

PERTH AND KINROSS COUNCIL

SCRUTINY COMMITTEE

20 APRIL 2016

MODERNISING PERFORMANCE REPORTING REVIEW- GUIDING PRINCIPLES

**Report by the Depute Chief Executive, Environment
(Sustainability, Strategic and Entrepreneurial Development)**

This report makes proposals for a set of guiding principles to steer the Modernising Performance Reporting Transformation review, and be used to inform the final business case to implement transformational change to performance reporting as a result of the review.

1 BACKGROUND/ MAIN ISSUES

- 1.1 A review of the Council's performance management arrangements is one of the Phase 1 reviews as part of the Council's Transformation Programme. Whilst Perth and Kinross is widely regarded as a high performing Council it has been recognised that there is a need to modernise, and create efficiencies, in the way in which performance information is gathered, managed and reported throughout the organisation, as well as ensuring our performance management is fit for purpose, for our reshaped public services.
- 1.2 In order to challenge the current arrangements, there should be a set of principles which will outline the direction of travel for the review, and provide outcomes which the review aims to achieve. Detailed below are a proposed set of **guiding principles** which the Modernising Performance Reporting Review will work to. Having a clear set of principles agreed from the outset means that transformational changes can be designed, driven and monitored to meet these requirements and minimises the risk of undertaking abortive work.
- 1.3 These principles have been developed as part of the ongoing work of the Modernising Performance Reporting Transformation working group.

2 PROPOSED GUIDING PRINCIPLES

- 2.1 The proposed guiding principles are as follows:
 1. **Performance management which can effectively inform political decision making-** Performance management should be carried out in such a way that performance data is accurate, timely and readily available to inform the strategic political decision making process.

2. **Relating performance information to our strategic objectives-**
Performance management should be set up in a way that the information gathered and measured can be directly linked the Community Planning/Council's strategic objectives, and the audiences for the information can clearly make this link.
3. **Managing - not just monitoring performance-** Performance management arrangements should result in more time being spent on using performance information to drive improvement. Time spent on gathering, collating, formatting and reformatting data and information into static, time limited paper-based reports will be eliminated as far as possible.
4. **Accountability and ownership of performance information-**
Individuals responsible for the performance will take ownership of the performance information. Performance management arrangements should ensure the relevant accountability for ensuring performance information is accurate, and improvement actions are being taken based on performance information. This will be crucial to embedding a performance culture throughout the organisation and will improve the audit trail for performance information.
5. **Public Performance Reporting-** Performance information will be incorporated into the Smart Perth & Kinross Open Data Platform as the default position. This will enable Council performance to be open to Public Performance Reporting, through the Open Data transformation work.
6. **Data as close as possible to "Real-time"**- the information presented shall be as current as possible, and accessed as needed. This should result in better day to day management, and offer opportunity to documents such as annual reports with more up to date data, which can be used to make improvements more promptly and more assuredly. The performance information produced will rarely be totally in `real-time`, due to the processing and authorisation required for Council performance information, and the availability of data from third party sources (such as the Local Government Benchmarking Framework). However the system will ensure authorised data is provided as close to real-time as possible, and is instantly made available for the audiences.
7. **Approval of information released at an appropriate level-**
Performance information arrangements in place with named data owners to ensure data is quality assured, and authorisation is given at the correct level before being released for a wider audience.

8. **Information is input once, used many times-** Providing efficiencies by ensuring there is no double entry of information and once data has been captured and stored in the first instance, it can be used for a number of audiences in a number of formats.
9. **Digital over paper-** Almost entirely digitally based performance reporting, replacing the need for lengthy paper-based reports, with benefits in resource utilisation and reduction in errors and rework. This will lead to more interactive performance reporting, which provides the necessary context and information without the need to capture this in paper based performance reports.
10. **Data available for all who need to see it-** Universal access to performance information for all who need to see it, within clear levels of authority, creating a culture of transparency. This includes access by Elected Members and public performance reporting, and will support sharing of data and 'stories of place' with the evolving Local Community Planning Partnerships.
11. **Highly visual, graphical representations of data-** Data and information is displayed in a user-friendly way so that it can be understood at a glance, without using text only descriptions or one-dimensional tables, which are harder to interpret. Data illustration should also focus primarily on the figures, with succinct supporting narrative where relevant.
12. **Customisable display of performance information for any audience-** Audiences should have the ability to customise their view of performance information, to view only the information and level of detail relevant to their needs.
13. **Continuous Improvement-** The Council's system of Performance Reporting will be monitored and reviewed, with improvements being made as needed, benchmarked wherever possible against known exemplar process.
14. **Collaborative working with partners-** We would strongly advocate our joint performance reporting partners (such as the Community Planning Partnership, Integrated Joint Board and ALEOs) to follow these principles and use shared performance reporting systems, wherever possible.

3 NEXT STEPS

- 3.1 Subject to approval, these proposals will shape the direction for developing the final business case for changes to performance management within the organisation.

4 CONCLUSIONS AND RECOMMENDATION

- 4.1 The Modernising Performance Reporting Guiding Principles provides the Committee with a clear understanding of the transformational changes proposed by this review.
- 4.2 It is recommended that the Scrutiny Committee approves the proposed principles as detailed in the report.

Author

Name	Designation	Contact Details
Ryan Laurenson	Graduate Trainee-Transformation	01738 475073 RLaurenson@pkc.gov.uk

Approved

Name	Designation	Date
Jim Valentine	Depute Chief Executive, Environment (Sustainability, Strategic & Entrepreneurial Development)	22 March 2016

If you or someone you know would like a copy of this document in another language or format, (on occasion, only a summary of the document will be provided in translation), this can be arranged by contacting the Customer Service Centre on 01738 475000.

You can also send us a text message on 07824 498145.

All Council Services can offer a telephone translation facility.

1. IMPLICATIONS, ASSESSMENTS, CONSULTATION AND COMMUNICATION

Strategic Implications	Yes / None
Community Plan / Single Outcome Agreement	Yes
Corporate Plan	Yes
Resource Implications	
Financial	None
Workforce	None
Asset Management (land, property, IST)	None
Assessments	
Equality Impact Assessment	None
Strategic Environmental Assessment	None
Sustainability (community, economic, environmental)	None
Legal and Governance	None
Risk	None
Consultation	
Internal	Yes
External	None
Communication	
Communications Plan	None

1.1 Strategic implications

This report supports the delivery of the Community Plan/Single Outcome Agreement 2013-23 and Corporate Plan 2013-18.

1.2 Consultation

The Modernising Performance Reporting Review Working Group has been consulted in the development of this report.

2. BACKGROUND PAPERS

There are no background papers.

3. APPENDICES

There are no appendices.

