reflect medium and long-term impact on stakeholders’ practice and positive outcomes for children and young people.</li> <li>• Trends over time that reflect the increasing collective expertise of the service.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>• Service development plans that reflect compliance with BPS requirements for training.</li> <li>• Staff appraisal records.</li> <li>• CPD logs.</li> <li>• Best Value reports.</li> <li>• Best Value improvement plans.</li> <li>• Service portfolio of training detailing courses delivered/offered/attended including joint training with other agencies.</li> <li>• Evaluation sheets from training courses attended by service staff.</li> <li>• Summary evaluation sheets which are made widely available to others.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• the data base or resource bank of training materials is regularly updated;</li> <li>• there is liaison with other authority staff and other agencies on the need for and delivery of joint training;</li> <li>• there is effective short- and medium-term evaluation of the impact of service training on stakeholders’ practice;</li> <li>• service, national and local priorities are mapped on to the training portfolio of the service;</li> <li>• the service targets its portfolio of training to best meet the needs of children and young people within the authority; and</li> <li>• there is a process for dissemination of information from training courses attended by members of staff.</li> </ul> <p><b>We will:</b></p> |

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|  | <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"><li>• Evaluation sheets from training courses.</li><li>• Medium-term evaluation of impact on practice from stakeholders.</li><li>• Records of requests for training from stakeholders.</li></ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"><li>• Observation of planning and of delivery of training offered.</li><li>• Examination of a resource bank of training materials.</li><li>• New stakeholder skills and knowledge, derived from training, observed in practice.</li></ul> |  |
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## How good is our delivery of key processes?

(KEY AREA 5: DELIVERY OF KEY PROCESSES)

### QI 5.5 Research and strategic development

#### Themes:

- Range and appropriateness of the research and development programme to meet service and authority priorities
- Skill, knowledge and expertise of staff in the participation in and undertaking of research and development activity

#### Key Features

This indicator draws on quantitative and qualitative data from direct observations, discussions and documentation including individual case files. Some examples of appropriate sources of evidence are given below. However, they are not considered to be comprehensive or prescriptive. Examples may include:

- observing, where appropriate, practice directly in the field;
- discussions with service staff and stakeholders including partner agencies;
- attendance at case reviews, multidisciplinary meetings, working groups and training events;
- review of individual case files and service documentation; and
- the use of case studies to determine service impact.

The second theme looks at the skills, knowledge base and expertise of staff delivering the research and development programme across the service and the authority. It will consider the range and frequency of support, guidance and training for staff in delivering a high quality research and development programme.

| HOW ARE WE DOING?   | HOW DO WE KNOW?   | WHAT ARE WE GOING TO DO NOW?  |
|---|---|---|
| <p><b>5.5 The extent to which the service provides research and strategic development of a very high quality</b></p> <ul style="list-style-type: none"> <li>• What system does the service have in place for mapping research and strategic development activities on to national, local and service priorities?</li> <li>• What system does the service have in place for mapping research and strategic development activities on to the identified needs of stakeholders?</li> <li>• What steps does the service take to ensure that individual members of staff have opportunities to develop their skills in research and strategic development?</li> <li>• Does the service have a detailed portfolio of research and strategic development activities?</li> <li>• What steps has the service taken to create a database or resource bank of materials to support research and strategic development?</li> <li>• What systems does the service have in place for evaluating the impact of research and strategic development activities?</li> <li>• What systems does the service have in place for disseminating the findings from research and strategic development activities?</li> <li>• What measures does the service take to ensure compliance with the requirements of the Data Protection Act, Freedom of Information Act,</li> </ul> | <p>Some examples of appropriate sources of evidence are given below. However, they are not considered to be comprehensive or prescriptive.</p> <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• Impact of research and strategic development activities on the local authority improvement plan.</li> <li>• Impact of research and strategic development activity on outcomes for children and young people.</li> <li>• Number of conference presentations and publications.</li> <li>• Number of feedback or dissemination sessions.</li> <li>• Statistics and trends over time that reflect changes and improvements due to research and strategic development.</li> <li>• Statistics from evaluation sheets following dissemination of research and strategic development activities</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>• Service development plans.</li> <li>• Staff appraisal records.</li> <li>• CPD logs.</li> <li>• Minutes of meetings.</li> <li>• Published reports of outcomes of research and strategic development (e.g. PDP annual publication, journal articles, conference presentations, reports from working groups).</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• research and strategic development activities are appropriately commissioned by the authority and the findings disseminated to improve outcomes for children and young people;</li> <li>• there is a regular review of policies and procedures for research and strategic development activities including compliance with the legislative requirements and the British Psychological Society Code of Ethics and Conduct;</li> <li>• there is a system in place to regularly update and disseminate outcomes from research and strategic development activities to members of the service and appropriate stakeholders;</li> <li>• data base or resource bank of materials are updated regularly;</li> <li>• portfolio of research and strategic development activities is kept up to date; and</li> <li>• feedback is obtained from stakeholders on the impact and benefits of research and strategic development information disseminated.</li> </ul> <p><b>We will:</b></p> |

| HOW ARE WE DOING? | HOW DO WE KNOW?  | WHAT ARE WE GOING TO DO NOW? |
|-------------------|--|------------------------------|
|                   | <ul style="list-style-type: none"> <li>• Best Value reports.</li> <li>• Best Value improvement plans.</li> <li>• Service portfolio of research and strategic development activities undertaken.</li> </ul> <p><b>Stakeholders' Views</b></p> <ul style="list-style-type: none"> <li>• Education and service managers' views of the value and utility of research and strategic development activities.</li> <li>• Records of requests for research and strategic development.</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>• Observation of planning and of delivery of research and strategic development activities.</li> <li>• Examination of a database/resource bank of materials that support research and strategic development.</li> </ul> |                              |

How good is our delivery of key processes?

(KEY AREA 5: DELIVERY OF KEY PROCESSES)

QI 5.6 Inclusion, equality and fairness

**Themes:**

- Promotion of inclusive practices
- Evidence of equal opportunities and fairness embedded in all aspects of practice



| HOW ARE WE DOING?   | HOW DO WE KNOW?  | WHAT ARE WE GOING TO DO NOW?   |
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| <p><b>5.6 The extent to which the service promotes and ensures inclusion, equality and fairness</b></p> <ul style="list-style-type: none"> <li>• What system does the service have in place to ensure that recruitment and professional practice complies with the requirements of key legislation including the <i>Additional Support for Learning Act 2005</i>, and the <i>Standards in Scotland's Schools Act 2000</i>?</li> <li>• What procedures does the service have in place to ensure that practice in assessment and intervention takes into account the needs of those for whom English is an additional language, the effects of ethnicity and diversity, and the requirements for reasonable adjustments and accommodations for those with disabilities or specific needs?</li> <li>• Does the service focus on promoting the inclusion of vulnerable (including children and young people with additional support needs) and minority groups within mainstream provision?</li> <li>• What policies and procedures does the service have in place to meet the requirements of the Data Protection Act, the Disability Discrimination Act and Equal Opportunities legislation in regard to monitoring ethnicity and socio-economic status?</li> <li>• What measures does the service take to ensure compliance with the requirements of the Data Protection Act, Freedom of Information Act, Equal Opportunities legislation and the British</li> </ul> | <p><b>Some examples of appropriate sources of evidence are given below. However, they are not considered to be comprehensive or prescriptive.</b></p> <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• Database with appropriate fields to monitor over- and under-representation of minority groups in national and local statistics.</li> <li>• Trends over time that monitor admission to segregated and specialist provision.</li> <li>• Trends that evidence reduction of exclusions from provisions.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>• Policies on inclusion, equality and fairness.</li> <li>• Equal opportunity monitoring for recruitment and employment.</li> <li>• Service development plans.</li> <li>• Case files.</li> <li>• Staff review records.</li> <li>• Documented systems for the management of staff absence.</li> <li>• Minutes of meetings.</li> <li>• Published reports of outcomes of good practice in relation to inclusion, equality and fairness (e.g. PDP annual publication, journal articles, conference presentations, reports from working groups).</li> <li>• Best Value reports.</li> <li>• Best Value improvement plans.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• database is kept up to date;</li> <li>• there is a regular review of policies and procedures on inclusion, equality and fairness;</li> <li>• there are service guidelines that ensure that recruitment and professional practice complies with the requirements of Equal Opportunities, Race Relations, Sex Discrimination, Disability Discrimination and Social Inclusion legislation; and</li> <li>• there are systems for monitoring performance of minority groups (e.g. looked after children and young people, children and young people with additional support needs, those for whom English is an additional language) to ensure inclusion, equality and fairness.</li> </ul> <p><b>We will:</b></p> |

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| <p>Psychological Society Code of Ethics and Conduct, etc?</p> <ul style="list-style-type: none"> <li>• Does the service record information about clients on a database that relates to ethnic background, looked after and accommodated status and additional support needs in order to support a strong ethos and practice of inclusion?</li> </ul> | <ul style="list-style-type: none"> <li>• Service leaflets in Braille and information on CD or DVD, and in stakeholders' first languages widely available within the local authority and community.</li> <li>• Records of use of language interpreters.</li> </ul> <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>• Stakeholders' feedback through questionnaires and focus groups.</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>• Observation of accessibility requirements being met.</li> <li>• Observation of members of staff taking account of cultural and language considerations in their practice.</li> </ul> |  |
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How good is our delivery of key processes?

(KEY AREA 5: DELIVERY OF EDUCATION PROCESSES)

QI 5.7 Improving the quality of services

**Themes:**

- Arrangements for quality assurance and improvement
- Support and challenge
- Evaluating outcomes and feedback from stakeholders
- Planning for improvement and monitoring progress
- Reporting progress to stakeholders

| HOW ARE WE DOING?  | HOW DO WE KNOW?   | WHAT ARE WE GOING TO DO NOW?   |
|--|---|--|
| <p><b>5.7 The extent to which the service is improving the quality of services</b></p> <ul style="list-style-type: none"> <li>• What system does the service have in place for self-evaluation and planning for improvement which draws upon quality indicators and accreditation schemes?</li> <li>• What systems does the service have in place to quality assure improvement/development planning, standards and quality reporting: staff review and development?</li> <li>• Can the service demonstrate commitment to developing a strong culture of support and challenge?</li> <li>• What measures does the service take to involve all staff in improvement/development planning?</li> <li>• What procedures does the service have in place for auditing the planning, design and delivery of activities?</li> <li>• What measures does the service take to analyse the findings from audit and evaluation in order to improve service delivery?</li> <li>• What action does the service take to record and disseminate information on performance standards?</li> <li>• Is there a system to map service national and local priorities with the CPD needs of individual members of staff, which in turn identify priorities for improvement/development planning?</li> </ul> | <p><b>Some examples of appropriate sources of evidence are given below. However, they are not considered to be comprehensive or prescriptive.</b></p> <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• regular monitoring and tracking of a variety of audit trails to determine performance, e.g. activity logs.</li> <li>• monitoring of the core roles at individual, team authority and national levels and their impact on stakeholders.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>• Service development plans.</li> <li>• Case files.</li> <li>• Staff review records.</li> <li>• Letters of appreciation.</li> <li>• CPD logs.</li> <li>• Minutes of meetings.</li> <li>• Service portfolios of professional training and research.</li> <li>• Service leaflets.</li> <li>• Complaints records and outcomes.</li> <li>• Published reports of outcomes of good practice in relation to quality assurance (e.g. PDP annual publication, journal articles, conference presentations, reports from working groups).</li> <li>• Best Value reports.</li> <li>• Best Value improvement plans.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• there are arrangements for quality assurance and improvement;</li> <li>• there is a culture of support and challenge across all aspects of the service;</li> <li>• there is a system to evaluate outcomes and feedback from stakeholders which leads to further investigation and action;</li> <li>• there are procedures in place to plan for improvement and monitor progress; and</li> <li>• there is a system in place to report publicly to stakeholders on performance standards.</li> </ul> <p><b>We will:</b></p> |

| HOW ARE WE DOING?  | HOW DO WE KNOW?   | WHAT ARE WE GOING TO DO NOW? |
|--|---|------------------------------|
| <ul style="list-style-type: none"> <li>• Is there a regular review of improvement/development plans and other policies and procedures in regard to quality assurance?</li> <li>• Is there evidence of a culture of support and challenge within the service?</li> <li>• Are there systems for monitoring performance and service delivery?</li> <li>• Are there systems for dealing with staff grievances and customer complaints?</li> <li>• Are there systems to report back to appropriate stakeholders?</li> </ul> | <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>• Stakeholder feedback, including feedback from educational psychology service staff.</li> <li>• Focus group meetings with members of staff and other stakeholders.</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>• Presentation on quality assurance in relation to service delivery.</li> <li>• Educational psychologists completing activity logs.</li> <li>• Observations regarding evaluation forms being distributed and collected from stakeholders at key stages.</li> <li>• Observation of service review meetings.</li> </ul> |                              |

How good is our management?

