



May 2026



**SERVICE SELF-
ASSESSMENT GUIDANCE
AND TEMPLATE**

Service Self-Assessment Guidance and Template

Guidance on Service Self-Assessment to Identify Priorities for Service Design and Operational Performance

Summary

It is well established that as part of the Change Programme, the organisation has been preparing to implement Service Design as a vehicle for change and this preparation is in three parts;

1. Training and familiarity with Service Design – a number of staff have participated in varying levels of learning.
2. Development of a tool kit to support Service Design – the toolkit has been designed and is being incorporated into an online resource.
3. Creation of a Service Self-Assessment to support the identification and prioritisation of areas to undertake Service Design.

Service Self-Assessment

To support services in identifying priorities for improvement, a practical method of service self-assessment has been created that all services will undertake (note exemptions later)..

The outputs will be gathered to support the organisation in prioritising areas for improvement which will be in the form of:

- a) Service Design and/or;
- b) Review of performance management arrangements.

A Service Design toolkit is available on MyCouncilWorks to support services in design or redesign. A template for self-assessment to assist in evaluating current performance across specific areas is included in this document.

The assessment is primarily against the following areas:

1. Performance
 - a. Management arrangements
 - b. Standards
2. Cost to the organisation (as opposed to budget allocation).
3. Customer Satisfaction
 - a. Current arrangements.
 - b. Current level of customer satisfaction.

Stages

There are two distinct stages with the second being the self-assessment stage which is essentially a 'snap shot'. To help prepare for this, the first stage is a preparation stage which may require undertaking some activity to develop information for the information and the following are examples of types of activity:

- Time recording.
- Documenting processes.
- Customer satisfaction survey.
- Identifying proxy measures.

Definition of a service

In accordance with the principles of the Scottish Approach to Service Design, this exercise will be aimed at specific functions as opposed to the services within the Council and be agnostic of organisational structures (this exercise will exclude the Health and Social Care Partnership).

This is a new approach for the organisation that supports a 'themes not teams' approach and is understood it will be difficult to develop and undertake. An initial pilot Service Self-Assessment taking a team approach was used to inform discussions on 'functions' and improve the methodology. The output report from this pilot has been identified as best practice by Internal Audit and should be used as a reference when reporting on outputs of self-assessment. A further pilot across thematic functions was then also undertaken.

Approach

1. The self-assessment documents and process are available within the MS Teams channel 'Organisational Performance' and on MyCouncilWorks
2. Services will provide evidence against their self-assessment. Authors are discouraged from submitting volumes of evidence and instead are asked to provide reference to existing or new sources of evidence e.g. LGBF, existing performance data, national standards, committee reports, audits etc.
3. All services are already working to full capacity and therefore every effort has been made to ensure that a proportionate approach is taken and minimise impact on colleagues' time and use existing information where available.
4. The assessments may involve advice from Financial Services, Internal Audit and the Data Advisory Group.

How will we use this information?

The Improvement Service's publication ['Delivering a Future for Scottish Local Authorities'](#) (October 2022) sets out a proposal to transition to a model of service delivery that is fit for purpose in the 21st century. The first stage is creating conditions for change including developing a baseline and understanding the data.

This exercise will produce the data that allows the organisation to assess performance, cost, and customer satisfaction across the organisation and more importantly the relationship of these elements with each other. For example, self-assessments may provide conclusions similar to the following;

- High performance against poor customer satisfaction,
- Low cost against limited future learning and growth,
- Good performance against acceptable costs and high customer satisfaction or possibly the reverse of all these.

Themes not Teams

“A Service... is simply something that helps someone to do something...a service provided by multiple organisations strung together to form one seamless service is an achievement of alignment and collaboration, but this sadly is not the norm for services that cross organisational boundaries as many do today”.

Good Services; how to design services that work – Lou Downe (2020)

The second stage of the Improvement Service’s publication ‘Delivering a Future for Scottish Local Authorities’ is understanding areas for innovation and transformation within the service including identifying areas where councils collaborate at a local, regional and national level to create cost savings and increased impact at scale.

Every effort will be taken to explore areas for Service Design that is agnostic of organisational structure. Ideas on cross cutting, partnership provision of services or novel approaches may emerge from the results of service self-assessments.

Cost to the organisation

With regard to cost to the organisation, in addition to revenue allocation, this is to include identifiable additional costs.

Where information is not available and cannot be calculated with reasonable efforts during the preparation phase (e.g. a time counting exercise or calculations), a broad judgement will be accepted as long as this is made clear.

Outputs

This exercise will produce a significant amount of information that will be presented in the following format;

1. An organisational ‘traffic light’ dashboard against the areas of self-assessment.
2. Summary tables.
3. Evidence as provided by authors.

Appendix 1 – Framework for Self-Assessment - template

No	Question
1	Description of Function a) Describe the function that is the subject of this assessment including purpose. b) What are the priorities for the function? c) Provide information of personnel involved (do not list individuals).
2a	Your performance management system. Description of any software used, frequency of monitoring, how this is reported and mechanism to escalate issues and identify areas for improvement. a) Describe the performance management system you have in place for operational performance? b) How would you rate your performance management system?  Below expected/agreed standards  Meeting expected agreed standards  Above expected agreed standards Do you have any other comments in relation to performance management?
2b	Customer Satisfaction Use national standards, guidance, benchmarking and qualitative data where available. a) What does excellence look like? b) What does minimal compliance look like? c) Describe the level of current performance for the function? d) How would you rate the performance of the function?  Below expected/agreed standards  Meeting expected agreed standards  Above expected agreed standards

No	Question
	e) Do you have any other comments in relation to performance?
3	Your understanding of the cost/resource to delivering the function. • Seek to understand costs against outputs and standards. • There is a recognition that identifying cost is a challenge for some services and may require some further activity to develop these. • Apportion additional costs i.e. known relevant costs to the organisation out with your resource allocation. a) Provide a broad breakdown of your annual costs. b) What is your understanding of the effectiveness of the cost/ resource to delivering the function against one of the following:  Below expected/agreed standards  Meeting expected agreed standards  Above expected agreed standards
4	How well demand need and issues of customers is understood. • Supports the development of a balanced view of cost and performance of operations against customer satisfaction. a) Describe how customer satisfaction is measured. b) How well is demand needs and issues of customers understood?

No	Question
	Below expected/agreed standards Meeting expected agreed standards Above expected agreed standards
5	How would your customer rate the current level of customer satisfaction • Where data does not exist, support will be provided to undertake customer engagement a) Describe the current level of customer satisfaction and expectation? b) How would you rate the current level of customer satisfaction? Below expected/agreed standards Meeting expected agreed standards Above expected agreed standards
6	3 Year Horizon Scanning Reference any emerging drivers that may trigger change and any plans in response e.g. changes in legislation, demand, change projects, etc.
7	Challenges List any specific challenges.
8	Do you have any other comments or evidence you wish to submit?

