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| <b>Meeting of:</b>                           | <b>CORPORATE OVERVIEW AND SCRUTINY COMMITTEE</b>  |
| <b>Date of Meeting:</b>                      | <b>21 MARCH 2024</b>  |
| <b>Report Title:</b>                         | <b>QUARTER 3 PERFORMANCE 2023-24</b>  |
| <b>Report Owner / Corporate Director:</b>    | <b>CHIEF OFFICER – LEGAL AND REGULATORY SERVICES,<br/>HR AND CORPORATE POLICY</b>   |
| <b>Responsible Officer:</b>                  | <b>ALEX RAWLIN<br/>POLICY AND PERFORMANCE MANAGER</b>   |
| <b>Policy Framework and Procedure Rules:</b> | <b>Monitoring the Council’s performance against its Corporate Plan forms part of the Council’s Performance Management Framework.</b>  |
| <b>Executive Summary:</b>                    | <b>This report provides –</b> <ul style="list-style-type: none"> <li>• <b>an overview of performance against wellbeing objectives in the Corporate Plan 2023-28 for Quarter 3 2023-24.</b></li> <li>• <b>more detailed analysis, as agreed with the Corporate Overview and Scrutiny Committee, on performance on the commitments and performance indicators in the Corporate Plan Delivery Plan 2023-24.</b></li> </ul> |

## **1. Purpose of Report**

- 1.1 The purpose of this report is to provide the Committee with an overview of Council performance against the Corporate Plan at quarter 3 of 2023-24. This is the first year of the new 5-year Corporate Plan 2023-28, and the 7 new wellbeing objectives set out within the plan. The format of this report has changed significantly this year to improve the way the Council monitors, analyses and understands its performance to inform effective decision making and allow robust scrutiny.

## **2. Background**

- 2.1 On 1 March 2023 Council agreed the Corporate Plan 2023-28 and the proposal to develop a one-year Corporate Plan Delivery Plan (CPDP) to help monitor progress against it. On 19 July 2023 Council agreed the Corporate Plan Delivery Plan 2023-24 which set out the wellbeing objectives and associated aims, commitments, and performance indicators to help measure the Council’s progress on these priorities.
- 2.2 Each Directorate has produced a business plan, which includes milestones against each commitment, targets against each Performance Indicator (PI) and a clear rationale for that target. The directorate business plans can be viewed through the staff intranet. Data quality and accuracy templates have been completed for each PI to clearly define what the PI is measuring, the scope of the data included, the

calculation and verification methods to be used, and clearly identify the responsible officers. In October 2023 the Corporate Plan PI targets and rationales were approved by Council and these are the targets used to judge performance at quarter 3 (Q3).

- 2.3 As part of the Performance Management Framework, monitoring of these commitments and PIs is carried out quarterly through 4 separate directorate performance dashboards scrutinised by Directorate Management Teams and reported quarterly to Corporate Performance Assessment (CPA). A performance overview report is presented to Corporate Overview and Scrutiny Committee (COSC) at quarters 2, 3 and 4 to help them scrutinise progress on delivery.
- 2.4 In October 2023 the performance team held a performance process review session with Corporate Overview and Scrutiny Committee, where proposals were discussed for improvements to the performance reporting process, where improvements to the way the council collates, summarises, analyses, and presents performance information were considered. Some of these changes were implemented when the Q2 performance overview report was brought to this Committee in December 2023, with further changes implemented in this report, and others that will come into play at Q4 and beyond.
- 2.5 At the meeting of this Committee in December 2023 it was recommended that improvements were made to the commentary in the dashboards, to give a clearer understanding of progress made, where PIs or commitments are off target, and what corrective actions are in place. This has been taken into account in providing commentary for Q3.

