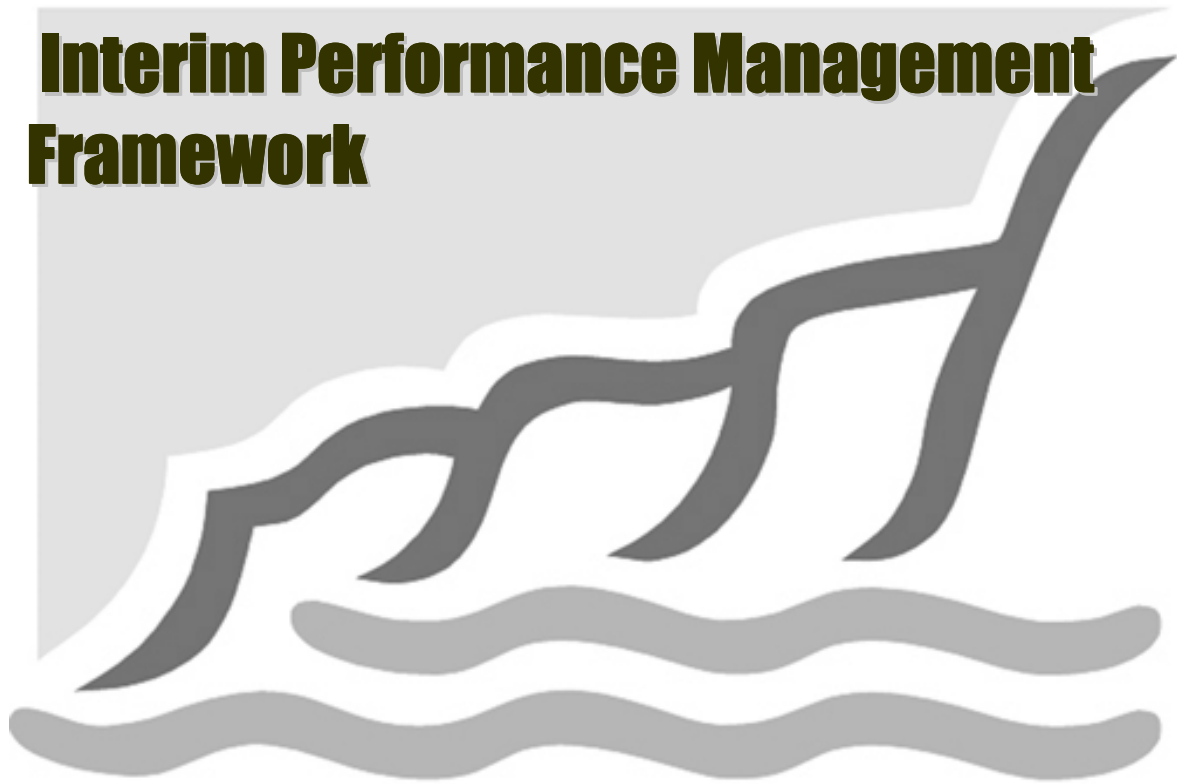


# VALE of GLAMORGAN

## **Interim Performance Management Framework**



# BRO MORGANNWG

**Note: This is an interim Performance Management  
Document until the end March 2016**

**September 2015**

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## Introduction

The purpose of this document is to provide a guide to managing organisational performance in the Vale of Glamorgan Council. It is intended for use by both Officers and Elected Members. The guide gives an overview of Performance Management and the approach adopted by the Council to deliver effective and efficient services.

Performance management is what the Council does to realise its aspirations. It encompasses everything the Council does and is everyone's job.

The Council's Performance Management Framework is underpinned by a set of strategic plans that help us focus our assets in order to improve services. The Medium Term financial Plan, Corporate Asset Management Plan, ICT Strategy, Customer Relations Strategy and the Risk Management Strategy and Register are fundamental to delivering the key priority outcomes as outlined in the Corporate Plan. **See Diagram 1**

Each directorate has a Service Plan that aligns to the priority outcomes that the Council is striving to achieve (as outlined within the Corporate Plan) and includes an assessment of how the service has contributed towards these priorities along with a range of key performance indicators so that we can keep track of progress.

These are in turn translated to team and individual levels within each directorate so that everyone knows how they will contribute towards service and corporate priorities. Together this enables residents, elected members, managers and other stakeholders to see how the Council 'measures up' in comparison to its own previous performance and in comparison to other councils. The framework is designed to provide a consistent approach to the way service performance and quality is managed, monitored, reviewed and reported at all levels in the Council that is, corporate, directorate, service and individual level. This framework applies to all.

In practice, the Council's Performance Management Framework comprises:

- an integrated planning system, linking the high level corporate plans to individual targets and objectives. (*This is the Golden thread - how the plans fit together*)
- a structure for performance measurement that includes performance indicators, targets and actions. (*This is how we measure performance*)
- a development and appraisal framework for members and staff to ensure they have the skills required to carry out their work. (*This provides a link between our key plans and individual improvement targets*)
- a monitoring framework to ensure that all targets and action plans are delivered. (*That is, what happens, when and how*)

