

PERFORMANCE SCRUTINY COMMITTEE

15 June 2017

PERFORMANCE REPORTING

Report by Steven Jones, Corporate Performance and Risk Manager

INTRODUCTION

1. Performance Scrutiny Committee is asked to consider material relating to the way in which performance information is routinely reported by the council, and how the Committee may access non-routine information when required.

DISCUSSION

2. Performance reporting is undergoing reform in Oxfordshire County Council (OCC) as part of wider improvement of how the council operates and manages its business. New arrangements are being developed with several objectives in mind:
 - a. Serve the business management needs of the County Leadership Team and Cabinet by better alignment of performance, risk and resource information across the whole council
 - b. Enable CLT and Cabinet to see, and act on, the critical OCC-wide issues affecting delivery of our published objectives
 - c. Enable public understanding of progress towards the council's stated objectives
 - d. Support the operation of OCC as one council and continue the move away from directorate silo working
 - e. Fit with related initiatives – business efficiency, the business intelligence work stream, improved financial control etc.
3. The products being developed to achieve this include:
 - a. A new, concise suite of performance outcomes and measures linked directly to the Corporate Plan priorities
 - b. A new narrative report supporting the dashboard with additional detail to help senior management groups understand and act on Red-rated performance, as well as identifying opportunities to celebrate performance successes
 - c. Greater emphasis on performance information being available to all, both routinely and by request
 - d. A new management dashboard presenting senior management groups with collated high-level information on performance, financial forecasts, workforce, customer satisfaction, and commercial/contract management activities

4. In August 2016 a private workshop for Performance Scrutiny committee looked ahead at the above ambitions and products, some of which have since been implemented, for example:
 - a) During the year the routine quarterly performance report was transformed, bringing both focus and strategic breadth to the information routinely being considered by senior management and councillors. A template for the report in use in 2016-17 is attached at Annex 1 for reference. Among other things, the new reporting format focuses strictly on the Corporate Plan priorities, strips out less vital detail previously being reported, and strengthens the focus on performance highlights and achievements. The outcomes and measures in the template are being reviewed by CLT and Directors now to produce the suite for 2017-18. The quarterly report is prepared for CLT's consideration, and subsequently passes to Performance Scrutiny Committee, enabling members to comment on any performance issues or concerns which the Chair then raises when the report goes to Cabinet.
 - b) In late 2016 the committee discussed a number of concerns over the council's performance in the matter of developer contributions ("Planning Obligations", or "s.106 agreements" for growth-related infrastructure provision). Members' concerns reflected both hard evidence in the quarterly performance report and experience in their own divisions. It was agreed that a small number of committee members would work directly with the relevant officers, outside the meeting schedule, to reach an in-depth understanding of the processes and the reasons for reported performance. Committee members and officers gained insight from the interaction, and both the process and the resulting paper presented in the January 2017 meeting served as an illustration of the "deep dive" model which members are increasingly encouraged to utilise as part of their scrutiny function.
 - c) The implementation of the Senior Management Review in early 2017, including the establishment of a new County Leadership Team and three new Strategic Directors, supported the drive to make performance reporting more strategic. Work has been going on in earnest with CLT and directorates to shape the suite of internal and external performance indicators which will be used throughout 2017-18. This will be returned to in later committee meetings.
5. The "deep dive" described at 4(b) above illustrates the fact that the information routinely reported in quarterly reports is not intended to offer the complete picture of the council's performance. Rather, the quarterly report summarises progress towards the priority outcomes in the Corporate Plan, and provides audiences such as scrutiny committee members a starting point for their consideration of performance levels in specific services. Officers will work with committee members to provide more detailed information on a given subject. The diagram in Annex 2 shows how OCC's performance information is collated for each audience.
6. Looking ahead, the alignment of performance data with data on other aspects of business management – finance, staffing, contract/commercial performance and

so on – remains relatively in its infancy, and needs improvement in order to provide a clearer picture of current business for CLT and other audiences

7. The “management dashboard”, trailed as a concept internally last Summer, remains an ambition, and we plan to circulate a working proposal of this, initially for CLT’s consideration, based on the best available real-time data on performance, finance, HR and commercial matters.
8. The process of gathering and collating performance data remains labour-intensive and slow. Staff involved in performance reporting and business management have maintained close engagement with the council’s Business Intelligence work stream and the Digital Services / Digital First programme, which could help to automate and transform these processes, making performance and business management quicker, more flexible and more effective.
9. More recently, coinciding with a renewal of officer support for the committee, an evaluation of the effectiveness of OCC’s scrutiny function has begun. Among the products of this activity will be a more strategic approach to forward planning across the council’s scrutiny committees, ensuring that the programme of meetings is co-ordinated, timely and carefully targeted, and that the schedule makes most appropriate use of officers’ time and information. Members will be encouraged to propose agenda items for meetings, and also to identify matters which are best handled via “deep dives” or thematic inquiries outside formal meetings. At the same time, Scrutiny Officers will continue to promote to officers the value of bringing developing policy to the committee to gain members’ insight into the emerging policy.

RECOMMENDATION

10. **The Committee is RECOMMENDED to note the approach to business management and monitoring and propose any immediate areas of scrutiny it would wish to undertake.**

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