

Appendix 2 - Bridgend County Borough Council Performance Framework

This document outlines Bridgend County Borough Council's Performance Management Framework. It explains what we do to monitor and report our performance, sets out the roles and responsibilities for performance in the council and outlines the timetables for reporting, challenge and publication of performance information.

In a time of decreasing budgets and increasing demand for council services, effective performance management becomes even more important.

The document is divided into two sections. The first section emphasises the importance of effective performance management within the organisation. It also explains our approach to performance management, the 'Plan, Do, Review' cycle and the way we measure and explain our progress against our corporate plan.

The second section is a practical guide, outlining the specific responsibilities and expectations of each role in the organisation. There is a section for every role, to help you understand what you need to do, when and why. You may also want to read the sections for other roles, whether you are:

- A member of the public
- An elected member
- A member of staff

We encourage you to read this document as it serves as a valuable resource to help deepen your understanding of both performance management and your own role and responsibilities.

For more information on anything in this document

Please feel free to contact the Corporate Performance Team. We are happy to help and provide any extra information you need.

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Why is performance important?

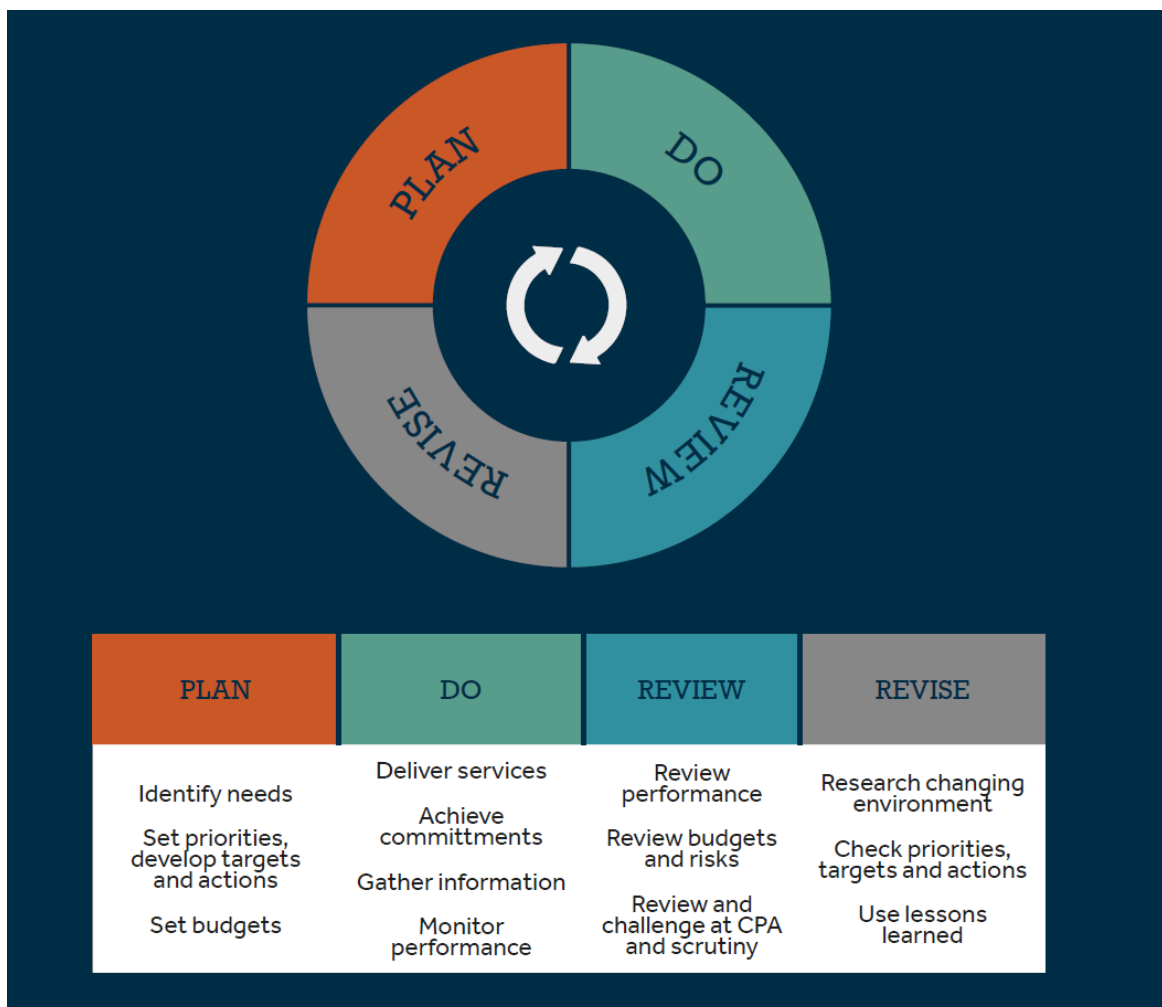
Performance management is defined as ‘taking action in response to actual performances to make outcomes for users and the public better than they would otherwise be’ (Source IDeA).