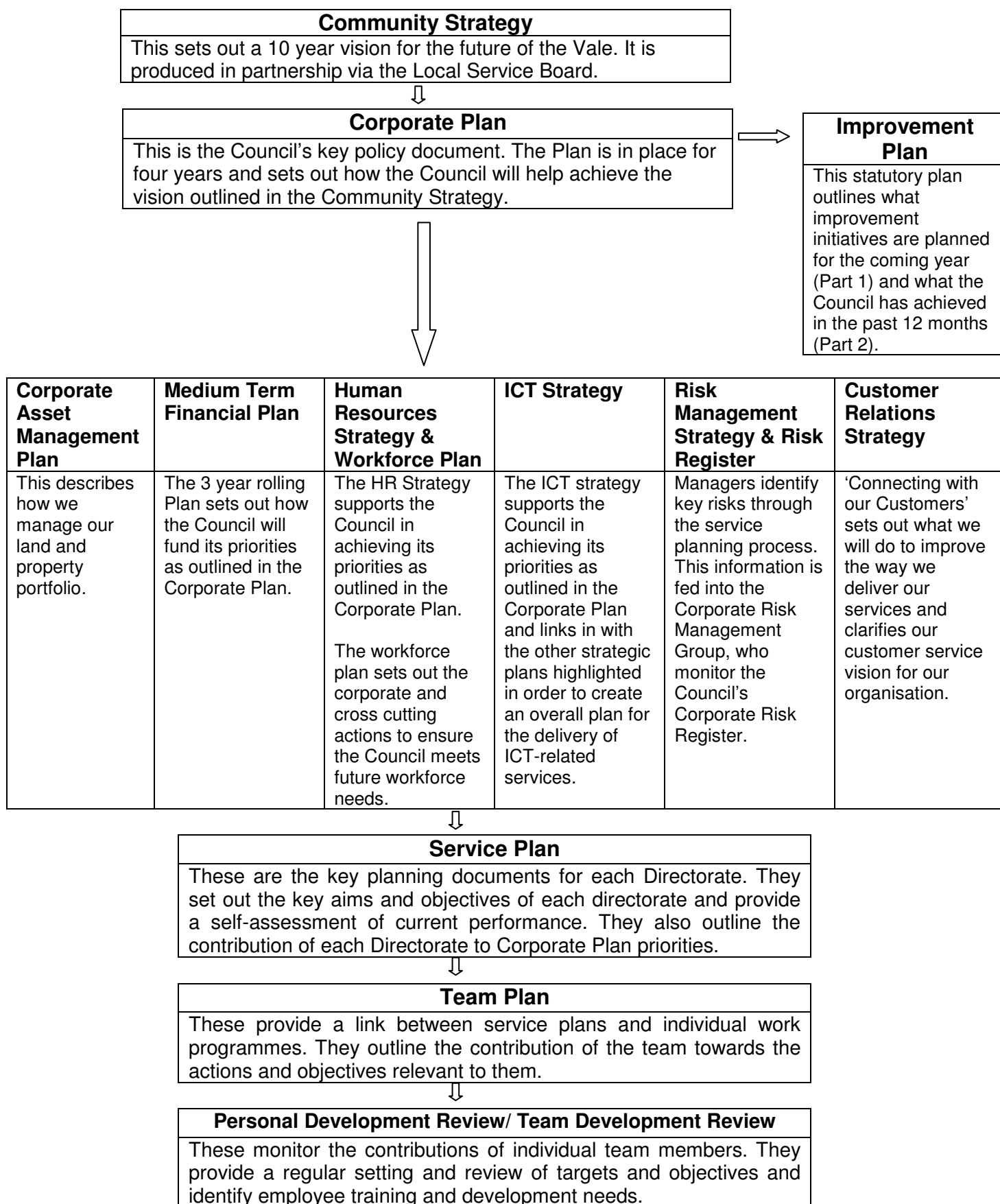
This Performance Management Framework is an interim document, as the Council is currently in the process of refreshing its Corporate Plan for 2016-2020. As a result the existing Performance Management Framework is currently under review and a new model will be developed and introduced from April 2016 (as the new Corporate Plan is launched). Although the interim Performance Management Framework has not significantly changed it has been refreshed to reflect changes to how we now undertake service planning, how data is collected via our performance management system and consequently the style of reporting to Cabinet, Corporate Management Team and Scrutiny Committees.

## **The Principles and Benefits of Performance Management**

The Council achieves its aspirations by using performance information to alter the way that we work. We do this by comparing our performance over time and with others, identifying actions for improvement and identifying and reducing risks. Measures and indicators of performance help to demonstrate how well the Council is meeting its vision and objectives, demonstrating accountability to the community, to government departments, managers and staff.

A clear, agreed and owned vision of where we want to be is critical if resources are to be used effectively and performance is to be maximised. Underpinning the Council's vision is a set of core values that shapes the attitude and behaviour needed to deliver its vision and develop the performance culture. The Council's vision and core values are communicated in the Corporate Plan. **See Diagram 2.**

**Diagram 1: The Vale of Glamorgan Council Performance Management Framework**



**Diagram 2: A Vision for the Vale of Glamorgan**

*The Vale is a place:*

- *that is safe, clean and attractive, where individuals and communities have sustainable opportunities to improve their health, learning and skills, prosperity and well-being and*
- *where there is a strong sense of community in which local groups and individuals have the capacity and incentive to make an effective contribution to the future sustainability of the area.*

**Our Core Values and Principles**

Sustainability

Delivering good services

Transparency

Engagement

Empowerment

Equality

**Corporate Priority Outcomes**

**Community Leadership**

*Citizens of the Vale of Glamorgan can easily access efficiently managed services that are focused around their needs, have confidence in how decisions are made and are proud to live in the Vale.*

**Children & Young People**

*Children and young people are engaged and supported and take full advantage of life opportunities available in their local community and beyond.*

**Learning & Skills**

*Citizens of the Vale of Glamorgan have the skills, knowledge and abilities required to maximise their opportunities.*

**Regeneration**

*The Vale of Glamorgan has a thriving economy supporting cohesive sustainable communities.*

**Environment**

*Current and future generations of Vale residents and visitors enjoy the built and natural environments of the Vale of Glamorgan and actively protect and maintain them.*

**Housing**

*Vale of Glamorgan residents have access to affordable, good quality suitable housing and housing advice and support.*

**Health, Social Care & Wellbeing**

*Citizens of the Vale of Glamorgan are healthy and have equality of outcomes and, through appropriate support and safeguards, the most vulnerable members of our community maximise their life opportunities.*

**Community & Public Safety**

*Residents and citizens of the Vale of Glamorgan feel safe and are safe within their community.*

## **What are the Benefits of Performance Management?**

An effective performance management framework provides management systems and an organisational culture that focuses on continuous improvement through knowing where we are, what we need to achieve, how to measure our progress, detecting performance problems and providing options to remedy them. These key questions are addressed in **Appendix 1**. Performance Management provides many benefits:

### ***For the customer/citizen:***

- Provides services which are continuously improving.
- Provides services which meet the needs of users.
- Makes the Council more accountable to residents and the community.
- Provides a basis for effective communication.

### ***For the Council:***

- Identifies corporate priorities and ensures everyone is pulling together and focusing on achieving them.
- Develops an understanding of staff and elected member training needs.
- Ensures work is achieved on time to agreed standards and with the resources and skills needed.
- Provides evidence of continuous improvement.
- Improves decision-making.
- Improves morale.

### ***For elected members***

- Cabinet members become fully engaged in the work of directorates and receive timely briefing on issues.
- Scrutiny members are able to monitor and question performance.
- Members are able to review whether intended outcomes have been achieved.

### ***For employees***

- Provides clarity and understanding of where each individual contributes to the vision and direction of the service and directorate.
- Increases job satisfaction, pride and self-esteem by clarifying roles, targets and achievements.
- Offers opportunity for learning and development.

## **Performance management or performance measurement?**

Performance measurement is the collection, calculation and reporting of performance measures.

