

Performance Management Framework and an update on Quarter 1 measures

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5th October 2023

Summary

This report outlines the current position on Corporate Performance reporting, which is in a developmental phase due to the decommissioning of Corvu and the ongoing Business Insight Performance Strategy (BIPS) programme.

The report details the proposed interim format for corporate reporting and describes the work which has been carried out to produce a Quarter 1 summary of performance.

Additionally, the report looks at the wider process currently in place for corporate reporting and proposes that this be adhered to until further notice.

Performance Management Framework and an update on Quarter 1 measures

1 Background

- 1.1 This report outlines the current position and forward planning of the performance improvement team with regards to the Corporate Performance Reporting process, and with specific reference to actions taken for monitoring Quarter 1 performance because of the decommissioning of Corvu.
- 1.2 The performance reporting process is in a developmental stage due to the transition from Corvu reporting to a more iterative and insight-based methodology. A permanent alternative system for business plan performance reporting cannot be determined until the BIPS programme is completed. As a result of this the Performance Improvement Team have developed an interim format for corporate performance reporting which has been utilized for Quarter 1 performance monitoring and will be outlined in this report.

2 Current Position

- 2.1 The Performance Improvement Team is currently pulling together the Corporate Performance Reports for Quarter 1. These reports are being presented in PowerPoint due to previous comments regarding the Corvu reporting system being overly data focused and lacking the nuanced insight and context which underpins each services' performance.
- 2.2 The new format of the Quarterly CPR includes a 1-page infographic summary for the service, a 1-page summary of 'what's good' ('health of the service'), a 1-page summary of 'red' measures with Director's comments, and a 1-page summary of performance improvement approach / plan to move forwards.
- 2.3 This layout was chosen as it allows for the key data to be presented whilst also allowing space for discussion and context surrounding the quarter's performance, as a result each service has more opportunity to consider their performance holistically and take any necessary actions to improve or maintain performance levels.
- 2.4 For some of the more data driven services PowerBI dashboards have also been utilised to allow for further analysis of the KPIs (see Appendix 1). This is an option that few services have yet had the capacity to explore, however, if there is a strong desire for this method of reporting to be utilized, the Performance Improvement Team is able to assist with this. It should be noted however that this method is not necessary for every service and should be produced only in relation to its suitability. The roll-out of a corporate Power BI license will allow users across services to access data via Power BI securely and for reports to be automated effectively. There will need to be clearly defined roles of "creators" and "consumers" so that those who do not require in depth training (consumers) are simply given the skills to navigate and interact with the dashboards and reports.
- 2.5 Where possible LG Inform Data and OfLog data has been used to provide benchmarking figures for relevant data, and services have been assisted in accessing and utilizing these open data sets. As these data sets become more dependable, as it is expected they will be, corporate reporting could potentially rely on them more heavily.

2.6 Below is a series of deadlines which are currently being shared to complete Quarter 1 reporting in a timely manner. Please see Appendix 2 below for Quarter 2-4 deadlines.

Key Milestones	Deadline	September	October
Collate all CPRs	21 st		
Present CPRs to MB	27 th		
Present CPRs to LB	2 nd		
Present CPRs to Scrutiny	5 th		
Review Scrutiny Comments	Ongoing		

3 Corporate Reporting Process

3.1 In addition to proposing the new format for reporting, it is also proposed that a new process be established to ensure that quarterly reporting is being done as efficiently as possible.

3.2 Below is a process chart indicating the stages that are involved in producing the Corporate Performance Reports each quarter.