Performance management is important because it:

- Demonstrates our priorities and if we are achieving them
- Is a requirement of our stakeholders and regulators
- Helps motivate and engage staff and assign accountability
- Allows us to identify and rectify poor performance
- Helps us learn from past performance and improve future performance

Performance Management Approach

We take a systematic approach to performance management, following the industry-recognised ‘plan-do-review-revise’ cycle.

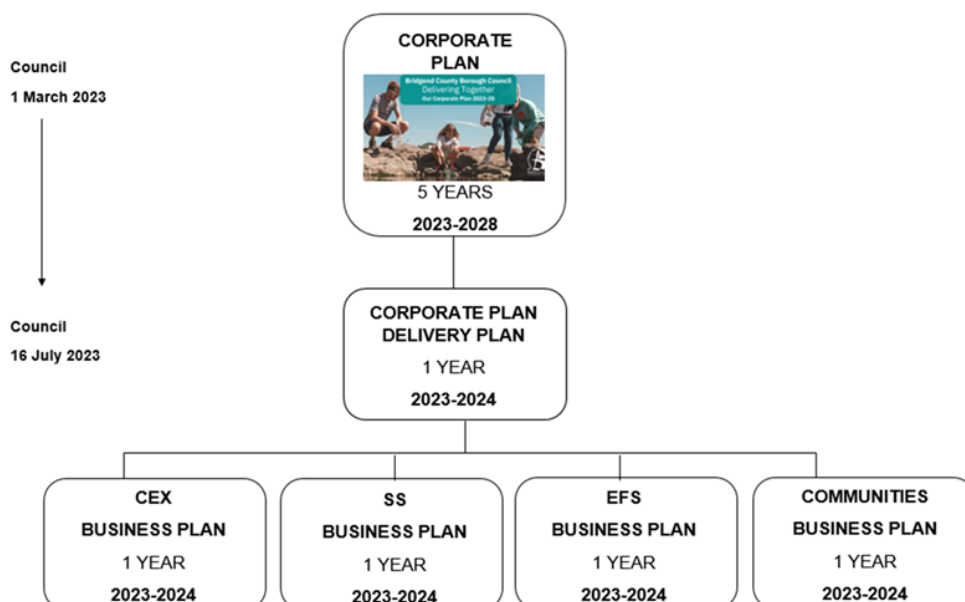


*CPA: Corporate Performance Assessment

Plan, do, review – What do we measure, where does it go?

Plan

We write plans at several levels to make sure we have clear priorities and know how we are going to achieve them. Our hierarchy of plans looks like this



Corporate Plan and delivery plan

Every five years the Council publishes a new Corporate Plan. It is informed by the Wellbeing of Future Generations Act and a range of other data and evidence. It describes the challenges the Council is facing, how we will work, our priorities for delivery and what success will look like. Our Corporate Plan 2023-28 was agreed by Council in March 2023 and sets out the Council's priorities (which are the Council's 7 wellbeing objectives and 5 ways of working), outcomes and success measures. The way we test how well we are doing against each wellbeing objectives looks like this –