Performance measurement alone achieves little; to be effective the Council must use performance measurement to assist improvement by ensuring it informs the decision making process. It uses what has been learned from the measurement process to identify what needs to be done or what needs to be done better. This leads to more effective strategic and operational management and delivers continuous improvement.

The successful integration of performance measurement and performance management into day-to-day operational management leads to a performance culture. Objectives and targets must be communicated upwards and downwards from the corporate to the individual level. The objectives and targets at each level need to support the achievement of the corporate priority outcomes and objectives. This means that clear links (or golden thread) should exist from the Community Strategy ↔ Corporate Plan ↔ Service Plans ↔ Team Plans ↔ individual plans (PDRS). A flow chart outlining the Council's framework is set out in **Appendix 2**.

To inform the framework a set of guiding principles for an effective performance management system are set out below:

### **The Council's Performance Management Framework**

The Council wants to deliver the right service to the right people at the right time and at the right cost. It does this through its performance management framework, which incorporates:

- Community Strategy and Corporate Plan
- Improvement planning
- Resource planning
- Performance management system (performance software)
- Service and team planning
- Member development
- Staff development and appraisal (Personal Development and Review Scheme)
- A performance management culture
- A Communications Strategy
- Performance monitoring
- Risk management

### **The Community Strategy and Corporate Plan**

The Vale of Glamorgan Local Service Board has agreed a [Community Strategy](#) to promote the economic, social and environmental well being of the area. The strategy is forward-looking. It seeks to provide a vision and identify actions and targets to improve the quality of life in the Vale through better co-ordination of public, voluntary, community, private sector organisations and individuals.

The [Corporate Plan](#) is the key Council policy document. The plan is in place for a five-year period and sets out how the Council will achieve the vision as outlined in the Community Strategy. This Plan outlines the Council's eight priority outcomes, each supported by improvement objectives which are the key commitments and activities we will be working towards over the next five years.

All statutory plans should be consistent with corporate priority outcomes, improvement objectives and the core values in existence at the time of publication of the Corporate Plan.



## **The Improvement Plan**

The Improvement Plan is a statutory document that must be produced annually. It is published in two parts; [Part 1](#) is to be published as soon as possible after 1<sup>st</sup> April each year and details the Council's improvement objectives (forward looking) with [Part 2](#) published by 31<sup>st</sup> October detailing the Council's assessment of its performance over the past year (backward looking). The Plan is externally audited, and it forms a judgement on the Council's performance management capabilities. A summary of the key issues and outcomes must be published for members of the public. [This is the public summary](#).

The Improvement Plan brings together a number of key Council documents: the Community Strategy, Corporate Plan and Service Plans.

## **Annual Budget and Medium Term Financial Plan**

A key aspect of the Council's overall performance is its financial performance which is a key part of the Council's performance management framework. The Council's financial performance is also a key part of its Annual Assessment and the four-yearly Corporate Assessment by the Auditor General Wales.

The Council operates a rolling [Medium Term Financial Plan \(3-year\)](#), which allocates resources to support the Council's priority outcomes as outlined in the Corporate Plan, taking into account demographic changes, future service pressures and associated risks, and the current climate of budget reductions.

In line with best practice the Council's financial planning process aims to:

- Help Elected Members determine priorities and their timing;
- Forecast changes in demand for services;
- Show the impact of changes in legislation on spending;
- Show the future costs of alternative policies;
- Align demand with available resources;
- Provide the framework for Service plans;
- Respond to and reflect Government funding proposals.

In setting its priority outcomes, the Council has established clear links with its budget setting and financial planning process. In this way, future resources can be predicted and future areas of significant expenditure identified and prioritised, not only in the light of corporate priorities.

Corporate monitoring of budgets takes place on a monthly basis by Directorate, and quarterly by Scrutiny Committees and the Cabinet.

## **Risk Management Strategy & Corporate Risk Register**

Risk management has a strong link to performance management – if risks are not managed effectively then it is unlikely that a Council will deliver its ambitions and achieve value for money. The Council has agreed a [Risk Management Strategy](#) which sets out the Council's approach to risk management both internally and within the wider environment in which the Council operates. This document should be referred to for more information on risk management.

Service Plans include a risk assessment following the Council's Risk Management Strategy and identify current and emerging service risks with appropriate current controls and countermeasures. This means that risks are considered at the outset, and mitigation is built into the plans to deliver service plan outcomes and objectives.

The Corporate risk register is overseen by the Corporate Risk Management Group (CRMG) and informs service planning and vice versa with emerging service risks fed into CRMG. CRMG receives progress reports in person from risk owners as timetabled on a quarterly basis and regularly brief Risk Champions on progress. This review of risks throughout the year, inform recommendations to Corporate Management Team (CMT), Audit Committee and Cabinet ensuring the effective management of emerging and current risks.

CMT, the Audit Committee and Cabinet oversee the effectiveness of corporate risk management arrangements and receive 6-monthly risk status reports. All approve measures and provide challenge to ensure the effective development and operation of risk management arrangements across the Council.

Cabinet act as 'champions' of risk management for the Council. Part of this role includes endorsing and approving the Risk Management Strategy and associated Corporate Risk Register and considering risk implications as part of the decision making process.

Scrutiny Committees monitor the implementation of Service Plan actions to manage service risks on a quarterly basis.

## **Human Resources (HR) Strategy**

The delivery of excellent services through skilled, engaged and motivated employees is fundamental to the Council successfully meeting its improvement priorities as outlined in the Corporate Plan.

A key aspect of performance management is to promote and improve employee effectiveness. Together the PMF and the [HR Strategy](#) help the Council align its activities in order to deliver on its improvement priorities at all levels. It also helps to identify the teams and individuals that need to be supported to help them perform to expected standards. In the current challenging financial times, the Council will need to maximise the return it gets from its employees through innovative approaches in training and development as it responds to the demands of service transformation.

The HR Strategy incorporates a Staff Development and Appraisal scheme. The Council's Personal Development Review (PDRS) scheme enables all employees to be clear about their role, their contribution to the Council's improvement priorities, and how effectively they are performing, as well as an opportunity to highlight any areas that could be developed further. The scheme provides for regular setting and review of targets and objectives, along with the identification of employee training and development needs. The Performance of all individuals is

appraised annually and includes targets for achievement which are reviewed at six months.

Elected members are embracing different and increasingly complex roles. The [Member Development Strategy](#) aims to ensure that all members have access to training and development opportunities to enable them to fully meet the demands of office to the highest standards of competence and effectiveness. The strategy incorporates a **Member Development and Appraisal scheme** which seeks to ensure that elected members are effective in their role.