(KEY AREA 6: POLICY DEVELOPMENT AND PLANNING)

QI 6.1 Policy review and development

**Themes:**

- Range and appropriateness of policies
- Coherence with council-wide policy
- Links to vision, values and aims
- Managing, evaluating and updating policies

**Key Features**

A successful, modern organisation will have a systematic and well-documented approach to management. This will be supported by a range of effective policies and advice that inform and impact on practice throughout the service, which in turn are linked to the wider policies of the authority. These policies provide clear strategic direction and help to ensure consistency in practice across the service and improved outcomes for children, young people and families.

**Useful definition**

What is the difference between policies, procedures, and practice guidelines?

A policy describes what you do and why you do it in that way. A procedure is an articulation of the policy at an operational level, i.e. how we deliver the policy in practice. A practice guideline can be one type of procedure, e.g. a practice guideline on assessment outlines how to apply the service assessment policy in context.

| HOW ARE WE DOING?  | HOW DO WE KNOW?  | WHAT ARE WE GOING TO DO NOW?   |
|--|--|--|
| <p><b>6.1.1 Range and appropriateness of policies</b><br/>How comprehensive is the policy framework within service?</p> <p>To what extent are clear expectations set for effective service delivery?</p> <p>To what extent do policies reflect national and local priorities, and related improvement objectives?</p> <p>To what extent is there a balance in the coverage of strategic and operational matters within policy advice?</p> <p>To what extent are individual policies supported by specific information about roles, responsibilities, and procedures?</p> <p>To what extent are individual policies supported by specific information regarding expectations of quality, outcomes, and evaluation processes?</p> <p>To what extent does the policy framework provide clear guidance to staff?</p> <p>To what extent does the policy framework assist in the delivery of consistent practice across the service?</p> <p>To what extent does the policy framework assist in the achievement of continuous improvement?</p> <p>To what extent do policies adhere to the British Psychology Society Code of Ethics and Conduct?</p> | <p><b>Some examples of appropriate sources of evidence are given below. However, they are not considered to be comprehensive or prescriptive.</b></p> <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• Range of policies.</li> <li>• Impact of policies on practice and outcomes for children and young people.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>• Statement of vision, values and aims of both service and education service.</li> <li>• Policy documents, procedures and practice guidelines.</li> <li>• Service development plan.</li> <li>• Evidence in documentation of references to council-wide policy, legislation and BPS documents, (e.g. standards and quality report, Best Value report, annual report, service handbook, HMIE reports, British Psychology Society Code of Ethics and Conduct, education service improvement proposals, council improvement proposals).</li> </ul> <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>• Views of service staff.</li> <li>• Views of education management.</li> <li>• Information gained from focus groups (e.g. headteachers, parents).</li> </ul> | <p>To ensure that the range and appropriateness of policies :</p> <ul style="list-style-type: none"> <li>• is comprehensive;</li> <li>• sets clear expectations for effective service delivery;</li> <li>• reflects national and local priorities and related improvement objectives;</li> <li>• achieves a balance between strategic and operational matters;</li> <li>• contains specific information about roles, responsibilities and procedures;</li> <li>• contains information regarding quality outcomes and evaluation processes;</li> <li>• provides clear guidance to staff;</li> <li>• assists in the delivery of consistent practice;</li> <li>• assists in the achievement of continuous improvement; and</li> <li>• adheres to BPS standards.</li> </ul> <p><b>We will:</b></p> |

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|  | <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>• Observations of individual practice and extent to which it is guided by and complies with policy.</li> <li>• Observations of practice across the team in particular areas (e.g. assessment, and extent to which it is consistent with policy).</li> </ul>   |   |
| <p><b>6.1.2 Coherence with council-wide policy</b><br/>How well does the service's policy framework articulate with the aspirations and outcomes of relevant council-wide planning?<br/>To what extent are service contributions to cross-cutting policy initiatives clearly reflected throughout service policies and practice?</p> | <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• Number of targets in service plan that specifically relate to council-wide planning.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>• Policy framework.</li> <li>• Service development plan.</li> <li>• Education service and council plans.</li> <li>• HMIE reports.</li> </ul> <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>• Views of education service and council managers on coherence between service policy framework and council-wide planning.</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>• Observation of development planning processes.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• the service's policy framework articulates with the aspirations and outcomes of relevant council-wide planning; and</li> <li>• the service's contributions to cross-cutting policy initiatives are clearly reflected throughout service policies and practice.</li> </ul> <p><b>We will:</b></p> |



| HOW ARE WE DOING?   | HOW DO WE KNOW?   | WHAT ARE WE GOING TO DO NOW?   |
|---|---|--|
| <p><b>6.1.3 Links to vision, values, and aims</b></p> <p>How explicit are the connections between service vision, values and aims, and service policy development?</p> <p>To what extent do service vision, values and aims provide a sound basis for policy making and service delivery?</p> <p>How well does the service vision, values and aims articulate with the national priorities?</p> <p>To what extent does the service vision, values and aims impact on the development of integrated services for children across the authority?</p> <p>To what extent does the service vision, values and aims provide useful criteria against which to review and evaluate service structures, policies, and practices?</p> | <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• Number of policies which explicitly refer to vision, values and aims.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>• Service statement on vision, values and aims.</li> <li>• Service policies and procedures.</li> <li>• Minutes of internal service meetings.</li> <li>• HMIE reports.</li> <li>• Current relevant national documents.</li> <li>• Integrated service plans.</li> </ul> <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>• Views of education service and council managers.</li> <li>• Views of service staff.</li> <li>• Views of schools and partner agencies.</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>• observation of development planning processes</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• there are explicit connections between service vision, values, and aims, and service policy development;</li> <li>• service vision, values, and aims provide a sound basis for policymaking and service delivery;</li> <li>• service vision values, and aims articulate with national priorities;</li> <li>• service vision, values and aims impact on the development of integrated services for children across the authority; and</li> <li>• service vision, values and aims provide useful criteria against which to review and evaluate service structures, policies, and practices.</li> </ul> <p><b>We will:</b></p> |

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| <p><b>6.1.4 Managing, evaluating, and updating policies</b></p> <p>To what extent are clear procedures in place for the coherent development and review of individual policies?</p> <p>To what extent are policy reviews and updates undertaken regularly, taking into account the views of stakeholders?</p> <p>To what extent do policy reviews and updates take account of relevant legislative changes, e.g. the <i>Education (Additional Support for Learning) (Scotland) Act 2004</i>?</p> | <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• Frequency of times that reviews have been completed with explicit review dates for policies.</li> <li>• Number of policies that make explicit reference to legislative changes and its effect on practice.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>• Policy statements on procedures for policy review.</li> <li>• Service development plan.</li> <li>• Minutes of internal service meetings.</li> <li>• Relevant evaluation reports.</li> <li>• Relevant legislation.</li> </ul> <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>• Views of service staff.</li> <li>• Views of education managers.</li> <li>• Views of stakeholders about the extent to which they have been asked for their views on policy review and development.</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>• Observation of internal meetings.</li> <li>• Observation of processes involving the gathering of views from stakeholders.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• clear procedures are in place for the coherent development and review of individual policies;</li> <li>• policy reviews and updates are undertaken regularly, and take into account the views of stakeholders; and</li> <li>• policy reviews and updates take account of relevant legislative changes.</li> </ul> <p><b>We will:</b></p> |
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## How good is our management?

### (KEY AREA 6: POLICY DEVELOPMENT AND PLANNING)

#### QI 6.2 Participation of stakeholders

##### Themes:

- Involvement in policy development
- Communication and consultation
- Active participation in the work of the service

##### Key Features

To fulfil the requirements of Best Value, and to conform to accepted good practice in local government, mechanisms need to be in place to link service management decisions to the needs of the community. There is an expectation that key stakeholders are actively involved in the development of the service and this will require a range of approaches and mechanisms to be applied across the service's areas of activity. To complement consultative mechanisms there needs to be an effective approach to communication. This will recognise that there are a number of different audiences which need to be kept informed about service activities. There should be a framework which facilitates effective communication with stakeholders. This will require a variety of approaches suited to the audiences concerned and will therefore involve a range of communication media.

| HOW ARE WE DOING?   | HOW DO WE KNOW?  | WHAT ARE WE GOING TO DO NOW?   |
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| <p><b>6.2.1 Involvement in policy development</b></p> <p>To what extent does the service systematically seek the views of a wide representation of stakeholders?</p> <p>To what extent is there a broad range of consultation processes in place to ensure effective development of policy and practice within the service?</p> | <p>Some examples of appropriate sources of evidence are given below. However, they are not considered to be comprehensive or prescriptive.</p> <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• Number and frequency of stakeholder consultation exercises.</li> <li>• Number of stakeholders consulted.</li> <li>• Outcomes of the consultation concerning improvement in service delivery and individual practice.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>• Reports of stakeholder evaluations and consultation exercises.</li> <li>• Information about education authority consultation processes.</li> </ul> <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>• Views of stakeholders on policies.</li> <li>• Views of stakeholders about the range of consultation processes in place.</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>• Observations on consultation processes, e.g. through the use of focus groups.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• the service systematically seeks the views of a wide representation of stakeholders;</li> <li>• the service acts on the information gained through consultation and makes appropriate changes to service delivery and individual practice; and</li> <li>• a broad range of consultation processes are in place to ensure effective development of policy and practice within service.</li> </ul> <p><b>We will:</b></p> |
| <p><b>6.2.2 Communication and consultation</b></p> <p>To what extent does the service have a clear framework for communication and consultation with all stakeholder groups?</p> <p>To what extent does the framework for communication and consultation provide clear</p>  | <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• Number of documents making explicit reference to advice from the service to stakeholder groups.</li> <li>• Number of reports, evaluations, leaflets giving information on the services offered.</li> </ul>   | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• the service has a clear framework for communication and consultation with all stakeholder groups;</li> <li>• the framework for communication and consultation provides clear strategic and operational advice to identified key stakeholder groups;</li> </ul>  |

| HOW ARE WE DOING?   | HOW DO WE KNOW?  | WHAT ARE WE GOING TO DO NOW?  |
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| <p>strategic and operational advice to identified stakeholder groups?</p> <p>To what extent does the service provide accurate and comprehensive views and reports on the services it offers?</p> <p>To what extent are the communication and consultation mechanisms appropriate to the needs of the stakeholders?</p> <p>To what extent does the feedback gained from consultation with stakeholders influence policy development?</p> | <ul style="list-style-type: none"> <li>• Range of alternative communication and consultation methodologies applied tailored to stakeholder needs, e.g. with regard to location, timing and accessibility.</li> <li>• Number of action points derived from consultation exercises and incorporated in service planning.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>• Consultation framework, policy and procedures.</li> <li>• Examples of forms of information to stakeholders and learners, e.g. leaflets, website information.</li> <li>• Minutes of consultative groups.</li> <li>• Team meeting agendas and minutes.</li> <li>• Service level agreements.</li> <li>• Policy and procedures for inter-agency working.</li> <li>• Reports of evaluation exercises.</li> <li>• HMIE reports.</li> <li>• Service development plan.</li> <li>• Evidence of the link between consultation with stakeholders and subsequent impact on policy.</li> </ul> <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>• Views of education management.</li> <li>• Views of service users, e.g. parents, carers, children and young people.</li> <li>• Views of partner agencies.</li> <li>• Views of service staff.</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>• Observations of consultation processes, e.g. through the use of focus groups.</li> <li>• Observation of planning processes.</li> </ul> | <ul style="list-style-type: none"> <li>• the service provides accurate and comprehensive views and reports on the services it offers; and</li> <li>• stakeholders' views are accurately represented in policy review and development.</li> </ul> <p><b>We will:</b></p> |

