

## PERFORMANCE MANAGEMENT

### Executive Summary

The Committee is invited to scrutinise the processes and arrangements that are in place for performance management and provide recommendations as it sees fit.

### Recommendations

The Committee is requested to:

**RESOLVE That** the report be noted.

The Committee has the authority to determine the recommendation(s) set out above.

<b>Background Papers:</b>	None.
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### 1.0 Introduction

- 1.1 Performance management within the Council historically took the form of the Green Book, which was a document produced every month containing a range of KPI's and financial information. The Green Book had been used within the Council for well over a decade, during which little had changed in relation to its structure and content.
- 1.2 Dr Gifty Edila's Report and Local Government Association Corporate Peer Challenge Action Plan was agreed at Full Council on 10 February 2022. A key recommendation was to undertake a review of the Green Book, as well as wider performance management across the Council, to ensure that the correct mechanisms are in place to properly measure performance in relation to the key priorities of the Council as stated in the Woking For All Strategy.
- 1.3 A report was submitted to the Overview and Scrutiny (O&S) Committee in March 2022, which outlined the objectives and scope of the review. A key driver of the review was to ensure that the new approach would strengthen transparency around Council performance and establish clear lines of accountability in relation to the functions/services that are provided to residents.
- 1.4 The O&S Committee received a further report in September 2022 which outlined progress that had been made in respect of the review, along with nine specific recommendations to improve performance management arrangements. A range of research was undertaken to inform the recommendations, this included:
  - Mapping performance management best practice elsewhere across Surrey; exploring what approach other authorities took in relation to performance management i.e., the nature, content, and frequency of their Green Book equivalent.
  - Identifying who performance management information was shared with in other authorities and establishing what governance was in place.
  - Cross-referencing information/KPIs that was in the Green Book with other authorities to determine if there were any obvious gaps and/or areas for improvement.
  - All Councillors were contacted for thoughts/suggestions, with direct engagement with the Leader, Chair, and Vice Chair of the O&S Committee.
  - CLT and stakeholders within the Council (notably finance colleagues and KPI contributors) were consulted around how to enhance performance management.
  - Commissioners were also actively consulted as part of the review process.
- 1.5 The direction of travel for performance management was agreed, and Officers were tasked with undertaking the necessary work to implement the changes. Progress was initially delayed due to Government Intervention and the issuing of the Section 114 Notice (May and June 2023 respectively), however the first publication of the newly titled 'Performance Management Report' was produced for Q3. of the 2023/24 Financial Year.

### 2.0 Performance Management Report

- 2.1 The new Performance Management Report is produced on a quarterly basis with an emphasis on making the information contained within it more accessible. The report is now structured around each directorate (Communities, Corporate Resources, and Place), with the addition of a 'Corporate Overview' section to report cross-cutting KPIs and strategic risks.
- 2.2 A key improvement to the new report is the introduction of a narrative supplied by the Chief Executive and each Strategic Director, which allows each contributor to highlight issues,

challenges, and opportunities for their respective section. The most recent report (covering Q4 2023/24) is attached as appendix 1.

- 2.3 The Performance Management Report is reviewed by CLT as part of quarterly 'Performance / Budget Deep Dive' meetings. The report is also submitted to the Executive.

### **3.0 Continuous Improvement**

- 3.1 Continuous improvement is a running theme within performance management, and a range of enhancements are made to the new report on a regular basis. Further areas for development have been identified and will be worked on as part of the next publication (Q1. 2024/25) and beyond. These areas include:

- Greater automation of the collection of data which largely relies on manual processes.
- Greater trend analysis.
- Clearer alignment of performance information and budget monitoring, so that we can better understand the impact of changes in service demands on our finances and, where these demands are detrimental to the Council's financial position, explore mitigations.
- Clearer identification of those performance measures which are most significant, to help us focus on those issues which are most important.

### **4.0 Corporate Strategy**

- 4.1 The application of robust performance management underpins the effective delivery of the functions that the Council provides, which in turn supports the objectives listed in the Corporate Strategy.

### **5.0 Implications**

#### Finance and Risk

- 5.1 None arising from this report.

#### Equalities and Human Resources

- 5.2 None arising from this report.

#### Legal

- 5.3 None arising from this report.

### **6.0 Engagement and Consultation**

- 6.1 None arising from this report.

REPORT ENDS