

Meeting of:	CORPORATE OVERVIEW AND SCRUTINY COMMITTEE
Date of Meeting:	25 JULY 2024
Report Title:	QUARTER 4 / YEAR-END PERFORMANCE 2023-24
Report Owner / Corporate Director:	CHIEF OFFICER – LEGAL AND REGULATORY SERVICES, HR AND CORPORATE POLICY
Responsible Officer:	ALEX RAWLIN POLICY AND PERFORMANCE MANAGER
Policy Framework and Procedure Rules:	Monitoring the Council’s performance against its Corporate Plan forms part of the Council’s Performance Management Framework.
Executive Summary:	This report provides – <ul style="list-style-type: none"> • an overview of performance against wellbeing objectives in the Corporate Plan 2023-28 at year-end 2023-24. • 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 (CPDP) 2023-24.

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 4 of 2023-24, which is the finalised year-end outturn position. This is the first full year of the new 5-year Corporate Plan 2023-28 and the final performance report for the 2023-24 Corporate Plan Delivery Plan (CPDP). 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 produced a business plan, which includes milestones against each commitment, targets against each Performance Indicator (PI) and clear rationales for targets. The directorate business plans can be viewed via 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 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 4 (Q4).

- 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) and now Cabinet and Corporate Management Board (CCMB) following the decision to discontinue CPA after Q3 2023-24. 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 to discuss proposals for improvements to the performance reporting process, including the way the council collates, summarises, analyses, and presents performance information. These changes have been implemented in stages throughout the year and will continue into 2024-25 to ensure the data is presented, summarised and displayed in the most effective way.
- 2.5 At the meeting of Corporate Overview and Scrutiny Committee in December 2023 members 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 implemented for the dashboards produced in Q3 and Q4.
- 2.6 A key improvement is the development of a single performance dashboard for Bridgend County Borough Council's performance against its Corporate Plan which was implemented at Q3 this year. This gives greater detail on the individual commitments and PIs along with improved explanatory comments.

3. Current situation / proposal

- 3.1 The year-end performance dashboard has been provided at **Appendix 1**, which details performance against the Corporate Plan for 2023-24, with final judgements on our commitments and comments to summarise key activities and achievements in the year and outline next steps where appropriate, and annual values and supporting comments for the performance indicators.
- 3.2 Our simple scale for how we score the Council's performance is set out in our Performance Management Framework. This is 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**).

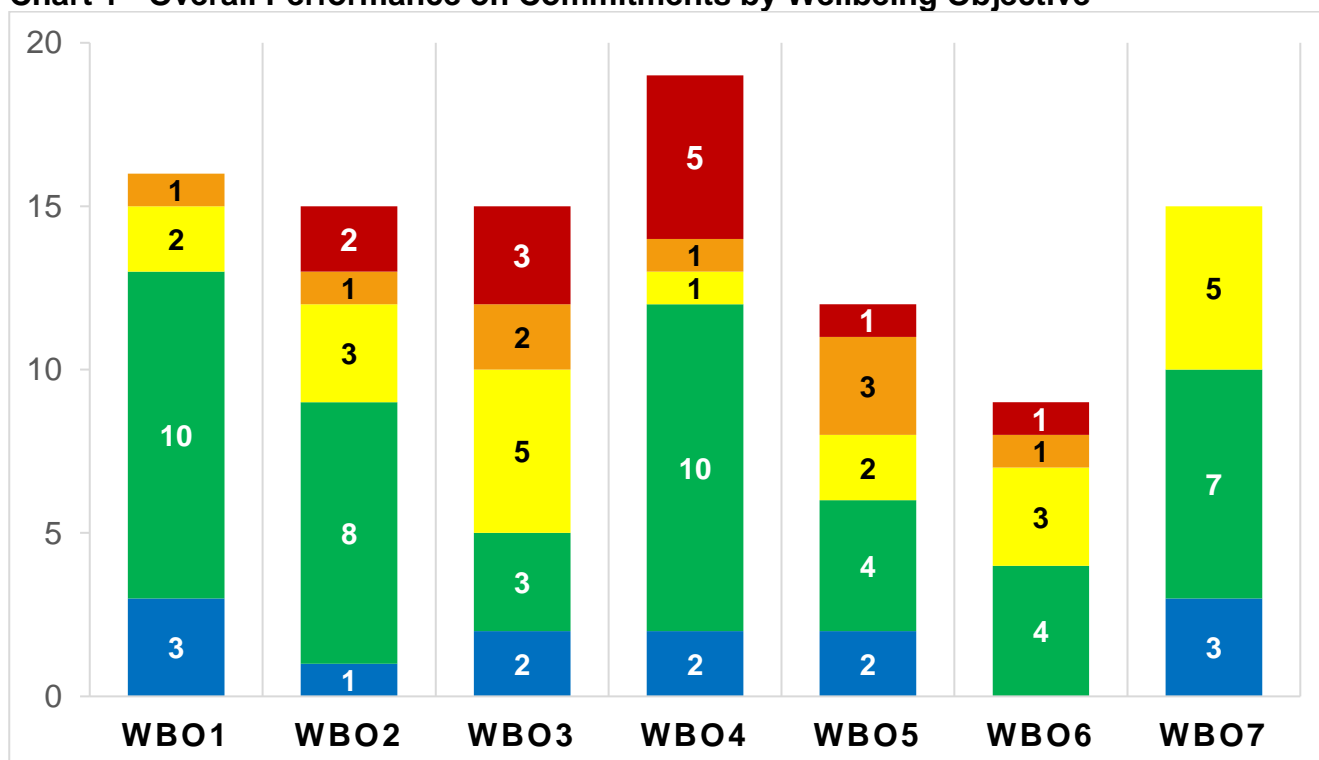
3.3 Summary of progress on Corporate Commitments