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| <p><b>6.2.3 Active participation in the work of the service</b></p> <p>To what extent are effective structures and systems in place to support and encourage active participation of stakeholders in the work of service?</p> <p>To what extent are effective procedures and processes in place to enable the sharing of information within and across inter-agency teams?</p> | <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• Number of opportunities provided for stakeholders to participate in the work of service</li> <li>• Range of stakeholders actively participating in the work of the service.</li> <li>• Outcomes of stakeholder participation</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>• Consultation framework, policy and procedures.</li> <li>• Examples of forms of information to stakeholders and learners, e.g. leaflets, website information.</li> <li>• Minutes of consultative groups.</li> <li>• Team meeting agendas and minutes.</li> <li>• Service level agreements.</li> <li>• Policy and procedures for interagency working.</li> <li>• Reports of evaluation exercises.</li> <li>• HMIE reports.</li> <li>• Service development plan.</li> <li>• Minutes of inter-agency meetings.</li> </ul> <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>• Views of education management.</li> <li>• Views of service users, e.g. parents, carers children and young people.</li> <li>• Views of partner agencies.</li> <li>• Views of service staff.</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>• Observation of relevant meetings.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• effective structures and systems are in place to support and encourage active participation of stakeholders in the work of service; and</li> <li>• effective procedures and processes are in place to enable the sharing of information within and across inter-agency teams.</li> </ul> <p><b>We will:</b></p> |
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How good is our management?

(KEY AREA 6: POLICY DEVELOPMENT AND PLANNING)

**QI 6.3 Operational planning**

**Themes:**

- Developing, implementing and evaluating plans
- Structure and content of plans
- Use of management information
- Joint planning with partner organisations and services
- Planning for sustainability

**Key Features**

The service plan, or its equivalent, will be central to performance management and planning. Documents in themselves can only be a partial reflection of effective management and planning, since the processes that surround both the development of the plan and its implementation are of critical importance. Operational planning should lead to service improvement and guide its focus, methodologies and mechanisms for reporting and future action. Service planning will be embedded within the service's approach to planning and clear links should exist between the Children's Services and other authority plans.

| HOW ARE WE DOING?   | HOW DO WE KNOW?   | WHAT ARE WE GOING TO DO NOW?  |
|---|---|---|
| <p><b>6.3.1 Developing, implementing, and evaluating plans</b><br/>           What planning cycles are in place within the service?<br/>           How effective are the mechanisms for developing, implementing and evaluating plans?</p>              | <p>Some examples of appropriate sources of evidence are given below. However, they are not considered to be comprehensive or prescriptive.</p> <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• Number of targets achieved within plans.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>• Service development plan, including progress reports.</li> <li>• Standing and working group development plans and minutes.</li> <li>• Individual personal action plans.</li> <li>• Evaluation reports.</li> <li>• Standards and quality reports.</li> <li>• Employee review and development reports.</li> <li>• BPS CPD logs.</li> </ul> <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>• Views of staff.</li> <li>• Views of education management.</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>• Observations of whole service and other planning meetings.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• planning cycles are in place within service; and</li> <li>• mechanisms for developing, implementing, and evaluating plans are effective.</li> </ul> <p><b>We will:</b></p>   |
| <p><b>6.3.2 Structure and content of plans</b><br/>           How clear, precise, and relevant are the presentation and structure of service planning?<br/>           To what extent does service planning cover the wide range of work undertaken?</p> | <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• Number and variety of roles reflected in targets.</li> <li>• Number of targets explicitly linked to national and local priorities.</li> </ul>   | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• presentation and structure of service planning are clear, precise, and relevant;</li> <li>• service planning covers the wide range of work undertaken; and</li> <li>• service planning reflects and influences national and local priorities.</li> </ul> |



| HOW ARE WE DOING?  | HOW DO WE KNOW?   | WHAT ARE WE GOING TO DO NOW?   |
|--|---|--|
| <p>To what extent does service planning reflect and influence national and local priorities?</p>   | <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>• Service development plan.</li> <li>• Standing and working group development plans and minutes.</li> <li>• Individual personal action plans.</li> <li>• Evaluation reports.</li> <li>• Standards and quality reports.</li> <li>• Employee review and development reports.</li> <li>• BPS CPD logs.</li> <li>• HMIE reports.</li> <li>• Education service plan, Children’s Services Plan.</li> <li>• Relevant national documents.</li> </ul> <p><b>Examples of stakeholders’ views</b></p> <ul style="list-style-type: none"> <li>• Views of education management.</li> <li>• Views of service staff.</li> </ul>          | <p><b>We will:</b></p>   |
| <p><b>6.3.3 Use of management information</b><br/>How explicit and connected are the links between action plans and budget-setting procedures?</p> | <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• Number of targets explicitly budgeted for in development plans.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>• Service development plan.</li> <li>• Action plans of working groups.</li> </ul> <p><b>Examples of stakeholders’ views</b></p> <ul style="list-style-type: none"> <li>• Views of education management.</li> <li>• Views of service staff.</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>• Observations regarding principles of Best Value being reflected in all aspects of service practice.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• links between action plans and budget-setting are explicit and connected.</li> </ul> <p><b>We will:</b></p> |

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| <p><b>6.3.4 Joint planning with partner organisations and services</b><br/>To what extent are partner organisations and services actively involved in joint planning?</p> | <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• Number and frequency of joint planning meetings.</li> <li>• Evidence of partner organisations influencing service planning and improvement.</li> <li>• Number of targets shared between the educational psychology service and other organisation/service plans.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>• Service development plans.</li> <li>• Other organisation/service plans.</li> <li>• Minutes of joint planning meetings.</li> <li>• Joint planning documents.</li> </ul> <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>• Views of partner organisations.</li> <li>• Views of service staff.</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>• Observation of joint planning activities and joint working.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• partner organisations and services are actively involved in joint planning.</li> </ul> <p><b>We will:</b></p>         |
| <p><b>6.3.5 Planning for sustainability</b><br/>How explicit are sustainability considerations within service planning for improvement?</p>                               | <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• Number of targets making explicit reference to sustainability.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>• Service development plan.</li> </ul> <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>• Views of education management.</li> <li>• Views of service staff.</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>• Observation of planning meetings taking consideration of matters relating to sustainability.</li> </ul>   | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• sustainability considerations are explicit within service planning for improvement.</li> </ul> <p><b>We will:</b></p> |

How good is our management?

(KEY AREA 7: MANAGEMENT AND SUPPORT OF STAFF)

QI 7.1 Sufficiency, recruitment and retention

**Themes:**

- Identifying and meeting human resource needs
- Recruitment, appointment and induction procedures
- Care and welfare
- Equality and fairness in recruitment and promotion
- Recognition

**Key Features**

This indicator relates to the service's effectiveness in managing the recruitment, appointment, induction and care and welfare of its staff. To provide a high quality service to its stakeholders, the service needs a clear understanding of its human resource requirements and effective procedures in place to recruit, retain, support and develop its staff to a high level. This will require proactive and imaginative recruitment procedures. The principles of equality and fairness, together with a commitment to recognise and celebrate achievement, will underpin the service's philosophy and practice in its management and support of staff.

| HOW ARE WE DOING?  | HOW DO WE KNOW?   | WHAT ARE WE GOING TO DO NOW?   |
|--|---|--|
| <p><b>7.1.1 Identifying and meeting human resource needs</b></p> <p>To what extent does the service have an overall human resource management framework, supported by a comprehensive range of policies?</p> <p>To what extent does the service have clear staffing standards, including staff in other services under its management?</p> | <p>Some examples of appropriate sources of evidence are given below. However, they are not considered to be comprehensive or prescriptive.</p> <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• Number and nature of policies pertaining to human resource needs within the council.</li> <li>• Year-on-year trends in staffing relative to overall demand, e.g. deployment to schools, specific initiatives such as post school psychological service and involvement in research and strategic development.</li> <li>• Comparative trends from national perspectives.</li> <li>• Deployment to support ring-fenced initiatives.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>• Council, education service and personnel policies and procedures.</li> <li>• Service development plans.</li> <li>• Standards and quality reports.</li> <li>• Best Value reports.</li> </ul> <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>• Views of service staff.</li> <li>• Views of education management.</li> <li>• Views of personnel services.</li> </ul> <p><b>Examples of direct observation</b></p> <p>Observation of the human resource management framework in action.</p> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• the service has an overall human resource management framework supported by a comprehensive range of policies; and</li> <li>• there are clear staffing standards.</li> </ul> <p><b>We will:</b></p> |

| HOW ARE WE DOING?  | HOW DO WE KNOW?  | WHAT ARE WE GOING TO DO NOW?  |
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| <p><b>7.1.2 Recruitment, appointment, and induction procedures</b><br/>                     How effective are the service recruitment procedures in ensuring appointment of suitably qualified and skilled staff?<br/>                     How transparent are the service appointment procedures?<br/>                     How effective are the service induction policies and procedures?<br/>                     How well does the service comply with BPS induction and accreditation quality standards?</p> | <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• Information concerning staff turnover.</li> <li>• Number of compliments/complaints from service users.</li> <li>• Number of re-advertisements.</li> </ul> <p><b>Examination of relevant documentation</b></p> <ul style="list-style-type: none"> <li>• Policy documents outlining recruitment and appointment procedures.</li> <li>• Local authority recruitment procedures.</li> <li>• Job outlines.</li> <li>• Selection criteria.</li> <li>• Job adverts.</li> <li>• Post-interview feedback.</li> <li>• Service induction procedures.</li> <li>• Local authority induction procedures.</li> <li>• Feedback from inductees.</li> <li>• BPS quality standards.</li> <li>• Accreditation certificate.</li> </ul> <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>• Views of service staff.</li> <li>• Views of education managers.</li> <li>• Views of applicants for posts.</li> <li>• Views of trade unions.</li> <li>• Views of professional associations, e.g. BPS.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• service recruitment procedures are effective in ensuring appointment of suitably qualified and skilled staff;</li> <li>• service appointment procedures are transparent;</li> <li>• service induction policies and procedures are effective; and</li> <li>• the service complies with BPS induction and accreditation quality standards.</li> </ul> <p><b>We will:</b></p> |

