



**REPORT of
DIRECTOR OF STRATEGY, PERFORMANCE AND GOVERNANCE**

to
**COUNCIL (EXTRAORDINARY)
25 JULY 2019**

FUTURE CORPORATE PERFORMANCE REPORTING

1. PURPOSE OF THE REPORT

- 1.1 To update on work that has taken place to realign performance indicators to the new Corporate Plan and Thematic Strategies.
- 1.2 To set out and agree key principles around future performance reporting based on new technologies and methods that are available to us.

2. RECOMMENDATIONS

- (i) That performance be reported through high level dashboards to specifically track the corporate plan outcomes, with detailed delivery kept in service plans and ad-hoc reporting;
- (ii) that quarterly dashboards for each of the new thematic strategies as of Quarter Two 2019 / 20 be reported to Performance, Governance and Audit committee from October 2019;
- (iii) that the Programmes, Performance and Governance team lead a customer survey programme, including running an annual survey starting in September 2019, to get resident and business feedback and insight as a way to measure some of the corporate outcomes;
- (iv) that a six monthly insight report is also produced, that will provide an overview of the District indicators and track broader outcomes which we cannot directly impact.

3. SUMMARY OF KEY ISSUES

- 3.1 Some of the performance measures identified to track corporate outcomes are new, and as yet, we have not collected the data to populate them. This information will be added as it becomes available. As a result, some of the reporting on a number of indicators will be phased in through Quarters 3 and 4. It is the aim that by the end of the financial year 2019 / 20, we will be able to report on all measures.
- 3.2 The proposed move to dashboard reporting (please see examples in **APPENDIX A**) will require an initial investment in time and licence of new a software, Power BI (an

Office 365 reporting tool that will pull performance data into one place and produce the dashboard views). In the long term this will allow us to replace legacy reporting software and create an overall saving.

3.3 Historically reported ‘performance indicators’ may be reported within service plan activity or six monthly insight reports rather than as performance in the future (for example planning statistics). Further detail on this is outlined in **APPENDIX A**.

3.4 The new reporting will be based on additional key principles including:

- running regular surveys around customer experience feedback that can help to improve services;
- measuring activity where the corporate outcome is broad and influenced by many factors;
- keeping specific detail on delivery and day-to-day service performance to the service plans and ad-hoc reports, where it doesn’t have a clear link to the corporate plan;
- utilising dashboard views within services as a way to plan delivery through the use of performance data and underpin this.

4. CONCLUSION

4.1 The refresh of approach to performance reporting is recommended as a way to give better clarity on performance specifically against the corporate plan outcomes.

4.2 The proposed programme of work will increase the level of insight and reporting taking place but some of this will be used to inform and shape future delivery rather than as a measure of success.

4.3 We recommend this approach to performance reporting as a way to give better clarity on performance against the corporate plan and simplify the link between strategy and delivery.

5. IMPACT ON STRATEGIC THEMES

5.1 The recommended performance reporting will give greater alignment and clarity to the strategic themes and tracking progress on their delivery. This will help to identify where future work needs to be targeted against specific strategic themes.

6. IMPLICATIONS

- (i) **Impact on Customers** – Structured customer engagement will take place through the new insight programme, positively engaging customers in our work.
- (ii) **Impact on Equalities** – None.

- (iii) **Impact on Risk** – Risk will continue to be reported in addition to performance, and we will centrally also monitor statutory returns of data. We expect no overall impact to risk.
- (iv) **Impact on Resources (financial)** – An initial investment will be made in PowerBI, but this will return savings in the long term.
- (v) **Impact on Resources (human)** – None.
- (vi) **Impact on the Environment** – None.

Background Papers:

Future performance reporting presentation - **APPENDIX A**

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