



Committee and Date
Transformation &
Improvement Scrutiny
3rd June 2024

Cabinet
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Item

Public



Performance Monitoring Report Quarter 4 2023/24

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Cabinet Member (Portfolio Holder):	Cllr Robert Macey, Culture & Digital		

1. Synopsis

The Shropshire Plan clarifies our vision and priorities, aligning our resources to deliver positive outcomes for our people, businesses and communities. Delivery of our outcomes is measured through the developing Performance Management Framework, demonstrating progress to date.

2. Executive Summary

Overview

The Shropshire Plan (TSP) was created to clarify Shropshire Council's vision, priorities and Strategic Objectives. These objectives reflect the outcomes we aim to achieve within our available financial envelope. We measure the achievement of TSP by monitoring our performance (using Key Performance Indicators (KPIs) to help measure, drive and understand delivery of our Strategic Objectives) and managing our overall financial position (ultimately delivering our outcomes while remaining within our agreed financial envelope).

This the final report for 2023/24 where the focus was to scrutinise our financial management with the aim to create a sustainable financial future. Over the year the need was to closely monitor and review our finances to support delivery of the Medium

Term Financial Strategy (MTFS). We are seeking to rebase our budgets over several years, in line with the outcomes defined in TSP, to secure a modern, efficient, and sustainable base for the Council finances across the 5-year period of the MTFS. This approach is aligned to the recommendations of the LGA peer review and is comparable with the best approaches seen in local government. We will need to make the adjustments each year to ensure financial survival moving towards financial stability and sustainability. Against this backdrop we are seeking to optimise our performance within our available financial envelope. Our plans will focus on economy, efficiency and effectiveness, redefining the way we deliver interventions to optimise delivery of our vision wherever and however possible.

Summary

- 2.1. The focus of the Council in 2023/24 and the immediate future is necessarily directed at the delivery of a balanced budget, and is currently, therefore, the highest priority Strategic Objective within TSP balanced alongside protecting our most vulnerable children. Our new Performance Management Framework has been reviewed and strengthened to align with all our strategic objectives to enable us to become an evidence led performance managed council.
- 2.2. Development of our KPIs will continue with Portfolio Holders, Executive Directors and Assistant Directors identified for each indicator. Targets, tolerances and benchmarks will be clarified over the coming months, where possible, with regularly updated monitoring information published via the performance webpage at - [Performance | Shropshire Council](#) Online performance reporting will be the main source of performance information enabling greater insight and scrutiny of the Council's performance and delivery of its outcomes as set out in TSP.
- 2.3. Through engagement across all Directorates the PMF has been launched with the focus on using data to inform decisions and actions particularly where performance may not be meeting targets and expectations. As part of the necessary arrangements for delivering TSP, the Council has reviewed and updated its approaches to both performance and financial monitoring. Both areas are now more pro-actively informed by timely activity data and are available to a range of officers to help guide decision making. Interactive dashboards using 'PowerBI' are being developed which will show a summary of KPIs for each Healthy priority through to agreed strategic objectives. It will then be possible to drill down into more detailed information for each KPI including status which is RAG (red, amber, green) rated, trend information and benchmarking where available against England and nearest statistical neighbours.
- 2.4. The Q4 Finance report (elsewhere on this agenda) sets out the financial envelope of the Council and how spending plans and patterns are being managed to deliver a balanced budget.
- 2.5. This Q4 Performance report complements the Finance report but provides a different perspective. We may therefore find that the position on KPIs is favourable, but that the finance position is adverse because the activity levels (the cost drivers) are higher than anticipated.
- 2.6. As part of our new approach feedback on the design and usability of the new report and performance webpage is welcomed. A feedback form will be available

for questions and queries, and this will be reviewed with responses provided and published where appropriate alongside the dashboard.

Key Indicators and Context

- 2.7. The Q4 performance report is written as an exception report with all key performance indicators being provided in the dashboard which should be viewed in conjunction with this report.
- 2.8. The Q4 report is not fully complete with all the agreed performance indicators due to the time taken to implement the new approach, obtain data and the focus on getting it right. Those outstanding are noted in the report. It should also be noted that some of the performance indicators are baseline figures from which targets will be established and then performance monitored against this.
- 2.9. It should be noted that the approach being taken by Shropshire Council is progressive and in advance of many other authorities and places us in a strong position to continually improve our approach to managing performance, identifying areas of under and over performance, and ultimately providing evidence of our ability to deliver the outcomes set out in TSP.

