

Performance Management – Progress/Discussion Report

1. Introduction

- 1.1 At the 5th October meeting, Members received a progress report explaining how performance monitoring, reporting and improvement were being embedded in the Council. For reference, the management summary to the October report is attached as **Appendix 1** and the good news is that the positive picture reported previously to Corporate Select Panel has been endorsed in the draft CAA Organisation Assessment of the Council that will be published in full on 9th December 2009. With regards to Performance Management, the Audit Commission has stated:
- 1.2 “Performance Management has developed well and there is a robust framework in place. The Corporate Plan sets out key priorities. Each Council Directorate has its own plan showing what actions it will take to help achieve Council priorities. Performance information for the old County and District Councils has been disaggregated for Cheshire West and Chester Council. Plans are in place which detail how the Council will secure value for money and an early analysis of how costs and performance compare with other councils has been undertaken”
- 1.3 This report builds on the 5th October position statement and reviews the mid year performance report received by Executive on 4th November and the future reporting timetable for 2009/10 (and in doing so looks at procedures for the Council and the West Cheshire Together Partnership). The final section of the report looks at proposals for the 2010/11 business planning cycle and the role of Scrutiny in this process.

2. 2009/10 Mid Year Performance Report

- 2.1 The 2009/10 mid-year performance report was considered by Executive at its meeting on the 4 November 2009. The report summarised the performance status of the council’s Corporate Plan and Directorate Plans up to the end of September 2009. The report particularly focused on those areas where significant performance issues existed.
- 2.2 The report also summarises the implementation status of the West Cheshire Together Local Area Agreement (LAA). Many of the indicators contained in the LAA also appear within the council’s Corporate Plan in order to ensure sustained focus on their delivery by the council. A report on the implementation status of the LAA was submitted to the 29 October 2009 meeting of the West Cheshire Together Local Strategic Partnership.
- 2.3 In summary, the report painted a promising picture with regard the council’s ambition to be one of the best performing authorities in the country. Whilst there were a small number of indicators showing as Red, this needs to be put into context against the ambitious targets the council has set. The council remains on target to be a ‘top ten’ authority by 2010/11.

- 2.4 **Appendix 2** lists the performance indicators currently assessed as Red (includes additional information to that presented to November Executive), the reasons for that and what remedial action is being undertaken to improve performance.

Discussion questions – Does the Panel have any advice to Executive on the proposed remedial actions? How does the Panel wish to be involved in monitoring progress?

3. **Internal performance assessment**

- 3.1 **Appendix 3** contains the Resources and Transformation performance tracker from the November Executive report i.e. the internally assessed performance indicators (as per Corporate Select Panel terms of reference). Members will note that the performance tracker is in a developmental stage but will be expanded and developed in the coming months.

Discussion questions – Does the Panel agree with the selected indicators in the Resources and Transformation tracker? Does the Panel need additional information to scrutinise ‘under’ performance?

4. **Reporting timetable for remainder of 2009/10**

- 4.1 **Appendix 4** sets out the performance reporting timetable for the remainder of 2009/10. This contains details for council and Local Strategic Partnership reports. This Panel will note that it is not scheduled to receive a performance update until its meeting on the 15 March 2010. This will be three quarter data and will be considered by the Panel one month after its consideration by Executive.

Discussion question – Is the Panel in agreement with the reporting schedule set out in Appendix 3?

5. **2010/11 Business Planning**

- 5.1 Officers are currently finalising the structure and approach to 2010/11 Business Plans. It is likely that the 2010/11 plans will build on the approach undertaken in 2009/10 Directorate Plans, and will be supported by service actions/milestones.

Discussion questions – Does this Panel and the other Scrutiny Panels have a role in the development/sign off of 2010/11 business plans? If so, how does this compliment the role of Portfolio holders?

6. **Role of Select Panels in supporting the council’s approach to performance management**

- 6.1 Other Select Panels have or intend to undertake reviews that include a performance management perspective to them. For example:
- 6.2 *Community Select Panel:* has commenced a scrutiny review of crime and disorder. The terms of reference of the review includes the examination of the performance and priorities of the Cheshire West and Chester Crime and Disorder Reduction Partnership (CDRP).