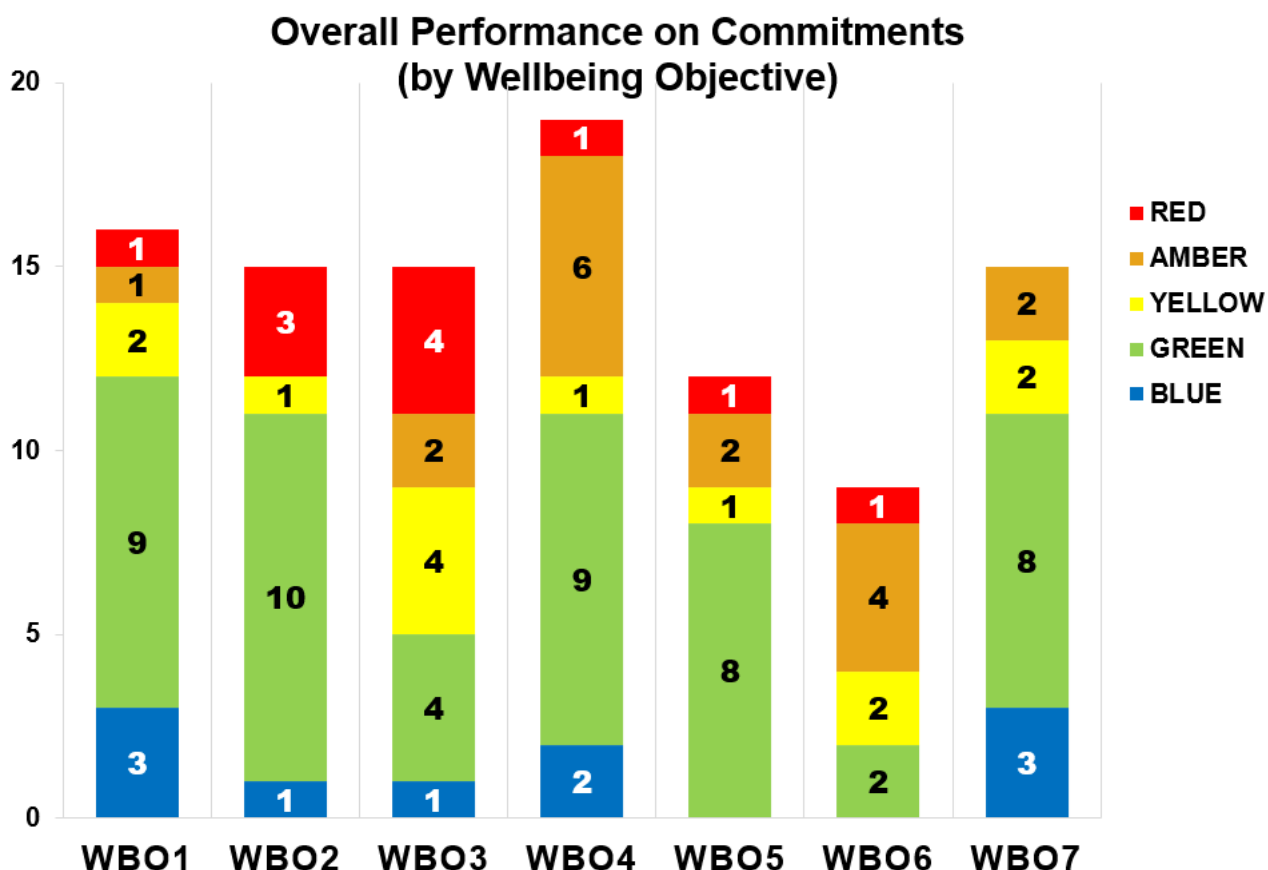
### **3. Current situation / proposal**

- 3.1 The key improvement for Q3 is the development of a single performance dashboard (**Appendix 1**) for Bridgend County Borough Council's performance against its Corporate Plan this quarter. This gives greater detail on the individual commitments and PIs along with improved explanatory comments.
- 3.2 We have one simple scale for how we score the Council's performance as set out in our performance framework. These are summarised again for members' convenience in each separate table in the analysis below and the full performance key is provided within the performance dashboard (**Appendix 1**).
- 3.3 **Summary of progress on Corporate Commitments**  
Table 1 shows the overall performance judgements for commitments at Q3 and comparison with the previous quarter (PQ), with Chart 1 breaking this down further to show performance for each of the wellbeing objectives.

