

## PERFORMANCE ACTION PLAN TEMPLATE

This template is to be completed for ALL measures showing **RED** status of non-compliance against the specified target.

INDICATOR OVERVIEW	
Indicator Title	<b>Percentage of Personal Finance Unit (PFU) assessments completed within timescale. (DP 11a)</b>
Strategic Director Lead	<b>Joe Blott</b>
Departmental Lead	<b>Malcolm Flanagan</b>
Target	<b>80%</b>

CURRENT SITUATION: Detail what the performance is for this measure and reason/s for non-compliance		
Performance this Period	<b>41%</b>	+ / - Target : -24% (YTD target 65.0%)
Non-compliance reason	Achievement of the PI assumes Senior Assessment Officers (SAO's) complete the financial assessment during a home visit to the service user. SAO's were stopped from visiting prior to moving over to Finance in April 2011, because the gathering of financial information was passed to the Social Workers responsible for carrying out the care assessment. It has been agreed that the practice of SAO's visiting service users and completing the financial assessment during the home visits should be resumed. Operationally this has not yet started as the four newly recruited SAO's only commenced in PFU on 2 <sup>nd</sup> September 2013 and are currently undergoing a period of intensive training, including shadowing existing SAO's during home visits. It is envisaged that the new recruits will be fully trained and operational by early November 2013.	

ACTIONS: This describes what's necessary or how to achieve a 'green' score. This way everyone is clear on what is required and when; knows the expected outcome and how to achieve it .	
What (is required)	SAO's to carry out home visits to all service users and complete the financial assessment during the visit or immediately following the visit. It will also be necessary to ensure that the existing backlog of approximately 500 outstanding financial assessments is cleared (this will be achieved as part of the training exercise for the new recruits and a concentration on this area of work by the existing SAO's).
How (will it be achieved)	SAO's visiting all service users and carrying out the financial assessment during the visit. By clearing the backlog of financial assessments as quickly as possible.
Who (will be responsible)	SAO's
When (will results be realised)	Late November 2013, however unlikely that year end target (80%) will be met, due to:

	<ul style="list-style-type: none"><li>• Length of time taken to recruit new SAO's.</li><li>• Length of time necessary to fully train new starters.</li><li>• The fact that improvements not likely to be realised until eight months into the current financial year.</li></ul>
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