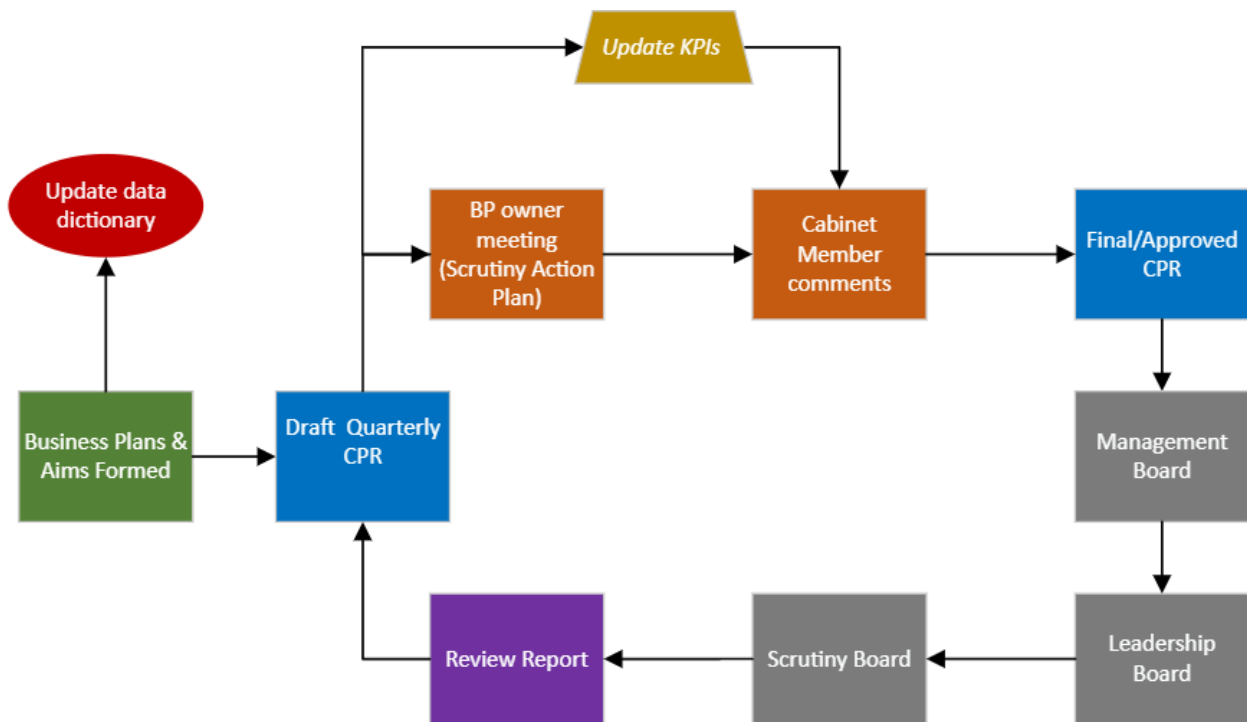


Figure 1. Corporate Performance Reporting- Process Map

3.3 At the beginning of the financial year each service is asked to produce a Business Plan detailing their objectives for the year and their Key Performance Indicators (KPIs). Once completed the performance improvement team can update each service's 'Data Dictionaries', which outline which measures the service wants to focus on, the person responsible for monitoring this measure, and any other details relating to reporting on the measure throughout the year.

3.4 At the end of the quarter, by focusing on the measures listed in the Business Plan, the Performance Improvement Team can begin to collate the CPR. It is the responsibility of the service to monitor their performance and therefore the measures should be readily available. Since the Business Plans were completed, the Performance Improvement Team

have been supporting services to collate their measures in a format suitable for the information they wish to report on.

- 3.5 Once the KPIs have been updated and service leads have had the opportunity to add their comments to the report, it can be sent to the relevant cabinet member for their comment also. It is encouraged that services themselves send the report to their cabinet member to enable any discussions surrounding the quarterly performance and promote ownership of performance.
- 3.6 The approved version of the CPR can then begin to make its way through the necessary decision procedures, after which time it will be presented at Scrutiny.
- 3.7 Following Scrutiny, any feedback or comments will be collated and built into the planning process for the next quarter of reporting.

