

## Report Title Here

Date of meeting:	25 <sup>th</sup> July 2024
Report to:	Cabinet
Report of:	Executive Director Corporate Services & Commercial
Portfolio:	Corporate Services
Wards affected:	All
Included in Forward Plan:	No
Is this a key decision:	No
Exempt/confidential report:	No

**Summary:**

The Sefton Corporate Plan (2023 to 2026) was approved in January 2023. It set out the Council's six strategic priorities agreed by Cabinet and the corporate objectives to deliver those priorities. This report sets out the refresh of the Sefton Corporate Plan (2024 to 2027), with revised corporate objectives to deliver the Council's agreed strategic priorities (Appendix A).

The report also sets out an updated Service Planning and Performance Management framework, aligned to the refresh of the Sefton Corporate Plan (2024 to 2027), for embedding the service level improvements in performance management, and to inform regular, collective and cross-cutting performance discussions at Cabinet (Appendix B).

Finally, in April this year, the Council received a letter from Simon Hoare MP, the then Minister for Local Government, requesting it to produce Productivity Plans, set out in the Local Government Finance Settlement, and setting out some guidance along with the timeframes for local authorities to submit their first iterations of the plan. The local authority is requested to submit its plan detailing ways to 'improve service performance and reduce wasteful expenditure' by Friday 19th of July 2024. The Council's Productivity Plan will be refreshed on an annual basis, informed by the Corporate Plan and following the same reporting mechanism set out in the Service Planning and Performance Management framework. The report sets out the first iteration of the 'Sefton Productivity Plan 2024' (Appendix C).

## Recommendation(s):

Cabinet is recommended to:

- (1) Note the refresh of the Sefton Corporate Plan 2024 to 2027, set out in Appendix A.
- (2) Note the updated Service Planning and Performance Management framework, set out in Appendix B.
- (3) Note the first iterations of the 'Sefton Productivity Plan 2024' to be submitted to the Ministry for Levelling Up, Housing and Communities on the 19th of July 2024, set out in Appendix C.

### 1. The Rationale and Evidence for the Recommendations

- 1.1 The Corporate Plan sets out the Council's strategic priorities for the short to medium term, aligned to the medium term financial planning process. It describes where overall the Council is headed (Council priorities) and outlines a roadmap to get there (corporate objectives).
- 1.2 During 2016 Sefton Council led on developing a new and exciting vision for the future of the borough. Working closely with partners, businesses, private sector organisations, the voluntary, community and faith sector and the wider Sefton community, the aim behind the work was to understand and focus on what is important for the borough and its communities in the future. Imagine Sefton 2030 engaged with thousands of people, local businesses and potential investors to create a vision that collectively promotes shared prosperity, coordinated public investment, and a healthy environment and population. Vision 2030 was agreed in November 2016, and guides the Council's long term planning - helping to stimulate growth, prosperity, set new expectation levels and to help focus on what is important for Sefton, its residents and communities. The Vision 2030 informed the Council priorities and its corporate objectives to deliver those priorities, for the short to medium term, which are set out in the Corporate Plan.
- 1.3 The current Sefton Corporate Plan (2023 to 2026) was produced in January 2023. It set out the Council's six strategic priorities agreed by Cabinet:
  - 1) Children & Young People – Improving outcomes for children and their families.
  - 2) Health & Wellbeing – Improving the health and wellbeing of everyone in Sefton and reduce inequality.
  - 3) Adult Social Care - Empowering people to live an independent life, exercise choice and control, and be fully informed.
  - 4) Working for Our Communities Every Day - Working together to deliver affordable services which achieve the best possible outcomes for our communities.
  - 5) Inclusive Growth – Creating more and better jobs for local people.
  - 6) Financial sustainability. (*The Government sets statutory duties for the local authority to provide a range of services, ranging from adult social care to waste collection. To remain financially sustainable, the local authority must be able meet its statutory service obligations*).
- 1.4 On the back of the various opportunities, challenges and changes in the operating environment, now is the perfect moment to take stock of the corporate objectives to deliver the Council's most key priorities over the next three year period, which will inform

underpinning strategies and plans, with clear milestones and metrics to measure deliverables and impact over this period. This includes taking stock and planning for new ways of working and the future financial challenges, including the impact of changes in the national economy. It also includes the role of the localities model and how it may evolve, as well as the capacity and partnerships required to deliver against the local ambitions.