3. Recommendations

Transformation & Improvement Scrutiny Committee

- 3.1. It is recommended that Members of the Transformation & Improvement Scrutiny Committee:
 - 3.1.1. Review and consider performance dashboard information alongside this exception report.
 - 3.1.2. Note progress to date in achieving the outcomes of The Shropshire Plan (TSP) and identify any areas for future consideration by the committee.
 - 3.1.3. Consider that the KPIs currently agreed remain the same for 2024/2025.
 - 3.1.4. The Portfolio Holders consider reviewing the targets for the agreed KPIs with the relevant Executive Director 2024/25.
 - 3.1.5. Consider a new set of KPIs and key deliverables aligned with the review of The Shropshire Plan.

Cabinet

- 3.2. It is recommended that Cabinet :
 - 3.2.1. Review and consider performance dashboard information alongside this exception report.
 - 3.2.2. Note progress to date in achieving the outcomes of The Shropshire Plan (TSP) and comment as appropriate.
 - 3.2.3. Consider that the KPIs currently agreed remain the same for 2024/2025.
 - 3.2.4. The Portfolio Holders consider reviewing the targets for the agreed KPIs with the relevant Executive Director.
 - 3.2.5. Consider a new set of KPIs and deliverables aligned with the review of The Shropshire Plan.

Report

4. Risk Assessment and Opportunities Appraisal

- 4.1. The management of the Council's Performance Management Framework is a key process in ensuring strategic risks are mitigated and the Council can carry out business as intended and planned for within TSP.
- 4.2. The management of key performance indicators is a key process to monitoring progress in the delivery of outcomes as set out in TSP. This provides insight into whether corrective action is required to bring performance back on track.
- 4.3. The performance reports and dashboards provide a high-level lens into the performance of Shropshire Council allowing for further targeted detail analysis to support the mitigation of any risks identified.
- 4.4. Regular financial reporting is part of the governance and risk management approach within the Council ensuring that it delivers sustainable and value for money services as required under statute. Risk management continues to be an active part of this process, and Officers review potential risk and opportunity scenarios each month. The Council holds two finance related strategic risks regarding managing the current financial situation and so this remains under constant review to consider appropriate management action of the situation.
- 4.5. The dashboards include instructions for use and a feedback form is available for completion should there be questions or feedback. Members will be shown how to use the dashboards.
- 4.6. Monitoring will be in place using the dashboards so any issues can be resolved in a timely manner.
- 4.7. Ultimately, the Council must risk assess the delivery of Strategic Objectives within TSP and adjust, accordingly, to ensure an acceptable balance of outcomes are achieved at a strategic level. This may mean the prioritisation of some objectives over others to react to the evidence presented within the PMF. It may not be possible to achieve optimal performance across all indicators and it may be necessary to oversee expected reductions in performance in some areas to remain within the overall financial envelope.

5. Financial Implications

- 5.1. The performance report provides progress on key activity targets which will have correlation to financial performance.
- 5.2. It should be noted that positive improvement on activity may not necessarily correspond to financial improvement, and this should be drawn out in the narrative of the financial and performance reports.

6. Climate Change Appraisal

- 6.1. The performance report includes KPIs for Healthy Environment with measures for monitoring Shropshire Council's direction of progress on climate change.
- 6.2. However, Climate Change also has significant implications for Healthy People, a Healthy Economy and a Healthy Organisation and further work to develop additional KPIs, in partnership with the Climate Team should reflect this. Further indicators will be made available as new data becomes available. This will support a positive outcome.

7. Background

- 7.1. Quarter 4 – a total of 87 Key Performance Indicators have been added to the Shropshire Plan report. Additional information will be added in the period between writing of this report and its presentation to members.
- 7.2. Information on each of these indicators can be found via the performance webpage at – [The Shropshire Plan Performance Dashboard](#)
- 7.3. The online performance report is now the main source of performance information. This report highlights any exceptions or downturns and explains the causal issues and any corrective actions the service is taking.
- 7.4. In Q4 there are 11 exceptions that have been raised and these are reported in the additional information section below.

