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SUBJECT: Corporate Performance reporting process

DATE: 12 September 2024

RECIPIENT: Overview and Scrutiny Management Committee

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THIS IS NOT A DECISION PAPER

SUMMARY:

Southampton City Council recognises the importance of effective performance management in delivering high-quality services to its residents. By implementing an updated, comprehensive reporting process, the council aims to foster an evidence and intelligence-led culture, as outlined in its Data and Intelligence Strategy.

The performance report is being developed on an iterative basis, and in time will align to ensure it is reflective of strategic outcomes in the City Plan, Master Plan and other key strategies.

BACKGROUND and BRIEFING DETAILS:

Southampton City Council is committed to providing high-quality services to its residents. To ensure effective performance management, the council has implemented an updated performance reporting process that aligns with our Data and Intelligence Strategy. This report outlines the reporting process, current challenges, and future improvements.

Currently Key Performance Indicators (KPIs) have been reviewed with leadership from across the council to ensure they provide a broad picture of performance including those measures outlined in the corporate plan. Targets have been agreed in some areas and this will be further developed across the suite of measures, aligning to business plans and associated activity. The report also allows users to benchmark indicators against the national average and comparator areas (where available) to get a broader understanding of relative performance and where Southampton may be an outlier to focus actions accordingly.

Whilst maintaining a focus on core data, the report will be developed iteratively, and new indicators may be added or removed by exception. As key plans (City Plan, Master Plan, revised Corporate Plan are developed, the report will be reviewed and updated.

Performance Reporting Process

The performance reporting process involves the following key elements:

1. **Monthly updates**: The KPI Performance report is updated monthly, alongside the HR and Finance dashboards, and circulated to managers through a single Management Reporting Power BI Application. Performance data is brought together with finance and HR data into a single location through a Power BI application, allowing managers to better manage their services.

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2. **Engagement**: Services are expected to fully engage with the process by reviewing KPI performance at Directorate Management Team (DMT) level, contributing to the organisational Business Planning & Performance Group, and providing commentary for the corporate report. Actions to address areas of concern, as well as share good practice and positive outcomes are core to these discussions.

3. **Quarterly reporting**: The report will be brought to Management Board and Cabinet Member Briefings on a quarterly basis, forming the basis of a quarterly performance discussion at a Cabinet/Executive Management Team session, prior to a formal Cabinet paper being submitted.

Current Challenges

The council faces several challenges in implementing an effective performance reporting process:

1. **Data accessibility**: The report relies on accessing data across the authority, much of which is still disparate, not joined up, and reliant on individuals and manual processes.

2. **Automation**: Only a small proportion of the indicators are fully automated through the council's central data warehouse or Application Programming Interface (API) functionality. As a result there is still a significant amount of manual work to produce reports.

3. **Continuous improvement**: Team changes and continuous improvement initiatives often require system and complex reporting changes, which impact the capacity to deliver improvements and efficiencies.

Future Improvements

To address these challenges, the following improvements are being implemented:

1. **Data Strategy**: Through the Data and Digital Strategies work (as part of Transformation), the council will further develop a centralised Data Warehouse and connect to an increasing number of systems to help automate data processing tasks. Where automation has been effectively implemented, work effort to produce reports has already been evidenced. The data strategy work also focuses on our predictive analytics capabilities so that we improve forecasting and 'what if' scenario planning to better understand the impact of early actions and interventions.

2. **Power BI Report**: An enhanced report is being developed to automate descriptive commentary and enable services to focus on value, add commentary and actions, inputting directly in the report. This report will also have some basic forecasting functionality built in.

3. **Business Partner support**: The level of business partner involvement has improved significantly over recent months. Further utilising specialist expertise through the involvement of the Business Partners will help interpret the information (Data, HR, Finance, etc.) and support services in understanding their performance and associated actions required.

4. **Performance management**: DMTs have regular performance items on their agendas, and Executive Directors have committed to ensuring representatives regularly attend

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the Business Planning and Performance Group. Focus on organisational as well as service performance is also seen as core to individual performance management.

5. **Dedicated performance roles**: Services with dedicated performance or quality assurance roles (as a single point of contact) are most engaged with the process, making it more efficient and effective. This is being taken into consideration as part of service redesigns.

As outlined above, the performance reporting process has been established to ensure a comprehensive approach to monitoring and understanding of, and taking action on, key indicators of performance across the council as a whole. Implementing the proposed improvements will support further performance ownership and improvement alongside supporting the development of the evidence led culture through the wider implementation of the data and intelligence and digital strategies.

RESOURCE/POLICY/FINANCIAL/LEGAL IMPLICATIONS:

Performance reporting delivered through BAU resource.

OPTIONS and TIMESCALES:

Alternative options considered: No corporate reporting process in place, with reporting ad-hoc or on request. Rejected as regular performance reporting and assessment of associated actions is essential for the council to effectively manage its business. A rigorous, regular reporting process is more efficient and reliable than ad-hoc reporting.

RISK MANAGEMENT IMPLICATIONS

Improves performance management of the organisation and early sight of warning indicators so that appropriate proactive action can be taken.

Appendices/Supporting Information:

N/A

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