**Table 1**

| Status                      | Meaning of this status   | Performance |       |              |       |
|-----------------------------|--|-------------|-------|--------------|-------|
|                             |  | PQ (Q2)     |       | Current (Q3) |       |
|                             |  | Number      | %     | Number       | %     |
| <b>COMPLETE (BLUE)</b>      | Project is completed   | 8           | 7.9%  | 10           | 9.9%  |
| <b>EXCELLENT (GREEN)</b>    | As planned (within timescales, on budget, achieving outcomes)  | 49          | 48.5% | 50           | 49.5% |
| <b>GOOD (YELLOW)</b>        | Minor issues. One of the following applies - deadlines show slippage, project is going over budget or risk score increases     | 12          | 11.9% | 13           | 12.9% |
| <b>ADEQUATE (AMBER)</b>     | Issues. More than one of the following applies - deadlines show slippage, project is going over budget or risk score increases | 23          | 22.8% | 17           | 16.8% |
| <b>UNSATISFACTORY (RED)</b> | Significant issues – deadlines breached, project over budget, risk score up to critical or worse                               | 9           | 8.9%  | 11           | 10.9% |
|                             | <b>Total</b>   | 101         | 100%  | 101          | 100%  |

**Chart 1**



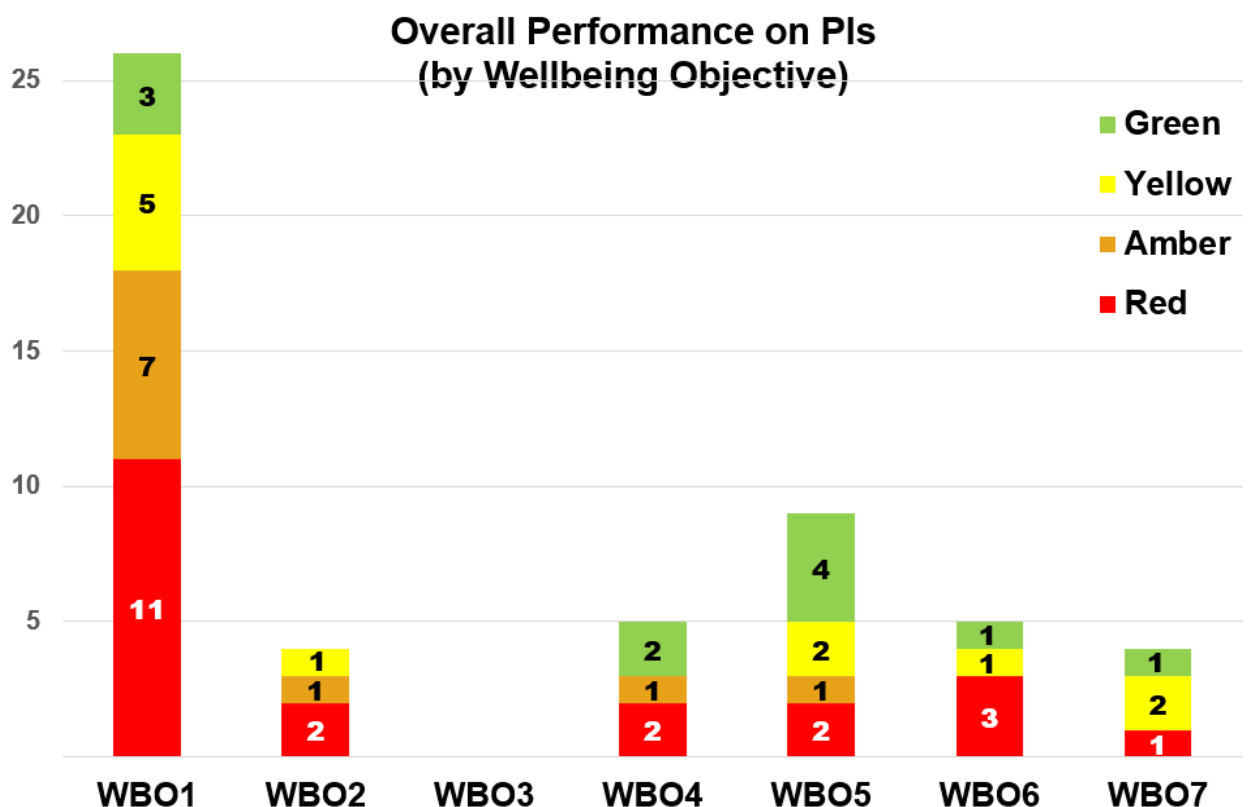
### 3.4 Summary of Performance Indicators