In line with Welsh Government guidance each Member has a Personal Development Plan which is reviewed on a regular basis, with this being used to inform the annual review of local Members' training and development needs. Performance management is a core theme running through the Member Development programme.

## **Customer Relations Strategy**

The Council's [Customer Relations strategy](#) is a key component in achieving its key improvement priorities as outlined within the Corporate Plan. The strategy enables the Council to deliver on its ambition to provide high quality, responsive, accessible value for money services which are effectively targeted to meet local needs. It acknowledges that in order to improve services and deliver the standard of customer services that will meet the expectations of an increasingly demanding public, the Council needs to address issues of people, process, technology and organisation. In addition we need to manage our resources to optimum effect.

Through the PMF we are able to measure how well we are performing from the customer perspective and through the setting and monitoring of meaningful outcomes and objectives drive service improvement to achieve for the benefit of our customers.

## **Service Plans**

[Service Plans](#) are the primary planning documents of the Council; each Director is responsible for developing and implementing this plan, along with Heads of Service, Operational Managers and their teams and agreed with their Cabinet Member(s).

Service Plans are a key building block in the performance management framework. They identify how each service will contribute towards Corporate Plan and Improvement Plan outcomes.

Each Service Plan outlines the key service outcomes and objectives of that service area and performance indicators and actions are used to measure whether these are being achieved. It is also the Council's key performance monitoring document and includes:

- An annual service self-assessment (How are we doing? What have we achieved? and What do we plan to do?)
- Service improvement actions, measures and targets informed by the Corporate Plan, Improvement Plan, our Outcome Agreement with Welsh

Government, improvement proposals from our external auditors; feedback from customers and the service self-assessment;

- Key service risks;
- Workforce planning priorities;
- Planned consultation activities and outcomes from previous consultation undertaken.
- Local and national performance indicators and targets;

Service Plans are monitored quarterly to ensure that targets and action plans are being delivered on time, with demonstrable progress towards achieving intended service outcomes.

## **Team Plans**

Team Plans provide a link between the Service Plan and individual work programmes. It identifies those service outcomes and objectives that are relevant to the team and lists actions, performance measures and targets that support those objectives and against which the team will be monitored.

Team Plans also inform the PDRS/TDRS process and will help identify objectives and actions for individual members of staff. This better aligns the contribution of individuals to corporate priority outcomes and objectives.

The Team Plan should be used as an agenda item at team meetings to help individuals understand how their roles and responsibilities assist the team to meet its objectives and to monitor progress in the achievement of those objectives.

## **Performance Management System**

The Performance Management Framework requires effective information management systems to support the process. The Council is currently using an interim system based on MS Excel to collate and report performance information as the pan-Wales performance management software (Ffynnon) contract ended in June 2014. A replacement system for Ffynnon will be considered during 2016.

Whilst more manual than its predecessor the interim system reflects the Service Plan structure and enables:

- performance information to be cascaded throughout the organisation via quarterly updater sheets and reports. Each quarter, updaters are prompted to enter their data into Excel spreadsheets in TRIM. This data then self populates a master spreadsheet (the annual performance framework) which also allocates a performance status for the data via pre-set tolerance levels [Performance has met or exceeded target, is within 10% of target or is more than 10% below target]. Reports are manually produced from this data. A similar process applies to progress against actions.
- the reporting of data by updaters to remain relatively simple as it was when the Ffynnon system operated.
- highlighting of performance trends;
- performance comparisons locally and nationally;
- setting of annual service improvement targets;

Each directorate has an identified Performance Management Co-ordinator and it is their role to ensure that performance is reported accurately and in a timely manner. It is the responsibility of the owner of the PI to ensure that the appropriate management system is developed to collect and validate the information needed to measure each performance indicator.

## **A Performance Management Culture**

To ensure the approach to performance management is recognised and owned by the Council it must be driven by the Council's Cabinet. The Cabinet and managers of the Council will take a leading role and will explain and reinforce the vision, core values and performance management approach at every opportunity through direct communication with staff. The role and responsibilities of members and officers in performance management are described in **Appendices 6 and 7**.

All chief officers should promote the use of performance information as an opportunity for learning about good practice and dealing with poor practice and about how performance and quality can be improved and maintained.

## **Communication Strategy**

Internal communication is at the heart of good business practice, improving morale and performance. In addition to personal planning through regular appraisal, team meetings are crucial to improve the flow of information between colleagues. In particular, a team review of targets and performance is informative and motivating. As a minimum, such meetings are required on a monthly basis.

The Council recognises the benefits of improving its internal communication and is committed to developing policies and activities that boost its performance in this area and make the Council a positive place to work.

## **Performance Monitoring**

Robust monitoring is a key tool to enable the achievement of a performance management culture. It helps the Council identify whether it is on course to deliver its ambitions and targets. The management and review of performance should be exercised at all levels of the Council from elected members to the individual.

To ensure that managers and members make informed decisions about services, policies and priorities the following mechanisms are in place:

- All Service Plans are subject to four levels of challenge via the Improvement & Development Team, relevant Cabinet Member, Scrutiny Committees and the Cabinet.
- Annual service targets for improvement are subject to four levels of challenge including the Improvement & Development Team, Corporate Management Team, Scrutiny Committees and the Cabinet.
- A quarterly performance report by Directorate is available to elected members and senior managers which incorporates all business critical information. This will include:

- An overall summary of progress made by each Directorate towards achieving service and corporate priority outcomes and objectives including the Corporate Plan, Improvement Plan and Outcome Agreement with Welsh Government;
- A brief evaluation of each service outcome outlining overall progress towards achievement.
- A detailed progress for each service objective looking at all actions and measures both national and local.
- Examples of exceptional performance achieved during the quarter;
- Areas of slippage and planned remedial actions;

Service performance targets are set in April in tandem with our end of year reporting process. These targets are then reported at the earliest Scrutiny Committee meetings following Corporate Management Team's challenge of proposed service targets, which is in June. This provides services with further opportunity to finalise previously proposed targets taking into account any new factors and adjust performance expectations to reflect any corporate decisions where necessary. **Appendix 3** describes the target setting process.

Managers will monitor performance issues identified in performance reports and Service Plans. If appropriate, the Cabinet can question the relevant Cabinet member and manager.

Scrutiny Committees will closely scrutinise performance and make appropriate recommendations on performance issues to the Cabinet.