Table 1 shows the overall performance judgements for commitments at Year-end (Q4) 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 (Q3)		Current (Q4)	
		Number	%	Number	%
COMPLETE (BLUE)	Project is completed	10	9.9%	13	12.9%
EXCELLENT (GREEN)	As planned (within timescales, on budget, achieving outcomes)	50	49.5%	46	45.5%
GOOD (YELLOW)	Minor issues. One of the following applies - deadlines show slippage, project is going over budget or risk score increases	13	12.9%	21	20.8%
ADEQUATE (AMBER)	Issues. More than one of the following applies - deadlines show slippage, project is going over budget or risk score increases	17	16.8%	9	8.9%
UNSATISFACTORY (RED)	Significant issues – deadlines breached, project over budget, risk score up to critical or worse	11	10.9%	12	11.9%
	Total	101	100%	101	100%

Chart 1 - Overall Performance on Commitments by Wellbeing Objective



3.4 Summary of Performance Indicators

At Year-end (Q4) we are able to evaluate performance on the full PI data set included in the 2023-24 delivery plan, which is 116 PIs, 60 of which are quarterly indicators, and 56 annual indicators which are included for the first time.

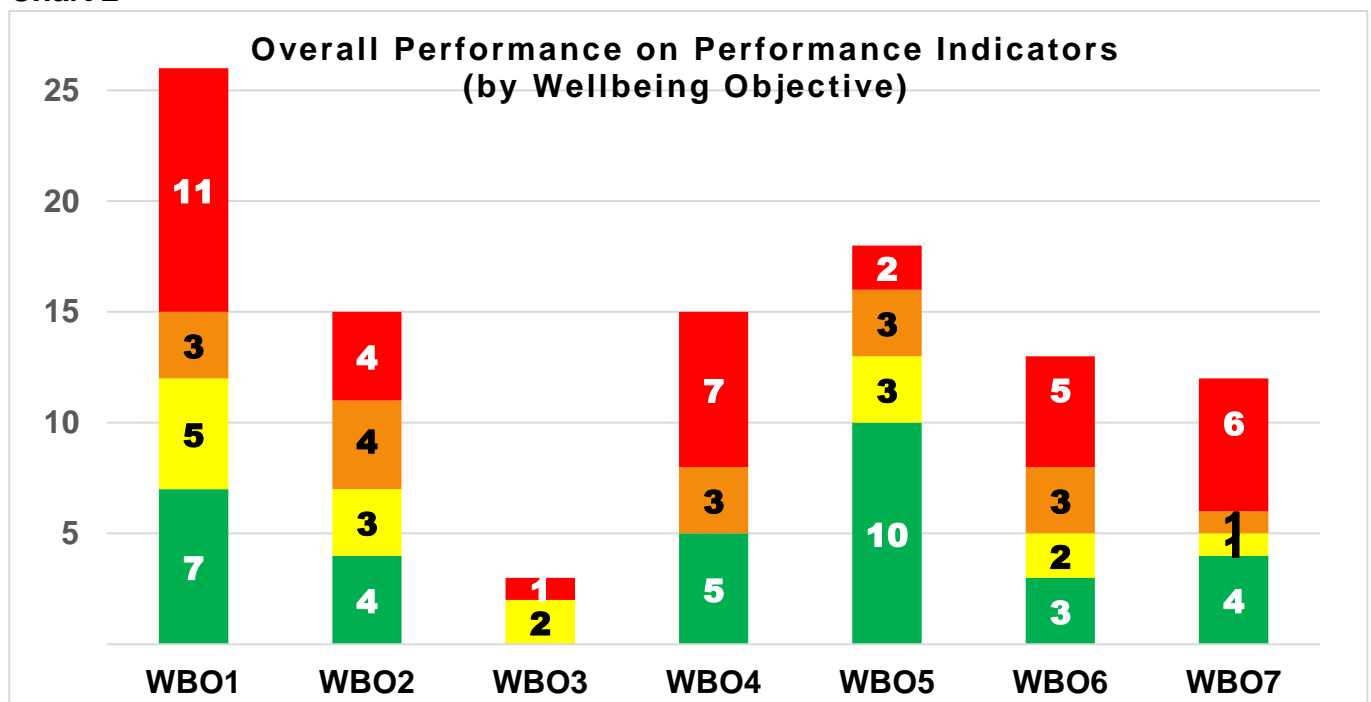
3.5 Of these 116, 114 have verified annual values, with 2 recorded as “data not available”. 102 could be compared against their target and awarded a RAYG status, with 12 of the indicators using 2023-24 to establish baseline values to set targets going forward.