59 Corporate Plan Indicators are reported quarterly, all of which have verified data reported for Q3. 6 of these quarterly indicators are currently establishing baseline figures. 53 indicators could be compared against their target and awarded a RAYG status. It should be noted that this is a decrease in the number of “baseline setting” indicators that were reported at Q2. As suggested at COSC in December 2023, the 4 new Disabled Facilities Grants (DFG) indicators now have the target set for 2023-24. Table 2 shows overall performance for indicators at Q3 and a comparison with the previous quarter, and Chart 2 the performance for each well-being objective.

**Table 2**





| Status                      | Meaning of this status                         | Performance |        |              |        |
|-----------------------------|--|-------------|--------|--------------|--------|
|                             |  | PQ (Q2)     |        | Current (Q3) |        |
|                             |  | Number      | %      | Number       | %      |
| <b>EXCELLENT (GREEN)</b>    | On target <u>and</u> improved or is at maximum | 13          | 27.65% | 11           | 20.75% |
| <b>GOOD (YELLOW)</b>        | On target                                      | 7           | 14.9%  | 11           | 20.75% |
| <b>ADEQUATE (AMBER)</b>     | Off target (within 10% of target)              | 7           | 14.9%  | 10           | 18.9%  |
| <b>UNSATISFACTORY (RED)</b> | Off target (target missed by 10%+)             | 20          | 42.55% | 21           | 39.6%  |
|                             | Total  | 47          | 100%   | 53           | 100%   |

**Chart 2**



- 3.5 There were 2 indicators which did not have data available at Q2, however these indicators are included for Q3.
- 3.6 Trend data is available for 30 Corporate Plan indicators, comparing current performance to the same period last year. Trend analysis is only possible where verified quarterly data for the same period last year is available. Trend analysis for quarter 3 is set out in Table 3, with a comparison to the previous quarter:

**Table 3**

| Performance Indicators Trend Definition  |  | Trend   |       |              |       |
|--|--|---------|-------|--------------|-------|
|  |  | PQ (Q2) |       | Current (Q3) |       |
|  |  | Number  | %     | Number       | %     |
|   | Performance has improved                           | 13      | 54.2% | 19           | 63.3% |
|   | Performance maintained (includes those at maximum) | 0       | -     | -            | -     |
|   | Declined performance (by less than 10%)            | 2       | 8.3%  | 5            | 16.7% |
|  | Declined performance (by 10% or more)              | 9       | 37.5% | 6            | 20%   |
| <b>Total</b>   |  | 24      | 100%  | 30           | 100%  |

### Measuring Performance against our Ways of Working





- 3.7 This is the first year of developing indicators / commitments to demonstrate how the Council is performing against the five ways of working in the Corporate Plan. This remains a work in progress, but as a first step, in Q2 and Q3 we have reported on a number of PIs. 8 of these indicators have been reported on for Q3, 7 of which could be compared against target and awarded a RAYG status. This is shown in Table 4.

