

A silhouette of a person standing on a beach at sunset, looking out at the ocean. The person is in the foreground, facing away from the camera. The background shows a bright sunset over the ocean with a few distant structures on the horizon.

# Sefton Service Planning and Performance Management Framework 2024

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**Wayne Leatherbarrow**

**Strategic Support Service**

## Document Control

### Issue/Amendment Record

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### Document Ownership

Role	Name/Title
Author	Wayne Leatherbarrow - Service Manager – Policy, Performance & BI Roger Robinson – Performance & BI Lead.
Release Authority	Phil Porter - Chief Executive Performance Management Project Senior Responsible Officer.

### Distribution

Cabinet Member – Corporate Resources and Customer Services
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Strategic Leadership Board (SLB) – Assistant Directors

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## Introduction

The importance of performance management has been set out in several government documents, such as the Local Government Act of 1999, which requires that services are: 'responsive to the needs of citizens, of high quality and cost-effective, and fair and accessible to all who need them'. There is also statutory guidance on 'best value duty' (Government, 2015), where authorities are under a general duty of best value to: 'make arrangements to secure continuous improvement in the way in which its functions are exercised, having regard to a combination of economy, efficiency and effectiveness.'

The principles of performance management are relatively simple:

- What gets measured gets done.
- If you don't measure results, you cannot differentiate between success and failure.
- If you can't see success, you can't reward it.
- If you can't reward success, you're probably rewarding failure.
- If you can't see success you can't learn from it; and
- If you can demonstrate results, you can win public support.

(Osbourne, 1993)

For Councils, performance management is about using data appropriately and robustly to inform action that will improve outcomes for people (Local Government Association, 2022), and used effectively, performance management should also provide an avenue for communication with key stakeholders, including Councillors and residents.

In Sefton, we want to develop a performance framework which can be used to ensure that the council achieves what it has set out to do in its Corporate Plan, with a focus on performance management rather than simply performance measurement. This document provides that framework for Sefton Council. It sets out how performance management will be aligned to the service planning process throughout each layer of the organization, so that the Council's vision, goals, and priorities are shared and are transparent to our workforce, members, and our citizens.

This framework considers the current Corporate Plan, alongside change proposed in the Council's Transformation Plan. It details the requirements for operational, tactical, and strategic reporting across the Council designed to maintain the 'golden thread' joining all Council activities to the ultimate goals of the organization in delivering improvements for the people of Sefton.

The framework outlines:

- Developing a performance management culture
- Building on existing structures to embed performance management.
- Setting measures
- Gathering and reporting the data

## Sefton Place, Vision, Core Purpose, Values, and Corporate Plan

### Sefton Place

Sefton is a confident, connected borough because of its people. Sefton has a unique socio-economic geography and is the local authority for the area of north Merseyside running from Bootle in the south to the resort of Southport in the north. Sefton has 275,899 residents with towns including Bootle, Litherland, Seaforth, Crosby, Formby, Maghull and Southport.



We have everything from beautiful coast and countryside to pretty villages, industrial areas and the docks. The distinctiveness of Sefton's towns and villages is integral to our uniqueness; however, it is the people that create the distinct and diverse communities that make it a vibrant place to live, work, visit and invest in.



### The Sefton Vision 2030

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 organizations, 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. The finding of this extensive consultation can be seen here [vision\\_2030\\_annex\\_b.pdf \(sefton.gov.uk\)](#)

Vision 2030 was agreed in November 2016, and guide's Sefton's long term planning - helping to stimulate growth, prosperity, set new expectation levels and to help focus on what is important for Sefton [vision\\_outcomes\\_framework.pdf \(sefton.gov.uk\)](#)

## Sefton's Core Purpose

At the same time that the Vision 2030 was agreed, the Council agreed its Core Purpose, which describes its role in delivering the 2030 vision and how the Council will contribute to achieving those ambitions set out in the Vision 2030 [core-purpose-delivering-the-2030-vision.pdf \(sefton.gov.uk\)](#). In the Core Purpose the Council sets out its strategic intention to:

- **Protect the most vulnerable:** i.e., those children and adults who have complex care needs with no capacity to care for themselves and no other networks to support them. For those who are the most vulnerable we will have a helping role to play, we will challenge others to ensure we all protect the most vulnerable children and adults and where we need to, we will intervene to help improve lives.
- **Facilitate confident and resilient communities:** the Council will be less about doing things to and for residents and communities and more about creating the capacity and motivation for people to get involved, do it for themselves and help one another. We will create an environment in which residents are less reliant.
- **Commission, broker, and provide core services:** the Council will directly deliver fewer services but will function as a broker and commissioner of services which meet the defined needs of communities, are person-centered and localized where possible.
- **Place-leadership and influencer:** making sure what we and what others do are in the best interests of Sefton and its residents and has a contributing role to the 2030 vision of the borough.
- **Driver of change and reform:** the Council will play a key role in leading change and reform to improve outcomes for Sefton residents, every child's future and continuously improve the borough.
- **Facilitate sustainable economic prosperity:** that is, people having the level of money they need to take care of themselves and their family; creating the conditions where low unemployment and high income prevail, leading to high purchasing power; opportunities for future generations and having enough money to invest in infrastructure.
- **Generate income for social reinvestment:** the Council will develop a commercial nature and look to what it can do either by itself or with others to generate income and profit that can be reinvested into delivering social purpose and preparing for the future.
- **Be Cleaner and Greener:** The Council will work with others to function as guardians and protect and maintain Sefton's natural beauty and ensure that its

many assets can be enjoyed by everyone and future generations and provide a contribution to Sefton's economy, peoples wellbeing and the achievement of the 2030 Vision.

## The Sefton Corporate Plan

In April 2023, the Corporate Plan was agreed to cover the period until 2026. The Corporate Plan sets out the overarching commitments and priorities for the Council over a four-year period. It provides the strategic direction and a framework for the medium term within the current financial and local context. The plan establishes the main priorities for the coming years and how these will be approached, including



objectives/goals, and references wider strategies and plans that support the goals of the Corporate Plan. *(The plan is due to be refreshed in July 2024 to reflect changes to the leadership in the Council).*

The Corporate Plan will set-out the aspiration for Sefton to be *“A confident and connected borough that offers the things we all need to start, live and age well, where everyone has a fair chance of a positive and healthier future”* and our priorities:

The Corporate Plan requires us to deliver the following outcomes:

- Improve outcomes for children and their families.
- Provide care and support that empowers people to live an independent life, exercise choice and control, and be fully informed.
- Improve the health and wellbeing of everyone in Sefton and reduce inequality.
- Work together to deliver affordable services which achieve the best possible outcomes for our communities.
- Create more and better jobs for local people.
- Ensure the financial sustainability of the Local Authority.

And in the context of what 'Good' will look like, our key priority areas of work to deliver these outcomes are:

- Children are protected from exploitation and have access to trauma informed support.
- Stability and capacity in the workforce.
- The voices of children and young people are heard and influence change.
- All children having a happy and healthy start in life.
- The Council and its partners are good Corporate Parents.
- Children are safeguarded and feel safe to live at home with their families.
- Children with additional needs and vulnerabilities feel safe and supported.
- Families have access to increased and effective targeted early help support to ensure problems are addressed earlier.
- Children, young people, and their families have access to good information and advice and early help.
- Children and young people feel like they belong and are proud of their neighbourhood.
- Tackling child poverty with our partners at the heart of our role as a service provider, educator, employer, and community leader.
- All children and young people enjoying a positive educational experience with education and training unlocking the door for every child.
- A range of services to address both the short- and long-term impact of domestic violence and abuse.
- Children with Complex Needs and their families have access to effective and timely support.
- More local Foster Carers.
- Equity for all people in terms of experience and outcomes.
- Stability and capacity on the workforce.
- Listening. learning & continuous improvement.
- High quality support and services for those with complex and neurodiverse needs.
- People benefiting from an early intervention approach.
- The most vulnerable people living in safety free from harm, discrimination, and abuse.
- Carers well supported and able to achieve their personal outcomes.
- Joined up working so people only tell their story once.
- A social care market that understands and meets the diverse needs of local people, offering flexibility, choice, and continuity.
- Quality & Safety at the heart of all we do.
- People are supported to manage their health and wellbeing, be independent and have choice and control.
- The voices of people being heard and influencing change.



