

# Planning and Performance Framework

Policy Review and Performance Committee  
15 January 2020

# Corporate Planning: New Context

- Capital Ambition:

- Refresh of Political Priorities
- To be considered by Cabinet in January 2020
- One of major drivers of Corporate Plan 20/21
- Alignment with budget
- Climate Emergency declared

- Legislative context:

- New improvement framework proposed in the Local Government and Elections Bill
- Repeal of 2009 Improvement Measure and emergence of WBFG Act as primary framework for improvement

# Corporate Planning: New Context

## Responding to the Local Government & Elections Bill

- Local Government & Elections Bill Part 6: **Reforms the Current Performance Arrangements**
- Seeks to *“establish a more regularised performance and governance system that puts the onus on ... self-improvement, and that builds reflection on performance and action to improve into the system.”*
- Requires **annual self-assessment of performance** by principal councils
- Requires an **external peer review once per administration** to provide an external, expert perspective on the council’s performance and progress in improving performance

# Planning and Performance: Review

1. What are we trying to do?
2. How are we planning to do it?
3. How, at any given moment, will we know whether we are on track?
  - i. *Performance Reporting*
  - ii. *Holding robust performance dialogues*
4. If we are not on track, what are we going to do about it?
5. Supporting delivery

# 1. What are we trying to do?

*There is a clear view of what success looks like – across the organisation and with relevant partners*

## Approach:

- Capital Ambition Refresh
  - Cabinet – 23 January
  - Public launch event followed by engagement programme of seminars with Cardiff University
  - PSB engagement – mid-point review of Wellbeing Plan
  - Staff engagement – January onwards

## 2. How are we planning to do it?

*Create realistic plans and budgets, settings clear accountabilities, metrics and targets*

### Approach:

- Corporate Plan:
  - Translate Capital Ambition commitments into SMART objectives and KPIs (January)
  - Leader and Cabinet Member led challenge session by Wellbeing Objective (January)
  - Performance Panel and pre-decision Scrutiny (February)
  - Cabinet and Council (February)
- Directorate delivery plans:
  - To contain **service performance and corporate organisational health KPIs**, with accountabilities for de
  - Importance of developing 'core data' and measures of success at service level
  - Ensure alignment between Cabinet approved strategies and Planning/Performance framework
- Capital Ambition Delivery Programme:
  - Greater alignment between 'change team' programmes and projects and Policy/Planning Framework
- Delivery Framework:
  - Setting out the planning and performance management arrangements (Cabinet in March)

### 3. How will we know whether we are on track?

***a) Performance Reporting:*** *Reporting gives a timely view of performance with appropriate detail, and it feels like it adds value rather than being a burden.*

#### Proposal:

- Fewer, more meaningful corporate performance reports: mid-year and year-end self-assessments
- More timely performance information: short, sharp quarterly updates to SMT/Cabinet
- Align (not integrate) wider performance system: service performance, finance, risk, assurance, assets, complaints
- Reduce the burden on managers: new sharepoint site being piloted
- Improve and automate presentation of performance information: PowerBi

# Sharepoint Site



1. Managers sent a link every quarter
2. Easy access to the Steps and KPIs they are responsible for
3. Ask Once / Collect Once

Collaboration

Share Next step

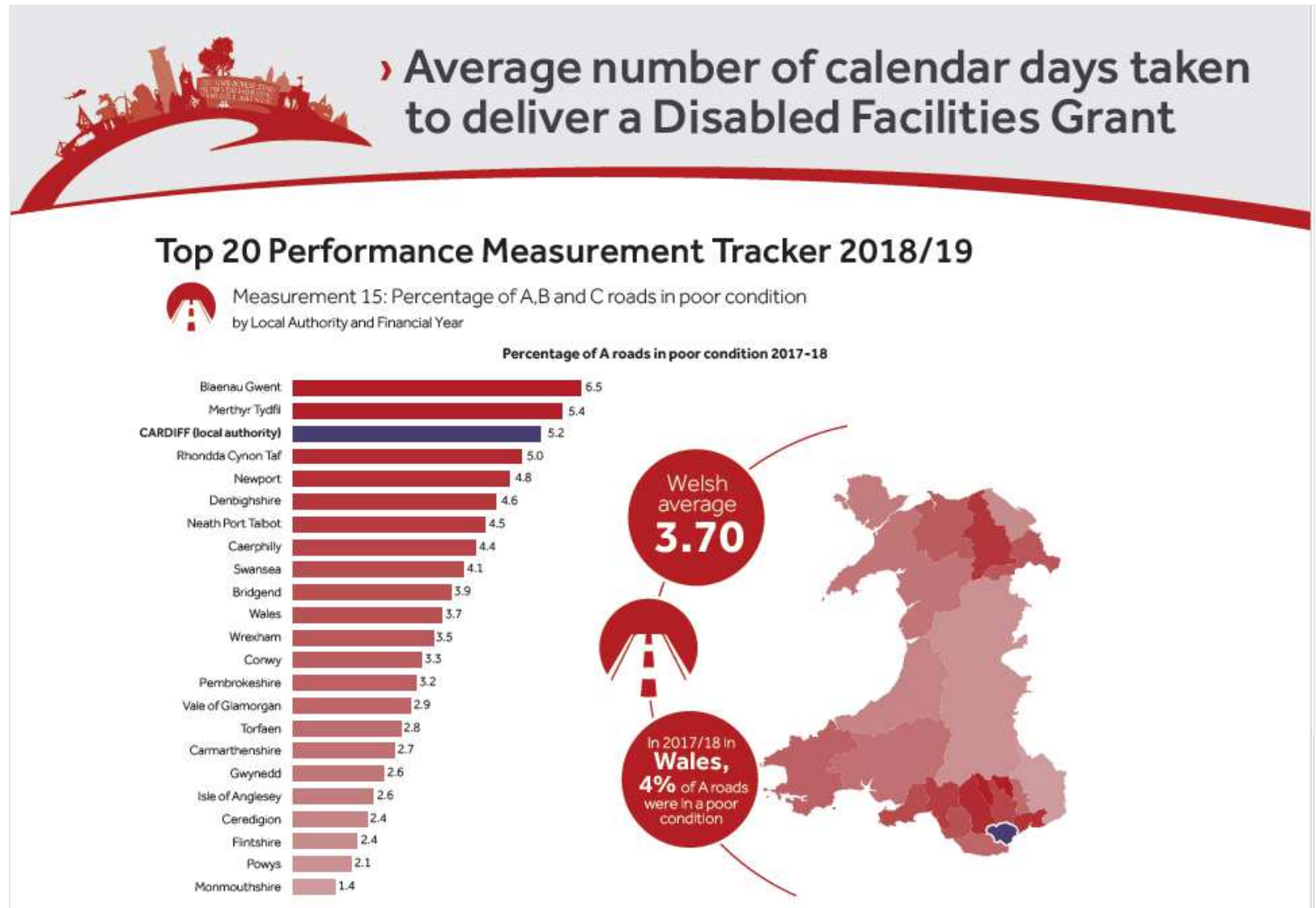
+ New Quick edit Export to Excel PowerApps Flow ... All Items