Wellbeing Objective Five - A County Borough that is responding to the climate and nature emergency		
	Commitments	Performance Indicators
Aim 1 – Moving towards net zero carbon	4 projects	2 PI
Aim 2 – Improving the energy efficiency of our buildings and services	1 projects	1 PIs
Aim 3 – Protecting our landscapes and open spaces and planting more trees	3 projects	2 PIs
Aim 4 – Improving the quality of the built environment through good placemaking principles	1 projects	2 PIs
Aim 5 – Reducing, reusing or recycling as much of our waste as possible	2 projects	4 PIs
Aim 6 – Improving flood defences and schemes to reduce flooding in our homes and businesses	1 project	1 PI

Directorate Business Plans and Service Plans

Directorate business plans are the action plans to help us achieve the Council's Corporate Plan. Each plan outlines the contribution that the directorate will make to achieve the Council's well-being objectives. It sets out key milestones against the commitments and details the performance indicators and targets. The plans also outline other directorate priorities and performance measures which are not aligned to the wellbeing objectives. CMB and directorate management teams are responsible for developing directorate business plans, which are then challenged by Corporate Management Board and scrutinised by Scrutiny chairs at CPA.

Service plans translate directorate objectives into service targets and operational activity, aligning with finance, workforce, and risk issues. Heads of Service and Group Managers are responsible for producing their service and group delivery plans.

Employee Appraisals

Employee appraisals help members of staff understand how they contribute to the council's priorities and make sure that we have clear and agreed actions to achieve all of our wellbeing objectives.

Do - Implementing and Monitoring Our Plans

The 'do' stage of performance management is about carrying out action and monitoring performance in delivering our plans. Regular performance monitoring is vital to achieve our planned outcomes, as it allows for immediate action or corrections where things aren't going to plan.

Corporate Plan

It is the responsibility of the Corporate Management Board (CMB) and Cabinet to lead the implementation and monitoring of progress on our corporate wellbeing objectives.

Directorate / Service / Employee Appraisals

Corporate Directors and their Directorate Management Teams (DMTs) are responsible for delivering their business plans and monitoring progress. It is the responsibility of the relevant Head of Service/Group Manager to deliver and monitor the progress of service or group plans. It is the responsibility of managers and employees to undertake and monitor individual objectives, as agreed in appraisals. Regular one-to-one meetings between employees and managers should also take place throughout the year. This ensures that all employees are undertaking their duties and can adjust their work plan where needed based on the 'corrective action' cascaded down from corporate, directorate or service level.

Review

The review stage assesses whether we are on course to deliver our wellbeing objectives and meet targets. It also identifies opportunities for improvement.

Corporate Performance Assessment (CPA)

Corporate Performance Assessment (CPA) is done quarterly, attended by Cabinet Members, members of the Corporate Management Board, Heads of Service, and Chairs of Scrutiny Committees. It is supported by Corporate Performance team to:

- demonstrate the Council's performance, effectiveness, and impact.
- identify cross-cutting issues and overspends that affect more than one area.
- critically challenge areas of poor performance; and
- identify improvement opportunities, risks and resource implications.

Scrutiny by Overview and Scrutiny Committee(s)

The Council's Corporate Overview and Scrutiny Committee receives information reports on the Council's performance quarterly in line with CPA. The Council's Corporate Performance Team prepares the reports for the Committee, which are used to inform the Committee's forward work programme. During the year, directorate/service performance is also scrutinised by Subject Overview and Scrutiny Committees. It is the responsibility of the directorate business support team to prepare required performance information for the Subject Overview and Scrutiny Committees.

Directorate Performance Review

Directorate Management Teams (DMT) meetings regularly report and scrutinise performance against their directorate business plans. These meetings are chaired by the relevant Corporate Director and supported by the directorate business support teams. It is the responsibility of the Corporate Director to ensure effective review at the directorate level. The business support teams are responsible for providing accurate and timely performance information for the directorate review.

Service/Group/Employee Performance Review

Service or group meetings regularly report and scrutinise performance against their service plans. It is the responsibility of the Head of Service and their managers for effective review at the service or group level. The business support teams are responsible for providing accurate and timely information.