- People connected across generations.
- Every child achieving the best start in their first 1001 days.
- As people grow older, they can access support, tailored to their needs which respects their dignity and individual preferences.
- Older people staying active, connected, involved, and valued in their communities.
- Sefton is a place where it is easy to be healthy and happy.
- Every child and young person having a successful transition to adulthood.
- Health, care, and wellbeing services across the wider system working together to support individuals, carers, families, and communities.
- Our communities and the built environment meeting the needs of people as they get older, through age and disability friendly towns, communities, services, housing, and transport.
- Education and training enabling every young person to unlock the door to more choices and opportunities.
- Everyone having a fulfilling role which can support their needs, with opportunities to contribute, learn and progress.
- People feel safe in their neighbourhoods.
- People have access to good, affordable housing that meets their needs.
- Local people and visitors safely enjoying Sefton's coast.
- People know where and how to access support.
- People proud of where they live.
- Commitment to reduce inequalities wherever they exist and to challenge discrimination.
- People value our efficient and effective everyday services.
- A carbon neutral and climate resilient organisation by 2030.
- The voices of local people are heard and influence change.
- Clean, safe, connected and well-maintained streets and green spaces for people to enjoy.
- The voices of local businesses are heard and influence change.
- Regenerated Places.
- People enjoy visiting Sefton.
- Inclusive Growth.
- People have support to access employment opportunities.
- Community assets - resources need to be made available for local groups to provide the wide range of support that enables people to remain in the community.
- Partnership working - services need to be integrated and built on partnership working using multi-disciplinary teams and, where feasible, single points of access. The Council and its partners need to work as a whole system and to embrace locality and integrated working.

- Co-production - all services should be co-produced with customers and communities. Ongoing engagement will be at the heart of commissioning and service delivery.
- Use of resources – the use and targeting of resources will be continually reviewed and moved to wherever can deliver best value.

## Sefton's Values

The values that govern the Council's approach to delivering the priorities set out in the Vision, Core Purpose and Corporate Plan are:

- We put people at the heart of what we do.
- We listen, value, and respect each other's views.
- We develop a culture of challenge, ownership, innovation, and improvement.
- We are ambassadors for Sefton (on local, national and international levels).
- We are responsive and efficient.
- We are clear about what we can and cannot do.

Beyond these values Sefton Council is also committed to:

- Fostering good relations with and within the community, collaborating with our communities and our partners to make things happen.
- Being customer focused, delivering, developing and commissioning inclusive and responsive services around the needs of our communities and residents, now and in future.
- Being open, accessible, and accountable.
- Being an effective, modern, sustainable organization that uses time and money wisely.
- Valuing people and building on their strengths.
- Developing and supporting a diverse workforce, and being an employer of choice.
- Acting ethically, with integrity and transparency in all that we do.

## A Local Sefton Framework

In Sefton, we want to develop a performance framework which can 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**. Reflecting on the guidance and best practice provided by the [Local Government Association](#) , this new performance management framework aims to:

- 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.
- Define the service planning and performance process, including how the relevant disciplines link together to create the golden thread of strategic activity.
- Define the roles and responsibilities within the service planning and performance management cycle.
- Provide transparency and clarity for the Council's aspirations for performance management, and the interlinking elements including governance and data management.

The framework also sets out the expectations of leaders in developing a strong culture of performance management, driven at all levels of the organization, to ensure that the council:

- is accountable to the public and measures how public money delivers quality services to citizens.
- takes an evidence-based approach to service design and delivery.
- is used to drive and secure improvement through a culture of high aspiration, high challenge, and high support.
- supports the council's journey of continuous improvement, self-assessment, and learning.

There are several outcomes that seek to be developed through this framework, that will evidence that the Council is effectively managing performance, including:

- An effective vision, goals, and expectations in place
- Skilled managers and leaders in performance management
- Transparent communication and collaboration
- Employee recognition and development
- A continuous cycle and commitment to improvement
- Quality and timely data, information, and insights



And in doing so:

- Good services are maintained.
- Services that are not meeting the expected standards are improved.
- The workforce is motivated and stable.



## A Model for Continuous Improvement in Sefton

The Council’s long-standing approach to planning and performance management is based on an “**Analyse – Plan – Do – Review**” cycle for improvement and change, which is used across most of the Council’s services, including commissioning, project management and business change activity.



The same cycle has been adopted for this strategic planning and performance management framework at micro and macro levels across the Council.

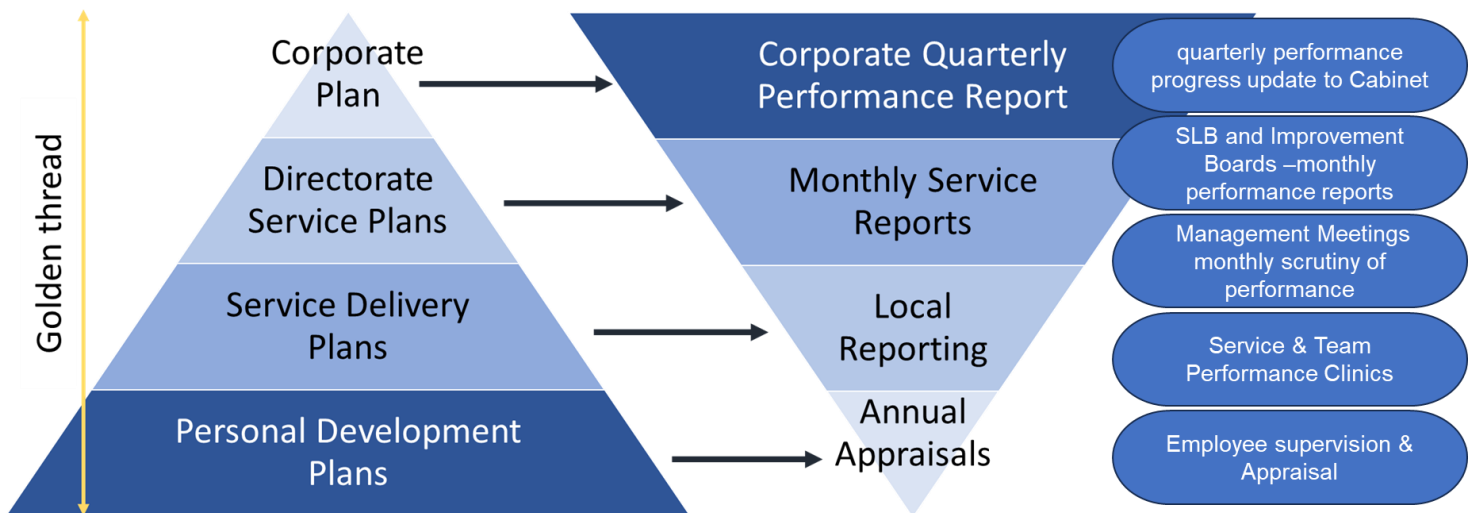
For example, across the four year Council Plan, the process of development will firstly be based on information from the political manifesto, local needs analysis and service information, which is **analyzed** and used to create the corporate **plan** and service plans (strategic and operational improvement). This will then put into implementation, ‘do,’ with the delivery of the Corporate Plan and services plans being **reviewed** regularly throughout their respective life cycle, evaluating the effectiveness and impact of planning through performance monitoring via a range of consistently reported performance data/insight (qualitative and quantitative). Finally, service plans and the Corporate Plan can be **revised** in response to evaluation of performance, cost benefit and quality measures.