- 6.3 *Every Child Matters Select Panel:* has considered a report outlining maintaining and evaluating performance in Cheshire West and Chester schools. The Panel is also to receive regular performance data on bullying within Cheshire West and Chester's schools.
- 6.4 *Health and Wellbeing Select Panel:* is to review the performance and action plans relating to drug and alcohol misuse and teenage pregnancy.

Discussion questions – What sources of information should drive and inform the future work programme of Select Panels? Is there merit in researching how other authorities scrutinise performance?

For further information:

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Appendix 1

Corporate Select Panel
5 October 2009

Performance Management Update

Introduction

This paper updates progress on embedding performance monitoring, reporting and improvement in the Council.

Latest Position

Comparative Performance

The first national picture of our 2008/9 performance is beginning to emerge. Based on data from the PWC benchmarking club (the national data hub is not yet operational), our 'inherited' 2008/9 performance results rank us on the cusp of the top/second quartile of single/upper tier councils. Importantly,

- Only four of the national indicators contained within the Corporate Plan are within the bottom quartile.
- If we achieve all 2009/10 targets (and all other authorities achieve their targets) we will move within the top ten of single/upper tier councils.
- If we achieve all 2009/10 targets (and other authorities achieve their targets), only two of the national indicators contained in the Corporate Plan are within the bottom quartile

The benchmarking data is currently being shared with Directorate Management Teams to explore how the data can support our performance improvement agenda, e.g. if there are authorities with a higher performance (particularly in our priority areas), can their ways of working be lifted and imported here. A presentation on the full benchmarking data was made to Members in mid September.

Corporate Reporting

During the next few weeks, in-year reports will be shared with Members regarding progress on the Corporate Plan key deliverables and performance indicators. The approach will be 'proportionate' and aims to highlight overall progress and to focus on areas that require corrective action. A key performance indicator tracker is being finalised and this will be shared with Members during October.

- Mid year data is currently being collected and will be reported to Executive and Scrutiny during November/December.
- Corporate reports to Executive/Scrutiny will highlight in-year progress against priority indicators and will report corrective actions where appropriate.
- Directorate reports will provide a fuller picture of performance compared to delivery/action plans and will be discussed by Directorate Management Teams during October.
- All reports will be published on the Policy, Performance and Partnerships web pages.

Local Strategic Partnership (LSP)/Area Partnership Boards

Following the agreement by the LSP in spring to an overarching performance management framework, thematic partnerships have agreed procedures that place the Local Area Agreement and performance management at the heart of their agendas. Considerable progress has been made in developing delivery plans that set out the roles, responsibilities and actions to be delivered by partners and these delivery plans form a strong platform for future performance monitoring. A performance management framework to support Area Partnership Boards will be finalised once the APB priorities are confirmed.

- The LAA 2008/9 (year 1 of 3) results were disappointing with only half of the interim targets being met.
- The 2009/10 mid year performance review is currently being prepared and will go to the West Cheshire LSP at the end of October.
- An analysis has been completed of all 'likely' Area Partnership Board performance indicators with regards to the ability of partners to provide accurate and timely local data. Whilst many indicators can provide data at APB level, others may require system upgrades or additional resources.
- All performance reports and delivery plans that underpin the LSP performance management framework will be placed on the Partnership web page when operational.

Data Quality

Data quality is a critical area of performance management that is often overlooked until an issue is highlighted through an inspection report. Procedures and actions have been established to ensure that we take data quality seriously.

- A data quality strategy has been developed and will be presented to Members during November.
- Systems are in place to ensure officers that collect, manage and report data do so in accordance with national definitions.
- An in depth audit of a small number of key indicators has been undertaken that overall presents a positive picture but highlights the need for further work.
- Known data quality issues with regards to social care are being investigated.