Employee appraisals are formal review meetings between individuals and their line managers. Managers and employees are jointly responsible in ensuring that appraisals and 6 monthly review meetings occur within the corporate timescales.

Regulatory tracker

To ensure that the outcomes of all audits, reviews and inspections are recorded, a regulatory tracker has been developed. This includes the outcome of inspections by Estyn, Care Inspectorate Wales and HM Inspectorates for Probation and Prisons as well as Audit Wales' work. Actions are considered and scrutinised at Corporate Management Board and Cabinet and Governance and Audit Committee receive 6-monthly updates each January and July.

Revise

This stage is about analysing and learning from the information we have gained during the 'review' stage.

We pull information together from quarterly and annual performance information, and from various other sources, including service users' feedback and findings of external inspections and audit. This is done through the formal, annual corporate self-assessment process.





We analyse what has and hasn't worked and use this to develop options for change. Based on our analysis, 'revisions' can be made at any level of the Council, from corporate priorities right through to individuals' own personal objectives. These may include a redistribution of resources, revised plans and timescales, or even a revision to our objectives and priorities in the next round of planning.

How will we mark or score ourselves

We have one simple scale for how we mark or score the council's performance. Because overall judgements, commitments and performance indicators are measured differently, the colours or judgements have different descriptions depending on which type of performance you are reviewing.

	What does this Status mean?		
	Overall / self-assessment performance	Commitments, projects or improvement plans	Performance Indicators
COMPLETE	Not applicable	Project is completed	Not applicable
EXCELLENT	Very strong, sustained performance and practice	As planned - within timescales, on budget, achieving outcomes	On target and performance has improved / is at maximum
GOOD	Strong features, minor aspects may need improvement	Minor issues. One of the following applies - deadlines show slippage, project is going over budget or risk score increases	On target
ADEQUATE	Needs improvement. Strengths outweigh weaknesses, but important aspects need improvement	Issues – More than one of the following applies - deadlines show slippage, project is going over budget or risk score increases	Off target (within 10% of target)
UNSATISFACTORY	Needs urgent improvement. Weaknesses outweigh strengths	Significant issues – deadlines breached, project over budget, risk score up to critical or worse	Off target (target missed by 10%+)

For performance indicators, we will also show trends in performance so you can see how we are doing compared with the same period last year.

Trend	Meaning
	Improved performance
	Maintained performance (includes those at maximum)
	Declined performance (by less than 10%)
	Declined performance (by 10% or more)

Corporate Plan performance

Each quarter, the corporate performance team and directorate performance teams work together to produce a performance dashboard. This includes –

- A detailed review of progress against the Corporate Plan
- A summary of the current budget position
- An update on key directorate issues which have an impact on service performance
- An update on current directorate risks
- An update on new and ongoing consultation, engagement, and involvement exercises
- An update on progress against regulator recommendations

As well as the detailed information, the corporate performance team will provide a 'heat map' showing performance for each wellbeing objective in a single, simple diagram. This will help CMB and elected members to identify and better understand patterns in performance and diagnose where things need to be changed.

Wellbeing Objective 1						
	Commitments			Performance indicators		
	1	2	3	1	2	3
Aim 1						
Aim 2						
Aim 3						
Aim 4						
Aim 5						