Appendices

- Appendix 1: Screenshots from PowerBI Dashboard for Children's Services (which is linked to the CPR)

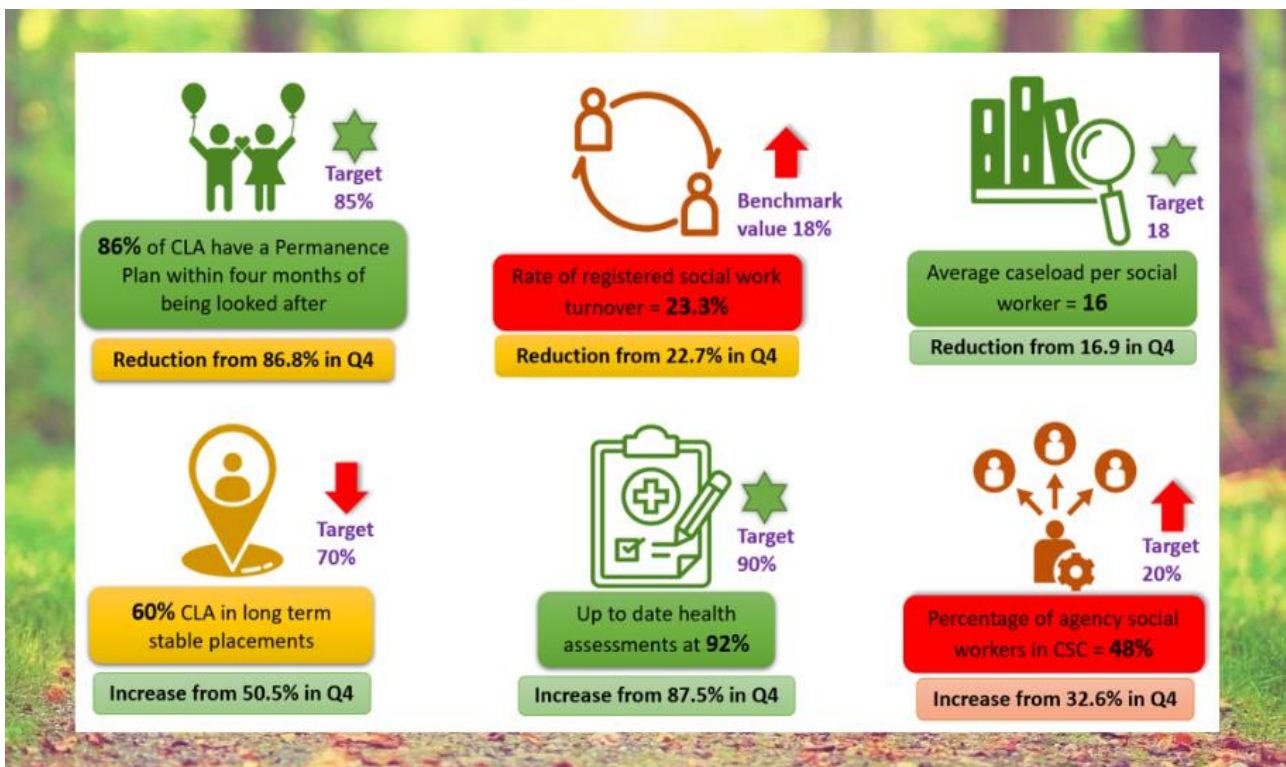


Figure 2. Infographics page including successes and areas for development (RAG rated).

