Wyre Forest District Council

PERFORMANCE MANAGEMENT FRAMEWORK
Refreshed November 2017

What is Performance Management?

1. Performance management is about making sure we **deliver**:

   ✓ **the right services**

   ✓ **at the right time**

   ✓ **in the right way**

   ✓ **at the right price**

   It is also about **improving** services - *"taking action in response to actual performance to make outcomes better than they would otherwise be"* (IDeA).

2. It applies to everyone within the organisation as well as our external partners, with whom we provide an increasing number of services.

3. Performance management follows the sequence of **Plan → Do → Review**.

   - **Plan** means being clear about what we are setting out to achieve and how we are going to achieve it
   - **Do** means putting our plans into action in the most efficient and effective way
   - **Review** means monitoring results to ensure that:
     - we achieve what was planned and to the agreed standard
     - we can compare our performance with other service providers and with our own past achievements to show trends
     - we have relevant and timely information to feed back into the planning process
     - we can inform stakeholders accordingly

4. Our Performance Management Framework sets out how we put this into practice.

   Diagram 1 provides an overview of the steps to be taken, followed by a brief explanation of each.

   Appendix 1 summarises Member and officer performance management roles and responsibilities.

   Appendix 2 lists reporting arrangements for various Council and Partnership plans and strategies.

Diagram 1: Overview of Performance Management Processes

PLAN

DO

REVIEW

1. Vision
Corporate Vision & Values

2. Planning
Plans & Priorities for service teams

3. Commitment
Ownership & Resources

Performance Management

6. Review & Response
Action & Communication

4. Action & Results
Standards, Targets, Measures & Outcomes

5. Monitoring
Information-gathering, benchmarking & reporting

1. Vision

Performance management begins with a clear vision.

The Council's corporate Vision is contained in our Corporate Plan for 2014-19:

> **Wyre Forest - where people have the opportunity to enjoy a good quality of life and want to live, work, visit and invest.**

This Vision is underpinned by our agreed values, which influence the way we work and lie at the heart of everything we do:

Our Values

We Will:

- ➔ Be confident and honest in expressing our views
- ➔ Work as one team and support each other
- ➔ Put our customers first
- ➔ Be innovative and flexible in the ways we work
- ➔ Invest in giving people the skills to do the job
- ➔ Celebrate good performance

2. Planning

The Council's Priorities are set out in the Corporate Plan and are informed by national and regional Priorities as well as those of the Sustainable Community Strategies for the District and County.

	Service Standards	Focus areas for Improvement	Measures	Service Outcomes
1. **National Priorities** Central Government				
2. **Regional Priorities** West Midlands Region				
3. **Community / Area Priorities** District & County Sustainable Community Strategies				
4. **Council Priorities** Corporate Plan				
5. **Council Action** Annual Wyre Forest Forward Programme of Work				
6. **Individual Performance** My Development Review Scheme				

The Council's focus must be how we and our partners can achieve positive **outcomes** for our communities - to improve their quality of life and the services we provide for them.

When planning, the Council must ensure it understands the District, our communities and their needs based on a detailed knowledge of key demographic data/customer satisfaction and perceptions. As a Community Leader, the Council should engage with and share information, where applicable, with partners.

We must also be aware of available resources, anticipated risks and levels of current performance when setting Priorities and developing Plans.

The Council's services are delivered through plans and strategies at all levels, both independently and in partnership with other service providers. Our Wyre Forest Forward Annual Programme of Work (no. 5 above) are the principal means of delivering services on the ground, and provide a link between our high-level Vision and strategic priorities and team/individual performance.

Our Priorities

The Council has agreed 2 Priorities in its new Corporate Plan for 2014-19, which support the corporate Vision.

> ➔ **Support you to contribute to a successful local economy**
> ➔ **Support you to live in clean, green and safe communities**

PLAN ➔

3. Commitment

Organisational commitment is demonstrated through the allocation of responsibilities and resources.

Members' responsibilities are set out in the Council's Constitution and the Political Structure. **Officers'** responsibilities are contained in the Constitution, Job Descriptions and the Wyre Forest Forward Annual Programme of Work developed alongside the annual budget process.

Ownership of responsibility is further supported by:

➔ The My Development Review scheme to link organisational targets and actions with those of individual employees

➔ Commitment to training and development through the Annual Training Plan and Training Budget

➔ Adoption of a competency-based management development framework

A summary of performance management roles is given in **Appendix 1**.

Financial resources are allocated to the Council's Priorities through the Medium Term Financial Strategy and annual Revenue and Capital Budgets. Resources provided by other bodies are secured through external funding bids.

Commitments towards achieving District and County Sustainable Community Strategy priorities is demonstrated through membership of Boards, Task Groups and Officer Working Groups.

4. Action and Results

Services are delivered in accordance with our strategies and plans, having regard to the following:

➔ Service **standards** (where agreed), published to inform stakeholders of the minimum level of service to be expected

➔ SMART **action targets** to achieve planned improvements in service levels

➔ **Measures** to monitor service-delivery in practice and to help focus attention on areas most in need of improvement

➔ Strategic **outcomes**, for example increased prosperity or community safety

Dedicated performance management software (*Pentana Performance*) helps to provide consistency and better access to information regarding ownership, service activity and measures, and to improve monitoring and reporting procedures.