Finally

An initial contact meeting was held in August with the Audit Commission regarding how the council and LSP manage performance. This was held as an introduction meeting ahead of the CAA organisation assessment that will take place next year and requires the Audit Commission to comment and score not only on our performance but also on how we manage performance. Feedback from the inspector was positive and no immediate concerns were raised.

Appendix 2

Corporate pledge tracker indicators assessed as Red

Corporate Plan Theme/Lead Directorate	Indicator description	2008/09 Outturn	2009/10 Target	Latest performance (October 2009)	Issue	Corrective action	Expected impact
Children and Young People/ Children and Young People's	NI 117 16 to 18 year olds not in education, employment or training (NEET).	5.4%	4.0%	7.1% (September 2009)	<p>Current performance levels may be attributable to the current economic climate and a 50% reduction in the number of suitable vacancies carrying both full and part-time employment and/or training opportunities.</p> <p>Although in excess of target levels, current performance is ranked 2nd in the North West, is better than the England average of 8.7% and ranks 5th compared to statistical neighbours (as at 30 September 2009).</p>	The council's delivery partner, Connexions, is delivering a number of initiatives to reduce the NEET population contained within a NEET 2009/10 improvement plan.	Although performance is expected to improve, it is unlikely that the 2009/10 target will be achieved by the 31 March 2010.

Operational tracker indicators assessed as Red

Corporate Plan Theme/Lead Directorate	Indicator description	2008/09 Outturn	2009/10 Target	Latest performance (October 2009)	Issue	Corrective action	Expected impact
Adult Health and Wellbeing/ Adult Social Care and Health	NI 132 Timeliness of social care assessment	63.20%	80.00%	68.3%	Current levels of performance are attributable to: Limited staff engagement with performance requirements; Inaccuracies in information entered on PARIS; Lack of understanding of overarching process to utilise PARIS effectively; Lack of quality assurance in teams; Vacancies in teams and backlogs of workload; Performance reports not available for majority of first quarter; Lack of market capacity emerging in some areas.	<ul style="list-style-type: none"> • Performance workshops are being held with Adult Social Care and Health employees during November 2009 to raise awareness and understanding of performance requirements and to ensure that actual performance is accurately recorded. • Deploying the first assessor model, new instructions to use the shortened version of Share Care. • The implementation of a pilot to fast track reablement services with a lighter touch from teams. • Work is underway with external providers to increase homecare and elderly, mentally, infirm (EMI) residential care supply. 	Performance expected to improve from December 2009 onwards. However, currently uncertain whether 2009/10 targets will be achieved.
	NI 133 Timeliness of social care packages	92.40%	93.00%	78.6%			

Operational tracker indicators assessed as Red (continued)

Corporate Plan Theme/Lead Directorate	Indicator description	2008/09 Outturn	2009/10 Target	Latest performance (October 2009)	Issue	Corrective action	Expected impact
Adult Health and Wellbeing/ Adult Social Care and Health	NI 145 Adults with learning disabilities (ALD) in settled accommodation	58.50%	None set	8.7%	Performance significantly below target, measured cumulatively as the year progresses. Current rate of improvement means 2009/10 target unlikely to be met	<ul style="list-style-type: none"> Recently restructuring the Learning Disability Service. This now falls under the responsibility of a single Senior Manager which was viewed as key to improving leadership and performance. Work is now underway with the assessment and care management teams to establish improved systems and processes to more effectively manage the workload and performance. 	Performance expected to improve from December 2009 onwards. However, currently uncertain whether 2009/10 target will be achieved.
	NI 146 Number of ALD in employment at point of assessment/review, as a % of all adults known to the service	4.40%	4.60%	0.6%			
Children and Young People/ Children and Young People's services	NI 59 % of initial assessments for children's social care carried out within 7 days	68.10%	80.00%	60.52%	Current performance significantly below target	<ul style="list-style-type: none"> An improvement team rotating between service provider teams during November/early December 2009 to enable backlogs to be cleared and ensure that 'current' workloads are the priority focus of activity. 	Performance expected to improve from December 2009 onwards. Current expectation is that 2009/10 targets will be achieved.
	NI 60 % of core assessments for children's social care carried out within 35 days	79.91%	85.00%	60.21%			