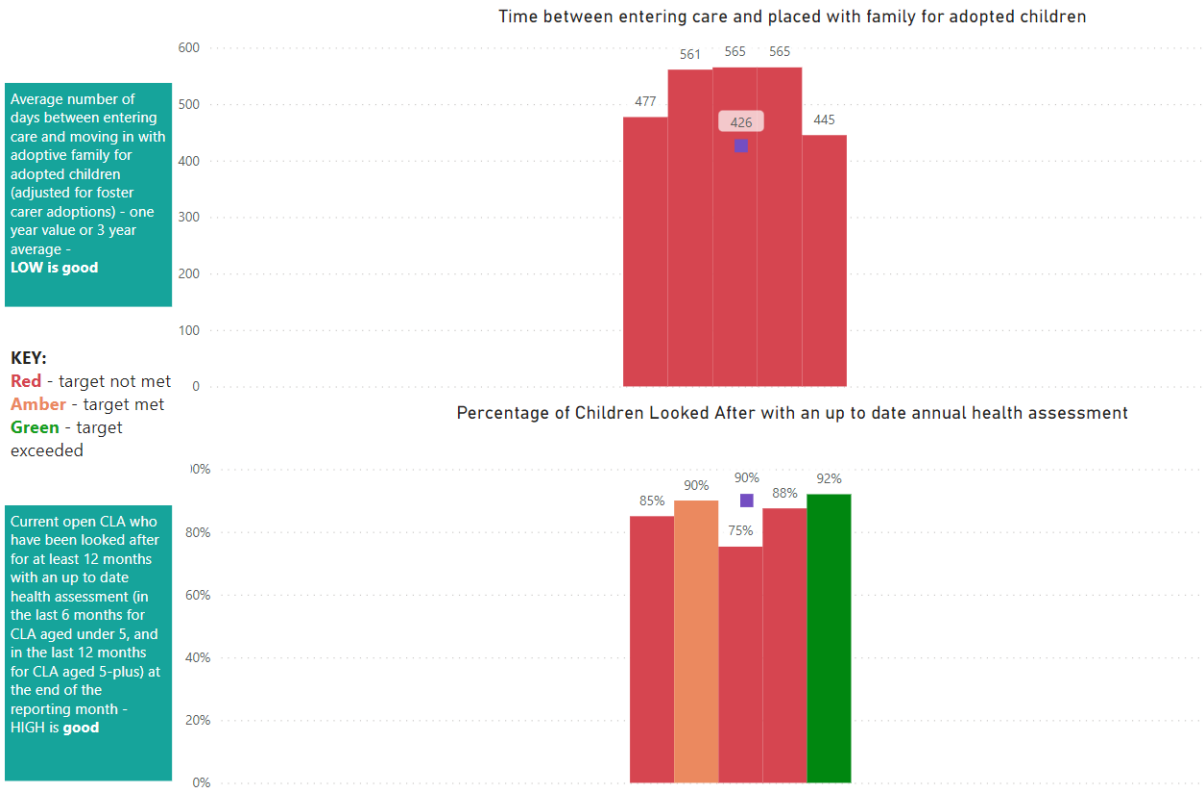


Figure 3. Page for successes, including descriptions and polarity



Figure 4. Areas for development, as above. Areas for development, as above. This Power BI report could be used instead of or alongside a PowerPoint presentation.

- Appendix 2: Deadline dates for future Corporate Performance Reports

Key Milestones	Deadline	September	October	
Collate all CPRs	21 st Sep			Q1
Present CPRs to MB	27 th Sep			
Present CPRs to LB	2 nd Oct			
Present CPRs to Scrutiny	5 th Oct			
Review Scrutiny Comments	Ongoing			

Key Milestones	Deadline	Oct-Nov	December	
Collate all CPRs	20 th Oct			Q2
Present CPRs to MB	22 nd Nov			
Present CPRs to LB	11 th Dec			
Present CPRs to Scrutiny	14 th Dec			
Review Scrutiny Comments	Ongoing			

Key Milestones	Deadline	February	March	
Collate all CPRs	2 nd Feb			Q3
Present CPRs to MB	28 th Feb			
Present CPRs to LB	18 th March			
Present CPRs to Scrutiny	21 st Mar			
Review Scrutiny Comments	Ongoing			
Creation of Business Plans	29 th March			

Key Milestones	Deadline	April	May	
Collate all CPRs				Q4
Present CPRs to MB				
Present CPRs to LB				
Present CPRs to Scrutiny				
Review Scrutiny Comments	Ongoing			