- 1.5 The refreshed Sefton Corporate Plan for 2024 to 2027 (appendix A) states the specific, corporate objectives to deliver the Council's key strategic priorities over this next period. The refreshed Corporate Plan will be used as an opportunity to ensure that underpinning strategies and plans across the organisation reflect the key priorities of the Council over the next period, and it will help to keep the Council priorities front and centre corporately, with partners, and collectively owned.
- 1.6 The Local Government Association (LGA) Corporate Peer Challenge completed in November 2023, recognised the progress that the Council has made to develop a Corporate Plan, which identified Council key priorities and corporate objectives. The review also recognised the progress that the Council had made to embed the service level improvements in performance management, with regular, collective and cross-cutting performance discussions at Cabinet. However, it was felt that there was further opportunity for improvement; monitoring the Corporate Plan objectives with a performance scorecard which tracks progress against the Council's key corporate priorities was a recommendation. Also then ensure that similarly routine performance information is provided to Scrutiny and all wider members. Suitable corporate monitoring and accountability will also be important for keeping on track, for supporting early and well informed remedial / corrective action and avoiding any future surprises.
- 1.7 Although the Council looks at performance data in a number of different forums (internal officer meetings, Cabinet, Member briefings, Scrutiny Committees and partnership forums), the Council identified that it would benefit from an overarching performance framework and process.
- 1.8 Over recent years the Council has made progress with performance reporting both in and of itself (for example, in developing comprehensive Children's and Adults social care Power BI dashboards), and in bringing it together finance and risk reporting to give a fuller picture (for example, quarterly performance reports to Cabinet in 2023/24 were introduced that bring together finance, performance and risk).
- 1.9 The Local Government Association (LGA) specifically recommended a review and refinement of the Council's performance management arrangements and to develop a performance management framework and in doing so ensure that the outcomes reported best reflect the Council vision, Council priorities and corporate objectives, the incorporation of direction of travel and benchmarking to better understand relative performance, and the use of targets to articulate ambition and focus attention on service improvement.
- 1.10 To develop this the Council has as established a working group of officers from across the organisation to drive forward organisational, culture and process changes in respect of performance management at pace, including the development of a Service Planning and Performance Management framework.
- 1.11 The Performance Management Working Group are exploring how the Council can maximise the impact of what is already in place; connecting the different reporting mechanisms and resources into a corporate performance framework and function is key, and bringing together the different reports and mechanisms into an overarching process where we can see the clear connection from front line team indicators, through internal officer reporting, to Cabinet

Member and a quarterly corporate performance report to Cabinet. Bringing this together will streamline the work and make it much simpler for the Council to demonstrate impact and tell its story consistently.

1.12 The Performance Management Working Group will agree:

- a) A vision for the use of data underpinned by sound governance so that the Council makes best use of data at strategic, tactical, or operational levels, to inform strategic choice, policy, and operational management.
- b) A Service Planning and Performance Management Framework for the Council.
- c) A Data Management Strategy.
- d) A consistent set of key performance reporting indicators (KPIs) aligned to the Corporate Plan.
- e) A single operating model for performance and data analysts across the Council.
- f) An approach to strengthening the performance management culture across the Council.
- g) Opportunities to improve career pathways and professional development in related analytics and performance management roles across the Council.

1.13 The Sefton Service Planning and Performance Management Framework 2024 (Appendix B) sets out how performance management will be aligned to the service planning process throughout each layer of the organization, so that the Sefton Vision 2030, the Council's Core Purpose, the Council priorities and corporate objectives identified in our refreshed Corporate Plan (Appendix A) are shared and transparent to our workforce, Members, key partners and our citizens in Sefton.

