

Report from Task & Finish Group – Performance Measures

Report to: Overview & Scrutiny Panel

Date: 19 November 2015

Title: Report from Task & Finish Group – Performance Measures Review

Portfolio Area: Strategy & Commissioning

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Recommendations:

That the Overview & Scrutiny Panel ENDORSE the Task and Finish Group findings whereby:

- 1. Streamlined versions of the Balanced Scorecard and Background & Exception report (as shown in Appendices A & B respectively) are to be made available to Members on a quarterly basis, containing measures where a Scrutiny role is beneficial.**
- 2. Financial measures are reported elsewhere and therefore will not be included in these reports. These will be replaced with specific T18 measures.**
- 3. An in-depth quarterly analysis of an area or department is to be included within the reporting, designed to interrogate the high level performance data further and identify trends, improvements, etc. This “deep-dive” quarterly analysis will either follow a pre-determined schedule or be flexible enough to focus on issues raised by a prior quarterly report.**
- 4. Once the T18 Transformation Programme is fully operational, Members will be given easy access to a much larger range of ‘live’ performance data that they can choose to access at any time, rather than just relying on the reports presented to them.**

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Executive summary

- 1.1. The corporate balanced scorecard contains a number of performance indicators, which provide information on the overall service provided by the Council.
- 1.2. It was proposed by South Hams District Council and West Devon Borough Council that a joint task and finish group be set up in order to review and update this information in light of the new organisational structure and current priorities to ensure that it is fit for purpose.
- 1.3. Utilising feedback from the joint Task & Finish group, the previously used Balanced Scorecard has been modified to include only the targeted measures that should be scrutinised by the relevant Panel.
- 1.4. The background and exception report has also been modified to include information that provides context without overloading either Members or Officers in collating or interpreting the information.
- 1.5. The design of the report has been changed to ensure that it can be interpreted whether printed in colour or in black and white.
- 1.6. It is recommended that the updated reports are used in future and the choice of Performance Measures will be subject to continuous review and changed as necessary and as Members' concerns altered.
- 1.7. Financial measures are reported elsewhere and therefore will no longer be included within these reports. These are to be replaced with specific T18 measures.
- 1.8. The new report is to be supplemented by the chance to drill down into the specific performance of certain areas in response to current issues, as detailed in 3.5 – 3.6 below.

2. Background

- 2.1. A joint South Hams and West Devon Task and Finish group was set up earlier this year to review performance indicator management information.
- 2.2. The Balanced Scorecard has suffered from scope creep over the years. Some measures were reported to Panel for interest rather than to fulfil a scrutiny role and generated questions rather than helping to provide answers.
- 2.3. Each measure has now been reviewed and the report updated to reflect the group's feedback.
- 2.4. The joint task & finish group agreed the following objectives at the outset:
 - 2.4.1. Agree upon a common set of performance indicators across both South Hams and West Devon
 - 2.4.2. The frequency of reporting and method of delivery are to be agreed

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- 2.4.3. The indicators chosen should provide members with sufficient information to monitor high level performance and challenge officers to deliver the appropriate customer service outcomes
- 2.4.4. The Performance Indicators are not designed to be used by operational managers to manage their teams; additional management information will be utilised by operational managers for that purpose. Members will have access to that information as and when requested

3. Outcomes/outputs

- 3.1. The recommended performance measures (***See Appendix A & B***) are ones where scrutiny in a quarterly setting is useful to the Council and officers. These are common across both Councils.
- 3.2. Reports will be made available to all Members, electronically.
- 3.3. The streamlined approach will release resources to conduct more in-depth analysis and investigation of performance, concentrating on the data behind the high level performance measure.
- 3.4. Officers will interrogate the data captured to highlight trends, improvements and where required, justifications for performance issues.
- 3.5. The area chosen for in-depth analysis could be selected as part of a pre-determined schedule for each quarter or based on an area of concern highlighted in the previous quarter's meeting.
- 3.6. The Overview & Scrutiny Panel will set the timetable for these deep dives.

4. Options available and consideration of risk

- 4.1. Members could maintain the status quo but it is felt that the current reports present information which the scrutiny Panel cannot influence.
- 4.2. Whilst the updated reports restrict the amount of data given to Members in a regular format, they will have access to a much wider range of information that they can actively review if issues are raised that require more timely investigation.

5. Proposed Way Forward

- 5.1. The Balanced Scorecard and background report as shown in the Appendices are approved by the panel
- 5.2. A schedule of proposed in-depth analysis reports are selected by the Overview & Scrutiny Panel for the upcoming quarters.

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5.3. To note that the specific T18 measures on the Balanced Scorecard are to be flexible – these will be altered and communicated dependant on the stage in the programme delivery – Moving from delivery to performance as the programme progresses.

6. Implications

Implications	Relevant to proposals Y/N	Details and proposed measures to address
Legal/Governance	N	
Financial	N	
Risk	Y	Poor performance has a risk to the Council's reputation and delivery to our residents. These proposals should give the Scrutiny panel the ability to address performance issues and develop robust responses to variation in delivery
Comprehensive Impact Assessment Implications		
Equality and Diversity	N	
Safeguarding	N	
Community Safety, Crime and Disorder	N	
Health, Safety and Wellbeing	N	
Other implications	N	

Supporting Information

Appendices:

Appendix A – Corporate Balanced Scorecard

Appendix B – Background and Exception Report

Background Papers:

None

Approval and clearance of report

None