8. Additional Information

During quarter 4 a total of 7 performance indicators showed an improvement of which the following are the most notable

- HP5 uptake of breast cancer screening,
- HP22 remaining in touch with a high proportion of care leavers,
- HEn6 improved rates of recycling, re-use and composting on last year,
- HEn9a increasing the generation of renewable energy solar,
- HEc18 reduction in number of households in B&B accommodation,
- HEc22 major planning applications processed,
- HO11 staff turnover rates.

There are 11 exceptions to report this quarter.

8.1. **HP18 Assessment timeliness: within 45 working days.**

A focus on completing out of date assessments has resulted in a dip in performance. The front door assessment performance remains strong, assessments that are open on children already being worked with do go out of

time more easily as they are live and evolving pieces of work, often linked to Children Looked After reviews or review Child Protection Conferences.

8.2. HP19 Stability of placements of looked after children: length of placement.

The stability of placements has fallen slightly, this is due to several sibling groups having to move placements.

8.3. HP31 Percentage of Educational Health Care Plans (EHCP) issued within 20 weeks.

Performance for the year is lower than target. During the year, the service area has seen a substantial increase in the number of EHCP requests, the first three months of 2024 have seen 205 EHCPs issued compared to 157 in 2023, this is an increase of 31%. A recovery plan has been developed and a new target profile will be provided.

8.4. HEc11 Paid employment for people with learning disabilities.

Supporting people with learning disabilities to achieve paid employment can increase self-confidence and independence whilst reducing reliance on others. The service is working with its clients to find opportunities to develop skills and positive experiences through training, volunteering and where suitable to find paid employment.

Performance for those in paid employment at quarter 4 is 6.43%, this has slightly missed the target of 7.2% but this is still an improvement from quarter 3 of 6.34%. This was a stretch target set locally and it is important to note that Shropshire is still above the West Midlands at 3.2% and England at 4.8%.

Whilst performance for paid employment is one element of the service, the Enable team continue to work with a range of clients offering support at various stages. They are currently working with 10 clients to support them with their work preparation to become ready for searching for paid employment and 11 clients to support them to retain their employment. They are currently working with 35 supported interns in 23/24 to find them work placements alongside their college work programme. The supported internship work contributes to the prevention of those clients needing adult social care intervention.

8.5. HEc21 Reduce the % of workforce with no or low level qualifications.

The percentage of the Shropshire workforce with low or no qualifications has decreased from 15.5% to 10.6%. Despite the improvement, rates are now higher than the England rate (8.8%) on which the target is based. Rates are similar to the West Midlands (10.5%).

Please note that the data is from the Annual Population Survey and that the sample size for Shropshire is relatively small compared with the West Midlands and England. Although still statistically robust, the confidence intervals are larger

which can mean that data at a local level is subject to a greater degree of annual fluctuation than regional or national data.

8.6. HEn11 The percentage of streetlights converted to LED

The conversion of streetlights to LED was proposed to be substantially complete by the end of December 2023.

At quarter 3, 84% of all Shropshire streetlights were LED, just short of the 88% target. During quarter 4 work to convert the streetlights has continued but the target of 98% has been missed with currently only 88% of streetlights converted. Updated feedback from the service is that it is not possible to complete 100% of the streetlights for example lanterns cannot be converted. Information and numbers around this are awaited from the service but at time of writing have not been provided.

The project delivering LED lighting is due for completion by the end of June 2024.

8.7. HEn15 Number of environmental permit inspections completed.

The aim of the environmental permit inspections is to reduce pollution from industrial and commercial operations to protect the environment. Carry out statutory Inspections of permitted industrial and commercial sites that emit pollutants in accordance with a risk-based inspection programme as set out in the statutory guidance.

Inspection numbers for Environmental Permitted Installations have fallen short of the statutory target this year due to sickness and conflicting statutory pressures. Steps are being taken to train up others in the team to provide more resilience as part of restructuring related to MTFs savings and so improved performance is expected for 2024/25.