## Sefton Service Planning and Performance Management Framework

This framework sets out the Council’s approach to **performance management**, and the critical alignment to **service planning**.

It is important to note that across Sefton Council some Services have differing performance management requirements and arrangements in place. Some areas within the Council have significant statutory duties and information requirements, as well as regulatory duties. This framework does not seek to replace performance reporting arrangements already in place in individual Services, rather it provides the framework for how organizational alignment will be achieved.

This core framework for service planning and performance management will link the strategic intentions identified in the Corporate Plan, through Service Plans, to the actions of individuals within their respective services and teams. There are **four levels of plans** in this framework, stemming from the overarching Corporate Plan to individual employee appraisal, that create the ‘**golden thread**,’ which aims to help staff understand how they are contributing to the Council ambitions (Sefton Vision 2030) and the identified corporate priorities (Corporate Plan), with the intention of boosting understanding, ownership, motivation, and morale.



Effective performance management needs clear objectives, actions which deliver those objectives, and measures of success. Therefore every layer of service planning has a corresponding performance reporting process to effectively review progress, which may inform the revision to plans. The pyramid represents the hierarchy of how performance travels from individual employees and feeds all the way through the organisation up to the Cabinet. This Tiered approach to performance management includes:

- Golden thread
- **Cabinet:** quarterly performance reports and scrutiny of performance
  - **Senior Leadership Board and Improvement Board(s):** monthly performance reports and scrutiny of performance
  - **Service Management Meetings:** monthly review and scrutiny of performance
  - **Service and Team Performance:** Regular performance meetings/clinics
  - **Employee supervision and appraisal**

## Service Planning Framework

**The Corporate Plan** sets out the overarching commitments and priorities for the Council over a four-year period.



It provides a strategic direction and framework for the medium term within the current financial and local context. The plan should establish the main priorities for coming years and how these will be approached, including objectives/goals and key measures. Wider strategies and plans should reference how they support the goals of the Council Plan.

Good service planning is a cornerstone of effective performance management, providing a solid foundation for keeping priorities and principles firm, even in times of change. Service plans describe how each Directorate, Service and Team is working towards the delivery of priorities identified Corporate Plan, and each year a new service plan is established defining the priorities for the coming financial year.



New **Directorate service plans** will be introduced, which will describe how each directorate is working towards the delivery of the goals and priorities set in the Council Plan. This should reflect the annual actions, projects, performance and contextual indicators, specifically relevant to achieving the commitments identified in the Corporate Plan and the Council's Transformation Plan.

These service Plan plans will be produced, agreed, and reviewed annually, aligned to the financial year, which runs from 1 April to 31 March for the purposes of government financial statements.

They will be owned by **Assistant Directors**, and will be a vital part of the 'golden thread' which links the Council's objectives, through to individual appraisals, making sure that each Service, Team and employee in the Council knows how their work contributes to achieving the priorities identified in the Corporate Plan and change activity agreed in the Council's Transformation Plan.

They will demonstrate how the outcomes prioritised by the Council will be achieved, setting out planned service priorities, clear accountability for delivery, how resources, (budget & workforce), skills, and assets will be used efficiently, identify and mitigate risks to planned improvements and provide a mechanism by which managers, members and officers can focus on performance and improvement, and track progress, including latest Performance (including Monthly KPI) data.

The **Directorate Service Plans** will inform **Operational Service Plans**.



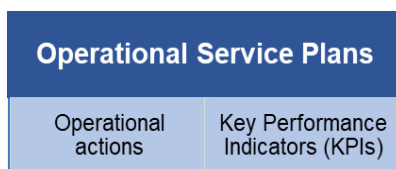
**Operational service plans** will continue to be used to capture the much broader range of work that individual Services will be undertaking. These are owned by **Service Managers** and developed within services as a management oversight and monitoring tool.

In addition to continuous improvement and transformation activity (linked to the directorate service plan and, in turn, to the identified priorities in the Corporate Plan and Transformation Plan) these operational service plans will include the annual deliverables and KPIs for the service area, alongside aspirations and goals for service improvement.

These plans will set out planned service priorities and improvements, accountability for delivery, identify and mitigate risks to planned service levels and improvements, address key issues such as quality and productivity, and provide a mechanism by which managers, and officers can focus on performance and improvement, and track progress.

There may be further **team level plans** that sit beneath the operational service plans. These team level plans are not mandatory and there is no obligatory corporate reporting process. However, managers may opt to continue to use them as a performance monitoring tool, and for reporting to senior leaders. Where team managers/supervisors choose not to produce plans, they must nevertheless be able to articulate:

- A brief overview of their service including key priorities
- How their work is directly linked to the Operational Service Plan, Directorate Services Plans the Corporate and/or Transformation Plan, the Core Purpose, the Council values, and the Sefton 2030 Vision ('golden thread')
- Current context and issues within the Service (where are we now?)
- Changes required (where do we need to be?)
- A clear plan for closing the gap (how do we get there?)
- Performance goals and targets, including key performance indicators to demonstrate 'how do we know we are there?'



Individual **personal development plans** will continue to be used connect the work of each Sefton employee to the broader service goals and the priorities identified in the Corporate Plan. Personal development plans will be agreed annually during the **'MySefton MySpace'** staff appraisal process. Objectives will reflect business need, which should directly relate to the actions in the operational and directorate services plans. Personal development plans will be supported by learning and development goals for the skills needed to achieve the organisations priorities and ambitions.

