Appendix 2 – Performance Management Improvement Plan (PMIP)

Issue	Short term solutions	Long term solutions
Performance management framework • **R1 – Business plans** - There is no clear flow between aims and the commitments and PIs that support them. Not all commitments are supported by PIs even where it makes sense to do so. • **R2 - Performance management framework** - as a whole does not adequately measure progress against the wellbeing objectives. Performance Indicators (PIs) are not always outcome focused. • **R4 – Analysis and broad range of information** - We do not always consider a full range of PIs in reports such as implications of budget workforce and performance.	• Develop a corporate plan delivery plan that defines and better links aims, commitments and PIs • Develop directorate business planning templates (and service level plans) that follow the same process • Ensure each wellbeing objective is fully reflected in aims, commitments and appropriate PIs • Ensure PIs balance inputs, outputs and outcomes • Add regulator comments, consultation and engagement to the quarterly dashboards so they are considered alongside commitments and PIs at CPA	• Develop annual review process for the performance framework
Data quality and accuracy • We have a large focus on collecting data rather than analysing it and ensuring its accuracy. • **R3 – Verification** - Many CPA PIs lack guidance notes that can provide ample evidence of data validation process, rationale behind calculation, define data and data sources. • Business managers and performance champions have clearly defined roles in the performance management process on paper but it is not understood or carried out consistently	• Develop clear criteria and guidance for developing aims, commitments and PIs • Develop a clear and agreed approach to data collection, use and validation with performance indicator guidance notes for each PI • Internal audit are carrying out performance indicator audits to test measurement methodology and accuracy	• Include data workings and tables in the performance system • We have asked internal audit to train BCBC performance team on undertaking performance audits • Develop an internal, annual, performance indicator audit regime

Performance management culture • Not all directorates complete the required information, in the correct order, at the right time. • Performance is not embedded across the organisation as part of everyone's job – included in induction, appraisals etc • RAG status is not always correct, and the milestone detail to support it is often missing and not on the PMS. • There is widespread misuse of RAYG ratings, particularly the yellow status, meaning on target but not improved. Awareness of the detail of the system may be an issue. • Challenges to RAG status, commentary and missing information are often resisted or ignored. • Amber / Red commitments routinely lack an explanation of next steps to address progress. • Dashboards remain incomplete, the PMS is not up to date and performance team are unable to run a live report on the quarter. • Benchmarking is not part of regular performance management discussions and challenges. • Scrutiny of performance indicators by members is limited (especially subject scrutiny committees)	• Reiterate communications on quarterly reporting deadlines and requirements to CMB, HoS, business managers and performance champions • Design the new corporate plan delivery plan to include nationally comparable data • Take part in the CPDN Data Cymru group on self-assessment national PIs • Implement a new system from Q2 with short presentations of key issues, challenges, opportunities and RAG indicators for each directorate (as well as providing detailed dashboards) • Plan CPA meetings further in advance and introduce whole day meeting at Q4 (to link with and include self-assessment) • Engage Heads of Service Board in the development and improvement of performance management framework • Introduce regulatory tracker to GAC and Scrutiny Chairs groups and a process for dissemination of messages	• Training and awareness raising with business managers and performance champions – clear responsibilities (and deadlines) for each stage of the performance process, information on the performance key and RAYG ratings • Reinforce messages about no-blame culture and requirement to be transparent and realistic in RAYG ratings • Consider how to address the resistance / ignoring of objective performance management advice or recommendations – introduce a scoring system to decide ratings? Make RAYG decisions centrally? Or implement additional testing / verification? • Develop e-learning module on performance management • Introduce corporate plan / performance management element to corporate induction • Review of performance scrutiny • Members performance and data training
Performance management capacity • The Corporate Performance Manager role remains vacant • The 6-month temporary transfer of the performance team comes to an end in April 2023 • Data champions are not clear on their role in performance management	• Recruit to the Corporate improvement officer and Corporate Performance Manager roles • Find a permanent home in the organisation for the performance team	• Clarify and implement the role of data champions • Improve benchmarking capacity
Performance management system • The PMS is relatively old, it is not intuitive and requires expertise to understand and use	• Use all fields available on the existing performance system • Fill in the system in a proper and timely way	• Provide additional training on the different reports available

• It is not able to speak to other systems in the authority and is therefore resource intensive • This is exacerbated by the issues in the 'performance culture' section, such as timeliness, providing detail, RAYG ratings etc • System outputs require substantial manual adjustment before they can be used to present performance information • There are numerous data sources and systems for recording and storing data around the authority which results in siloed data as well as duplication.	• Investigate how the current system can talk to / take from other directorate systems • Complete system rebuild to address the new corporate plan	• Support ICT team in considering introduction of Power BI