A Data Quality Strategy has also been developed to ensure the proper collection, recording, analysis and reporting of data for performance management purposes.

5. Monitoring and Progress Reporting

Feedback and other information generated in delivering services enables us to actively monitor performance and report as necessary to Committees, management & operational teams, individuals, members of the public and external agencies. This is undertaken in accordance with the frequencies shown in **Appendix 2**.

Results of service performance are published internally and externally in the Council's Overview & Scrutiny Committee reports.

6. Review and Response

Reviewing and taking corrective action are essential steps as they distinguish performance management from performance monitoring. Action taken is recorded to provide an audit trail and evidence of improvement, and could include any or all of the following:

➔ Reassessing the need for a particular service
➔ Re-designing standards, measures and targets
➔ Reviewing systems and processes
➔ Re-evaluating resource requirements

Customer feedback is used to support the review process, while benchmarking with other service providers helps to set Council performance into context by comparing processes and measure results, for example when carrying out service reviews or value-for-money exercises.

Implementation of this Framework is overseen by the Corporate Leadership Team.

Further Information

Glossary

Benchmarking   A measurement or standard that serves as a point of reference by which performance is measured. A structured approach for identifying the best practices and more efficient and effective processes

Outcomes   A measurable, external consequence attributed to an organisation, policy, program or initiative (i.e. the results of activities and outputs)

Outputs   The product (goods, money, materials or services) of an activity

Measures   Quantitative or qualitative monitoring of a service

Priorities   Objectives or targets which are the most important for the organisation or individual to deliver

Standards   Minimum level of service to be provided and which service users can reasonably expect

Targets   The level of performance that the organisation or individual aims to achieve

Values   The beliefs within the organisation as demonstrated through the day-to-day behaviours of all employees. An organisation's values make an open proclamation about how it expects everyone to behave

Vision   A statement that captures what the organisation wants to achieve overall in the longer-term (5 – 10 years)

Useful websites

Communities & Local Government   www.communities.gov.uk

Pentana Performance   https://www.ideagen.com/products/pentana-performance/

IDeA   www.idea.gov.uk

LGA   www.lga.gov.uk

Performance Management Roles

Who	Role	When
Full Council	• Approving Council Plans & Strategies • Agreeing the Budget and confirming our priorities	• As required • Annually (Feb/Mar)
Cabinet	• Endorsing new Plans & Strategies for Council approval • Formulating the Budget and Annual Priorities for Council approval • Monitoring progress with Annual Priorities • Monitoring other Plans & Strategies	• As required • Annually (Oct-Feb) • Monthly • As required
Individual Cabinet Members	• Monitoring measures and action targets for relevant services in consultation with Directorates	• Continuous
Group Leaders	• Approving Wyre Forest Forward Programme of Work	• Annually (Apr)
Scrutiny Committees	• Monitoring progress with: • Annual Priorities • Measures • Wyre Forest Forward Annual Programme of Work	• Quarterly - highlight / exceptions
CLT	• Agreeing Plans & Strategies for Cabinet endorsement • Monitoring progress reports for Cabinet consideration and overseeing corrective action	• As required • Monthly
DMTs	• Producing Plans & Strategies for CMT agreement • Implementing Plans & Strategies • Monitoring progress with implementation and determining corrective action where necessary	• As required • Continuous • Continuous
Section Managers	• Monitoring the Section's performance, taking corrective action where necessary and giving feedback to relevant officers	• Continuous
All Employees	• Individual performance, including agreeing personal goals and measures • Giving 'bottom up' feedback and contributing to service improvement both generally and through the My Development Review scheme • Responsibility for the quality of all data they handle	• Continuous • Continuous • Continuous
Partnerships	• Actively contributing to Plans & Strategies • Monitoring and reporting progress • Taking corrective action where necessary	• Continuous • Continuous • Continuous

Performance Monitoring Reports

Service Area / Performance Information	Internally		Committees / Ext.		Resp. Directorate
	Freq	Where	Freq	Where	
1. Leading Measures	Monthly	CLT	Quarterly	CLT/Cabinet	Chief Exec Directorate
			Quarterly	Scrutiny	
2. Lagging Measures	Quarterly	CLT	Quarterly	CLT/Cabinet	Chief Exec Directorate
			Quarterly	Scrutiny	
3. Wyre Forest Forward Programme of Work	Quarterly / Monthly	CLT / Group Leaders	Annual	CLT/Cabinet & Council	Chief Exec Directorate
			Quarterly	CLT/Cabinet	
			Quarterly	Scrutiny	
4. Data Quality	Bi-Annual	CLT	Bi-Annual	Scrutiny	Chief Exec Directorate
5. Risk Register	Quarterly	CLT	Quarterly	Audit Committee	Chief Exec Directorate
6. Internal Audit Reports	Quarterly	CLT	Quarterly	Audit Committee	Chief Exec Directorate
7. Corporate Governance Framework	Bi-Annual	CLT	Bi-Annual	Audit Committee	Chief Exec Directorate
8. Budget (spending)	Monthly	DMTs			Chief Exec Directorate
	Quarterly	CLT			
9. My Development Review	Annually	All			Chief Exec Directorate
10. Annual Review	Annual	CLT	Annual	Council	Chief Exec Directorate