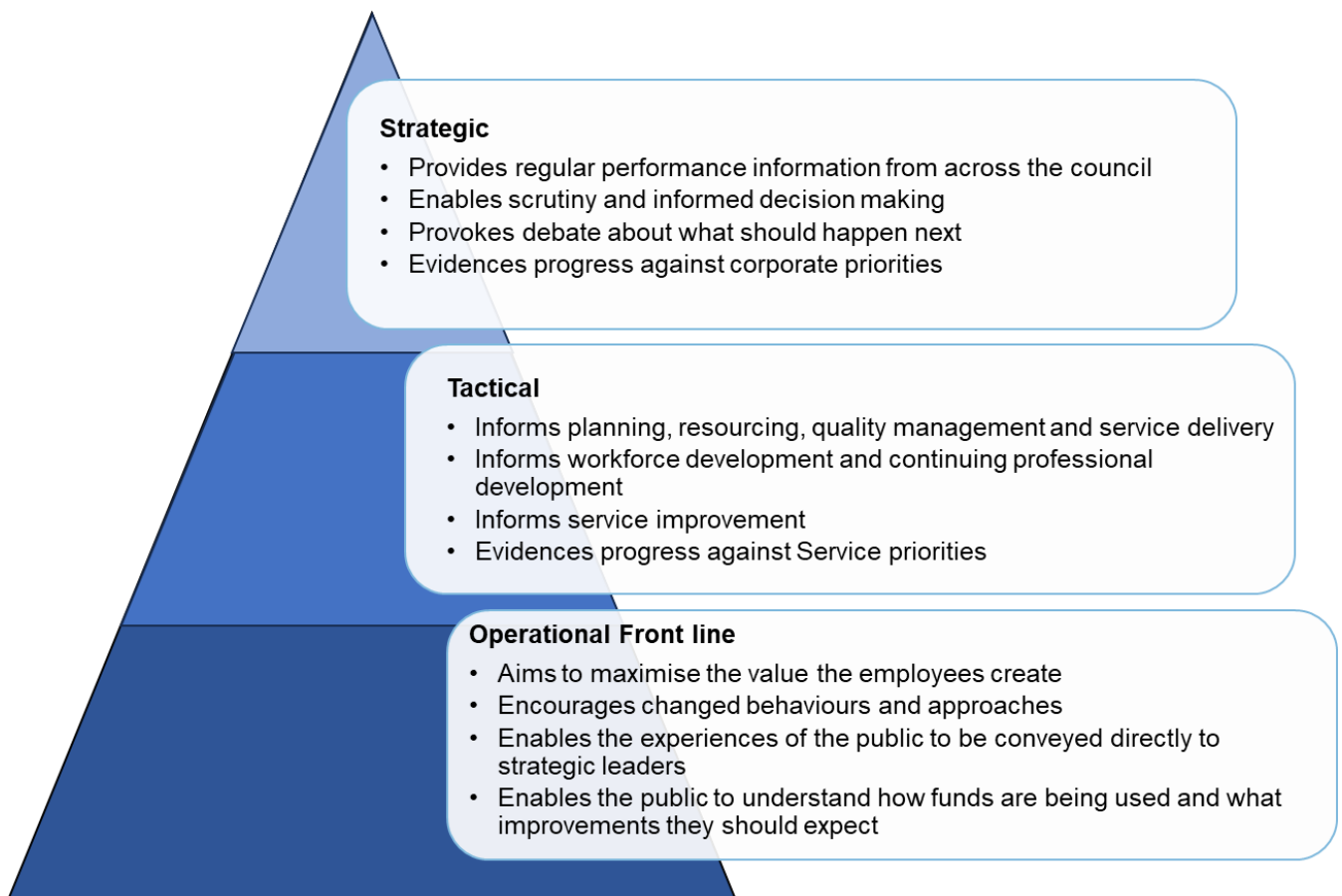
## Performance Management Framework

A performance framework needs to be both usable and small enough to allow users to quickly see and monitor issues, but also wide and detailed enough to provide assurance across a wide and complex business such as the Council.

As a result, this framework uses several themes to split up the proposed measures. There are of course 'grey areas' across themes and metrics and the purpose of splitting up measures is not to create a perfect linear model, but to allow a simpler oversight of what will inevitably be vast quantities of information and insight.

Our framework is designed around a set of **strategic, tactical, and operational** level processes which are used in different ways depending on circumstance. Where practical the measures have 'SMART' targets attached (Specific, Measurable, Achievable, Relevant, Timebound, and includes responsibility). Measures will be focused on outcomes where possible, but activity measures will also be provided in associated dashboards and reports for context. Measures are designed to reflect Council priorities developed in consultation with our communities and partners, which will be continually reviewed, and where available, national and regional benchmarking is used to provide further context.

Whilst this document outlines the overarching framework and strategic measures, the reporting and monitoring is done elsewhere in the associated performance dashboards and individual project and programme 'in-depth' reports.



**Hierarchical View of the Council's Information need and classifications adopting Anthony's Triangle (1965)**



**Strategic** level measures will focus on key business and strategy goals and will be the responsibility of the Executive Directors and Assistant Directors. These will consist of a small set (around 10) key outcome measures and an ad hoc set of in-depth insight reports as required on specific topics. These will drive the key action plans disseminating from the Strategic Performance Group (SPG).

**Tactical** level measures will focus on two key areas - projects and programmes, and work themes. Project reporting will be the responsibility of the project or programme lead, and theme reporting will be the responsibility of the Service Manager for the key work area. Monitoring of themes will be supported by a small set (around 20) key outcome and output measures. Projects and themes will additionally be supported by measures relating to volumetrics and inputs for context that will not be target set. Reporting will be by exception to the Strategic Performance Group (SPG). However, Service Managers and project leads will be expected to discuss performance in their responsible areas with their teams and put in place tactical action plans and task and finish groups to address issues 'locally' as they arise. These will be performance managed, and delivery reported to the Strategic Performance Group (SPG).

**Operational** level measures will focus primarily on the workforce and will be the responsibility of Team Leaders and Lead Practitioners. Monitoring of themes will be supported by a small set (around 10) key outcome and output measures. Teams will additionally be supported by measures relating to volumetrics and inputs for context that will not be target set. Reporting will be to the associated Service Manager and then by exception by the Service Manager to the Strategic Performance Group (SPG) as required. Operational monitoring will relate to the following themes:

- Team Business Plans
- Individual Performance Plans & Supervision
- Training & PDR Completion
- Caseload Management

A set of performance information, reporting and structures are already in place in some areas, for **existing Groups and Boards** and these will not be changed at this stage. This includes (but is not limited to):

- Safeguarding Adults Board
- Health & Wellbeing Board
- Integrated Care Board
- Children and Young People Partnership Board

## Performance Management Processes

The mechanics of performance management:

- Starts at individual performance,
- Links up to the different Teams, Services and Directorates within the organisation, who use their data capture systems to feed into the Key Performance Indicators
- Which are taken to Senior Leadership Board (SLB) and used to support strategic improvement planning, as well as Cabinet Briefings, Committees and various Corporate Management teams.

The processes and measures within the performance framework will be structured to:

- Provide clarity by painting and reflecting a clear picture of strategy and direction of travel.
- Provide focus on what is important, requires attention, or is going well.
- Monitor improvement by measuring progress towards the desired state.
- Be relevant, clearly defined, and balanced.
- Cover all key aspects of input, process, output, and outcomes.
- Through measurement, provide support for performance analysis, risk awareness, and decision making.

Whilst the Council's Corporate Performance & BI Team provide support with performance monitoring and reporting across the Council, some individual directorates/services currently have their own performance monitoring in place. The respective performance leads within each directorate are currently responsible for collating key metrics and providing this data either to use internally or as part of the wider council reporting systems. It is imperative that this continues to happen, with an emphasis on each individual service providing the data for the purposes of monitoring, reviewing, and auditing performance.

As a result, it is expected that there can be no 'one size fits all' approach and that different areas and processes will be monitored in different ways. In addition, it is anticipated that the measures and framework will change significantly as time progresses and hence this document will be under regular review.

When trying to make this framework work in the real world it will be important to remember:

- Whilst the initial key monitoring is based around a standard 'dashboard/scorecard approach' these are not appropriate for all scenarios and will be supplemented by individual, focussed 'in-depth' reports on specific topic areas and reports on progress of individual projects and programmes. It is for this reason that reporting of performance measures has been split into areas and responsibilities so that the complexity of the real world can be maintained (avoiding oversimplification) whilst making the job of monitoring more straight-forward for those responsible for doing it.

- Real world performance isn't wholly quantitative. Whilst initially many of the proposed measures are numbers, we try to avoid *only* measuring things that can be readily reported in a 'numeric' dashboard. Qualitative reporting will be critical to the success of the performance framework and ensure we include the voices of our customers and partners. This will also allow us to answer the 'why' and not just the 'what'.
- The initial structure of this performance management framework is 'past dependent' in that it reports what has happened, though where possible more 'near real-time' change will be captured. Future iterations once this is embedded must contain more forward-looking performance assessment if it is to be of value. This should embrace ambitious target and goal setting, encourage innovation, and use predictive analysis and risk segmentation.
- Performance management is cultural, a set of measures (however 'SMART' and clearly defined) will not make change happen; this must be driven by individuals at all levels in an organisation and through a focus on continuous (even if small) improvement. The traditional mantra is 'better today than yesterday'.

The performance framework is designed to help us identify whether the things we are doing are working in the way we expect and are delivering the improvements we and our customers want. Whilst the framework reflects the changing national landscape its focus is the monitoring and correction of the things done to support our customers and communities in need of help. The framework is one part of a larger set of strategies to create an environment of continuous improvement supporting our staff, customers, and partners.