Operational tracker indicators assessed as Red (continued)

Corporate Plan Theme/Lead Directorate	Indicator description	2008/09 Outturn	2009/10 Target	Latest performance (October 2009)	Issue	Corrective action	Expected impact
Resources and Transformation/ Resources	NI 181 Time Taken to process Housing Benefit and Council Tax Benefit claims and changes in circumstances	8.9 days	12 days	<p>12.2 days</p> <p>Significant improvement in performance in October was partly due to a large number of quick changes that had a very positive impact on performance.</p> <p>Excluding these changes increases the October result to 18.8 days, which is a 27% improvement on the September monthly result of 25.6 days.</p>	This is due to several factors including resources re-directed to deliver a single computer system, increase in application volumes and workload due to economic climate and benefit campaigns.	Performance has already started to improve following the completion of benefit system migration and training. A fast track process to deal with priority claims has been introduced.	It is unlikely that the 2009/10 target will be attained by the end of March 2010. However it is expected that monthly performance levels in the latter half of 2009/10 will approach the 2009/10 target level.

Appendix 3 Resources and Transformation Tracker – First Sheet

Goal: Make the best use of our resources to provide high quality services which deliver value for money and get things right first time

Corporate Pledge Indicator Tracker - 2009/10 Performance Data

Corporate Pledge	National Indicator reference and description	Outturn 2008/09	Cheshire West and Chester Target 2009/10	Apr-09	May-09	Jun-09	Jul-09	Aug-09	Sep-09	Oct-09	Nov-09	Dec-09	Jan-10	Feb-10	Mar-10	Latest Status	
We will make sure that our communities can inform and influence the decisions we take	NI 4 The percentage of people who feel they can influence decisions in their locality	26.90%	28.00%	~	~	~	~	~	~	~	~	~	~	~	~	Green (*)	
We will increasingly ensure that customer queries are resolved at the first point of contact	NI 14 Reducing avoidable contact: minimising the proportion of customer contact that is of low or no value to the customer	21.00%	20.00%	Able to provide monthly data from Oct 09 which is consistent with definition							~	~	~	~	~	~	Green (*)
	Customer Services Contacts	~	No target set	Back Office Data not being collected							Implementation of back office data collection - monthly data will be provided once implemented begins but will be reported separately until implementation and training completed					~	
We will ensure that the design, delivery and commissioning of services are fair, equitable and accessible	Local indicator: percentage of key plans, strategies and service changes with a supporting Equality Impact Assessment	Not appropriate	100%	~	~	~	~	~	~	~	~	~	~	~	~	Green (*)	
	Local indicator: to achieve Level 3 of the Local Government Equality Standard by the end of 2010/11	Not appropriate	To achieve Level 2 of the Local government Equality Framework	~	~	~	~	~	~	~	~	~	~	~	~	Green (*)	
We will enhance cohesive communities and promote equal life chances for all	Local indicator: number of community groups and partners engaged	Not appropriate	Identify groups	~	~	~	~	~	~	~	~	~	~	~	~	Green (*)	
	NI 1 The percentage of people from different backgrounds who believe that they get on well together in their local area	77.40%	80.00%	~	~	~	~	~	~	~	~	~	~	~	~	Green (*)	
Key performance measures outside of Corporate Plan added by Resources Director	NI 180 Number of change of circumstances affecting customers Housing Benefit/Council Tax Benefit entitlement within the year '000 caseload	1,347	1,200	61 (target 100)	242 (target 200)	318 (target 300)	383 (Target 400)	482 (target 500)	616 (target 600)	~	~	~	~	~	~	Green	
	NI 181 Time Taken to process Housing Benefit and Council Tax Benefit claims and changes in circumstances	8.9 days	12 days	YTD 19.86 days (Apr 19.86)	YTD 17.17 days (May 15.87)	YTD 21.38 days (Jun 30.15)	YTD 24.2 days (Jul 33.06)	YTD 26.12 days (Aug 32.01)	YTD 26.01 days (Sept 25.63)	~	~	~	~	~	~	~	Red
	Local indicator - number of days lost to sickness absence	Data not collected	Baseline data evaluated and baseline agreed	Currently unable to report												Amber (*)	
										Status guidance		Green: in-year performance at or within target		Amber: in-year performance within 10% of target		Red: in-year performance 10% or more below target	
(*) Where in-year performance is not yet available, latest status sourced from in-year assessment of LAA delivery plan implementation status or in-year Directorate Plan deliverable implementation status																	

