



Committee and Date

Transformation & Improvement Scrutiny
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Cabinet
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Item

Public



Performance Monitoring Report Quarter 1 2024/25

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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 is the first report for 2024/25 and sets out the key issue to manage this year; delivering acceptable performance while remaining within our available financial envelope. Over the year we need to monitor and review our finances, aligned to TSP, 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 must adjust each year to ensure financial survival, with the aim to move towards financial stability and sustainability over the medium term. Against this backdrop we are seeking to manage our performance and therefore expectations, 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 2024/25 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 (PMF) 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, transparency 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 Q1 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 Q1 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. Likewise, as Shropshire Council continues to manage an unprecedented financial position significant management action is required over the remainder of the financial year to ensure the Council's financial survival. This may involve scaling down initiatives, changing the scope, delaying implementation, or extending delivery timescales and impacting performance in some areas.

- 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 Q1 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 Q1 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.

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. Agree to individual Portfolio Holders reviewing the targets for the agreed KPIs with the relevant Executive Director.

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 and ensure full focus is given to prioritised areas of activity by officers including significant management action required over the remainder of the financial year to ensure the Council's financial survival.

5. Financial Implications

- 5.1. Shropshire Council is currently managing an unprecedented financial position as budgeted for with the Medium Term Financial Strategy approved by Council on 29 February 2024 and detailed in our monitoring position presented to Cabinet on a monthly basis. This demonstrates that significant management action is required over the remainder of the financial year to ensure the Council's financial survival. While all Cabinet Reports provide the financial implications of decisions being taken, this may change as officers review the overall financial situation and make decisions aligned to financial survivability. Where non-essential spend is identified within the Council, this will be reduced. This may involve
- scaling down initiatives,
 - changing the scope,
 - delaying implementation, or
 - extending delivery timescales.
- 5.2. The considerations set out in para 5.1 (above) may mean that some areas of performance decline in the coming months while new operating arrangements are put into place which will ensure the longer term financial sustainability of the Council.
- 5.3. The performance report provides progress on key activity targets which will have correlation to financial performance.
- 5.4. 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. Recommendations within the Climate Strategy and Action Plan Monitoring Report 2023 were agreed by the Council on the 18th July 2024, including two recommendations specific to key performance indicators which will be incorporated into the Shropshire Plan Performance Report for future reporting:
- 6.2.1. Specific carbon emission reductions by activity
 - 6.2.2. Energy efficiency to support point 3.5 in the Progress Report
- 6.3. 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 will reflect this. Further indicators will be made available as new data becomes available to ensure that as high a percentage as possible of primary data collected is based on measured carbon emissions via a clear and transparent process such as carbon accounting, rather than estimating scope 3 emissions based on spend.
- 6.4. Measuring emissions also provides a baseline for setting climate targets and deciding where to start reducing emissions. Repeating the measurement process

annually allows Shropshire Council to track and report progress in a clear, transparent way to ensure that key stakeholders - members, regulators, employees, members of the public, other local authorities and system partners are informed about our collective climate action and impact.

7. Background

- 7.1. Quarter 1 – a total of 45 Key Performance Indicators have been updated in 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 Q1, there are 12 exceptions that have been raised and these are reported in the additional information section below.

8. Additional Information

- 8.1. During quarter 1, a total of 17 out of the newly updated 45 performance indicators showed an improvement and are above their target. Of which the following are the most notable:
 - **HP22 % of care leavers the service remains in touch with** – As of June 2024, the service remains in touch with 99.0% of care leavers, an 9% improvement compared to March 2022. This is a strong improvement from the service.
 - **HEc13 Young people (16 - 17) Not in Employment, Education or Training** – 2.8% of 16-17 year olds are not in Employment, Education or Training, over performing against the target of 3.4% and a showing a further slight reduction of those not in employment, education or training compared to the previous quarter of 3.1%.
 - **HEn6 % of household waste sent for re-use, recycling and composting** – 57.7% of household waste sent for re-use, recycling and composting, above the target of 52.6% and a slight rise compared to the previous quarter.

There are 12 exceptions out of the newly reported 45 performance indicators this quarter:

8.2. **HP15 Excess mortality rates for people with severe mental illness**

Excess mortality rates for people with severe mental illness in Shropshire for 2020/22 is 474 per 100,000 population, this is higher than the England average of 386. This is newly reported data at quarter 1 24/25.

The Integrated Care System have been working to implement a physical health check programme specifically to address this inequality, and in line with

recommended best practice – quarter 1 targets have been met and work continues to enhance progress for quarter 2.

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

The timely assessment of a child's needs is key in determining the necessary steps to ensure their safety and wellbeing. Performance at Q1 is 73% against a target of 82% this is an improvement from Q4 which was 69%. The previous quarter saw a dip due to completing out-of-date assessments, though we are now seeing improvement, and our Front Door timeliness is currently at 75%.

8.4. **HP19 Stability of placements of looked after children: length of placement.**

This figure remains consistent with the previous quarter following several sibling groups having to move placements. Of those children looked after for more than 2.5 years and whose placements are not 'long term', 23% are placed with parents. By comparison, our overall rate for Placed with Parents is 12.5% compared with a national rate of 7%, and statistical neighbours rate of 4.8% at the end of March 2023.

8.5. **HP31 % of Educational Health Care Plans (EHCP) issued within 20 weeks (excluding exceptions)**

Performance for % of Educational Health Care Plans (EHCP) issued within 20 weeks (excluding exceptions) has improved significantly during quarter 1.

