

## **APPENDIX 1**

### **1 BEST START IN LIFE: PERFORMANCE MONITORING FRAMEWORK**

Having an effective process for monitoring implementation of the Joint Health and Wellbeing Strategy (JHWS) 2023-2033 is key to providing the Health and Wellbeing Board (HWB) with assurance that the strategy is on track. This paper sets out a proposed process for monitoring implementation of the strategy. It should be noted that the same framework and processes will be used across both of the core priorities: best start in life and good mental health.

### **2 RECOMMENDATION**

2.1 The Health and Wellbeing Board is asked to consider and agree to take forward the proposed approach for monitoring implementation of the JHWBS. It is suggested that the approach is initially trialled for a period of 12 months and then reviewed.

### **3 THE REPORT**

3.1 The Joint Health and Wellbeing Strategy 2023-2033 (JHWS) is a ten-year strategy which sets out a vision to put in place the best conditions for people of all ages to live healthy and fulfilling lives. The JHWS was approved by the Health and Wellbeing Board (HWB) on 27th April. The initial JHWS Implementation Plans were shared with the HWB and signed off at the meeting on 04<sup>th</sup> December 2023.

3.2 The JHWS sets out two core priorities to improve the health and wellbeing of all residents in Herefordshire.

- (1) Best Start in Life
- (2) Good mental wellbeing across the lifetime

3.3 There are six supporting priorities for the strategy:

- (1) Support people to live and age well.
- (2) Improve access to local services.
- (3) Good work for everyone.
- (4) Support those with complex vulnerabilities.
- (5) Reduce our carbon footprint.
- (6) Improve housing and reduce homelessness.

3.4 The JHWS is led by the HWB and is closely aligned with other strategies and plans at System (Herefordshire and Worcestershire integrated care system) and Place (Herefordshire) which help to deliver on and support the strategy.

## **Monitoring the Implementation Plan**

- 3.5 The HWB has a shared responsibility for oversight and effective implementation of the JHWS. The process of monitoring the implementation plans of the strategy needs to be light touch but with the necessary rigour required in order for the HWB to have assurance on delivery and impact.
- 3.6 It is proposed that monitoring of the implementation progress can be undertaken through four complementary processes. These are summarised below and followed by a more detailed description of what each element comprises:
- (1) Reports from partners on relevant projects across the year.
  - (2) Exception reporting on delivery of all the actions in the implementations plans- twice a year for each core priority.
  - (3) Measuring impact through the outcome dashboard.
  - (4) Development sessions with the HWB that enable longer scrutiny and discussion of progress or delays within the implementation plan.

### **Reports from partners to the HWB**

Presentation of reports from partners provides an important opportunity for assessment of progress undertaken to support delivery of specific actions outlined in the two implementation plans of the JHWS.

### **Exception reporting on actions in the Implementation Plan**

- 3.7 To provide high level, assurance to the HWB and reduce unnecessary duplicate reporting, a process for exception reporting on the implementation plan will provide the HWB with an 'at a glance' opportunity to view implementation progress. Exception reporting is a useful tool in guiding focus to areas requiring immediate attention where actual performance has deviated significantly from expectations set out in plans and strategies. Reporting by exception is a practical method by which the HWB can have oversight on delivery of the JHWS Implementation Plans.

### **Reporting Leads and Sponsors**

- 3.8 Each of the two core priorities within the JHWS have a number of ambitions and associated actions outlined in the two implementation plans. It is proposed that reporting leads from key partnerships and organisations responsible for delivery of the actions provide exception reports to the HWB. The reporting leads have been identified as the person best placed to progress the specific action and be more directly involved in implementation of the action or work closely with colleagues working in the same partner organisation or team, who are directly responsible for the action and therefore best placed to gather the information needed.
- 3.9 In addition, it is suggested that each core priority will have a sponsor who would be accountable to the HWB for ensuring that mitigating actions are

being taken where progress is not on track through liaison with the reporting lead. Sponsors will be members of the HWB to ensure a chain of accountability and ownership of the implementation plan. All actions detailed in the implementation plan are within existing strategies and plans so the governance and management of performance where necessary will be picked up elsewhere, but the HWB needs to have oversight and assurance. Each core priority of the JHWS will have one sponsor. Each action in the implementation plans will have a named reporting lead.

- 3.10 Reporting leads will be requested to complete the exception reporting form prior to the HWB meeting twice a year for each core priority. A simple template for exception reporting has been designed (see appendix one). The form includes a RAG rating indicating if the actions outlined are broadly on track or not, and if the former no further detail is required and if the latter some detail on the nature of the issue and mitigating actions being taken will be logged. Where actions have been completed ahead of schedule and/or the impact has been exceptionally positive this can be noted also.
- 3.11 The JHWS implementation plans will be a standing agenda item at HWB meetings. Exception reporting will facilitate identification of areas of potential concern, and where there has been exceptionally positive progress. To capture further detail on specific actions within the plan hyperlinks or sources of further information can be added to the report. This also helps to strike balance between (potentially negative) exception reporting and an opportunity for the HWB to learn more about the positive progress being made. A log of exception reports will be maintained so that previous reports can be reviewed to provide the HWB with assurance that any risks to delivery of the implementation plan have been addressed through existing partnership and strategic fora.
- 3.12 The outcome dashboard once finalised will be another element of providing assurance that progress is being made and having impact on health and wellbeing

### **Monitoring progress through the outcomes dashboard**

- 3.13 A set of priority indicators has been drafted to assess the extent to which the outcomes set in the implementation plans are achieved. The indicators will support the HWB in measuring progress on implementing the strategy and provide evidence of impact and outcomes.

### **Development Sessions**

- 3.14 In addition to the public HWB meetings, the Board also has development sessions (workshops) which offer an opportunity for discussing progress in implementing the JHWS. Development sessions will allow for a deeper dive into the implementation plans. They offer a space for further exploration of issues highlighted through exception reporting that board members may be able to offer support with, while acknowledging that actions within the implementation plan will have their own governance structure and opportunity to address any issues through the normal governance routes. More formal reporting on progress would be through the usual route of bringing papers to

the HWB meeting and any issue raised through a development session that requires board endorsement would be brought to the attention of the HWB.

| <b>Actions</b><br>(Add hyperlink to update on detailed progress on this action where available) | <b>Review date</b> | <b>Reporting lead</b> | <b>Indicators/ measurements</b> | <b>Target</b> | <b>RAG</b> (Please see "Please read" sheet for guidance about RAG rating) | <b>Reasons for escalation</b><br>(leave blank if RAG Green unless exceptional progress) | <b>Action to control risk</b> | <b>Any request to the Health and Wellbeing board</b> |
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