The performance timetable in practice

By when				By who	What	Why
Q1	Q2	Q3	Q4			
30 June 23	30 Sept 23	31 Dec 23	31 March 24	Corporate Performance	Agree and communicate timetables CPA timetable to be prepared and circulated	Ensure common understanding of deadlines and requirements
	5 Nov 23	6 Feb 24	tbc	Collating officers, Responsible Officers, supported by Performance Champions and Business Managers	Collate performance data Produce accurate PI data following guidance for calculation and including evidence where possible. Ensure data is validated and entered in the performance management system (PMS), is authorised and approved. Add comments to support data, for those that are off target or where performance is worsening Update commitments and their milestones / activities in PMS and provide BRAYG status	To ensure accurate, real time data is available on the PMS, allowing performance reports to be produced to populate directorate dashboards.
n/a	14 Nov 23	16 Feb 24	tbc	Corporate Performance Team	Create draft dashboards Run system reports to produce dashboard. Check for missing data, ensure trends are accurate. Check commitments to ensure comments are comprehensive, and the BRAYG is fair given the evidence provided and linked milestone progress Add other dashboard elements such as sickness information, regulatory tracker, budgets. Complete dashboard summary information with BRAYG analysis / performance heatmaps to inform judgements.	To pull information together in a comprehensive and consistent format To check for gaps / inconsistencies To provide an initial challenge on comments and BRAYG ratings before formal member challenge To allow for analysis of overall performance in the period
n/a	21st Nov 2023	23rd Feb 2024	tbc	Corporate Director/ Heads of Service supported by Business Managers	Director input and sign off Review dashboard and address any requests highlighted by the performance team Update Regulatory Tracker information and BRAYG	To ensure consistency / accuracy To allow for a broad understanding of Directorate Performance / prepare for CPA

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					Provide overall Director Comments and produce short performance summary presentation for CPA	To respond to initial challenges from the performance team
n/a	28th Nov 2023	1st March 2024	tbc	Corporate Performance	<p>Papers circulated for CPA</p> <ul style="list-style-type: none"> • Agenda • Performance dashboards • Directorate summaries 	<p>To collate all relevant information into one place</p> <p>To allow for well informed and constructive member challenge</p>
n/a	4 th Dec 2023	7 th March 2024	tbc (June 2024)	CMB members Heads of Service Cabinet Chairs of Scrutiny committees	<p>CPA meeting</p> <p>Broad presentation on each directorate’s challenges, achievements and performance (focusing in turn on the RAYG rated indicators and commitments)</p> <p>Consideration of more detailed performance dashboards</p> <p>Constructive Member challenge and officer responses</p>	<p>To raise member awareness of performance issues and allow for challenge / political perspectives</p> <p>To ensure effective monitoring / management of performance</p> <p>To improve decision making and drive performance improvement</p>
n/a	7 th Dec 2023	Tbc	Tbc	Corporate Performance team	<p>Papers circulated for COSC</p> <ul style="list-style-type: none"> • Cover / summary report • Performance dashboards • Feedback from CPA 	To collate all relevant information into one place and allow for well informed and constructive scrutiny member challenge
n/a	14 th Dec 2023	tbc	tbc		<p>COSC meeting</p> <p>Present performance overview report and feedback from CPA</p>	<p>To raise scrutiny awareness of performance and allow for challenge / political perspectives</p> <p>To ensure effective monitoring / management of performance</p> <p>To improve decision making and drive performance improvement</p>

I am a Member of the Public

As a member of the public I expect:

- High quality services that meet my needs.
- Access to up-to-date performance information that is easy to understand.

I am responsible for:

- Taking part in council consultations and telling them what's important to me.
- Taking responsibility for my own actions and supporting the council's work
- Challenging the council's performance and letting them know where things can be done better.

How do I do this?

- Find consultations on the council's website
- Follow us on all of our social media platforms
- Read and act on our performance priorities and reviews including 'how can I help' sections e.g. in our Corporate Plan and our annual corporate self-assessment
- View our quarterly performance reports in Cabinet or Scrutiny meetings
- You can let the council know what you think at any time in any number of ways:
 - Online: General Enquiries Form on our website.
 - Complaints, compliments and feedback
 - Phone: 01656 643643 (Monday to Friday, 8:30am to 5pm).
 - Write to us: Bridgend County Borough Council, Angel St, Bridgend CF31 4WB
 - Talk to your councillor: Find your councillor - www.bridgend.gov.uk

I am an Elected Member

As an elected member I expect:

- Reliable information, advice and support from council officers to help me make decisions and carry out my role.
- Accurate, accessible and up to date performance data on how services are performing and whether we are achieving our aims in the corporate plan
- To be kept informed of issues affecting my ward or the whole Borough

I am responsible for:

- Reviewing the performance documents and dashboards that are produced
- Challenge, ask questions, scrutinise & make recommendations for change
- Informing, approving and owning the Corporate Plan, Delivery Plan and Self-assessment
- Supporting officers in service delivery and monitoring progress to ensure citizens' needs are met
- Using the councillor portal to report issues

How do I do this?