There is a weekly focus with Senior Case Officers and SEN Case Officers (SEN Team) to consider all Education, Health and Care Assessments (EHCNAs) and the timeliness of all cases, highlighting those can be completed within the 20 week timescale and those where additional casework is required to finalise the EHC Plan, in collaboration with parents, carers and educational settings. There is also weekly reporting to the Service Manager – SEND and Inclusion as well as monthly monitoring meetings with Shropshire's DfE advisor. As a result of this there has been an increase in the 20-week performance from 18.42% at Q4 to 43.3% at Q1 despite issuing a significant number (118) of late EHC Plans. Work continues within the service area, and we expect to see a further improvement during Q2.

8.6. **HP33a Top quartile performer for the rate of admissions per 100,000 people to residential and nursing care (18-64)**

This is a key measure within the Adult Social Care Outcomes Framework and aligns with the priority to support people in the community.

There have been changes to the reporting methodology for KPI's HP33a and HP33b, meaning data for Q1 are not comparable to data previously reported, hence noting these KPI's as exceptions.

The Adult Social Care Short and Long Term Return (SALT) has been replaced with a new Client Level Data (CLD) return. NHS Digital has published a new methodology for deriving the new admissions indicators. This methodology will also apply to the ASCOF indicators set centrally from Local Authorities CLD submissions.

Work is ongoing between local authorities and NHS Digital to realign this data. An update will be provided in the Q2 report.

We support a high number of people in the community. We do continue to monitor admissions but overall performance is good in this area.

8.7. HP33b Top quartile performer for the rate of admissions per 100,000 people to residential and nursing care (65+)

See HP33a regarding methodology changes. We continue to maintain excellent performance and keep this figure lower than the national rate in line with our strategy to support people to live at home with self-directed support in the community.

8.8. HEc11 Paid employment for people with learning disabilities.

The service continues to work with its clients to find opportunities to develop skills and positive experiences through training, volunteering and where suitable to find paid employment.

The data collection methodology has changed for 2024/25. This means data points from 2023/24 are not comparable to Q1 of 2024/25 currently, hence noting this KPI as an exception.

As the new data collection methodology is incorporated, figures will become comparable again in the next quarterly report.

8.9. HEc18 Reduction of households in B&B accommodation

The number of households in B&Bs are subject to some fluctuation due to changes in demand. There were 104 households in B&B's as at 30 June , compared to 102 as at 31 March and 111 as at 31 December 2023. The Council has several new temporary accommodation units planned and can confirm that the overall number of households in B&Bs will decrease over the coming months as more council owned temporary accommodation units come into use.

8.10. HEn11 % of streetlights converted to LED

At quarter 1, 93.7% of all Shropshire streetlights were LED, just short of the 100% target.

During quarter 1 work to convert the streetlights has continued and will continue into Q2. The remaining conversions are problem sites which have not been accessible for several reason, these include: -

- Parked cars - these are slowly being resolved with the notices being issued.
- Birds nesting - these sites are now being revisited following nesting season finishing on the 31st of July
- Requirement of complex traffic management for example lane closures - the details of this are currently being established as this involves work with contractors Kier.

- Programmed works – Joint working with major projects sharing Traffic Management to reduce disruption and costs

Overall, 17,682 have been converted and work to convert the remaining 1,196 continues.

8.11. HO1 Number of compliments received.

There were 95 compliments received within quarter 1. This is a slight reduction compared to previous quarters, 107 at quarter 4. Due to some late reporting numbers can increase slightly after quarter end. Anecdotal evidence suggests some service areas may not be reporting their unsolicited compliments to the Feedback and Insight Team.

8.12. HO6 Budget Outturn vs Budget

The Quarter 1 Finance Report is included elsewhere on this agenda. It identifies a forecast spend above budget of £38.5m based on information to the 30 June. This is compared to the available general reserves of £38.8m, meaning that the Council continues to project a position that remains within available funding. This is summarised below.

Directorate	Revised Budget (£'000)	Projected Outturn (£'000)	(Under)/ Overspend (£'000)
Health & Wellbeing	349	534	185
People	208,304	225,611	17,306
Place	65,059	79,822	14,763
Resources	3,453	8,083	4,630
Strategic Management Board	614	1,053	438
Service Delivery Budgets	277,779	315,102	37,323
Corporate	(16,082)	(9,398)	6,684
Net Expenditure	261,697	305,704	44,007
Estimated benefit from re-sizing¹		(5,500)	(5,500)
Net Expenditure including delayed information	0	38,507	38,507

The forecast of £38.5m is the central forecast within a range from a favourable outturn of £25.5m spend over budget to an adverse outturn of £73.75m spend over budget, as set out below.

Scenario	Potential variation to budget
Favourable	£25.50m
Central	£38.50m
Adverse	£73.75m

8.13. HO17 Responding to Freedom of information Requests within statutory timescales (20 working days)

At Quarter 1, 75% of freedom of information requests were responded to within the statutory 20 days. Performance against the legislative timescales has been reported via the IGLOO meeting and raised by the Executive Director of Resources at EMT to increase the response rate. In addition, a new FOI handling system (Dynamics) is being implemented in partnership with PwC which will help with Council wide approach to complying with the legislative response times. It is envisaged that this will be fully operational by the end of 2024. An FOI compliance follow up review meeting has taken place with the ICO on 7th August and whilst the ICO accepted that this represents a significant sustained improvement on the 2022/23 position, it is still short of the 95%+ compliance rate required and he made it clear that further action is required to improve. The Council must also now publish FOI compliance statistics on a quarterly basis. The ICO advised that Shropshire Council is in the top 20 Councils for FOI related ICO complaints. This, coupled with the lower compliance rate gives the ICO cause for concern and whilst the Council remains amongst the top 20 they will continue to monitor this. This has been raised with EMT and regular follow ups will be undertaken in the coming months via the Information Governance, Leadership and Oversight Group (IGLOO).

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: All

Appendices

None