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|  | <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>• Observation of interview procedures.</li> <li>• Observation of induction procedures.</li> </ul>  |   |
| <p><b>7.1.3 Care and welfare</b></p> <p>To what extent does the service demonstrate an appreciation of the duty of care towards members of staff?</p> <p>How aware are staff about their rights and responsibilities?</p> <p>How clear are the expected standards of conduct, care, and welfare which staff can expect and which are expected of them?</p> | <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• Staff turnover.</li> <li>• Absence rates.</li> <li>• Number of times that grievance procedures are used.</li> <li>• Number of compliments/complaints.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>• Local authority and service policy statements covering care and welfare issues.</li> <li>• Supervision policy.</li> <li>• Staff review and development policy.</li> </ul> <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>• Views of service staff through appraisal/supervision procedures.</li> <li>• Views of education management.</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>• Observation of interaction between team members, and of support and supervision provided.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• the service demonstrates an appreciation of the duty of care towards members of staff;</li> <li>• staff are aware of their rights and responsibilities; and</li> <li>• the expected standards of conduct, care, and welfare are clear and upheld by all staff.</li> </ul> <p><b>We will:</b></p> |

| HOW ARE WE DOING?  | HOW DO WE KNOW?  | WHAT ARE WE GOING TO DO NOW?   |
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| <p><b>7.1.4 Equality and fairness in recruitment and promotion</b></p> <p>To what extent is there a well established equal opportunities policy relevant to the needs of those who work in and use the service?</p> <p>To what extent are equal opportunities issues addressed in relation to recruitment and promotion?</p> <p>To what extent are qualitative and quantitative measures in place to monitor equality and fairness issues?</p> | <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>Data on representation of minority groups within the educational psychology service.</li> <li>Recruitment information.</li> <li>Number of compliments/complaints from staff.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>Equal opportunities policy of services.</li> <li>Local authority equal opportunities policy.</li> <li>Other relevant service policies.</li> <li>HMIE reports.</li> <li>Evaluation reports.</li> <li>Job specifications.</li> <li>Job adverts.</li> </ul> <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>Views of service staff.</li> <li>Views of service users.</li> <li>Views of applicants for jobs.</li> <li>Views of personnel service.</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>Observation of everyday practice among service staff.</li> <li>Observation of recruitment/promotion practice.</li> <li>Observation of service management practices.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>there is a relevant equal opportunities policy;</li> <li>equal opportunities issues are addressed in relation to recruitment and promotion of all staff; and</li> <li>qualitative and quantitative measures are in place to monitor equality and fairness issues.</li> </ul> <p><b>We will:</b></p> |

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| <p><b>7.1.5 Recognition</b></p> <p>To what extent is there an ethos of positive recognition and celebration of achievement?</p> <p>To what extent do service managers communicate regularly with staff to identify successes and examples of best practice and innovative practice?</p> | <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• Number of positive recognitions and celebrations of achievements recorded.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>• Team meeting minutes.</li> <li>• Standards and quality reports.</li> <li>• Appraisal reports.</li> <li>• Minutes of meetings outwith the service, e.g. education management minutes, headteachers' meetings.</li> <li>• Education service newsletters.</li> <li>• HMIE reports.</li> <li>• Staff ethos surveys.</li> </ul> <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>• Views of service staff.</li> <li>• Feedback from education managers.</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>• Observations at team meetings and at appraisal and supervision sessions.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• there is an ethos of positive recognition and achievement; and</li> <li>• service managers communicate regularly with all staff to identify examples of best practice and innovative practice.</li> </ul> <p><b>We will:</b></p> |
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## How good is our management?

(KEY AREA 7: MANAGEMENT AND SUPPORT OF STAFF)

### QI 7.2 Deployment and teamwork

#### Themes:

- Appropriateness and clarity of remits
- Deployment to achieve planned priorities
- Teamworking
- Communication and involvement in decision-making

#### Key Features

This indicator is concerned with the effectiveness of individual and team contributions. The main asset of any service is its people. In order to achieve its objectives and to implement the service plan, staff need to be deployed effectively to respond to the needs of stakeholders and to develop effective teamwork and communication. Their work should focus on the achievement of the service's planned priorities and improvement objectives whilst also responding to key stakeholders' needs.

| HOW ARE WE DOING?  | HOW DO WE KNOW?  | WHAT ARE WE GOING TO DO NOW?  |
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| <p><b>7.2.1 Appropriateness and clarity of remits</b></p> <p>To what extent do staff have clearly stated job descriptions and remits?</p> <p>How clear are lines of communication and accountability within the service?</p> <p>To what extent are staff appropriately empowered, challenged, and supported?</p> | <p>Some examples of appropriate sources of evidence are given below. However, they are not considered to be comprehensive or prescriptive.</p> <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• Number of service staff with clearly stated job descriptions and remits.</li> <li>• Effective completion of designated tasks and projects.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>• Evaluation reports, e.g. staff surveys.</li> <li>• Job descriptions.</li> <li>• Papers outlining remits of different members of the service.</li> <li>• Records of supervision, annual review and development and CPD.</li> <li>• Minutes of meetings.</li> <li>• Papers illustrating service structure, e.g. relevant policy papers.</li> <li>• Service development plans.</li> </ul> <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>• Views of service staff.</li> <li>• Views of education management.</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>• Observations of team meetings, management team meetings, etc.</li> <li>• Observations of direct service delivery.</li> </ul> | <p>To ensure that:</p> <ul style="list-style-type: none"> <li>• there are clearly stated job descriptions and remits;</li> <li>• lines of communication and accountability within the service are clear; and</li> <li>• staff are appropriately empowered, challenged, and supported.</li> </ul> <p><b>We will:</b></p> |

| HOW ARE WE DOING?   | HOW DO WE KNOW?   | WHAT ARE WE GOING TO DO NOW?  |
|---|---|---|
| <p><b>7.2.2 Deployment to achieve planned priorities</b><br/>                     To what extent is there articulation between staff remits and activities and the authority's improvement objectives?<br/>                     How well do staff understand their contributions to the service plan and the role they play in the wider local authority?</p> | <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• Analysis of deployment of service staff across the delivery of key processes</li> <li>• Evidence of positive contributions towards meeting the authority's improvement objectives.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>• Standards and quality reports.</li> <li>• Evaluation reports.</li> <li>• Service development plans.</li> <li>• Local authority plans and reports.</li> <li>• Information given on intranet, web pages, etc.</li> <li>• Authority-wide procedures and guidelines.</li> <li>• Papers outlining staff remits.</li> <li>• Allocation of workload and responsibilities, e.g. schools, local authority projects and priorities, etc.</li> <li>• Papers describing allocation of time to service delivery, CPD, team meetings, admin, etc.</li> </ul> <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>• Views of education management.</li> <li>• Views of agencies.</li> <li>• Views of service staff.</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>• Observations of staff participation in meetings and in local authority and national working groups.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• there is a clear articulation between staff remits and activities and the authority's improvement objectives; and</li> <li>• staff understand the role they play in the wider local authority.</li> </ul> <p><b>We will:</b></p> |

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| <p><b>7.2.3 Teamworking</b></p> <p>To what extent is there an ethos of teamworking within the service?</p> <p>To what extent do service managers regularly monitor team and individual deployment and performance against achievements of agreed priorities, outcomes and targets?</p>   | <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• Number of service teamworking groups.</li> <li>• Number of training events/projects delivered collaboratively by educational psychologists.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>• Service development plan.</li> <li>• Minutes of working groups.</li> <li>• Evaluation reports.</li> <li>• Papers describing service structure and processes.</li> <li>• HMIE reports.</li> <li>• Appraisal reports.</li> </ul> <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>• Views of service staff.</li> <li>• Views of education management.</li> <li>• Views of partner agencies.</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>• Observations of collaborative working.</li> <li>• Observation of working groups, team meetings.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• there is an ethos of teamworking within the service; and</li> <li>• service managers regularly monitor team and individual deployment and performance against achievement of agreed priorities, outcomes or targets.</li> </ul> <p><b>We will:</b></p>   |
| <p><b>7.2.4 Communication and involvement in decision-making</b></p> <p>To what extent do staff feel consulted on major issues which affect their working practices?</p> <p>To what extent do staff consider they have genuine opportunities to raise concerns with or make constructive suggestions to service managers?</p> <p>To what extent do staff consider service managers to be visible and accessible?</p> | <p><b>Example of performance data</b></p> <ul style="list-style-type: none"> <li>• Statistical information concerning effective involvement by all service members in decision-making.</li> <li>• Number of service staff who use information and communications technology to liaise with stakeholders.</li> </ul>  | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• staff feel consulted on major issues which affect their working practices;</li> <li>• staff feel they have genuine opportunities to raise concerns with, or make constructive suggestions to, service managers; and</li> <li>• staff consider service managers to be visible and accessible.</li> </ul> <p><b>We will:</b></p> |

| HOW ARE WE DOING? | HOW DO WE KNOW?   | WHAT ARE WE GOING TO DO NOW? |
|-------------------|---|------------------------------|
|                   | <p><b>Example of Relevant Documentation</b></p> <ul style="list-style-type: none"> <li>• Minutes of meetings.</li> <li>• Appraisal reports.</li> <li>• Evaluation reports.</li> <li>• HMIE reports.</li> </ul> <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>• Views of service staff.</li> <li>• Views of service managers.</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>• Observations of team meetings, working groups, etc.</li> </ul> |                              |

How good is our management?

(KEY AREA 7: MANAGEMENT AND SUPPORT OF STAFF)

QI 7.3 Development and support

**Themes:**

- Processes for staff review and support
- Training and development
- Joint training with staff from partner agencies

**Key Features**

This indicator relates to the service's management of its review processes and to the provision of training and development opportunities for its staff. It evaluates the service's effectiveness in monitoring and reviewing the performance of its staff against agreed criteria, and facilitating their personal and professional development. All staff must be able to develop their skills to maximum effect in order to achieve continuous improvement in their professional skills. Staff have an entitlement to receive a formal programme and record of professional review and development (PRD) or CPD.

| HOW ARE WE DOING?  | HOW DO WE KNOW?   | WHAT ARE WE GOING TO DO NOW?  |
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| <p><b>7.3.1 Processes for staff review and support</b><br/>                     To what extent has the service developed a formal PRD/CPD framework for all staff and, where appropriate, in accordance with BPS guidance?<br/>                     To what extent are PRD/CPD-related processes and procedures clear, and user-friendly and relevant to the job?<br/>                     How well are related processes and procedures supported by initial training and relevant documentation?</p> | <p><b>Some examples of appropriate sources of evidence are given below. However, they are not considered to be comprehensive or prescriptive.</b></p> <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• Number of educational psychologists who are recording using BPS on-line CPD framework.</li> <li>• Dates of appraisal meetings.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>• Council and education service personnel policies and procedures.</li> <li>• PRD/CPD policy.</li> <li>• Staff handbook.</li> <li>• Standards and quality reports.</li> <li>• Best Value reports.</li> <li>• Self-evaluation framework.</li> <li>• Individual educational psychologists on-line CPD records.</li> <li>• Appraisal records.</li> </ul> <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>• Views of service staff.</li> <li>• Views of BPS, and other relevant professional associations.</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>• Observations of appraisal meetings.</li> <li>• Observations of training events.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• the educational psychology service has developed a formal PRD/CPD framework for all staff and, where appropriate, in accordance with BPS guidance;</li> <li>• the framework and procedures are clear and user-friendly and related to the job; and</li> <li>• this framework is supported by documentation and training for staff.</li> </ul> <p><b>We will:</b></p> |