The measures and monitoring processes set out here are aligned to our core strategic goals, objectives and the outcomes expected are set out in the Corporate Plan. Though to ensure the Council is achieving its core purpose, officers and Councillors must have insight into two basic questions:

- **Have those aspects of people's lives which the Council influences improved?**
- **Has there been an overall improvement in the quality of life for people who live in the area?**

## A Balanced Scorecard Approach

The objective of this framework is to ensure that information is available which enables us to understand, monitor and assess our outcomes, enabling appropriate action to be taken when performance deteriorates, identify areas for continued growth, and spot opportunities for innovation. The metrics described here cover a set of key themes including but not limited to:

- Performance information – activity and process efficiency information.
- Strategic direction – key strategic objectives.

- Organisational capability - capacity plans for both activity and staffing, benchmarking, and comparative data where relevant.
- Finance – annual cost and income budget plans, other divisional financial information, and efficiency programmes.
- Quality information – customer safety, support effectiveness, customer experience and compliments and complaints.
- Human resources information – staff engagement, absence data, turnover and vacancies.
- Governance, risk, and compliance information.
- Commissioning information – market shaping, capacity, risks, and quality.
- Project, Programmes and Team Business Plans information – progress with agreed transformation delivery and objectives.

Some elements of the self-assessment / balanced score card approach do not lend themselves to quantitative assessment and as such the number and focus of those 'measures' vary as highlighted in this document as elements such as 'leadership and governance' for example lend themselves to a different 'assessment' approach.

The domains are:

- Leadership & Governance.
- Performance & Outcomes.
- Commissioning & Quality.
- National Priorities & Partnerships.
- Resource & Workforce.
- Culture & Challenge.

Where appropriate both a qualitative and quantitative approach will be taken to facilitate the balance overview of our performance and activity. This will include self-assessment through discussions with partners and stakeholders including audit reviews and case studies.

## Performance Monitoring & Reporting

It is critical that performance is regularly and appropriately reported across all areas of the business. To support this:

- Every quarter a meeting of the Senior Leadership Board will be set aside for a detailed discussion and review the Council's performance. SLB will consider the new Corporate Plan Overview Report (CPOR), which sets out the performance and progress against the commitments made in the Corporate Plan across all the strategic priorities and goals. The report, which will be presented to Cabinet, will include both qualitative and quantitative updates and will also be presented to Cabinet and Committees. SLB will need to consider performance issues arising from the previous quarter, changes to

targets, agreement for new or revised indicators, resource implications required to meet specific targets.

- The Executive Leadership Team (ELT) may consider establishing a Strategic Performance Group (SPG) to consider performance across the whole council. In addition regular meetings, the SPG will provide the opportunity to review highlights from the various thematic performance dashboards, updates on projects and programme metrics 'by exception,' and cross cutting deep dive into operational issues, e.g. front door, demand management, customer feedback, sickness etc. The meeting will be chaired by the Chief Executive and attended by relevant Assistant Directors, HR and finance leads. Where necessary 'task and finish' groups may be initiated by the SPG to deliver on remedial actions to address specific performance issues.
- From September 2024 Directorate Service Plans will be 'going live.' These plans will form a useful tool to support the Executive Leadership Team and Assistant Directorates and will be capable of capturing information from across the Council on delivery against the Corporate Plan, performance issues and mitigation measures.
- Service Managers will report, highlight, and discuss performance issues with Team Managers and staff to ensure all members of staff are sighted on performance. Issues raised by staff will be escalated back to the SPG through Team Leaders and Service Managers as necessary.
- Where appropriate SPG members will report performance back to partners to ensure the integrated system is aware of performance, issues, and risks.
- All performance reports, live KPI dashboards and directorate delivery plans will be available via the internet and will be accessible to all staff across the organisation. The Corporate Performance & BI team will work with staff across the whole of the council to improve the consumption and utilisation of the performance products. This will deliver a rolling programme of improvement for the Performance Management Framework.
- The role of the Corporate Performance & BI team will be to develop into a quasi-independent reporter on the Council's progress and provide robust challenge to practice and delivery across the whole organisation.
- Performance will be shared with the wider public through mechanisms such as 'Local Accounts' and 'Provider/User Forums' to ensure transparency and challenge through-out the system.



**Corporate Plan Overview Report**

The Corporate Plan Overview Report (CPOR) will set out the performance and progress against the commitments made in the Corporate Plan across all the strategic priorities and goals. The report includes both qualitative and quantitative updates and will be presented to Cabinet quarterly.

**Quarterly Service Reports**

Each directorate produces a Quarterly Service Report (QSR) detailing the performance and progress against the commitments made in their annual service plans. The report includes both qualitative and quantitative updates. QSRs should be reviewed with the relevant Executive Member Portfolio holders and the directorate management team. Directorates should review the progress as part of their Directorate Management Team

meetings, with focused discussions on red, amber, or missing data items.

**Service Level Reporting**

The Quarterly Service Report (QSR) and The Corporate Plan Overview Report (CPOR) are the corporate reporting documents, however local plans should also have a proportionate reporting process. To ensure there is opportunity to review the delivery of plans and reflect on opportunities for improvement, Operational service plans and team plans should include an agreed review cycle. Services may wish to use local trackers and simple Red, Amber, Green (RAG) status reviews. Council staff also have access to Microsoft Excel and Power BI, which can be explored to present and review performance data.

Public reporting will be through dashboards available on the Council's website and through reports to committee meetings held in public. These will primarily reflect the delivery of the priorities in Sefton's Corporate Plan.

Council Members and officers will be able to self-serve performance information on a more frequent basis as data becomes available and dashboards are updated, rather than waiting for reports to committees. This will enable areas of interest and emerging issues to be identified for more detailed investigation and consideration, possibly as standalone topics for Scrutiny Committee agenda or specific points of focus in quarterly performance reporting. In addition, this more frequently updated information will enable the Council to celebrate successes as they are identified.

Exception reporting to Cabinet will take place quarterly highlighting the actions that are being taken to maintain or improve performance and the progress being made. This will include identifying where performance is exceeding the agreed target. This will be alongside a thematic view looking in more detail at one of the priorities in the Sefton Plan (the timing of which quarter a priority will be reported will be linked to publication

of national data to be used for benchmarking purposes alongside local information).

The Council's Corporate Performance Dashboard will provide a view of the key performance indicators for the Council, providing a clear and focused view on the progress that the Council is making.

The Transformation Programme, Projects, Operational Service Plans, Team Service Plans and Personal development Plans will be covered elsewhere and are not repeated here. Suffice to say that the performance metrics and deliverable monitoring in these plans and projects will be reported to the Strategic Performance Group (SPG) as necessary.

## Local Cycle

The corporate planning and performance cycle takes place over a four-year period and aligns with the local political cycle. However, much can change over four years. Therefore, it is important that more detailed service plans are reviewed every year to amend actions as needed.

It is also important that the corporate planning process is aligned with financial planning, as budget setting is key to what can be achieved.

### Four-year cycle

A new Council Plan and service plans will be developed and agreed prior to the start of the financial year following a borough election. There will then be three annual service plans prior to a final transition plan prior to developing a new Council Plan.

### Annual cycle

Each annual period (financial year) will include the full process of analyse-plan-do-review. This aims to ensure that plans stay relevant to the local needs and that performance reporting is used as part of the process of improvement. Quarter three is the main period where service plans are reviewed ahead of the following year.

The annual planning and performance cycle also aims to align with milestones within the budget planning process. Development of service plans, operational business plans and budget planning takes place between September and January each year.

