

Explanatory notes

1 Introduction

- 1.1 The aim of this Email Bulletin is to provide a checklist of the regular and ongoing tasks that arise in relation to running a legal aid contract and operating the Specialist Quality Mark effectively.
- 1.2 It is a managers' checklist in that it gives an overall indication of where an organisation is at any one time provided it is updated, with completed tasks being 'crossed off'. It allows a manager to see that regular and ongoing tasks are being completed irrespective of who completes them. Managers may also find it useful to incorporate relevant items on the checklist into any annual work-plans they might set for themselves.
- 1.3 The checklist is a template only; organisations may have very good reasons for undertaking certain tasks at other times of the year from those shown. Likewise organisations could delete or add certain tasks (as long as this does not affect any legal or other obligation they may have).

2 How to use the checklist

- 2.1 The checklist could be stuck on a wall in your office with tasks being crossed off as they are completed.
- 2.2 The checklist could be discussed at staff meetings and certain tasks allocated. Administrative staff, for example, could make sure that Contract forms are sent off each month and then cross off these tasks on the checklist. Responsibility for the tasks indicated in the checklist will vary between organisations depending on how they are structured and how the manager has decided to delegate tasks.
- 2.3 Certain tasks can be done at the same time as others, for example, reviewing the business plan, producing a quarterly variance analysis of income and expenditure against budget and reviewing client feedback.

3 Feedback

- 3.1 We would be grateful for any feedback on the checklist if managers do use it – particularly comments on tasks that are missing and that you think should be included (email: cls.support@asauk.org.uk). We would also be interested to see completed versions where managers have amended the checklist to suit their own organisation.

4 Further sources of support and guidance

- 4.1 This Email Bulletin is one example of what CLS Support is doing to address performance management in agencies. Other examples are our

training (particularly Course 2: *Monitoring Performance: An introduction to supervision, file review and appraisal* and Course 3: *The Effective Supervisor*) and our written briefings, especially Quality Mark Briefing No.10: *The SQM – Getting the most out of it* (published in October 2004).

- 4.2 If you need further guidance on any of the issues covered in this Email Bulletin, please contact the CLS Support **consultancy service** on **0870 7700 447, 1pm – 4pm Monday to Friday**, or email cls.support@asauk.org.uk at any time.