Cabinet or Scrutiny can request further reports from managers to provide more detailed reasons for non-achievement of targets and full action plans for improvement

When monitoring the update, the focus should be on those actions and key performance indicators that are not on target to achieve intended outcomes (these are called variations). The Cabinet member or officer should provide: reasons for variations, whether remedial action could be taken and the nature of any remedial action that is being taken.

Chief officers should establish regular briefings with their relevant Cabinet member(s) to discuss progress on performance over the course of the year, not only those causing concern.

Monitoring of performance and target achievements should be standing items on all team meetings.

Achievement of key targets for which they are ultimately responsible is part of the appraisal process of chief officers.

The Vale of Glamorgan's annual performance timetable and monitoring mechanisms are set out in **Appendices 4, and 5.**

## **What this means for elected members and staff**

The involvement of staff and members in developing the performance culture is critical to this process. Staff should recognise their individual roles and responsibilities and understand how the service they deliver assists the Council in meeting its priorities. The agreement with staff of individual performance objectives and targets will improve both understanding and ownership of the performance framework.

Everyone in the Council has their own roles and responsibilities, this will include, for example Cabinet Members:

- working with the relevant chief officers to engage in the wider work of the service and to develop Service Plans and targets.
- meeting regularly with their service chief officers to discuss issues and monitor the delivery of action plans and targets.

Both Cabinet and Scrutiny Members are responsible for monitoring performance through the corporate monitoring mechanisms and can request further reports outlining reasons for non-achievement. The detailed roles and responsibilities of members and officers are outlined in **Appendix 6 and 7**.

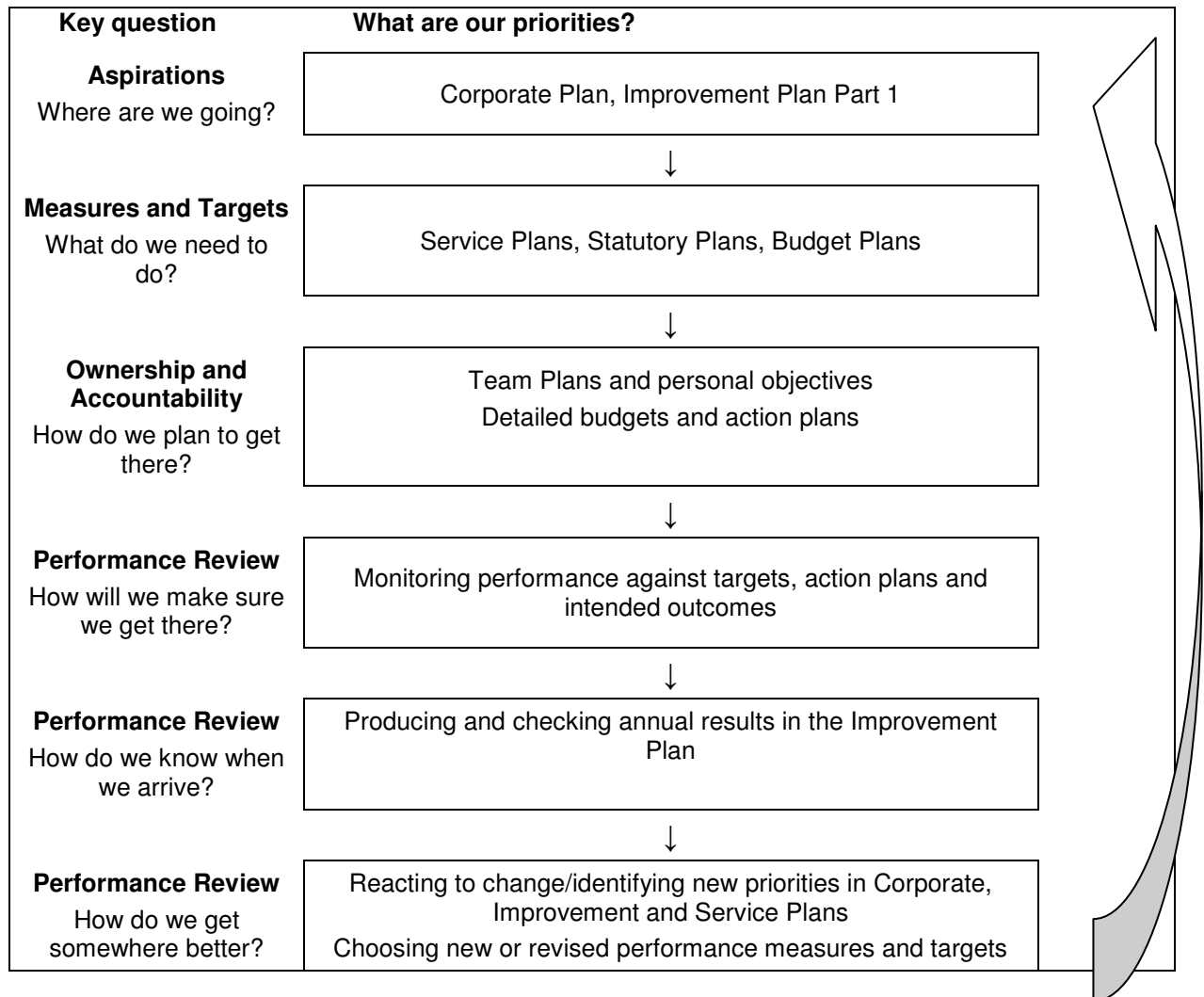
Staff at all levels should know:

- their own targets and objectives;
- their team and service outcomes and objectives;
- the information they must record and collect;
- team meetings which they should attend.

Staff with line management responsibilities have extra responsibilities, including:

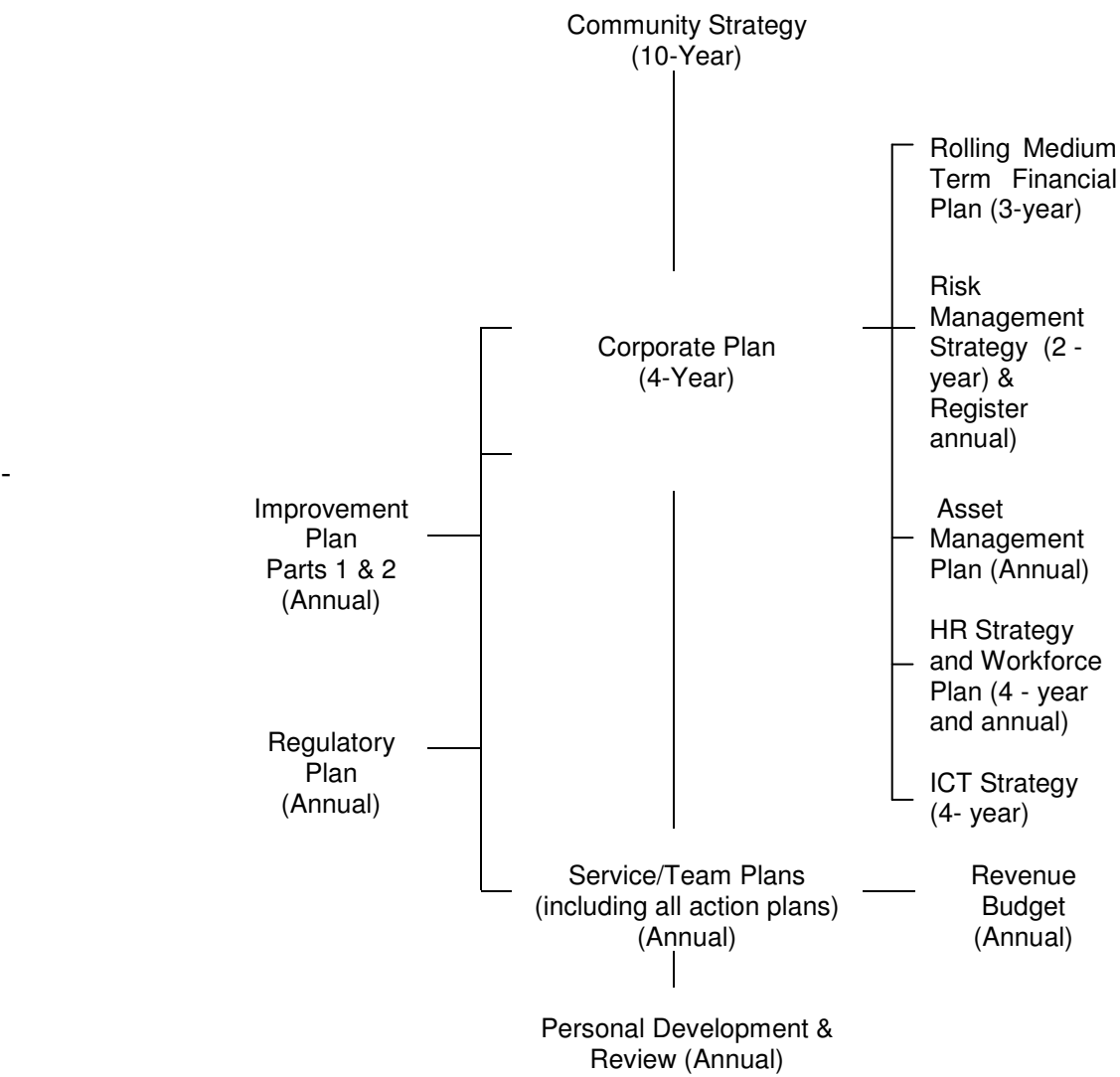
- arranging and holding regular team meetings;
- ensuring all meetings have agreed agenda items and are minuted and ensuring PDRS is undertaken with all staff.

## Appendix 1 – Key Questions





**Appendix 2 - Vale of Glamorgan Planning Framework**



## **Appendix 3 Target Setting Guide**

### **What is a target?**

- Targets are time bound statements which define a desired level of service delivery measured via performance indicators.
- Targets identify a level of performance you want to achieve and provide a mechanism by which we can measure our performance against. Targets provide us with an indication of where we want to be and help us to distinguish between good and poor performance.
- Targets enable us to focus on continuous improvement through setting targets that are both challenging and realistic. In the current financial climate, the challenge may be not on improving performance year on year, but instead focusing on sustaining/maintaining performance to acceptable standard. In these circumstances it is important that there is a rationale in place to evidence why this is the case. For example, a service area's target may have previously been set at 100%, as this is the best possible performance. In this circumstance, there is no improvement that can be made to the target.
- Targets can be used at both the strategic planning level and at the individual level. At the strategic planning level we incorporate targets within our key planning documents such as the Corporate Plan and Service Plan, which can then be aligned to performance indicators. At the team/individual level, targets can be used within Team Plans and Personal Development Reviews (PDR).

### **Why set targets?**

- Targets assist us in driving a culture of continuous improvement by enabling us to identify where we are, what we need to achieve and a means through which we can measure our performance against. Targets help us to:
- *Prioritise - targets give us an idea of where our priorities lie.*
- *Define an agreed direction of travel* – targets show us more precisely what we are trying to achieve, so that levels of performance and expectation can be clearly communicated to Elected Members, staff, the public and our partners
- *Focus our attention and resources* - setting targets enables us to focus both our attention and resources on contributing to the achievement of the Council's strategic outcomes and priorities.
- *Promote a sense of accountability*- setting challenging but realistic targets can be motivating and create a sense of ownership at both the strategic and individual level. At the strategic planning level, our targets are embedded within Directorate level Service Plans that link to our Team Plans. Targets can be used within Personal Development Reviews (PDRs) in order to drive improvement and build a sense of accountability at the individual level.

### **Types of target**

Target setting can be undertaken with either an internal or external focus. Where possible we try to adopt an external focus to our target setting as this enables us to set targets relative to external benchmarks, such as the performance of other local authorities. This is primarily done for national (statutory) indicator data sets where comparative data is available across Wales and for benchmarking club-based data sets such as APSE data sets etc.

When setting targets against external comparators, we need to be clear on what we are comparing ourselves with i.e. Welsh Average, Top quartile performers. Where available we should benchmark our target setting against top quartile performance in the first instance

unless there is a suitable rationale to explain why we benchmark our targets against the Welsh average.

Internal target setting focuses on analysing our performance year on year by using trend data to identify targets that are suitably challenging but realistic. Targets that are set with an internal focus tend to be for indicators where there is no comparative data available externally such as our localised performance indicators.

There are a variety of different types of target. A summary of these along with examples are outlined below:

<b>Target</b>	<b>Description</b>	<b>Example</b>	<b>Context for use</b>
Continuous	A level of service to be expected all the time.	100% of invoices paid within 30 days.	Used for setting targets against performance indicators.
Time-bound	These define levels of service delivery within a given time-frame.	100% of council owned properties meet WHQS standards by 2017.	Used for setting time-bound based targets within strategic planning documents i.e. Corporate Plan, Service Plans etc.
Percentage achievement	Commitment to achieve stated level of service against a standard.	Raise standards in English and Maths so that 85% of 11 year olds achieved level 4 or above.	Used when setting targets against performance indicators.
Qualitative	Descriptive targets of what level of service to expect.	We will continue to adhere to the All Wales Standards and associated protocols for Social Services and all relevant staff will attend mandatory safeguarding training.	Used for setting a qualitative level of expectation/aspiration within strategic planning documents i.e. Corporate Plan, Service Plans etc.
Absolute	This is a finite figure/amount that we intend to achieve.	Reduce/ increase by 15.	These types of targets can be used for setting both targets for performance indicators as well as for strategic planning.
Relative to cost	This may be represented as a percentage or as an absolute figure that is linked to cost.	e.g. Make budget savings of 5% e.g. Make savings of £200K.	These types of targets can be used in our strategic planning documents.