1.14 The framework will be used to ensure that the Council achieves what it sets out to do in its Vision, Core Purpose and Corporate Plan, with a focus on performance management rather than simply performance measurement. The Service Planning and Performance Management Framework will therefore:

- a) help improve the Council's corporate approach to service planning and performance management, supporting the Council to achieve its vision and to deliver high-quality outcomes for its residents.
- b) Define the service planning and performance management process, including how the relevant disciplines link together to create the golden thread of strategic activity across the organisation.
- c) Define the roles and responsibilities within the service planning and performance management cycle.
- d) Provide transparency and clarity for the Council's aspirations for performance management, and the interlinking elements including governance and data management.

1.15 Embedding the Service Planning and Performance Management Framework will help the Council to develop a culture of high challenge, high support behaviours across the organisation, recognising the energy and enthusiasm that exists across Sefton's workforce, increasing the focus on performance accountability, whilst also helping staff with service planning and prioritisation of tasks.

- 1.16 The Service Planning and Performance Management framework is supported with a performance scorecard, which will be used to track progress against the Council's key corporate priorities. Also to ensure that similarly routine performance information is provided to Scrutiny and all wider members.
- 1.17 The measures included on the performance scorecard in the Service Planning and Performance Management framework are the first iteration of suggested indicators to be used to measure progress and impact of the objectives in the Corporate Plan. Strategic measures should focus on used to tracking progress in achieving the Council priorities and corporate objectives set in the Corporate Plan, and not appear too operational in nature. Moving forward offices will review and make recommendations to Cabinet to amend as necessary the performance measures, to ensure that the Council achieves the right balance between the macro and micro analysis, and demonstrating progress and impact using quantitative and qualitative data. Elsewhere on this agenda is the outturn report for 23/24 that brings together finance, risk and performance, from Q1 of 24/25 performance reflecting this new approach will be reported as a standalone item.
- 1.18 The measures included on the performance scorecard in the Service Planning and Performance Management framework will be reviewed to report Council productivity if there is a continued requirement to do so with the change of government.
- 1.19 The previous Department for Levelling Up, Housing and Communities (DLUHC) identified a priority to review productivity across all public services and local government. On 24<sup>th</sup> January 2024, the Department for Levelling Up, Housing and Communities published details of additional funding which councils could expect in the final Local Government Finance Settlement (LGFS). As part of this announcement, the then government asked all local authorities to publish a productivity plan before summer recess setting out how they will 'improve service performance and reduce wasteful expenditure.'
- 1.20 On 5th February 2024, the DLUHC provided further details, explaining that the plans should be 'short and draw on work Councils have already done, identifying ways to unlock productivity improvements, and setting out the key implementation milestones'; published with progress updates on council websites, and agreed by council Leaders and elected members. DLUHC expect the plans to cover four main areas:
- 1) Theme 1 - Transformation of services to make better use of resources.
  - 2) Theme 2 - Opportunities to take advantage of advances in technology and make better use of data to inform decision making and service design.
  - 3) Theme 3 - Ways to reduce wasteful spend within systems, including specific consideration of expenditure on consultants and discredited staff Equality, Diversity and Inclusion (EDI) programmes.
  - 4) Theme 4 - Barriers preventing activity that Government can help to reduce or remove.
- The Council received a letter from the Minister for Local Government dated 16 April 2024, setting out the beginning of that process and a deadline for a plan to be submitted, and brief guidance over what the plan should look like or how it should be structured, by 19 July 2024. This guidance set a three/four-page expected length for the plan and contained twenty-four prompting questions to inform content, which are included in the Appendix 1.
  - The guidance implied that after publication councils should update the published plans and report on progress on a regular basis. This will involve including relevant metrics and key

performance indicators in the plans. This requirement is to effectively monitor whether the transformation projects stated in the plans are being carried out and the anticipated benefits realised. This will be picked up in the new corporate performance reporting as necessary/appropriate if there is a change in government.