**Table 4**

| Status                      | Meaning of this status                         | Performance |        |              |        |
|-----------------------------|--|-------------|--------|--------------|--------|
|                             |  | PQ (Q2)     |        | Current (Q3) |        |
|                             |  | Number      | %      | Number       | %      |
| <b>EXCELLENT (GREEN)</b>    | On target <u>and</u> improved or is at maximum | 2           | 28.57% | 2            | 28.57% |
| <b>GOOD (YELLOW)</b>        | On target                                      | 2           | 28.57% | 2            | 28.57% |
| <b>ADEQUATE (AMBER)</b>     | Off target (within 10% of target)              | 2           | 28.57% | 2            | 28.57% |
| <b>UNSATISFACTORY (RED)</b> | Off target (target missed by 10%+)             | 1           | 14.29% | 1            | 14.29% |
| <b>Total</b>                |  | 7           | 100%   | 7            | 100%   |

3.8 Trend data is available for 5 of the 8 ways of working indicators, comparing performance with the same period last year. Trend analysis is set out in Table 5:

**Table 5**

| Performance Indicators Trend Definition   |  | Trend   |      |              |      |
|---|--|---------|------|--------------|------|
|   |  | PQ (Q2) |      | Current (Q3) |      |
|   |  | Number  | %    | Number       | %    |
|  | Performance has improved                           | 2       | 40%  | 2            | 40%  |
|  | Performance maintained (includes those at maximum) | 2       | 40%  | 2            | 40%  |
|  | Declined performance (by less than 10%)            | 1       | 20%  | 1            | 20%  |
|  | Declined performance (by 10% or more)              | -       | -    | -            | -    |
| Total   |  | 5       | 100% | 5            | 100% |

### Summary of Sickness Absence

3.9 Sickness absence is included as one of the ways of working PIs under Better and More Targeted use of Resources. The focus continues to be on trying to reduce sickness across the organisation, therefore no targets were set for the overall staff indicator or individual directorates. Staff wellbeing measures are in place and sickness continues to be closely monitored by Directorate Management Teams, Corporate Management Board, and at CPA.

3.10 At Q3 cumulative days lost per FTE across the organisation is 8.77, showing an improved position compared with 9.77days for the same period last year, a 10.24% decrease, and a further improvement on the trend seen at Q2. This improved trend is mirrored within the directorate data for both Social Services and Wellbeing and Education and Family Support, however a worsening trend compared to last year is seen in Chief Executives, Communities Directorate, and Schools. The proportion of absences that are short-term at Q3 is 26%, which is the same as Q3 last year, but increased from the 23% reported at quarter 2 2023-24.

#### **4. Equality implications (including Socio-economic Duty and Welsh Language)**

- 4.1 The protected characteristics identified within the Equality Act, Socio-economic Duty and the impact on the use of the Welsh Language have been considered in the preparation of this report. As a public body in Wales the Council must consider the impact of strategic decisions, such as the development or the review of policies, strategies, services and functions. This is an information report, therefore it is not necessary to carry out an Equality Impact assessment in the production of this report. It is considered that there will be no significant or unacceptable equality impacts as a result of this report.

#### **5. Well-being of Future Generations implications and connection to Corporate Well-being Objectives**

- 5.1 This report assists in measuring and monitoring progress made against the following corporate well-being objectives under the Well-being of Future Generations (Wales) Act 2015 that form the Council's Corporate Plan 2023-28:-

1. A County Borough where we protect our most vulnerable
2. A County Borough with fair work, skilled, high-quality jobs and thriving towns
3. A County Borough with thriving valleys communities
4. A County Borough where we help people meet their potential
5. A County Borough that is responding to the climate and nature emergency
6. A County Borough where people feel valued, heard and part of their community
7. A County Borough where we support people to live healthy and happy lives

- 5.2 The 5 ways of working set out in the Well-being of Future Generations (Wales) Act have also contributed to the Council developing its own five ways of working. The ways of driving and measuring those ways of working is also contained in the Corporate Plan Delivery Plan.

#### **6. Climate Change Implications**

- 6.1 There are no specific implications of this report on climate change. However, some of the measures and projects included within the Corporate Plan 2023-28 and annual delivery plan for 2023-24 have been developed to help assess the Council's performance on areas including climate change.

#### **7. Safeguarding and Corporate Parent Implications**

- 7.1 There are no specific implications from this report on safeguarding or corporate parenting.

#### **8. Financial Implications**

- 8.1 There are no financial implications arising from this report.

#### **9. Recommendations**

- 9.1 The Committee is recommended to note the Council's performance at quarter 3 for the year 2023-24.

#### **Background documents**

None