- Read meeting papers and performance documents to keep informed
- Participate in meetings, representing the voice of the citizen.
- Raise issues / concerns with relevant managers.
- Analyse and scrutinise the information in Performance Reports to challenge on issues, help inform decisions and identify ways to make improvements.

I am a Cabinet Member

As a Cabinet member I expect:

- Reliable information, advice and support from council officers to help me make decisions and carry out my role.
- Detailed and regular briefings and performance information to provide an understanding of my portfolio and inform policy decision making
- Accurate, accessible and up to date performance data on how services are performing and whether we are achieving our aims in the corporate plan
- To be kept informed of issues affecting my ward or the whole Borough

I am responsible for:

- Championing the performance of my own portfolio and becoming a subject expert
- Reviewing the performance documents and dashboards that are produced
- Challenge, ask questions, scrutinise & make recommendations for change
- Informing, approving and owning the Corporate Plan, Delivery Plan and Self-assessment
- Supporting officers in service delivery and monitoring progress to ensure citizens' needs are met
- Using the councillor portal to report issues
- Answering performance questions on my portfolio at Council meetings

How do I do this?

- Attend Corporate Performance Assessment meetings as a Leader and subject expert
- Read meeting papers and performance documents to keep informed
- Participate in meetings, representing the voice of my portfolio and the Cabinet.
- Raise issues / concerns with relevant managers.
- Analyse and scrutinise the information in Performance Reports to challenge on issues, help inform decisions and identify ways to make improvements.

I am a Member of a Scrutiny Committee

As a scrutiny committee member I expect:

- Reliable information, advice and support from council officers to help me make decisions and carry out my role.
- Scrutinise performance and decisions relating to my scrutiny committee
- Accurate, accessible and up to date performance data on how services are performing and whether we are achieving our aims in the corporate plan
- To be kept informed of issues affecting my ward or the whole Borough

I am responsible for:

- Scrutinising performance on my subject areas and becoming a subject expert,
- Asking questions, or for more information & make recommendations for change
- Reviewing the performance documents and dashboards that are produced
- Informing, approving and owning the Corporate Plan, Delivery Plan and Self-assessment
- Supporting officers in service delivery and monitoring progress to ensure citizens' needs are met
- Using the councillor portal to report issues

How do I do this?

- Chairs attend Corporate Performance Assessment meetings as a scrutiny champion and subject expert
- Read meeting papers and performance documents to keep informed
- Participate in meetings, representing the voice of my scrutiny committee.
- Raise issues / concerns with relevant managers.
- Analyse and scrutinise the information in Performance Reports to challenge on issues, help inform decisions and identify ways to make improvements.

I am a CMB member or Head of Service

As a CMB member, I expect:

- For me and my directorate to be engaged with the Corporate Plan and self-assessment understand our contribution
- Support and information from Corporate performance and Directorate business support and performance champions
- Consistent and timely business plan templates following agreement of annual delivery plans
- Clear expectations and timelines for performance information

I am responsible for:

- Accountable for development & delivery of Corporate Plan, MTFS and other strategic plans and the annual corporate self-assessment
- Ensuring staff appraisals take place to link Corporate Plan priorities and individuals objectives
- Operational accountability for delivering priorities in the Corporate Plan and reporting accurate and timely performance information that measures our progress
- Accountable for development, scrutiny and delivery of directorate business plans and service plans
- Constructively responding to performance challenge in CPA, Scrutiny etc

How do I do this?