- The Council has considered the letter and the questions it suggested should be considered in developing a local productivity plan, and has developed a first iteration Sefton Productivity Plan (Appendix C), which has been approved by the Cabinet Member for Corporate Services.
- At this stage the Council is awaiting further commentary and instruction from the new Ministry of Housing, Communities and Local Government regarding the submission. Officers are ready to submit the plan on the 19<sup>th</sup> of July 2024 as originally requested by the former government, if still required to do so by the new government.

## **2. Financial Implications**

There are no financial implications.

## **3. Legal Implications**

There are no legal implications.

## **4. Corporate Risk Implications**

Productivity Plans were intended by the former government to be used as part of the process for allocating future Local Government Funding, however the intention is still to be confirmed.

## **5 Staffing HR Implications**

At this stage the expectation and frequency of any re-submission of a Productivity Plan to the new Ministry of Housing, Communities and Local Government is unclear. Furthermore the Office for Local Government (Oflog) has not prescribed a set of metrics and key performance indicators associated with monitoring plans, but expect an increase understanding about the performance of the Council aligned with the first iteration of the 'Sefton Productivity Plan 2024' plan.

Any further re-submission of the Council's Productivity Plan and associated performance management/reporting is likely to place a new burden on the Council's performance and business intelligence capacity.

## **6 Conclusion**

A refresh of the Sefton Corporate Plan 2024 to 2027 is set out in Appendix A. This states the specific, corporate objectives to deliver the Council's key strategic priorities over this next period, and will be used as an opportunity to ensure that underpinning strategies and plans across the organisation also reflect the key priorities of the Council over the next period. It will help to keep the Council priorities front and centre, corporately, with partners, and collectively owned.

Over recent years the Council has made progress with performance reporting both in and of itself (for example, in developing comprehensive Children's and Adults social care Power BI

dashboards), and in bringing it together with finance and risk reporting to give a fuller picture (for example, quarterly performance reports to Cabinet in 2023/24 were introduced that bring together finance, performance and risk). The Sefton Service Planning and Performance Management Framework 2024 (Appendix B) sets out how performance management will be aligned to the service planning process throughout each layer of the organization, so that the Sefton 2030 Vision, the Council's Core Purpose, the Council priorities and corporate objectives identified in our refreshed Corporate Plan are shared and transparent to our workforce, Members, key partners and our citizens in Sefton. With an increased focus on performance management rather than simply performance measurement, the Service Planning and Performance Management framework is supported with a performance scorecard, which will be used to track progress against the Council's key corporate priorities.

The measures included on the performance scorecard in the Service Planning and Performance Management framework will be reviewed to report Council productivity if there is a continued requirement to do so with the change of government.

### **Alternative Options Considered and Rejected**

**None**

<b>Equality Implications:</b>
There are no equality implications.
<b>Impact on Children and Young People:</b>
The refreshed Corporate Plan shows the Council's continuing commitment to children and young people, improving outcomes for children and their families.
<b>Climate Emergency Implications:</b>
The recommendations within this report will have a Neutral impact.

### **What consultations have taken place on the proposals and when?**

#### **(A) Internal Consultations**

The Executive Director of Corporate Services and Commercial (FD.7719/24.) and the Chief Legal and Democratic Officer (LD.5819/24) have been consulted and any comments have been incorporated into the report.

## **(B) External Consultations**

The refresh of the Corporate Plan draws on the previous extensive prior consultation - Imagine Sefton 2030, which engaged thousands of people, local businesses, visitors and potential investors to create the Sefton Vision 2030 that collectively promotes shared prosperity, coordinated public investment, and a healthy environment and population.

### **Implementation Date for the Decision :**

Following the expiry of the “call-in” period for the Cabinet decision.

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### **Appendices:**

The following appendices are attached to this report:

- (1) The Sefton Corporate Plan 2024 to 2027, set out in Appendix A.
- (2) The Service Planning and Performance Management framework, set out in Appendix B.
- (3) The first iterations of the ‘Sefton Productivity Plan 2024’ to be submitted to the Ministry of Housing, Communities and Local Government on the 19th of July 2024, as originally requested by the former government, if still required to do so by the new government.