

REPORT TO: POLICY AND RESOURCES COMMITTEE ON 27 APRIL 2010

SUBJECT: PERFORMANCE MANAGEMENT – QUARTERLY MONITORING DOCUMENT

BY: CHIEF EXECUTIVE

1. REASON FOR REPORT

- 1.1 The Policy and Resources Committee are asked to approve the development of a quarterly monitoring document which will be the supporting background information for the Performance Management Framework.
- 1.2 This report is submitted to Committee in terms of Section 3A(42) of the Council's Administrative Scheme relating to ensuring that the organisation administrative and management processes of the Council are designed to make the most effective contribution to achieving the Council's objectives.

2. RECOMMENDATION

- 2.1 **The Policy and Resources Committee are asked to approve the development of a quarterly monitoring document which will provide all of the supporting background information for the Council's Performance Management Framework in one document.**

3. BACKGROUND

- 3.1 At the Special Full Council meeting on 30 September 2009, the revised Performance Management Framework was approved. Currently the following information is reported to committee and community planning strategic groups on a quarterly basis.
- SOA overview – Same information reported to Policy & Resources Committee, Audit & Performance Committee and Community Planning Board at various times over a 12 week cycle.
 - SOA Local Delivery Actions Plans – Similar information reported to the 5 strategic theme groups over a 12 week cycle.
 - Service Improvements Plans, Service Outcomes, Service Standards, & Statutory & Local Performance Indications – Similar information with slight variations reported to service committees over an 8 week cycle.
- 3.2 The current system provides a constant flow of performance information continuously through the quarterly cycle. However, a review of the system has highlighted areas which could be improved. For instance:
- It takes 18 weeks from the end of the quarter to complete the reporting cycle for community planning.

- Some information is being reported three times in a cycle requiring slight amendments to the covering reports and photocopying of the large supporting documents for each report.
- No overview of performance across the all services is readily available.
- Performance information is available at the end of the quarter though publication of the information must await the appropriate Committee dates in the cycle.

3.3 The current arrangements can be improved by the production of an indexed quarterly document at the end of each quarter. The contents of the quarterly document would include:-

1. SOA – overall performance on key outcomes
2. Theme groups – local delivery actions plans
3. Service Improvement Plans
4. Service Outcomes
5. Service Standards
6. Audit Scotland Performance Indicators
7. Local Performance Indicators & budget monitoring
8. Complaints

A sample of the quarterly document (based on quarter 2 information) is available in the members' library.

3.4 A copy of the quarterly document would be provided to all Elected Members and the Corporate Management Team. Performance analysis of the indicators will be provided by the Research & Information Officers. Service Managers will submit exception reports throughout the cycle to the relevant committee or community planning group according to the timetable.

3.5 The committee reports on performance will refer to the quarterly document but will not be attached to the relevant report. Members and officers would be expected to refer to the quarterly document which has previously been circulated.

3.6 It should be noted that the content of this quarterly document will alter slightly throughout the year to reflect annual indicators such as attainment, year end financial indicators, etc as the information becomes available.

3.7 By compiling all of the indicators in one document it will give Members and the Corporate Management Team a clearer picture of performance across the Council rather than piecemeal throughout the cycle and year. It will also ensure that information is reported in a more consistent manner than at present.

3.8 It is planned that this quarterly document would be produced within 5-6 weeks of the end of the quarter. This is the same timeframe as is currently operating except that information is reported incrementally to committees during the cycle. From beginning to end it can take committee 14 weeks (6 weeks to gather data at close of quarter and 8 week committee cycle) and community

planning 18 weeks (6 weeks to gather data at close of quarter and 12 week community planning cycle) to receive one quarter's information at the relevant meeting.

- 3.9 If agreed, there is further developmental work required on the document to ensure a consistent format for all similar reported information i.e. Service Improvement Plans, Service outcomes, etc.
- 3.10 There is also likely to be some developmental work concerning information gaps which are becoming apparent now that the full suite of indicators has been compiled. Two areas where information can be improved have already been identified e.g:-
1. very few services give unit cost data or overall cost, to chart changes in demand.
 2. very few services give an indication of staff workloads e.g. number of cases dealt with each month
- 3.11 Currently, there are also performances indicators submitted to committees by service managers which are not held or collected on the corporate system, covalent. These indicators in time will be added to the quarterly document to ensure a full suite of performance across all services is available.

4. SUMMARY OF IMPLICATIONS

(a) Single Outcome Agreement/Service Improvement Plan

Within Outcome 15 the Partnership has committed to developing joint governance and scrutiny arrangements of the Council and its Community Planning partners as a priority for 2009-10. The review of the performance management framework in the first step in the Council to developing scrutiny arrangements for the SOA.

(b) Policy and Legal

The SOA is a public statement of the joint commitment and mutual accountability of the Scottish Government and community planning partners to deliver agreed outcomes.

The Local Government Acts 1992 requires the Accounts Commission to give directions that require councils, fire & rescue and police authorities to publish information relating to the performance of their activities.

A programme of best value audits was introduced in response to the Local Government Scotland Act 2003 which placed a legal duty of continuous improvement on local authorities and led to the introduction of community planning on a statutory basis.

(c) Resources (Financial, Risks, Staffing and Property)

Production of a quarterly monitoring document which acts as a reference document throughout the reporting cycle provides a more efficient and effective system for reporting of performance information.

(d) Consultations

Consultations have taken place with Corporate Management Team/Senior Management Team who are in agreement with the proposal.

5. CONCLUSION

5.1 The Policy and Resources Committee are asked to approve the procedures of a quarterly monitoring document which will be the supporting background information for the Performance Management Framework.

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Background Papers:

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