The Council has an annual planning cycle which includes Medium Term Financial Planning (MTFP) and setting the budget, service improvement planning, reviewing the Performance Management Framework (PMF) and the regular reviews for individual staff members through the Personal Development process. There are also regular reviews of the strategic and operational risks to the Council.

The strategic planning cycle for the Council is as follows:

Strategic Planning Cycle			
Date	Activity	Date	Activity
Apr	Quarter 4 Performance Report	Oct	Quarter 2 performance report Service improvement planning for following year
May		Nov	
Jun	Outturn report for previous financial year	Dec	Medium Term Financial Planning update
Jul	Quarter 1 Performance Report	Jan	Quarter 3 performance report Sign-off service improvement plans for April
Aug		Feb	Confirmation of New Performance Monitoring and Targets
Sep		Mar	

More detailed performance monitoring will take place at varying regularity for example:

- Weekly
  - Caseload
  - Case and Data quality
  - Operational targets – near ‘real-time’ performance
- Monthly
  - Service Area Departmental and Service Management Teams
  - Team Meetings
  - Staff one to ones
- Quarterly
  - Scrutiny
  - Portfolio Holders
  - Executive Directors
- Yearly
  - Financial year outturn report
  - Performance Annual Report
  - Personal Development

## Training & Development

We will continue to develop our training and workshops to support both our councillors and staff to engage with performance management and measurement, by increasing understanding of interpreting data and understanding statistics, improving data literacy, and developing skills in constructive challenge.

## Performance Management Culture

Effective performance management is not just about developing technically good indicators and measures, and a structure of planning and monitoring. It is equally important to establish a culture where there is a desire and commitment to have an evidence-based improvement approach, where staff have permission to test their ideas with the freedom to fail and learn.

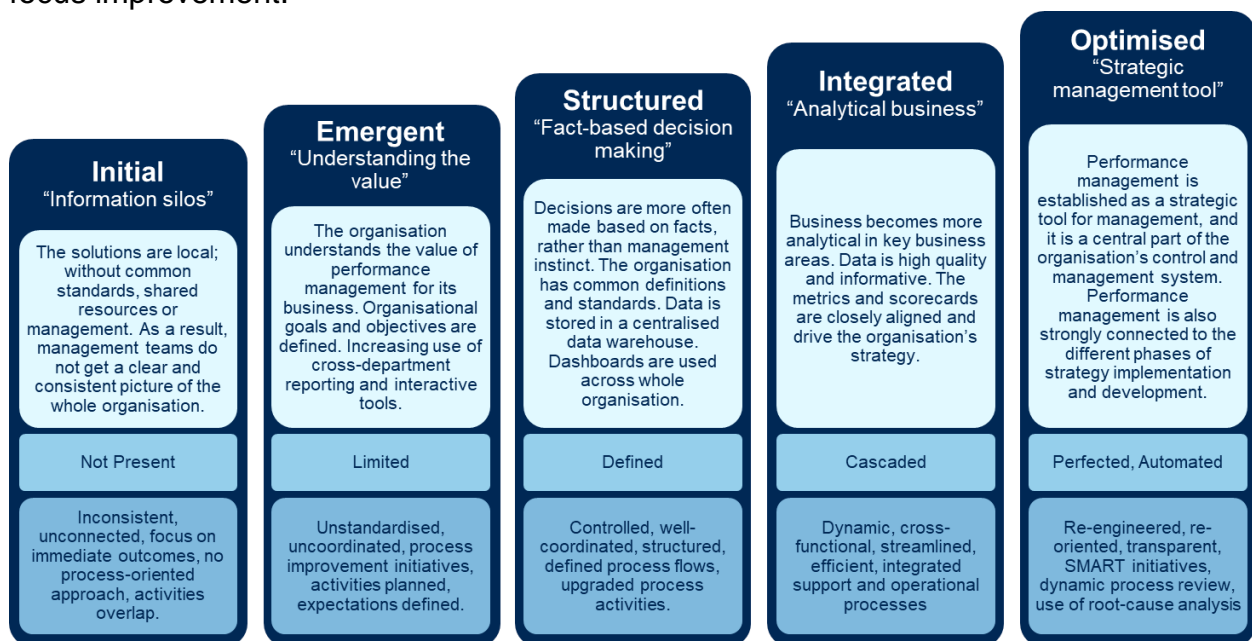


Whilst it is difficult to objectively measure the effectiveness of culture for delivering good performance management, the Local Government Association has identified [seven core standards](#) that promote good improvement culture and provide insight on issues which may prevent progress. These standards are integral to developing and embedding a strong performance management culture and will be adopted in Sefton.

- **Leadership:** which encourages learning, and an infrastructure which enables learning (for example, sufficient time, resources, experience).
- **Staff involvement and commitment:** A real commitment from staff is needed to create a culture throughout all levels of the organisation.
- **Transparency:** A culture where staff are actively encouraged to flag risks or concerns to help prevent failure and create a context of reflection when failure does occur.
- **Willingness to learn from poor performance:** Similarly, a willingness to reflect upon and learn from previous poor performance is required to focus on improvement in the future.
- **Communication and language:** Good internal communication of performance management, for instance, promoting good practice and communicating success.
- **Support and advice:** Staff should be able to access support and advice when they need it, to create a positive culture of learning and growth.
- **Reinforcement:** Demonstrating the benefits of performance management to staff and celebrating successes is effective in raising the credibility of performance management.

### Organizational Maturity

Performance management maturity models such as the [Local Government Data Maturity Model](#) exist to reflect on the current organisational position and key areas to focus improvement.



The journey to develop the performance management utility, skills and capability within Sefton will be continuous, however there is already a good foundation in place, and although there is some variation in the thresholds between models, current reflection locates the organisation on the border between “**emergent**” and “**structured**” levels. There is a continued emphasis on the value of performance management within the Council, and the potential to expand competence across the whole organisation and to improve data quality and management is recognised. This framework will help us to improve the clarity of definitions and expectations for the organisation to progress within the “structured” level.

### Performance Management Structure

Embedding performance management throughout the council is a continual process and involves everyone. An overview of the roles and responsibilities related to corporate performance management is set out below.

<b>Councillors</b>			
<b>Group</b>	<b>Role</b>	<b>Task</b>	<b>Responsibility</b>
Full Council	Strategic role in informing vision and direction for the Council.	Approve new Council Plan	Approves the overall priorities and budget for the Council.
Leader	Strategic role in setting vision and direction for the Council.	Review and present The Corporate Plan Overview Report (CPOR) Quarterly	Leads the work of the Cabinet, its programmes and priorities, has overall responsibility for the development, implementation, monitoring and review of the Council's vision, objectives and priorities.
Cabinet Members	The Cabinet comprises of the Leader of the Council and nine Cabinet Members of the Council. Each Cabinet Member has a specific area/portfolio of responsibility relating to performance monitoring.	Review The Corporate Plan Overview Report (CPOR) Quarterly Approve annual Service Plans.  Review Quarterly Service Report (QSR) for relevant portfolio area.	Liaises closely with Executive Directors and Assistant Directors responsible for activities within their portfolio, scrutinise service performance.  Work closely with other Councillors who will support their portfolio.
Overview and Scrutiny	Contributing to policy development, holding decision makers to account, investigating issues of importance to the wider area, and overseeing delivery.	Scrutinise The Corporate Plan Overview Report (CPOR) Quarterly.	Discuss information they have received and heard evidence from Councillors, officers, experts, and members of the public.  The scrutiny committee makes recommendations for improvement to the Cabinet, to other committees, to the Council – or to local partners.
All Councillors	Keep a watching brief on the Council's overall performance, particularly areas of poorer performance and risk, as well as good practice and innovation.	Monitor corporate performance information.	Provide challenges on performance issues. Use the information received through surgeries and queries from members of the public when considering performance.