3.6 Table 2 below shows overall year-end performance for PIs and a comparison with the previous quarter performance (Q3), and Chart 2 the performance for each wellbeing objective.

Table 2

Status	Meaning of this status	Performance			
		PQ (Q3)		Current (Q4)	
		Number	%	Number	%
EXCELLENT (GREEN)	On target <u>and</u> improved or is at maximum	11	20.75%	33	32.35%
GOOD (YELLOW)	On target	11	20.75%	16	15.69%
ADEQUATE (AMBER)	Off target (within 10% of target)	10	18.9%	17	16.67%
UNSATISFACTORY (RED)	Off target (target missed by 10%+)	21	39.6%	36	35.29%
	Total	53	100%	102	100%

Chart 2



3.7 Verified data could not be provided for 2 indicators detailed below with explanations provided by the Service.

SSWB55b) Percentage of carers who were offered a carers' assessment - Adult Social Care	Performance: In Adult Social Care we are currently working with our IT department to resolve the reporting issues with this measure. A Carers action plan has been developed and is currently in progress. Carers champions across all adult social work teams have been recruited.
SSWB72 Percentage of pupils who participate in three or more occasions of activity per week (FG Indicator 38 Sport Wales School Sport Survey data)	Performance: Survey not undertaken this year. This is based on the national school sport survey that is run by Sport Wales involving primary and secondary schools but is not annual and next survey is not imminent. Bridgend has demonstrated top quartile performance in the previous survey in a range of categories including overall activity levels, after school participation and links to community activities. The surveys cover primary and secondary school ages.

3.8 Trend data allows us to compare our 2023-24 annual values with the same period last year (2022-23 annual values). Comparable data for last year is available for 68 of the 116 PIs. Of the remaining 48, 2 indicators are “data not available”, 42 indicators do not have comparable verified data for last year because they are new or data was not collected last year, and 4 PIs are “trend not applicable” due the way the targets are profiled. Trend analysis for year-end performance is set out in Table 3, with a comparison to the trend analysis at Q3, and Chart 3 the trend analysis for each wellbeing objective.