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| <p><b>7.3.2 Training and development</b></p> <p>What extent is the service committed to developing its entire staff?</p> <p>To what extent is there a link between the service development priorities, the staff review process and staff development opportunities?</p> <p>To what extent is there a link between the CPD programme and authority-driven developments aimed at achieving stakeholder needs, and national or local priorities?</p> | <p><b>Some examples of appropriate sources of evidence are given below. However, they are not considered to be comprehensive or prescriptive.</b></p> <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• Number of PRD/CPD sessions over the year.</li> <li>• Number of sessions linked to identified service staff training needs.</li> <li>• Resource allocation to staff development activities, including budget allocating.</li> <li>• number of PRD/CPD sessions linked to national and local authority priorities.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>• PRD/CPD policy.</li> <li>• PRD/CPD training programme.</li> <li>• Staff handbook.</li> <li>• Standards and quality reports.</li> <li>• Best Value reports.</li> <li>• Self-evaluation framework.</li> <li>• Staff review and development policy.</li> <li>• Individual practitioners on-line BPS PRD/CPD records.</li> <li>• Annual report on service PRD/CPD undertaken.</li> <li>• Service development plans.</li> <li>• Calendar of service organised PRD/CPD days</li> <li>• Education service and council improvement objectives.</li> </ul> <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>• Views of service staff.</li> <li>• Views of education management.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• the service is committed to developing all staff.</li> <li>• training and development programmes arise from stakeholder needs, staff development needs and from authority-driven developments aimed at achieving national or local priorities; and</li> <li>• the service has produced a comprehensive catalogue of staff development opportunities.</li> </ul> <p><b>We will:</b></p> |
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| HOW ARE WE DOING?   | HOW DO WE KNOW?  | WHAT ARE WE GOING TO DO NOW?   |
|---|--|--|
| <p><b>7.3.3 Joint training with staff from partner agencies</b><br/>                     To what extent are there opportunities for joint training with staff from partner agencies?<br/>                     To what extent is evidence available to demonstrate the impact on services for children and young people?</p> | <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>• Observations of PRD/CPD events.</li> <li>• Observations of service staff making effective use of training in their professional practice.</li> </ul> <p><b>Some examples of appropriate sources of evidence are given below. However, they are not considered to be comprehensive or prescriptive.</b></p> <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• Number of joint PRD/CPD sessions over the year.</li> <li>• Number of joint planning meetings.</li> <li>• Dates of joint staff meetings and training events.</li> <li>• Information showing improved outcomes for children and young people in targeted areas.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>• PRD/CPD policy.</li> <li>• PRD/CPD training programme.</li> <li>• Staff handbook.</li> <li>• Standards and quality reports.</li> <li>• Best Value reports.</li> <li>• Minutes of joint planning meetings.</li> <li>• Evaluations of joint training events.</li> <li>• Service development plans.</li> <li>• Evaluation reports.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• there are opportunities for joint training with staff from partner agencies; and</li> <li>• joint training and development for the service and partner agency staff leads to quantifiable improvements in identified, stated and measurable aspects of children's services.</li> </ul> <p><b>We will:</b></p> |

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|  | <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"><li>• Views of service staff.</li><li>• Views of partner agency colleagues.</li><li>• Views of education management.</li><li>• Views of children, young people and families.</li></ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"><li>• Observation of joint training initiatives.</li><li>• Observation of joint planning meetings.</li><li>• Observation of improved service delivery in targeted areas.</li></ul> |  |
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## How good is our management?

### (KEY AREA 8: PARTNERSHIPS AND RESOURCES)

#### QI 8.1 Partnership working

##### Themes:

- Evaluations of quantitative and qualitative data that demonstrate the extent to which the service:
  - engages with, and supports, partner agencies and community organisations
  - engages partner agencies and community organisations in, and contributes to, wider developments
- Extent to which partner agencies and community organisations report that service:
  - engages with, and supports, them in projects and developments
  - engages partner agencies and community organisations in, and contributes to, wider developments

##### Key Features

This indicator refers to the role of the service in promoting and encouraging effective partnership working with stakeholders, partner agencies and the local community. A central role of the service is to secure and sustain cohesive and meaningful partnerships. To encourage and support these processes the service will participate in bringing key partners together at the strategic decision-making level. To fulfil the requirements of Best Value and to conform to accepted good practice, there must be mechanisms in place to link leadership and management decisions to the needs of all stakeholders. This will require a range of approaches to consultation and communication that can be applied across the service's areas of activity. There should also be in place a public performance reporting (PPR) framework to communicate clearly with the full range of stakeholders and partner agencies and community organisations.

The second theme deals with the views of partnership agencies and community organisations as reported in responses to questionnaires, surveys, focus groups and its unsolicited comments. These responses provide evidence of the extent of their satisfaction with the services and may cover aspects such as:

- clarity of purpose and aims;
- service level agreements, roles and remits;
- access to services and facilities;
- working across agencies and disciplines;
- staff roles in partnerships; and
- responsibilities to enquiries and complaints.

| HOW ARE WE DOING?  | HOW DO WE KNOW?   | WHAT ARE WE GOING TO DO NOW?  |
|--|---|---|
| <p><b>8.1.1 Engages with, and supports, partner agencies and community organisations</b></p> <p>How effectively does the service engage with, and support, partners and community organisations so joint working can be established and flourish?</p> <p>How clearly are the purposes and aims of partnerships reported and articulated?</p> <p>Is partnership working built into the strategic planning of the service at the highest level?</p> <p>How clearly are the purposes and aims of partnerships communicated?</p> | <p>Some examples of appropriate sources of evidence are given below. However, they are not considered to be comprehensive or prescriptive.</p> <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• Service handbook.</li> <li>• Service self-evaluation.</li> <li>• Standards and quality reports.</li> <li>• Service leaflets.</li> <li>• Number of service Level Agreements.</li> <li>• Number of active partnership arrangements.</li> <li>• Percentage of satisfied partnership staff.</li> <li>• Collated data and follow-up activities.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>• Self-evaluation reports which describe the views of stakeholders regarding partnership working.</li> <li>• Minutes and notes of meetings involving partners.</li> <li>• Records of development days and of multi-agency working groups.</li> <li>• Service level agreements at operational and strategic levels with partner agencies.</li> <li>• Records with stated aims and objectives.</li> <li>• Agreements which have been renegotiated and reworded.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• a strategic framework is established with partner agencies and community organisations;</li> <li>• a culture which promotes the strategic involvement of all partners and community organisations;</li> <li>• service level agreements are well established with partners and community organisations and have an impact at strategic and operational levels;</li> <li>• the service works very effectively in a range of multi-disciplinary partnerships;</li> <li>• multi-disciplinary working contributes to the achievement of the vision, values and aims of the service; and</li> <li>• staff are very clear about their roles and remits within partnership working agreements.</li> </ul> <p><b>We will:</b></p> |

| HOW ARE WE DOING?   | HOW DO WE KNOW?   | WHAT ARE WE GOING TO DO NOW?  |
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| <p><b>8.1.2 Engages partner agencies and community organisations in, and contributes to, wider developments</b></p> <p>How effectively does our management team work with other agencies and organisations?</p> <p>How well do our staff work with others in partnerships?</p> <p>How effectively does the service engage partner agencies and community organisations in the planning, delivery, monitoring and evaluation of joint projects and multi-disciplinary working?</p> | <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>Views of partners through interviews and questionnaires</li> <li>Views of clients regarding impact and outcomes of partnership working.</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>Observations of staff working in a range of settings with regard to partnership agreements.</li> <li>Observations of working in line with purposes and aims of the partnership agreement.</li> </ul>  |   |
|   | <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>Evidence of effective partnership working with other agencies to achieve agreed aims.</li> <li>Number of targets successfully achieved.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>Service development plans.</li> <li>Minutes of joint working group meetings.</li> <li>Evaluation reports.</li> <li>Training materials.</li> </ul> <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>Opinions of relevant staff on the usefulness of partnership documents.</li> <li>Views of external agencies about the contributions of educational psychologists working in joint projects.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>communication and consultation between the service management team and its partners are regular, structured, supportive and efficient;</li> <li>there is an effective reporting framework to communicate with the full range of stakeholders and partners;</li> <li>staff from the educational psychology service and partner agencies are very effective in a wide range of partnerships; and</li> <li>staff consistently seek opportunities for improvement and development in all partnerships.</li> </ul> <p><b>We will:</b></p> |

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|  | <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"><li>• Observations of staff operating in settings where there are service level agreements or other partnership agreements in operation.</li><li>• Observations of staff applying their agreed roles and remits across a range of settings.</li></ul> |  |
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How good is our management?

(KEY AREA 8: PARTNERSHIPS AND RESOURCES)

**QI 8.2 Financial management**

**Themes:**

- Budget management and enterprise in securing funding
- Range and implementation of financial procedures and controls
- Processes for collecting, analysing and evaluating financial information
- Providing Best Value

**Key Features**

This indicator relates to the capacity of the service to help to deliver planned national and local priorities. This will require the service to have developed a rigorous, thorough and imaginative approach to financial management. Such an approach will require high level managerial planning and control coupled with rigorous operational management, monitoring and review of a wide range of financial systems and procedures. The working relationship between the service and the authority's finance department will be critically important. The indicator also relates to the service's capacity to deliver Best Value through its approach to financial management.

| HOW ARE WE DOING?  | HOW DO WE KNOW?   | WHAT ARE WE GOING TO DO NOW?   |
|--|---|--|
| <p><b>8.2.1 Budget management and enterprise in securing funding</b></p> <p>How effective is our budget management?</p> <p>How enterprising is the service in securing additional funding?</p> | <p>Some examples of appropriate sources of evidence are given below. However, they are not considered to be comprehensive or prescriptive.</p> <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• Evidence relating to Best Value reviews.</li> <li>• Effectiveness of projects bids.</li> <li>• Statistical data regarding project action plans and evaluations.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>• Service self-evaluation documentation.</li> <li>• Council documentation on financial procedures and controls.</li> <li>• Service development plan and consequent budget deployment and review documentation.</li> <li>• Service financial procedures and controls.</li> <li>• Records of additional funding being secured to undertake planned initiatives.</li> </ul> <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>• Views from the Council finance department about service effectiveness regarding budget management.</li> <li>• Stakeholders' opinions about procedures for securing additional funds.</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>• Observations of meetings concerning budget management.</li> <li>• Observation of planning to secure additional funding for projects.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• the service's budgeting process is clearly related to that of the authority and demonstrates clear links to the service planning process;</li> <li>• budgets and financial matters are discussed regularly and rigorously at all management levels; and</li> <li>• service managers have established fully effective working practices with their colleagues in the finance department.</li> </ul> <p><b>We will:</b></p> |



| HOW ARE WE DOING?  | HOW DO WE KNOW?  | WHAT ARE WE GOING TO DO NOW?   |
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| <p><b>8.2.2 Range and implementation of financial procedures and controls</b><br/>How well equipped are budget holders to implement financial procedures and controls?</p>                           | <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>Evidence relating to Best Value reviews.</li> <li>Statistical data on effectiveness of financial procedures and controls.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>Financial and administrative guidelines.</li> <li>Council training materials and processes.</li> <li>Documentation on the effectiveness of training events on improving financial procedures and controls.</li> </ul> <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>Views of the Council finance department about effectiveness of service financial procedures and controls</li> <li>Views of service staff.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>fully effective financial and administrative procedures have been developed to plan and manage budgets, including budgetary variances;</li> <li>there is a systematic and well-organised approach to budgetary administration which provides service managers with easily interpreted, accurate and reliable data to allow well-informed decisions to be taken; and</li> <li>financial procedures are well known to budget holders and all other staff with financial responsibilities.</li> </ul> <p><b>We will:</b></p> |
| <p><b>8.2.3 Processes for collecting, analysing and evaluating financial information</b><br/>How effective are service processes for collecting, analysing and evaluating financial information?</p> | <p><b>Examples for performance data</b></p> <ul style="list-style-type: none"> <li>Data on the effectiveness of processes to manage and evaluate finances.</li> <li>Evidence of efficient and effective financial auditing analysis and evaluation.</li> <li>Evidence in financial reports.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>Documentation pertaining to service auditing procedures and processes.</li> <li>Service self-evaluation documentation.</li> </ul>   | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>the authority is kept well informed of budgetary matters in line with the scheme of delegation;</li> <li>the authority regularly receives high quality financial reports concerning the psychology service finance and actively monitors budgetary performance; and</li> <li>arrangements for financial planning and expenditure are transparent, dynamic in nature and fully utilise a wide range of management and performance information.</li> </ul> <p><b>We will:</b></p>   |

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|   | <ul style="list-style-type: none"> <li>• Service development plans along with accounts of budget allocation.</li> <li>• Records of financial decisions and consequent spending.</li> </ul>  |   |
| <p><b>8.2.4 Providing Best Value</b><br/>How effective are our procedures to ensure Best Value?</p> | <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• Statistical data approved for Best Value reviews.</li> <li>• Evidence in Best Value review reports and associated documentation.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>• Records and written feedback from staff reviews.</li> <li>• Council and wider stakeholder feedback regarding reports.</li> </ul> <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>• Stakeholders' opinions about involvement in Best Value review processes.</li> <li>• Stakeholders' report involvement in Best Value review processes and their reported levels of satisfaction with service delivery.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• the service's financial planning and management regime is characterised by efficiency, effectiveness, elimination of duplication and the provision of high quality services and value for money; and</li> <li>• All aspects of financial planning and management are governed by the principles of Best Value.</li> </ul> <p><b>We will:</b></p> |

How good is our management?