8.8. HO1 Number of compliments received.

The number of compliments received by the Council has declined from 142 at quarter 3 to 107 at quarter 4 whilst this has missed the target, the performance is in line with other quarters. The number of compliments received can be an indication of quality of service delivery. The number of complaints received at quarter 4 has also fallen and whilst this is good news, the lower number suggest that overall, less people got in touch during quarter 4.

8.9. HO6 Budget Outturn vs Budget

The Council revenue position has been finalised for 2023/24. The Council has:

- Substantially contained revenue expenditure within the available budget (a variance of £7.302m against net spending representing 1.21% on the gross budget or 2.85% of net budget)
- Delivered £41.818m savings (81% of the target, and by both value and percentage the highest ever achieved by the Council)

- Improved the overall financial variance when compared to that projected at Quarter 3 by £6.656m (£14.533m compared to £7.877m)
- Delivered a smaller overall overspend than delivered in the previous financial year (£7.877m compared to £8.499m)
- Ensured the General Fund Balance has increased compared to the previous year (£8.237m compared to £7.093m, with plans to improve this position again in 2024/25)
- Reprofiled the capital programme over the year, aligning with revised delivery expectations, to £100.012m. Outturn capital expenditure for 2023/24 is £92.339m, representing 92.3% of the re-profiled budget. All £7.673m of the underspend has been carried forward to the 2024/25 programme.

8.10. **HO13 Number of days lost due to sickness absence.**

Overall lost days has increased by 8% this quarter however the increase in coughs, colds and influenza was by almost 18% and an increase of 26% for gastrointestinal illnesses which suggest that return to school/work following the Christmas break has led to the spread of winter viruses which is the main contributor to the increase in sickness absence for this quarter.

8.11. **HO17 Responding to Freedom of information requests within statutory timescales (20 working days).**

FOI response rates are monitored by Executive Directors through the PowerBi dashboard. There has been some slippage in response rates since the enforcement notice was lifted in November 2023. However, 76% is a sustained increase since the enforcement notice was issued in April 2023.

8.12. **Exceptions previously reported**

The following 5 measure are showing as red on the dashboard but as no new data is available, they have already been highlighted by this report in a previous quarter.

HP11 The percentage of adults who are overweight or obese. This measure is annual and was last updated in 21/22. The data is collected and reported by...

HP15 Excess under 75 mortality rate in adults with severe mental illness. This measure was last updated in 2018/19. The data is collected and reported by....

HEc2 Reduce the workplace pay gap with the national average by 50% by 2027

HEc20 Attainment 8 inline or better than national average

HO5 Resident satisfaction with Highways and Transport services

8.13. **KPIs not available during the 2023/24 reporting period.**

The following measures have not been included with the 2023/24 report but may be included during the 2024/25 Performance Reporting year.

HEn2 Public rights of way - this measure is currently being reviewed and a definition to be agreed so this can be included in the 2024/25 reporting period.

HEn5c % of street scene inspections meeting the required standards of cleanliness (weeds) - this has now been merged with HEn5a as weeds falls under litter and detritus.

HEn9b, c & d Increasing the generation of renewable energy by Shropshire Council b. wind c. hydro d. bioenergy. These will be reported when the Council has developed energy generation schemes from these sources.

HO10 Reducing bad debt by 10% per year – a debt KPI will be included in the 2024/25 reporting period and data is available.

HO16 % of staff who rate Shropshire Council as a good employer – due to a number of staff surveys already undertaken in 2023/24 it was decided to postpone the pulse survey to September 2024.

HO20 Member attendance at full council – this measure will be included in the 2024/25 reporting period with a suggested target of 96% attendance.

HP34 The number of people in long term care with digital included in their plan. The definition of the measure has been agreed and will be included in the 2024/25 reporting period.

9. Conclusions

- 9.1. The development of the new reporting sees a substantive step change in the reporting of performance with more emphasis on target delivery and comparator information.
- 9.2. The key performance pressure remains the delivery of a balanced budget which are detailed in the financial report.

List of Background Papers (This MUST be completed for all reports, but does not include items containing exempt or confidential information)

Local Member: N/A

Appendices

None