Quarterly Reports List > Communities

Priority	Wellbeing Objective	Theme	Lead Directorate	Shared	Step Owner	Step	DDI
Priority 1 - Working for Cardiff	Cardiff is a great place to grow up	Supporting vulnerable children and families	Communities	Social Services	Avril Hooper	Develop a new delivery model for an integrated early help and prevention service for families, children and	Con
Priority 1 - Working for Cardiff	Cardiff is a great place to grow older	Joining up Social Care, Health and Housing Services	Communities		Dave Jaques/Ellen Curtis	Deliver the Older Persons Housing Strategy to support independent living, fully understanding their	Con
Priority 1 - Working for Cardiff	Cardiff is a great place to grow older	Creating Age Friendly Communities	Communities	Education	Carolyn Palmer	Address social isolation and enhance quality of life of older people by	Con



# Improved & Automated Presentation of Data: Power Bi



# 3. How will we know whether we are on track?

***b) Holding robust performance dialogues:*** Performance reviews are both challenging and supportive, and are focussed, fact based and action orientated

## Approach:

- Cabinet Ambition Progress and Performance: Twice yearly evaluative assessment of delivery of Capital Ambition with Cabinet, including progress made, challenges and next steps/mitigating actions.
- Quarterly stocktake: Performance Stocktake at SMT and Cabinet immediately following end of quarter, with a focus on reviewing areas of challenge or change.
- Performance Group – including lead officers from Corporate and service performance, finance, risk to review, assess and provide evaluation of delivery, reporting to SMT.
- Scrutiny:
  - Committees: Provided mid-year/year-end reviews
  - Performance Panel: To be convened to consider and input into Corporate Plan (Jan/Feb) and end of year performance (July).

## 4. If we are not on track, what are we going to do about it?

*Actions are taken to improve performance and there are visible consequences for good and bad performance.*

### Proposal

- Mitigating actions following quarterly stocktakes are identified, accountable managers identified and progress tracked
- Strengthened Performance and Analysis team to undertake in depth data analysis of areas of concern e.g. city centre homelessness; children's services; street cleanliness.
- Focus on enhanced operational performance management in areas of performance weakness.

## 5. Supporting delivery

*A small team dedicated to planning, performance reporting and designing and supporting the routines and structures that ensure a focus on performance.*

### Approach

- Creation of a new team through merging existing corporate planning, performance management, partnerships and data teams.
- Review and refresh network of performance leads in service areas.
- Focus on operational performance management
- Culture and system change:
  - Expectations around planning, management, reporting clearly set.
  - Training and development support provided in developing 'core data', creating performance systems and actively managing performance.

# Scrutiny: Points of Influence

- **Performance Panel consider early draft of the Corporate Plan (Policy Development)**
  - Review Steps, Performance Indicators and Targets
  - Make recommendations on content
  - Chaired by chair of PRAP and chairs of every Scrutiny Invited
- **Each Scrutiny Committee to undertake Pre-decision Scrutiny of Corporate Plan (Policy Review)**
- **Policy Review and Performance Committee consider Half Year Performance Assessment (Performance & Policy Review)**
  - Recommend areas of further scrutiny (potentially by other committees)
  - Recommend areas for immediate action / review
  - Recommend content for the next Corporate Plan
- **Policy Review and Performance Committee / Performance Panel consider End of Year Performance Assessment (Performance Review)**

# Next Steps

- Capital Ambition
- Performance Panel w/c 10<sup>th</sup> February
  - Consider draft of Corporate Plan
  - Review Steps, Performance Indicators and Targets
- Pre-Decision Scrutiny of Corporate Plan/Budget (All Committees) w/c Xth February
- Cabinet 20th February
- Council 27<sup>th</sup> February