(KEY AREA 8: PARTNERSHIPS AND RESOURCES)

**QI 8.3 Resource management**

**Themes:**

- Accommodation
- Resources and equipment
- Efficiency and effectiveness in use of resources
- Health and safety

**Key Features**

The management of finances is closely linked to the wider management of resources. This indicator sets out to evaluate the effectiveness of the service's approach to the management of its resources in the widest sense. The service will need to demonstrate that it is fully aware of the range of resources at its disposal, from both internal and external sources, and that it has developed a planned, proactive approach to resource management. This provides a firm base from which to promote service development and continuous improvement.

| HOW ARE WE DOING?  | HOW DO WE KNOW?  | WHAT ARE WE GOING TO DO NOW?  |
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| <p><b>8.3.1 Accommodation</b><br/>How well does accommodation in the service meet the needs of the service, staff and users?<br/>Is the accommodation fully accessible, meeting legislative requirements?</p>                              | <p>Some examples of appropriate sources of evidence are given below. However, they are not considered to be comprehensive or prescriptive.</p> <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• Accessibility audit.</li> <li>• Health and safety audit.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>• Health and safety logs, for example maintenance of fire extinguishers, etc.</li> </ul> <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>• Views of a range of service users through interviews and questionnaires on suitability of accommodation.</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>• Observations of whether the accommodation fully serves the range of purposes for which it is used.</li> <li>• Observations of a range of work situations, e.g. one-to-one interviews, confidential meetings, large group meetings, staff development days.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• the service monitors and continuously addresses issues relating to accommodation needs of staff and users.</li> </ul> <p><b>We will:</b></p>   |
| <p><b>8.3.2 Resources and equipment</b><br/>To what extent do we know that the resources and facilities meet the needs of all staff and stakeholders?<br/>How appropriate are our plans to manage and develop resources and equipment?</p> | <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• Resource and equipment audit</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>• Council and service committee reports.</li> <li>• Minutes of staff and CPD meetings.</li> </ul>  | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• the service monitors resources and equipment on an ongoing basis and takes appropriate steps to update reference and professional materials to deliver better outcomes to stakeholders; and</li> </ul> |

| HOW ARE WE DOING?  | HOW DO WE KNOW?   | WHAT ARE WE GOING TO DO NOW?  |
|--|---|---|
| <p><b>8.3.3 Efficiency and effectiveness in use of resources</b><br/>How do we ensure that resources are allocated to meet national and local needs?</p> | <ul style="list-style-type: none"> <li>• Reports on how resources and equipment are managed and developed.</li> </ul> <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>• Views of a range of service staff and stakeholders through interviews and questionnaires on extent to which resources and facilities fully meet their needs.</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>• Observations of staff in a range of different activities to assess whether the resources and facilities available fully meet their needs and the needs of stakeholders, e.g. whether the library has an appropriate range of reference and professional materials.</li> </ul> <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• Evidence on service improvements resulting from the effective and efficient use of resources.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>• Council and service reports.</li> <li>• Service development plan.</li> <li>• Guidance on the use of resources.</li> </ul> <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>• Views of a range of stakeholders with regard to efficiency and effectiveness of the use of the service's resources.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• the service's approach to resource management and resource allocation meets national and local improvement objectives and priorities; and</li> <li>• the service's performance is routinely reported to the authority.</li> </ul> <p><b>We will:</b></p> |

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| <p><b>8.3.4 Health and safety</b><br/>Are service managers applying health and safety and risk management procedures effectively?</p> | <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>Data contained in the service's health and safety audit.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>Health and safety policy.</li> <li>Health and safety manual.</li> <li>CPD logs on training to meet service health and safety requirements.</li> </ul> <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>Views of service staff and other users regarding health and safety issues.</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>Service staff uphold service policy in all circumstances.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>the service's approach to health and safety is consistent with service policy, council policy and addresses the needs of staff and users.</li> </ul> <p><b>We will:</b></p> |
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## How good is our management?

(KEY AREA 8: PARTNERSHIPS AND RESOURCES)

### QI 8.4 Information systems

#### Themes:

- Data collection, storage and retrieval
- Linkages between, and sharing of, information
- Processes for analysing, evaluating and using information

#### Key Features

A management information system (MIS) is a system used to enter, store, manipulate and retrieve information. A well-run, computerised management and administration system supports the key business processes of a modern service and provides the means of monitoring provision and improving effectiveness. An MIS should be seen in the context of helping a service to deliver its core functions and achieve its improvement objectives. Analyses of the data can give managers, staff and stakeholders a more informed view of current practice in the service. Because data sharing is a central aspect of the MIS, security is clearly important. Different levels of security are appropriate for different user groups.

| HOW ARE WE DOING?   | HOW DO WE KNOW?   | WHAT ARE WE GOING TO DO NOW?   |
|---|---|--|
| <p><b>8.4.1 Data collection, storage and retrieval</b></p> <p>Is there a robust MIS for the coordinated collection, analysis and evaluation of data?</p> <p>Are all record keeping procedures well organised?</p> | <p>Some examples of appropriate sources of evidence are given below. However, they are not considered to be comprehensive or prescriptive.</p> <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• MIS contributions to the achievement of improvement objectives.</li> <li>• Compliance of data written information about individual children, young people and families in relation to Data Protection and Freedom of Information Acts, and the British Psychological Society's Code of Ethics and Conduct.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>• Practice guidelines on how the MIS is used by the service and what data sets are kept.</li> <li>• Induction guidelines and training materials for new staff on the service's MIS.</li> <li>• Individual professional development plans on the use of the MIS.</li> <li>• Stakeholder evaluations, which are automatically sent out when a new referral is made, a case discharged or a report provided.</li> <li>• Practice guidelines describing the service's procedures in relation to the maintenance of records.</li> <li>• Procedures for access to files.</li> <li>• Authority guidance on archiving discharged files.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• the service has a robust management information system which is used to enter, store, manipulate and retrieve information; and</li> <li>• the service continually monitors its procedures and security in relation to record keeping.</li> </ul> <p><b>We will:</b></p> |



| HOW ARE WE DOING? | HOW DO WE KNOW?  | WHAT ARE WE GOING TO DO NOW? |
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|                   | <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>• Views of a range of stakeholders on the value of the information provided to them from the MIS. For example, schools may be provided with data relating to the activities undertaken by service staff during the academic year and could comment on the usefulness of such information.</li> <li>• Information on stakeholders' views on the service's MIS and how well it is used.</li> <li>• Views from stakeholders who have had experience of accessing information from service files, e.g. education authority managers, Reporter to the Children's Panel, social workers, parents, and young people.</li> <li>• Views from schools about information held in school work files and the security of such data</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>• Observations on staff's ability to input, store, manipulate and retrieve information from the various electronic systems used to hold data.</li> <li>• Observations of management staff using the information stored in the service's MIS to facilitate business meetings, planning, resource allocation, and appraisal of individual staff members.</li> <li>• Examination of the organisation, clarity and user-friendliness of case files.</li> <li>• A check on whether all records of individual children, young people and families are kept in a secure place.</li> <li>• A check on whether the disposal and discharging of files follow agreed procedures.</li> </ul> |                              |

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| <p><b>8.4.2 Linkages between, and sharing of, information</b><br/>How effective is the information and communications technology strategy?</p> | <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>Evidence of MIS being used to identify trends and provide benchmark and comparative information in planning for improvement.</li> <li>Evidence of information from the MIS being used, for instance, in school work files, reports, meetings, working groups. For example, each school has a print out in their school file regarding the number of school visits and the activities undertaken during the year by its psychologist.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>Procedural guidelines outline the data sources and how these are used.</li> <li>Policy on authority-shared information database sources.</li> <li>Staff training materials available on-line or on hard copy.</li> </ul> <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>Views of a range of stakeholders about the value of the information provided by the MIS. For example, schools may be provided with data relating to the activities undertaken by service staff during the academic year and could comment on the usefulness of such information. Much of the information sought from stakeholders should be incorporated into other stakeholder evaluation processes (e.g. focus groups, questionnaires, individual interviews, school practice agreement evaluations).</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>the system enables high performance to be recognised and under-performance to be quickly identified and addressed.</li> </ul> <p><b>We will:</b></p> |
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| HOW ARE WE DOING?  | HOW DO WE KNOW?  | WHAT ARE WE GOING TO DO NOW?   |
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| <p><b>8.4.3 Processes for analysing, evaluating and using information</b><br/>How well does the service provide effective central coordination and interpretation of data provided by its MIS?</p> | <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>• Observation of staff's use of the data stored by the service's MIS to communicate within and outwith the service.</li> <li>• Observations of managers' use of the MIS in their day-to-day business.</li> <li>• Databases are observed to be updated and managed by a range of service staff, for example, by office administrators, research assistants, main grade, senior and principal psychologists.</li> <li>• All staff are observed as having direct access to appropriate data sources.</li> <li>• Staff are aware of shared information databases used within the authority and are observed using them (e.g. for child protection cases).</li> </ul> |  |
| <p><b>8.4.3 Processes for analysing, evaluating and using information</b><br/>How well does the service provide effective central coordination and interpretation of data provided by its MIS?</p> | <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• Use made of the data held in the MIS, in standards and quality report.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>• Improvement plans use information from the MIS to inform future areas for improvement.</li> <li>• Audit of service delivery through the use of the MIS. For example, data base monitoring and recording of school visits on a central database which result in a change of time allocation to schools from disadvantaged areas.</li> <li>• Work plans making use data stored in the MIS to improve service delivery at individual psychologist level.</li> </ul>                     | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• the service has an appropriate information communications technology (ICT) strategy which complies with relevant legislation, and allows for shared information across service areas.</li> </ul> <p><b>We will:</b></p> |

- Stakeholder evaluations managed through the use of the MIS. For example, questionnaires being automatically sent out when a new referral is made, a case discharged or a report provided.
- Research reports which have made use of data from MIS.

#### **Examples of stakeholders' views**

- Results from stakeholder evaluations on whether there is a positive impact of data received from the service. For example, the balance of individual to whole-school interventions changes as a result of the data provided from the school data base.
- The views service staff on their use of data held in the MIS. For example, their opinion on the use of information held in a shared drive, or the data held in a central data base recording school visits and activities undertaken.

#### **Examples of direct observation**

- Observations of staff using the information systems to access information.
- Observations of staff during their work, for example, in school meetings, working groups, to see if they are using information from the MIS.
- Observations of management staff to show how they use the MIS, for example, to facilitate planning, resource allocation and appraisal of individual staff members. Printouts of data may be observed as being used to inform management meetings and other activities within the Council.