- Provide input to Corporate Plan and self-assessment
- Produce directorate plans, service plans and individual objectives
- Sense checking quarterly performance information and providing holistic / overarching comments and presentations
- Engaging with discussions at CPA and Scrutiny and using their feedback to improve performance

I am a Group Manager / Manager

As a Manager I expect:

- Clear direction from the Council and senior leaders.
- For me and my team to be engaged with the Corporate Plan and self-assessment and understand our contribution
- Support and information from Corporate performance and Directorate business support and performance champions
- To be engaged in the business planning and service planning process
- Clear expectations and timelines for performance information

I am responsible for:

- Providing information for the development of Corporate Plan, Directorate Business Plans and service plans and annual Self-Assessment
- Ensuring staff appraisals take place to link Corporate Plan priorities and individuals objectives
- Operational accountability for delivering priorities in the Directorate and Service Plans and reporting accurate and timely performance information that measures our progress
- Providing accurate and timely performance targets and information and ensuring there are systems in place to capture, calculate and validate performance data
- Providing accurate and timely information on commitments and projects
- Providing additional data requested by Scrutiny committees
- Quality-assure performance data, providing data calculation and validation forms and appropriate evidence

How do I do this?

- Contributed to the development of the Corporate / Directorate / Service Plan and self-assessment?
- Complete staff appraisals with individuals' objectives

- Set realistic performance targets and quality assurance mechanisms
- Set realistic milestones and activities to support our commitments
- Provided quarterly data, comments and ratings / judgements on PIs and commitments and signed them off

I am a Business Manager / Directorate Performance Champion

As a Business Manager / Directorate Performance Champion I expect:

- Clear direction from my CMB member
- For me and my team to be engaged with the Corporate Plan and self-assessment
- Support and information from Corporate performance team
- To be engaged in the business planning and service planning process
- Clear expectations and timelines for performance information in a robust performance framework
- Adequate systems and IT resources to support the development, communication and monitoring of performance. Technical support and training where needed
- Buy-in from CMB / HoS / Managers and all directorate staff on effective performance management

I am responsible for:

- Championing the importance of performance management in my directorate including the performance framework, roles, responsibilities and deadlines and the performance management system (PMS)
- Ensuring that Directorate / service plans are produced, and progress is monitored
- Ensuring there are processes to collect / validate quarterly performance data
- Producing and analysing performance data and drafting reports for senior managers, cabinet members and Scrutiny committees
- Providing input, feedback and challenge within my directorate to ensure continuous improvement and escalate issues if they are identified

How do I do this?

- Stay informed regarding corporate performance requirements and initiatives and familiarise myself with the performance framework, roles and responsibilities and deadlines

- Read meeting papers and performance documents to keep informed
- Raise issues / concerns with relevant managers.
- Analyse and scrutinise the data my directorate produces to challenge on issues, help inform decisions and identify ways to make improvements.
- Engage with directorate staff at all levels in order to improve the performance management culture

I am a member of the Corporate Performance Team

As a member of Corporate Performance Team I expect:

- Support from CMB and HoS as corporate leads on performance
- Engagement of staff and elected members on the effective management of performance and improving the performance management culture in the organisation
- Leaders, managers and staff to understand and follow the performance framework
- Adequate systems and IT resources to support the development, communication and monitoring of performance. Technical support and training where needed
- Buy-in from leaders, managers and staff on effective performance management

I am responsible for:

- Coordinating development of the Corporate Plan / delivery plan / self-assessment
- Developing and reviewing the performance framework to ensure arrangements are working and scrutiny of performance is effective
- Coordinating the development of directorate business plans to ensure alignment to the wellbeing objectives set out in the corporate plan
- Implementing the PMS including quarterly performance reporting at CPA, the annual self-assessment and reporting of regulator recommendations
- Improving performance management and data quality / accuracy
- Support the development of a challenge culture, providing education, awareness raising and support to officers and elected members.

How do I do this?

- Regularly review and update the performance framework

- Lead on the Corporate Planning, business planning and self-assessment processes, reviewing best practice across Wales
- Monitor, challenge and review the performance of council's services and identify ways to make improvements. Providing constructive, evidenced challenge on directorate performance.
- Support the development of a challenge culture across the council, providing education, awareness raising and support to officers and elected members.

Ensuring we are subject experts in performance management to champion performance management principles