<b>Officers</b>			
<b>Group</b>	<b>Role</b>	<b>Task</b>	<b>Responsibility</b>
Chief Executive	Leads the delivery of Council services, following the direction of decision-making Councillors.	Produce, review and present the Corporate Plan Overview Report (CPOR) Quarterly	Takes action to deal with areas of poorer performance across the Council as appropriate. Makes decisions, where permitted to do so under the Council's scheme of delegation.
Executive Directors	Ensures action is being taken to deal with areas of poorer performance and risk as well as developing areas of best practice and innovation.	Review and present the Quarterly Service Report (QSR) for relevant portfolio area.  Compile annual service plans.	Takes action to deal with areas of poorer performance across the council as appropriate, and directed by the Chief Executive. Makes decisions, where permitted to do so under the council's scheme of delegation.
Assistant Directors	Responsible for the leadership, management, and performance of key council services and working with councillors to ensure the delivery of the council's vision, approach and policies.	Produce Quarterly Service Report (QSR) narrative and data. Oversee the development and delivery of Operational Service plans.	Accountable for their service's operational performance. Develops staff and teams to ensure they deliver their objectives and contribute to the Council's strategic objectives as detailed in the Corporate Plan.
Service Managers and Team Managers	Reinforce the links between organisational and individual objectives and provides feedback that motivates employees, helping them to improve and holding them to account.	Contribute to performance narrative and data entry for Quarterly Service Report (QSR). Develop Operation Service Plans and Team level plans.	Carries out self-evaluation of strengths, areas for improvement, outstanding risks and how these are being dealt with. Helps team members understand the organisation's performance management framework and how their role contributes to the achievement of Council priorities.
Audit Team	Audits Performance Management Framework and KPI suite annually.	Undertake sample tests of KPIs.	Feedback audit of performance to Assistant Directors and Executive leadership Team.
Business Intelligence	Extracts and processes information from data systems and other	Edits and communicates revisions of the framework and KPI Suite.	Support Executive leadership Team and Assistant Directors to produce the Corporate

Team	sources.	<p>Maintains register of KPIs. Quality assures data and KPIs produced by Business Intelligence Team.</p> <p>Extracts and analyses data in response to performance issues and investigations.</p>	<p>Plan Overview Report (CPOR), Quarterly Service Report (QSR), and performance reports for Cabinet Members and/or other stakeholders, including technical commentary on suitable indicators and interpretation of trends.</p>
Frontline teams / staff	<p>Record data using business systems.</p> <p>Identify actions required to achieve priorities and objectives.</p>	<p>Provide insight and data entry, where applicable.</p>	<p>Hold knowledge of local communities and their specific needs.</p> <p>Holds knowledge and skills to contribute to making services more valuable.</p> <p>Gather first-hand knowledge of what is working and what is not, and routinely feeds back on measures, targets and risks to achieving desired outcomes.</p>

## Strategic Measures

Corporate Plan Theme	Corporate Plan Measure	Target	What is 'Good'	Theme Responsibility	Metric Responsibility	Data Source & Officer
Improving outcomes for children and their families	Percentage of Child Assessments involving Exploitation.		Low			
	Social Worker Staff Turnover Rate.		Low			
	Percentage of Agency Workers.		Low			
	Social Worker Average Caseload.		Low			
	Response Rate to Children and Young People Plan Survey.		High			
	Percentage of Cared for Children in Stable Placements.		High			
	Percentage of Cared for Children with Permanent Social Workers.		High			
	Percentage of Cared for Children with Combined Visits and Casework up to date.		High			
	Percentage of Cared for Children Placed with Parents.		High			
	Response Rate to SEND Survey (Positive Experience).		High			
	Percentage of Repeat Referrals in Previous 12 Months.		Low			
	Total number of in-house/LA Registered foster carers.		High			
	EYFS - % Achieving Good Level of Development.		High			
	Percentage of children achieving expected standard+ (EXS+) combined Reading, Writing, Maths (RWM) by end of KS2.		High			
	Progress 8 for KS4 pupils.		High			
	Attainment 8 for KS4 pupils.		High			
	Percentage of Children Persistently Absent		Low			
	Percentage of Sefton Children Educated in a School Rated Good or Outstanding.		High			
	Percentage of care leavers aged 19-21 who are Not in Education, Employment or Training (NEET).		Low			
	Percentage of children with Education, Health and Care Plans (EHCP) issued within a 20-week statutory timeframe.		High			
	Percentage / Total of children with SEN Support (Excl EHCP Plan).		Low			
	Number of children living in families in absolute low income.		Low			

Corporate Plan Theme	Corporate Plan Measure	Target	What is 'Good'	Theme Responsibility	Metric Responsibility	Data Source & Officer
Providing care and support that empowers people to live an independent life, exercise choice and control, and be fully informed	Percentage of Safeguarding Clients Whose Making Safeguarding Personal Outcomes Were Met.		High			
	Percentage of Clients whose Services have Improved Their Quality of Life.		High			
	Percentage of Carers whose Services have Improved Their Quality of Life.		High			
	Social Worker Staff Turnover Rate.		Low			
	Social Worker Average Caseload.		Low			
	Percentage of Agency Workers.		Low			
	Number of clients with assistive technology/telecare.		High			
	Number of visits to 'AskSara' website.		High			
	Percentage of Clients Involved in a Safeguarding Episode.		Low			
	Percentage of Clients Placed in Good or Outstanding Care Homes.		High			
	Percentage of Carers who can do what they want.		High			
	Percentage of Casework Audits Rated Good or Excellent.		High			
	Percentage of Clients who state they have Good/Excellent Choice & Control.		High			
Percentage of Clients/Carers asked about their experience.		High				

Corporate Plan Theme	Corporate Plan Measure	Target	What is 'Good'	Theme Responsibility	Metric Responsibility	Data Source & Officer
Improving the health and wellbeing of everyone in Sefton and reduce inequality	Number of Domestic Violence Incidents Reported.		Low			
	Number of visitors to monitored open spaces.		High			
	Total number of visits to leisure facilities managed by Active Sefton.		High			
	Rate of Overweight Children – NCMP.		Low			
	Rate of Child Vaccinations.		High			
	Rates of Mental Health Issues - Child/Adult.		Low			
	Library Visits.		High			
	Community Centre Visits.		High			

Corporate Plan Theme	Corporate Plan Measure	Target	What is 'Good'	Theme Responsibility	Metric Responsibility	Data Source & Officer
Working together to deliver affordable services which achieve the best possible outcomes for our communities	Number of schemes delivered to support Safer Routes to School programme.		High			
	Total recorded crime excluding fraud (crime rate per 1,000 for headline offences).		Low			
	Completions of new homes in line with housing trajectory.		High			
	Additional affordable homes completed (affordable rented and shared ownership).		High			
	Affordable housing completions on qualifying sites (percentage of total completions on qualifying sites).		High			
	Number of people rough sleeping.		Low			
	Percentage of Homelessness Preventions.		Low			
	Number of households in Temporary Accommodation.		Low			
	Proportion of Contact Centre Answered Calls.		High			
	Number of One Stop Shop Visitors.		High			
	Number of Website Visitors.		High			
	Percentage of women in the top 5% of staff earners.		High			
	Percentage of BME in the top 5% of staff earners.		High			
	Percentage of LGBTQ+ in the top 5% of staff earners.		High			
	Percentage of disabled staff in the top 5% of staff earners.		High			
	Recycling rate – percentage of household waste sent for reuse, recycling and composting.		High			
	Percentage of complaints investigated and upheld by the Local Government & Social Care Ombudsman.		Low			
	Percentage of council-wide corporate complaints responded to within agreed timescale.		High			
	Percentage of minor planning applications decided within time or with an extension of time.		High			
	Percentage of major planning applications decided within time or with an extension of time.		High			
	Proportion of Staff not Commuting.		High			
	Business Miles Claimed - Non Electric.		Low			
	Number of publicly available charge points per 100,000 population.		High			
	Estimated renewable energy generated installed on council estate. (KWp).		High			
	Scope 1 and 2 emissions from direct Council operations (consumption of fossil fuels including heating, electricity consumption and fleet fuel) (T Co2e).		Low			