## How good is our leadership?

(KEY AREA 9: LEADERSHIP)

QI 9.1 Vision, values and aims

### Themes:

- Appropriateness and coherence with corporate and community vision, values and aims
- Sharing and sustaining the vision
- Promotion of positive attitudes to social and cultural diversity

### Key Features

This indicator relates to the collegiate leadership of the service and to the way in which it exercises its functions through unity of purpose. This will be expressed through the service's effectiveness in establishing direction through its vision. To demonstrate good practice, the service will have to ensure that this vision actively influences practice at the point of delivery. This indicator focuses on the extent to which vision, values and aims guide planning for, and impact on, maintaining and improving the quality of services for children, young people, families and other stakeholders.



| HOW ARE WE DOING?   | HOW DO WE KNOW?  | WHAT ARE WE GOING TO DO NOW?   |
|---|--|--|
| <p><b>9.1.1 Appropriateness and coherence with corporate and community vision, values and aims</b></p> <p>To what extent do the aims of the service relate to aspirations and expectations?</p> <p>How clearly the are service's vision values and aims articulated and implemented in relation to national and local authority priorities?</p> <p>To what extent are the service's vision, values and aims clearly articulated?</p> <p>To what extent are the service's vision, values and aims appropriate?</p> <p>How clear are the links between strategic, improvement and operational planning?</p> <p>To what extent are these coherent with corporate and community statements of vision, values and aims?</p> <p>What evidence is there that the service's vision directs the work of the service?</p> <p>To what extent do the vision, values and aims of the service relate to national priorities and expectations for children, young people and their families?</p> | <p>Some examples of appropriate sources of evidence are given below. However, they are not considered to be comprehensive or prescriptive.</p> <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• Data used in preparing Best Value report.</li> <li>• Benchmarking data for service development plan.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>• Service handbook.</li> <li>• Statement of vision, values and aims.</li> <li>• Service development plan.</li> <li>• Best Value improvement objectives.</li> <li>• Minutes of team and working groups.</li> </ul> <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>• Views of staff and other stakeholders contained in self-evaluation reports.</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>• Public display of the statement of vision, values and aims in service offices.</li> <li>• Managers are observed to operate in ways congruent to the service's vision, values and aims and to promote these among all service staff.</li> <li>• Observations of service staff across a broad range of settings.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• aims of the service relate to aspirations and expectations;</li> <li>• service vision, values and aims are clearly articulated;</li> <li>• there are clear links between strategic, improvement and operational planning;</li> <li>• there is coherence with corporate and community statements of vision, values and aims;</li> <li>• the service's vision directs its work; and</li> <li>• the vision, values and aims of the service relate to national priorities and expectations for children, young people and their families.</li> </ul> <p><b>We will:</b></p> |

| HOW ARE WE DOING?   | HOW DO WE KNOW?  | WHAT ARE WE GOING TO DO NOW?   |
|---|--|--|
| <p><b>9.1.2 Sharing and sustaining the vision</b><br/>           What evidence is there of a shared vision for the service?<br/>           To what extent do the vision, values and aims of the service lead to shared expectations and aspirations for all stakeholders?<br/>           How is the statement of vision, values and aims shared with service staff, service users and stakeholders?<br/>           How has the service involved and taken into account the views of stakeholders in developing and reviewing its vision, values and aims?</p> | <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>Data used in preparing Best Value report.</li> <li>Benchmarking data for service development plan.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>The service's statement of its vision, values and aims.</li> <li>Service handbook.</li> <li>Information leaflets.</li> <li>Service development plan.</li> <li>Self-evaluation reports.</li> </ul> <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>Views of staff and other stakeholders and the extent to which the vision of the service is shared.</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>Public display of the statement of vision values and aims in service offices.</li> <li>Observations of how well service staff share and sustain the service's vision in everyday practice.</li> <li>Senior managers are observed promoting the vision of the service among stakeholders.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>there is evidence of a shared vision for the service;</li> <li>vision, values and aims of the service lead to shared expectations and aspirations for all stakeholders;</li> <li>the statement of vision, values and aims is shared with service staff, service users and stakeholders; and</li> <li>the service has involved and taken account of the views of stakeholders in developing and reviewing its vision, values and aims.</li> </ul> <p><b>We will:</b></p> |

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| <p><b>9.1.3 Promotion of positive attitudes to social and cultural diversity</b></p> <p>To what extent do the vision, values and aims set out clear expectations for equality and social justice?</p> <p>In what ways do senior managers demonstrate and take a clear lead in equality issues?</p> <p>To what extent are systems in place to promote positive attitudes to social and cultural diversity?</p> | <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• Data relating to the promotion of positive attitudes to social and cultural diversity for self-evaluation reports.</li> <li>• Data on equality and social justice issues in benchmarking exercises.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>• Services handbook.</li> <li>• Service development plan.</li> <li>• Standards and quality reports.</li> <li>• Information leaflets.</li> </ul> <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>• Views of all staff and other stakeholders on how well the service promotes positive attitudes to social and cultural diversity.</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>• Observations of service staff across a broad range of settings.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• the vision, values and aims of the service set out clear expectations for equality and social justice;</li> <li>• senior managers demonstrate and take a clear lead in equality issues; and</li> <li>• there are systems in place to promote positive attitudes to social and cultural diversity.</li> </ul> <p><b>We will:</b></p> |
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## How good is our leadership?

(KEY AREA 9: LEADERSHIP)

### QI 9.2 Leadership and direction

#### Themes:

- Strategic planning and communication
- Strategic deployment of resources
- Evaluation of risk

#### Key Features

This indicator is fundamentally about strategic planning for future sustainable development. It focuses on the mapping out of future developments which are challenging, realisable and sustainable. This indicator also relates to the success of senior managers in linking the authority's vision to strategic deployment of resources to deliver services, secure Best Value and manage sustainable development. Significant current and planned service activities will take place within a culture which supports and enables effective risk management.

| HOW ARE WE DOING?  | HOW DO WE KNOW?   | WHAT ARE WE GOING TO DO NOW?  |
|--|---|---|
| <p><b>9.2.1 Strategic planning and communication</b></p> <p>In what ways do managers communicate and demonstrate a clear view of service aims?</p> <p>In what ways do senior managers demonstrate a commitment to continuous improvement?</p> <p>To what extent are effective strategic plans developed?</p> <p>How accessible and succinct are planning documents?</p> <p>How effective are channels of communication?</p> <p>What evidence is there that planning leads to sustainable change?</p> <p>To what extent is there strong leadership and direction on corporate policies?</p> <p>In what ways do managers lead individuals and teams successfully through the strategic planning cycle?</p> <p>To what extent is succession planning evident?</p> <p>How do managers lead in achieving key objectives?</p> <p>Does strategic planning reflect appropriate national and local priorities?</p> <p>Is strategic planning developed and reviewed with the involvement of service staff and stakeholders?</p> <p>Is strategic planning communicated effectively to staff and stakeholders?</p> | <p><b>Some examples of appropriate sources of evidence are given below. However, they are not considered to be comprehensive or prescriptive.</b></p> <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• Data collated for Best Value reports.</li> <li>• Benchmarking data for service development plan.</li> <li>• Audit contained in source improvement plan.</li> <li>• Data collated in the preparation of the service development plan.</li> <li>• Quantitative data in Best Value reports.</li> <li>• Evaluations within HIME reports.</li> <li>• Data on communication for self-evaluation reports.</li> <li>• Number of stakeholders and agencies which have commented on the service development plan.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>• Planning documents.</li> <li>• Self-evaluation reports.</li> <li>• Standards and quality reports.</li> <li>• Planning cycle for reviewing policies, procedures and guidelines.</li> <li>• Minutes of team and working groups.</li> <li>• Documentation produced by working groups.</li> <li>• Minutes of stakeholder reference groups.</li> <li>• Minutes of team and working groups.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• managers communicate and demonstrate a clear view of service aims;</li> <li>• managers demonstrate a commitment to continuous improvement;</li> <li>• effective, accessible and succinct strategic plans are developed;</li> <li>• channels of communication are effective;</li> <li>• planning leads to sustainable change;</li> <li>• there is strong leadership and direction on corporate policies;</li> <li>• managers lead individuals and teams successfully through the strategic planning cycle and key objectives;</li> <li>• succession planning is evident;</li> <li>• regular review of the strategic plan considers developments in other relevant sectors;</li> <li>• periodic revision of the strategic plan is undertaken;</li> <li>• documents show that the service actively reflects on its strategic plan;</li> <li>• the service has a development plan which reflects national and local priorities;</li> <li>• the process of review and revision includes a presentation at a staff meeting;</li> <li>• the published plan is sent to appropriate stakeholders;</li> <li>• documents show staff participation and ownership;</li> </ul> |

| HOW ARE WE DOING?  | HOW DO WE KNOW?   | WHAT ARE WE GOING TO DO NOW?   |
|--|---|--|
| <p><b>9.2.2 Strategic deployment of resources</b></p> <p>How do managers lead in achieving Best Value?</p> <p>To what extent is a Best Value approach to continuous improvement taken?</p> <p>To what extent is wider authority resource management taken into account in service planning?</p> <p>Is there a strategic resource deployment plan linked with strategic planning?</p> | <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>Views of service staff on strategic planning and communication by management.</li> <li>Views of stakeholders as collated in evaluation reports.</li> <li>Information obtained through focus groups.</li> <li>Analysis of stakeholders' views.</li> <li>Information obtained from independent audits of stakeholders' involvement.</li> <li>Views of stakeholders on the service's standards and quality report.</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>Observation at staff meetings.</li> <li>Observation of the work of strategic planning groups.</li> <li>Observation of senior managers outlining strategic plans to stakeholders.</li> </ul> | <ul style="list-style-type: none"> <li>regular review of strategic planning is a participative process involving service staff and seeking the views of stakeholders;</li> <li>evaluation reports demonstrate stakeholder satisfaction with the service's strategic planning;</li> <li>the plans are developed and reviewed with the involvement of service staff and stakeholders;</li> <li>evaluation reports demonstrate stakeholder satisfaction with strategic planning; and</li> <li>the service plan is communicated to staff and stakeholders.</li> </ul> <p><b>We will:</b></p> |
|  | <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>Data collated for service development plan.</li> <li>Data collated for Best Value reports.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>Service standards and quality reports, service handbook, self-evaluation reports, Best Value reports.</li> <li>Minutes of team and working groups and reports from working groups.</li> </ul>   | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>managers take a lead in achieving Best Value;</li> <li>a Best Value approach is taken to continuous improvement with regard to the strategic deployment of resources;</li> <li>wider authority resource management is taken into account in service planning;</li> <li>the regular review of strategic planning is a participative process involving service staff and seeking the views of stakeholders;</li> </ul>  |

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| <p>Is the strategic resource deployment plan developed and reviewed with the involvement of service staff and stakeholders?</p> <p>Is this plan communicated to staff and stakeholders?</p> <p>Is this plan communicated to staff and stakeholders?</p>   | <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>Views of service staff on strategic planning and communication by management.</li> <li>Views obtained from external agencies.</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>Observation at staff meetings; planning meetings and meetings with education authority managers.</li> </ul>  | <ul style="list-style-type: none"> <li>evaluation reports demonstrate stakeholder satisfaction with the way in which the service deploys its resources;</li> <li>the strategic resource deployment plan is developed and reviewed with the involvement of service staff and stakeholders;</li> <li>the process of review and revision includes a presentation at a staff meeting;</li> <li>the service plan is sent to appropriate stakeholders;</li> <li>documents show a staff participation and ownership; and</li> <li>evaluation reports show stakeholder satisfaction with the strategic planning process.</li> </ul> <p><b>We will:</b></p> |
| <p><b>9.2.3 Evaluation of risk</b></p> <ul style="list-style-type: none"> <li>What evidence is there that the service is risk-aware?</li> <li>To what extent are costs-benefits analyses carried out when considering new service developments?</li> <li>In what ways are relevant partners and stakeholders consulted in relation to risk management?</li> </ul> | <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>Statistical evidence for Best Value report.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>Service documentation, e.g. service handbook, statement of vision, values and aims, service development plan, local authority service plan, Best Value report, Best Value improvement objectives.</li> <li>Minutes of team and working groups and reports from working groups.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>the service is risk-aware;</li> <li>risks are balanced against benefits in any new service development; and</li> <li>relevant partners and stakeholders are consulted in relation to risk management.</li> </ul> <p><b>We will:</b></p>   |

| HOW ARE WE DOING? | HOW DO WE KNOW?   | WHAT ARE WE GOING TO DO NOW? |
|-------------------|---|------------------------------|
|                   | <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"><li>• View of service staff, partners and other stakeholders about the service's approach to evaluation or risk.</li></ul> <p><b>Direct Observation</b></p> <ul style="list-style-type: none"><li>• Observation of cost/benefits discussions and analysis.</li><li>• Observation of development planning discussions.</li></ul> |                              |

How good is our leadership?