### **When and how to set targets**

Targets are set annually in accordance with our Performance Management Framework (timetable). At the end of every reporting year (End of March), we undertake a review of our performance indicators. This gives us an opportunity to identify whether our existing performance indicators are still appropriate and relevant in reflecting our priorities for service delivery.

As part of this review process, Directors are responsible for identifying which indicators they will retain, replace, delete or add. There are four types of indicator that are exempt from deletion/replacement:

- National Statutory Indicators
- Public Accountability Measures
- Improvement Objective Indicators
- Outcome Agreement Indicators.

There are no strict guidelines on the number of indicators that should be reported against each Directorate, but the number needs to be proportionate to reflect the objectives of each service and its core functions and where applicable any statutory reporting requirements i.e. national data sets, improvement objectives and outcome agreement indicators.

Once all indicators have been reviewed and the new data set for collection has been agreed by each Directorate, target setting can be undertaken. We utilise our end of year performance data (from previous year) in order to drive the target setting process. A target setting template has been developed to assist Directorates in formulating challenging, but realistic targets. All new targets must have an accompanying rationale to explain why performance will be set at this level. The template is attached at Appendix 1.

When using the template to set targets there are a number of factors that should be considered:

- There should be an initial assessment/evaluation of how we have performed against target previously by analysing previous performance trends. This involves comparing our end of year performance result with the existing target for that year. This enables us to identify whether we successfully met/exceeded or missed target in that year.
- For national data sets or benchmarking data sets, target setting should be done against the externally available comparators. For example for the national data sets (NSI and PAM indicators) target setting should be undertaken in line with both the Welsh average and Welsh top quartile figures of the previous year. Again if it is not possible to set targets within the top quartile range, the default position should be within the Welsh average. Where this is not possible an alternative target can be proposed, but again a robust rationale would need to be provided to explain why the target has not been set based on the benchmarking data available.
- When setting a new target, service areas should carefully consider how much of a priority the indicator is to the Council and whether there is the 'capacity to improve' on the previous year's performance based on available resources and if any planned changes to processes and service delivery will impact on the performance of this indicator. The default position should always be to improve on the previous year's performance. However, in challenging financial times just sustaining a certain level of performance (either at or below previous levels) might be the only way forward. Where this is the case an appropriate rationale needs to be provided in order to explain why targets have been defined in that way. The rationale will need to evidence both the internal/external factors that have driven that decision to set the target at that level.

### **Further information**

Further information and support for target setting is available from the Improvement and Development Team.

- The Improvement and Development contacts are as follows:
- **Julia Archampong (Corporate Performance Manager)** - Tel: 01446 709 318
- **Julia Esseen (Corporate Performance Co-ordinator)** - Tel: 01446 709287

**The 2015/16 target setting process will operate as follows:**

<b>Activity</b>	<b>Timeframe</b>
Target setting template circulated to each Directorate's Performance indicator co-ordinator in an Excel format.	April (23 <sup>rd</sup> April)
Each Performance indicator co-ordinator will be responsible for liaising with the relevant Performance Indicator owners (Heads of Service/Operational Managers) for the return of information needed in the template.	April (23 <sup>rd</sup> April-1 <sup>st</sup> May)
Performance Co-ordinators will be responsible for obtaining initial approval of the draft target setting template with relevant Director.	April (23 <sup>rd</sup> April-1 <sup>st</sup> May)
Draft target setting to be submitted to the Improvement and Development team for challenge function.	May (1 <sup>st</sup> May)
Improvement and Development Team will provide a 'Challenge Function' to quality check that the targets set are robust and clear rationale for each target has been provided. This will involve working with the Director to negotiate any changes/amendments needed to targets or the rationale.	May (week commencing 4 <sup>th</sup> May-8 <sup>th</sup> May)
Following the challenge process, Directors will be responsible for signing off their target setting template with the relevant Cabinet Member/s.	May (week commencing 4 <sup>th</sup> May-8 <sup>th</sup> May)
All targets (contained in the template) will be reported to CMT for final consideration.	May (6 <sup>th</sup> May)
All targets will then be reported via Scrutiny Committees for consideration and challenge.	May (week commencing 18 <sup>th</sup> - 21 <sup>st</sup> May)
A report will be sent to Cabinet confirming final targets to allow for any final consideration and challenge, so that these targets can then be formally adopted.	June (15 <sup>th</sup> June Cabinet)

## Appendix 1: Target setting template

**Table 1: National Statutory Data sets/Benchmarking Data sets (includes only NSI/PAM indicators and any other data sets benchmarked via benchmarking clubs).**

Directorate:

PI description	Data trend	Current performance		National benchmarking		Other considerations		Target setting		Rationale for target
	Perf 2013/14	Target for 2014/15	Actual perf 2014/15	Wales top quartile 2013/14	Wales average 2013/14	Links to corporate priorities?	National minimum standards/statutory targets?	New target for 2015/16	Direction of travel	
<b>PI description, data trend, current performance and national benchmarking</b> will be pre-populated for you, so that you can use the previous data trends, current performance and national benchmarking data to assess your performance and assist you in identifying a target that is both challenging and realistic.										<b>Other considerations-</b> Links to corporate priorities will be pre-populated for you where there are links to the Corporate Plan, Outcome Agreement and Improvement Objectives. Where applicable we will pre-populate and reference the links and identify any associated targets that will help to inform your target setting. However, you will be responsible for identifying if there are any national minimum standards/statutory targets associated with this indicator. If there are any statutory targets you will need to outline what these are.
										<b>Target setting</b> - This is where you outline your new target (s) for the financial year. These targets need to be informed by data trends, current performance, any national benchmarking, corporate priorities and/or national/statutory targets. The default position is to set targets aimed at improvement i.e. set in line with national benchmarking figures and any national/statutory standards and aimed at improving on previous year's performance (2013/14 and 2014/15). Where this is not possible, targets should still be challenging but realistic taking into account any internal/external factors that are likely to impact on the service environment i.e. budgetary and resource constraints. <b>Direction of travel</b> - this defines whether the target has been set to improve on previous year's performance by way of using arrow symbols. An upward arrow indicates the target has been set to improve on the 2014/15 performance, a static arrow indicates target has remained the same and a downward arrow shows the target has been set at a reduced level compared to previous year (2014/15).
										<b>Rationale</b> - This needs to explain the reasons for setting the target(s) at this level. Where a target has been set to improve on previous year's performance the reasons need to be aligned to national benchmarking data (top quartile/Welsh average), improving on current performance and any other considerations such are corporate priority targets (linked to the Corporate Plan, Improvement Objectives and Outcome Agreement). Where the target has been set to remain static or below the previous year's performance reasons will need to be provided to explain why the target has been set at this level. This rationale needs to evidence the current issues/constraints facing the service that are likely to impact on the ability of the service to improve its performance compared with previous years. Where the target is to retain best possible performance (100% achievement), the rationale needs to state that the service is seeking to sustain its best possible performance.