Corporate Plan Theme	Corporate Plan Measure	Target	What is 'Good'	Theme Responsibility	Metric Responsibility	Data Source & Officer
	Tonnage of low carbon road material used within planned highway maintenance programmes.		High			
	Trees Planted.		High			
	Total number of vehicles and internal combustion engine (ICE) powered plant converted to electric (associated with the highway works contract).		High			

Corporate Plan Theme	Corporate Plan Measure	Target	What is 'Good'	Theme Responsibility	Metric Responsibility	Data Source & Officer
Creating more and better jobs for local people	Visitor Numbers.		High			
	Percentage of un-occupied units on neighbourhood parades.		Low			
	Business survival beyond four years.		High			
	Number of new businesses births in Sefton.		High			
	Unemployment rate of the working age, economically active population.		Low			
	Claimant Rate.		Low			
	Apprenticeship starts since start of academic year.		High			

Corporate Plan Theme	Corporate Plan Measure	Target	What is 'Good'	Theme Responsibility	Metric Responsibility	Data Source & Officer
Financial Sustainability of the Local Authority	Value (£000s) of un-recovered debt.		Low			
	Section 106 income recovered.		High			
	Council tax collection rate.		High			
	Business Rates collection rate.		High			
	Debt outstanding as a percentage of gross debt.		Low			
	Total debt as a percentage of core spending.		Low			
	Value of achieved savings from Transformation Change Programme.		High			

## Appendix 1 Key Performance Indicator (KPI) Quality Standards

This checklist should be used to ensure the quality of any Key Performance Indicator (KPI) used within the Council at any level.

Is the KPI:

- Specific: The performance measure indicates exactly what result is expected so that performance can be judged accurately.
- Measurable / Cost-effective: Data is available or is collected easily, balancing the benefits of the information against the costs of collecting evidence.
- Achievable: The measure is realistic, not based on aspiration.
- Relevant / Appropriate: The measure matters to the intended audience and is clearly related to the service being measured and is useful for the stakeholders who are likely to use it.
- Timely: Information is available frequently enough to have value in making decisions, and information is provided to managers and policymakers at times they need it.
- Responsible: There are clearly allocated individuals responsible for achieving the goal.
- Focused: Focused on the organisation's aims and objectives.
- Balanced: Giving a picture of what the service is doing, covering all significant areas of work.
- Robust: Robust to withstand organisational changes or individuals leaving.

Other considerations:

- Can 'good' be easily and appropriately identified?
- Are you clear on what success looks like?
- Is the KPI outcome focussed?
- Do the measures allow for nuance, improvement, and analysis of trends? Are they realistic but also ambitious?
- Should a target be used and how will it be set?
- Is there an appropriate comparator?
- Is trend data available?
- Are the calculations used to produce the KPI accurate or subject to margins of error / estimation and are these appropriately commented on?
- Is the data sufficiently recent?
- How does this link to the council's overall strategy, corporate plan, departmental plan, and individual appraisals or workplans? How does it link to national initiatives?
- Is this making use of existing data, or does it require new data to be collected? Is there a minimal burden on the frontline service collecting this? Is there any existing data that could contribute to this that is not currently being used?
- What exactly does this data tell us?

## Appendix 2 Key Performance Monitoring Reporting & Interpretation Standards

Questions to explore when gathering and presenting the data:

- Is there a mix of qualitative and quantitative data, if appropriate? That is, can we understand cost, quality, and opinion? (How did we do? What difference did it make?)
- How will the citizen's voice be captured?
- Can the data be shared in a way that is easy to understand? Are there graphics, simple language, charts?
- Does the presentation allow context and nuance around the data? Is there space for narrative around the graphs / charts?
- Does the data presentation allow and encourage challenge from the scrutiny committee and councillors with responsibility for the services?
- When you have presented the data, how is it then used to influence performance?
- What are the limitations of the data? Is it likely to have over-or-under-represented certain views or experiences?
- What are the key messages that arise from the data?
- What are the common or majority view experiences? What are the outlying views?
- What are the views/ experiences of individuals/ groups?
- Are there any unanticipated messages or themes?
- Does the data prompt any further questions or lines of inquiry?
- Do I have any biases, perceptions or life experiences that could affect my analysis of the data?

Cyclical processes to undertake when monitoring performance:

- Define where we are now – baseline & determine where we want to be based on the corporate plan, key strategies, and budget constraints / savings.
- Quantify the measures and set targets.
- Review the performance, understand deviations, and analyse the root cause.
- Agree actions to correct performance and implement the actions.
- Evaluate the effectiveness of interventions.

## Appendix 3 Approach to data and indicators

There is not a national set of indicators that English councils must monitor themselves against. Therefore, our approach is locally set, incorporating opportunities for benchmarking where possible and any statutory return requirements.

All measures, and actions should be SMART, throughout service plans, operational business plans and personal development plans.

**S - specific** – detailed and meaningful

**M - measurable** – this could be an input, output or outcome

**A - achievable** - but also stretch the organisation/individual

**R - relevant** – aligned with the overarching objectives

**T - timebound** – clearly setting out when it will be achieved

**R - responsibility** – clearly setting out who is responsible for the indicator

All data collected is expected to be high quality so it can be used to make effective decisions. It is each manager or data entry officer's responsibility to ensure this. Quality data reflects information that is accurate, valid, dependable, complete, relevant and timely.

Whilst the Council's Performance & Business Intelligence team continue to drive forward work to improve data quality and access, which will support the organisation to be data driven in decision making and improvement, the longer-term aspirations to integrate resources, develop data infrastructure, enhance automation and improve staff skills will all contribute to the progress across Council.

There are four types of information collected for the QSRs and CPOR, each has a different purpose, but all should be based on the principles described above.

- **Annual actions** - These are specific tasks that focus on strategic projects or programmes. They are updated each quarter with narrative, extent of completion and a self-reported RAG status.
- **Key Results** – These are key measures identified through the Corporate Plan. They are outcome focused to assess progress toward each of the Corporate Plan priorities and goals. The result will often be influenced by wider partners and external factors.
- **Performance Indicators** – These are traditional measures of performance, where targets are defined to assess performance against target.
- **Contextual Indicators** – These provide more general and contextual information, often to help forward planning and decision making. These will be included to monitor where delivery of the corporate priorities could be affected, for example demand or capacity management.

Benchmarking plays an important role to increase understanding of the Council's position and outcomes. It allows local authorities to identify their comparative strengths and areas for improvement. There is extensive data available through platforms such as LG Inform, so local measures should be identified based on strategic relevance, timeliness, and completeness of data.

Relevant comparison groups include the Chartered Institute of Public Finance and Accountancy (CIPFA) nearest neighbours for Sefton in the Liverpool City Region, the Northwest region, and statistical neighbours. CIPFA neighbours are a group of approximately 15 other local authorities who share similar characteristics, including population, geography, economic position and type of authority.

The Office for Local Government (Oflog) launched its 'Data Explorer' in 2023 to provide additional data insights for local authorities. They continue to expand the data available, and their data explorer tool may offer further comparative information.

Other comparative data is available through the LG Inform (themed reports or data explorer), PHE Fingertips, and the Office for National Statistics official census and labour market statistics.