Resources and Transformation Tracker – Second Sheet

PWC benchmarking data

National Indicator reference and description	Outturn 2008/09	2008/09 PWC benchmark position	Cheshire West and Chester Target 2009/10	2009/10 PWC target benchmark position	In year performance v 2009/10 PWC target benchmark position
NI 1 The percentage of people from different backgrounds who believe that they get on well together in their local area	77.40%	2nd Quartile	80.00%	No comparative targets set as Place Survey indicator	
NI 4 The percentage of people who feel they can influence decisions in their locality	26.90%	2nd Quartile	40.00%	No comparative targets set as Place Survey indicator	
NI 14 Reducing avoidable contact: minimising the proportion of customer contact that is of low or no value to the customer	20.00%	Results not ranked by PWC	19.00%	Results not ranked by PWC	
NI 180 Number of change of circumstances affecting customers Housing Benefit/Council Tax Benefit entitlement within the year '000 caseload	1,347	2nd Quartile	1,200	2nd Quartile	3rd Quartile
NI 181 Time Taken to process Housing Benefit and Council Tax Benefit claims and changes in circumstances	8.9 days	1st Quartile	12 days	1st Quartile	4th Quartile

Performance commentary

National Indicator reference and description	Issue	Corrective action
NI 181 Time Taken to process Housing Benefit and Council Tax Benefit claims and changes in circumstances	This is due to several factors including resources re-directed to deliver a single computer system, increase in applications and workload due to economic climate and benefit campaigns	Performance has already started to improve following the completion benefit system migration and training. A fast track process to deal with priority claims has been introduced.

Relevant information published in the last month

1 The Revenues and Benefits team's project to join up services for the launch of the council in April 2009 is a finalist in the annual Local Government IT Excellence Awards	4
2	5
3	6

Appendix 4 Performance reporting timetable for the remainder of 2009/10

Report	Review period	CW&C report dates	LSP report dates
November tracker	November 2009	CMT: 23/12/09 or 27/01/10	
		Informally to Executive members: 23/10/09 or incorporate in 2009/10 Quarter 3 report	
December tracker	December 2009	To be incorporated in 2009/10 Quarter 3 report	
2009/10 Quarter 3 report, focusing on implementation status of Corporate Plan, Directorate Plans and Local Area Agreement (LAA)	1 April 2009 to 30 November 2009	CMT: 27/01/10	LAA report to: Thematic Groups: week commencing 11/01/10
		Executive: 10/02/10	Thematic Leads: 18/01/10
			Local Strategic Partnership (LSP): 28/01/10
January tracker	January 2010	CMT: 24/02/10	
		Informally to Executive members 25/02/10	
2009/10 Quarter 3 report, focusing on implementation status of Corporate Plan, Directorate Plans and Local Area Agreement (LAA)	1 April 2009 to 30 November 2009	Corporate Select Panel 15 March 2010	
February tracker	February 2010	CMT: 24/03/10	
		Informally to Executive members 25/03/10	
March tracker	March 2010	CMT: 28/04/10	
		Informally to Executive members 29/04/10	
Quarter 4 and 2009/10 outturn report focusing on implementation status of Corporate Plan, Directorate Plans and Local Area Agreement (LAA)	Quarter 4: 1 December 2009 to 31 March 2010 Outturn: 1 April 2009 to 31 March 2010	CMT: May 2010	LAA report to: Thematic Groups May/June 2010
		Executive: May/June 2010	Thematic Leads May/June 2010
			Local Strategic Partnership (LSP) May/June 2010

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