(KEY AREA 9: LEADERSHIP)

QI 9.3 Developing people and partnerships

**Themes:**

- Development of leadership capacity
- Building and sustaining relationships
- Teamwork and partnerships

**Key Features**

This indicator relates to the effectiveness of the service in building capacity for leadership at all levels and securing positive working relationships and successful outcomes with stakeholders and partner agencies. The indicator relates to the ethos and culture of the service and beyond, through its operations corporately within the authority and in joint working with its partner agencies. The effectiveness of the service management team, their deployment, responsibilities and co-working in relation to organisational requirements and key strengths are relevant. Delegation to and empowerment of staff and partners are important features, alongside the development and support of effective teamwork.

| HOW ARE WE DOING?  | HOW DO WE KNOW?   | WHAT ARE WE GOING TO DO NOW?  |
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| <p><b>9.3.1 Development of leadership capacity</b></p> <p>To what extent do the service managers model a wide range of effective leadership skills and motivate others to give of their best?</p> <p>To what extent is there a balanced range of skills and personal qualities evident in the service leadership?</p> <p>How effectively does the service identify and promote talent?</p> | <p>Some examples of appropriate sources of evidence are given below. However, they are not considered to be comprehensive or prescriptive.</p> <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• Data concerning leadership capacity in Best Value and HMIE reports.</li> <li>• Number of times that talents and achievements are recognised.</li> <li>• Data relating to the identification and promotion of talents in evaluation reports.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>• Minutes of team and working groups, reports from working groups, review and development proformas.</li> <li>• Service improvement plans and standards and quality reports.</li> <li>• CPD records.</li> <li>• Evaluation reports from working groups.</li> <li>• Service development plan.</li> </ul> <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>• Views of stakeholders as shown in evaluation reports.</li> <li>• Views on leadership capacity from senior managers in the authority.</li> <li>• Results from staff surveys.</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>• Observations of how managers identify and promote talent across a broad range of settings.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• senior managers are effective team builders and motivators who are aware of their leadership qualities and of those aspects requiring development;</li> <li>• senior managers have a programme of CPD which addresses both their applied psychology and managerial skills; and</li> <li>• there are structures in place to draw upon collective knowledge, experience, skills and personal interests, to identify and direct talent, and to promote skills including leadership.</li> </ul> <p><b>We will:</b></p> |



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| <p><b>9.3.2 Building and sustaining relationships</b><br/>         How effectively has the service developed a supportive work environment in which staff share a sense of responsibility to improve the quality of services?<br/>         How effectively does the service develop working relationships that are built on trust and reflect a genuine concern for staff and relevant partners?</p> | <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>Data on building and sustainability effective relationships in Best Value and HMIE reports.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>Standards and quality reports.</li> <li>Evaluation reports on teamwork and on joint research projects.</li> <li>Minutes of team and working groups and reports from working groups.</li> </ul> <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>Views expressed in stakeholders' evaluation reports.</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>Observations of how managers build and sustain relationships across a broad range of settings.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>there are structures in place for staff to discuss and shape council, education and service priorities and promote a sense of common ownership;</li> <li>service staff can openly discuss challenges and difficulties that arise and promote agreed solutions; and</li> <li>staff have good opportunities both as individuals and as a collective team, to form effective working relationships with each other and with partner agencies.</li> </ul> <p><b>We will:</b></p> |
|--|--|---|



| HOW ARE WE DOING?  | HOW DO WE KNOW?  | WHAT ARE WE GOING TO DO NOW?  |
|--|--|---|
| <p><b>9.3.3 Teamwork and partnerships</b></p> <p>To what extent are systems in place to help people tackle challenging problems, share information and deal with difficulties?</p> <p>To what extent does the service proactively establish strong links with establishments, stakeholders, partner agencies and other council services and lead joint improvement activities?</p> | <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>Evaluate data concerning the effectiveness and successes of teams.</li> <li>Audit data for service development plan.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>Minutes of team and working groups and quality assurance reports on teamwork.</li> <li>Joint reports on the outcomes of partnerships.</li> </ul> <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>Views of service staff on teamwork.</li> <li>Views on effectiveness of partnerships from other agencies.</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>Observations of how service managers promote partnerships with other agencies across a broad range of settings.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>there are structures in place for staff to discuss and shape council, education and service priorities and promote a sense of common ownership;</li> <li>staff have good opportunities to examine challenges and difficulties and promote agreed solutions; and</li> <li>senior managers promote within their teams, other council services and partner agencies the need to build opportunities and structures for effective joint working.</li> </ul> <p><b>We will:</b></p> |

How good is our leadership?

(KEY AREA 9: LEADERSHIP)

QI 9.4 Leadership of change and improvement

**Themes:**

- Support and challenge
- Creativity, innovation and step change
- Continuous improvement

**Key Features**

This indicator is concerned with the effectiveness of the leadership of the service to maintain high levels of quality, deliver continuous improvement, and work towards achieving excellence in the quality of applied psychological services for children, young people, families and other stakeholders. A critically important component of the leadership function is the need for service managers and stakeholders to challenge staff continuously to improve the quality of service, by setting demanding but realistic performance targets and by providing high-level support to assist them to achieve these. The indicator also relates to the ability and success of the service management team systematically to encourage and support innovative and effective practices which bring about positive step changes in learners' experiences.

| HOW ARE WE DOING?  | HOW DO WE KNOW?  | WHAT ARE WE GOING TO DO NOW?  |
|--|--|---|
| <p><b>9.4.1 Support and challenge</b><br/>To what extent have Service managers' embedded challenge and support of staff as a means of securing continuous improvement?</p>   | <p>Some examples of appropriate sources of evidence are given below. However, they are not considered to be comprehensive or prescriptive.</p> <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• Data of meeting improvement targets.</li> <li>• Statistical information for Best Value reports.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>• Minutes of team and working groups.</li> <li>• Evaluation reports outlining outcomes and impact on the work of the service.</li> </ul> <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>• Stakeholders' evaluations of service's outcomes and impact.</li> <li>• Collated information from staff surveys.</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>• Observations of managers promoting challenge and support across a broad range of settings.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• senior managers take a leading role in ensuring that structures exist to challenge and support colleagues in the quest for improvement; and</li> <li>• senior managers and staff promote best practice from both within the service and from other services.</li> </ul> <p><b>We will:</b></p> |
| <p><b>9.4.2 Creativity, innovation and step change</b><br/>To what extent have service managers encouraged and supported innovative and effective practices which result in qualitative step change in staff experiences and service delivery?</p> | <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• Qualitative data on meeting targets.</li> <li>• Number of innovative practices successfully introduced by service.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>• Evaluation reports on innovative practices.</li> <li>• Standards and quality reports.</li> <li>• Research reports on projects in schools and across the authority.</li> </ul>  | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• senior managers take a leading role in ensuring that structures exist to promote creativity, innovation and step change; and</li> <li>• senior managers and staff promote innovative practices from both within the service and from other services.</li> </ul> <p><b>We will:</b></p>         |

|  |   |   |
|--|---|---|
|  | <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>• Views of stakeholders in evaluation reports.</li> <li>• Evaluations of senior managers in the authority about the outcomes and impact of new ways of working.</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>• Observations of staff planning and implementing innovative practices.</li> </ul>  |   |
| <p><b>9.4.3 Continuous improvement</b></p> <p>How have service managers and staff succeeded in building a strong capacity for improvement within the organisation?</p> | <p><b>Examples of performance data</b></p> <ul style="list-style-type: none"> <li>• Qualitative and quantitative data on the success of innovative practices.</li> <li>• Statistical information regarding the attainment of improvement targets.</li> </ul> <p><b>Examples of relevant documentation</b></p> <ul style="list-style-type: none"> <li>• Research reports on the impact of innovative practices.</li> <li>• Standards and quality reports.</li> <li>• Publications by service staff in journals and on the internet.</li> </ul> <p><b>Examples of stakeholders' views</b></p> <ul style="list-style-type: none"> <li>• Views of stakeholders in evaluation reports about innovation and step change.</li> </ul> <p><b>Examples of direct observation</b></p> <ul style="list-style-type: none"> <li>• Observation of managers promoting continuous improvement across a broad range of settings.</li> </ul> | <p><b>To ensure that:</b></p> <ul style="list-style-type: none"> <li>• senior managers take a leading role in ensuring that structures exist to plan and implement innovation and step change; and</li> <li>• senior managers and staff promote best practices with regard to creativity, innovation and step change.</li> </ul> <p><b>We will:</b></p> |

Part B

# Journey to Excellence for the educational psychology services

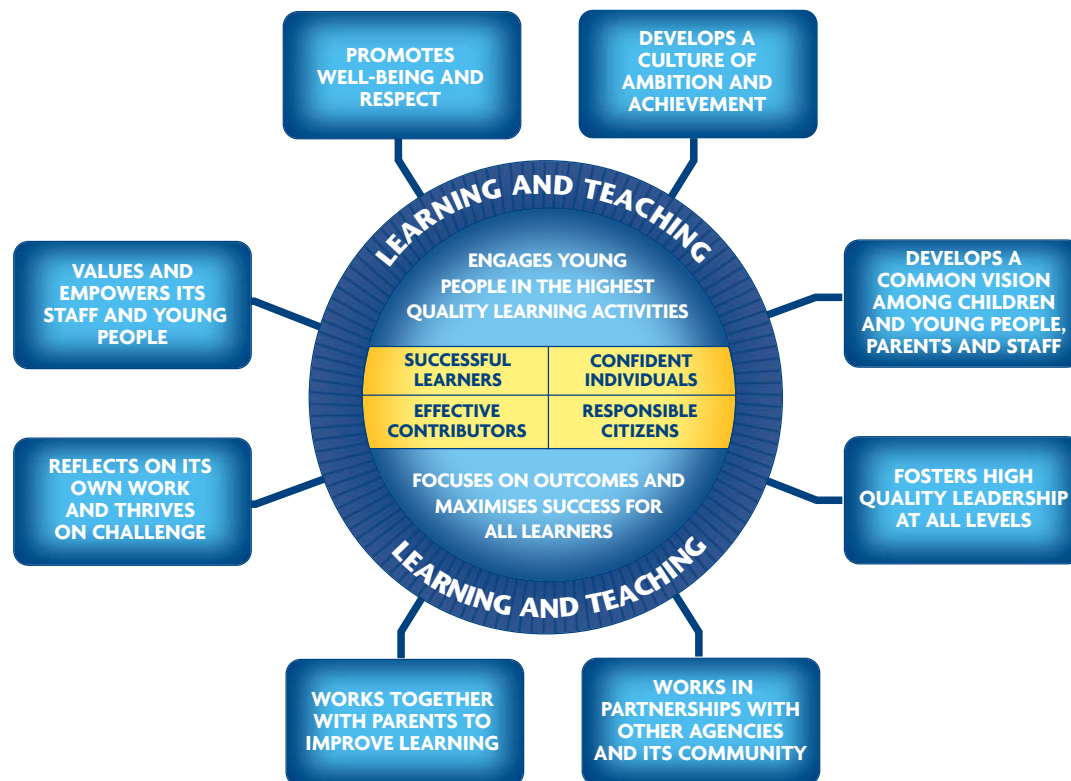


# Part B – Journey to Excellence for the educational psychology services

## Introduction

The self-evaluation framework is about improving educational psychology services to deliver better outcomes for all service users. Schools have received a copy of *How good is our school? The Journey to Excellence*, which outlines ten dimensions of excellence. These do not cover everything which goes on in a school but rather focus on those aspects which have a **direct** impact on learning and outcomes for all young people. The ten dimensions and their related features provide an indication of some of the things which make a school excellent. The ten dimensions and the related features are also relevant to educational psychology services and their journey to excellence. Educational psychology services can support services and schools on their journeys to excellence and also examine where the service is on its own journey to excellence. For example, schools may ask the educational psychology service for help in working on the partnership dimension.

## The ten dimensions of excellence



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B

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