Table 3





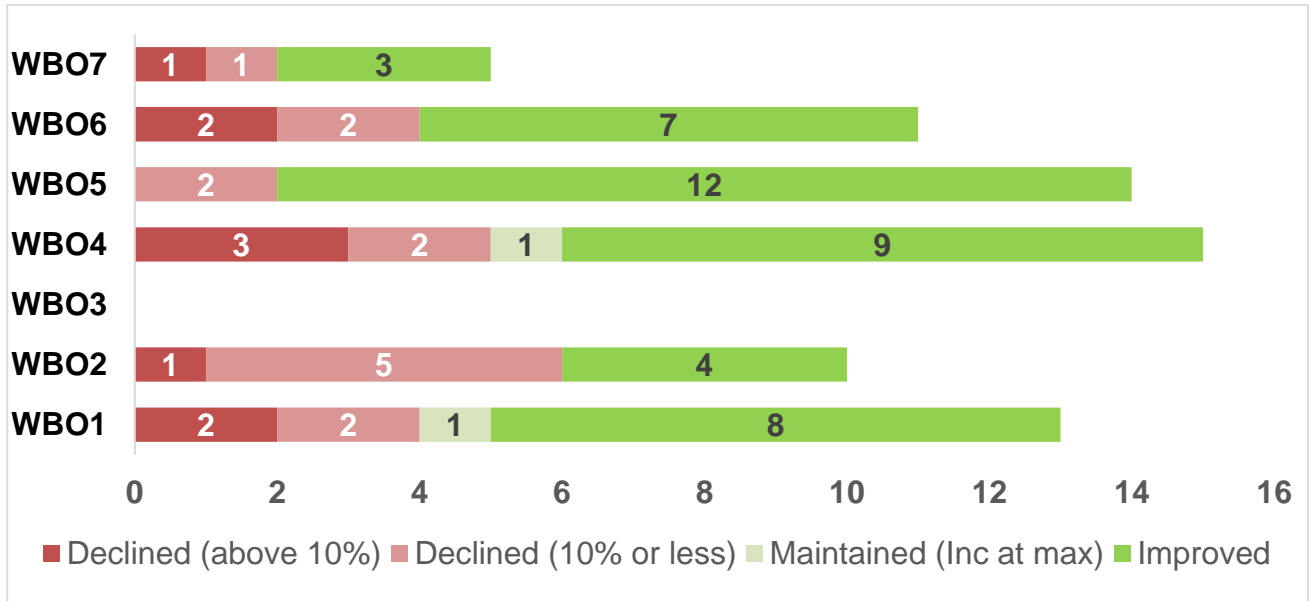
Performance Indicators Trend Definition		Trend			
		PQ (Q3)		Current (Q4)	
		Number	%	Number	%
	Performance has improved	19	63.3%	43	63.24%
	Performance maintained (includes those at maximum)	-	-	2	2.94%
	Declined performance (by less than 10%)	5	16.7%	14	20.59%
	Declined performance (by 10% or more)	6	20%	9	13.23%
Total		30	100%	68	100%

Chart 3 – Performance Indicator Trend by Wellbeing Objective



3.9 At the performance process review session held with COSC in October 2023 members indicated it would be useful to have a more detailed visual summary to show performance at a glance in the form of a heat map. This is intended to allow members to pick out specific areas of concern which can then easily be identified on the performance dashboard. This is provided in Chart 4 on the next page.

Measuring Performance against our Ways of Working





- 3.10 This is the first year of developing indicators / commitments to demonstrate how the Council is performing against the five ways of working in the new Corporate Plan. This remains a work in progress and will continue into 2024-25 with more work needed to agree how we judge progress against the ways of working commitments and come to overall judgements.
- 3.11 As a first step this year we have reported on a number of ways of working PIs in addition to those included within the wellbeing objectives. 9 of these indicators have been reported on at Q4, 8 which are quarterly PIs, with 1 annual indicator. Of the 9, 7 have an annual outturn value which could be compared against target and awarded a RAYG status. This is shown in Table 4, with comparison to the previous quarter.

Table 4

Status	Meaning of this status	Performance			
		PQ (Q3)		Current (Q4)	
		Number	%	Number	%
EXCELLENT (GREEN)	On target <u>and</u> improved or is at maximum	2	28.57%	2	28.57%
GOOD (YELLOW)	On target	2	28.57%	1	14.29%
ADEQUATE (AMBER)	Off target (within 10% of target)	2	28.57%	2	28.57%
UNSATISFACTORY (RED)	Off target (target missed by 10%+)	1	14.29%	2	28.57%
	Total	7	100%	7	100%

- 3.12 Trend data is available for 6 of the 9 ways of working indicators, comparing annual performance for 2023-24 with the same period last year. Of the remaining 3, 1 of the indicators does not have comparable verified data for last year because it is new, and 2 indicators are “trend not applicable” due the way the targets are profiled. Trend analysis is set out in Table 5 on the next page.

Table 5

Performance Indicators Trend Definition		Trend			
		PQ (Q3)		Current (Q4)	
		Number	%	Number	%
	Performance has improved	2	40%	3	50%
	Performance maintained (includes those at maximum)	2	40%	2	33.33%
	Declined performance (by less than 10%)	1	20%	1	16.67%
	Declined performance (by 10% or more)	-	-	-	-
	Total	5	100%	6	100%

Summary of Sickness Absence

- 3.13 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/CCMB.
- 3.14 At Q4 cumulative days lost per full time equivalent (FTE) employee across the organisation in 2023-24 is 12.37, showing an improved position compared with 13.2 days for 2022-23, a 6.3% decrease, and bringing levels back down in line those reported in 2021-22. 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 classified at short-term has decreased slightly from 27% in the 2022-23 to 26% in 2023-24, which is the same as reported at Q3.

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 4 for the 2023-24 financial year.

Background documents

None