PI description	Data trend	Current performance		Other considerations		Target setting		Rationale for target
	Perf 2013/14	Target for 2014/15	Actual perf 2014/15	Links to corporate priorities?	National minimum standards/statutory targets?	New target for 2015/ 16	Direction of travel	

**PI description, data trend and current performance** will be pre-populated for you, so that you can use the previous data trends, and current performance data to assess your performance and assist you in identifying a target that is both challenging and realistic.


**Other considerations** - Links to corporate priorities will be pre-populated for you where relevant to the Corporate Plan, Outcome Agreement and Improvement Objectives. Where applicable we will pre-populate and reference the links and identify any associated targets that will help to inform your target setting. However, you will be responsible for identifying if there are any national minimum standards/statutory targets associated with this indicator. If there are any statutory targets you will need to outline what these are.

**Target setting** - This is where you outline your new target for the financial year. These targets need to be informed by data trends, current performance and any corporate priorities and/or national/statutory targets. The default position is to set targets aimed at improvement i.e. targets that are set in line any national/statutory standards/requirements and aimed at improving on previous year's performance (2013/14 and 2014/15). Where a target aimed at improving performance is not possible, targets should still be challenging but realistic taking into account any internal/external factors that are likely to impact on the service environment i.e. budgetary and resource constraints.

**Direction of travel** - this defines whether the target has been set to improve on previous year's performance by way of using arrow symbols. An upward arrow indicates the target has been set to improve on the 2014/15 performance, a static arrow indicates target has remained the same and a downward arrow shows the target has been set at a reduced level compared to previous year (2014/15).


**Rationale** - This needs to explain the reasons for setting the target(s) at this level. Where a target has been set to improve on previous year's performance the rationale needs to focus on continuous improvement i.e. improving on current performance and any other considerations such are corporate priority targets (linked to the Corporate Plan, Improvement Objectives and Outcome Agreement). Where the target has been set to remain static or below the previous year's performance reasons will need to be provided to explain why the target has been set at this level. This rationale needs to evidence the current issues/constraints facing the service that are likely to impact on the ability of the service to improve its performance compared with previous years. Where the target is to retain best possible performance (100% achievement), the rationale needs to state that the service is seeking to sustain its best possible performance.

## Worked Example: For benchmarked indicators

PI description	Data trend	Current performance		National benchmarking		Other considerations		Target setting		Rationale for target
	Perf 2013/14	Target for 2014/15	Actual perf 2014/15	Wales top quartile result 2013/14	Wales average 2013/14	Links to corporate priorities?	National minimum standards/statutory targets?	New target for 2015/16	Direction of travel	
PSR/002- Average number of days taken to deliver a Disabled Facilities Grant.	284 days	245days	200.58 days	206 days	239 days	This indicator links to our Corporate Plan priority H11. It is also linked to Outcome Agreement (OA3) to improve the lives of older people. The target for 2015/16 in the OA has been set at 250. This indicator is also aligned to an Improvement Objective (IO2) to support people towards independence. The target against this IO for 2015/16 has been set at 195.	There are no national minimum standards/statutory targets associated with this indicator. However, we do benchmark our performance annually against the rest of Wales.	195 days		The target for 2015/16 has been set at 195 days. Although a target of 250 days has been previously set as part of the target setting process associated with Outcome Agreement, our performance against this measure has significantly moved forward. For example, our end of year actual performance was 200.58 days. This improved figure has now brought our performance in line with top quartile performance of 2013/14 (206 days). Therefore, it is anticipated that a revised target of 195 days will be challenging enough so that we can continue to demonstrate improved performance whilst remaining above the Welsh average for 2013/14 (239 days).



## Worked Example: For non-benchmarked indicators

PI description	Data trend	Current performance		Other considerations		Target setting		Rationale for target
	Perf 2013/14	Target for 2014/15	Actual perf 2014/15	Links to corporate priorities?	National minimum standards/statutory targets?	New target for 2015/16	Direction of travel	
<b>HS/M002- Percentage of Housing stock where work that meets the WHQS standard has been completed.</b>	54.2%	60%	76% (Qtr3 fig)	This indicator links to our Corporate Plan Priority H7 and to Outcome Agreement (OA4) to improve social housing. The 2015/16 target has been set at 80%	Welsh Government standards require 100% of properties to meet WHQS standards by 2017.	80%		The target has been set to improve on previous year's performance of 76%. This indicator is aligned to an Outcome Agreement which has a target of 80% for 2015/16 that has been agreed with the Welsh Government. The Welsh Government require us to achieve 100% by 2017, therefore a target of 80% for 2015/16 demonstrates that we are committed to driving this improvement and meeting the national standards within the deadline.

#### Appendix 4 - Annual Planning Framework Timetable (2015/16)

April	May	June	July	August	September	October	November	December	January	February	March
				Annual Report (Community Strategy)							
			Corporate Plan monitoring (End of year) - CMT		Corporate Plan monitoring (End of year): Cabinet		Corporate Plan Review	Corporate Plan Consultation		Corporate Plan - Cabinet	
			MTFP				Draft Budget: Cabinet	Draft Budget: Scrutiny		Final Budget Proposals: Cabinet	Budget Approval: Council
			Corporate Workforce Plan: CMT/Cabinet			Directorate Workforce Planning					
Draft Improvement Plan Part 1: Scrutiny/ Cabinet/ Council Part 1 Published			Improvement Plan Part 2		Draft Improvement Plan Part 2: CMT/ Scrutiny/ Cabinet	Improvement Plan Part 2: Council/ Published	Improvement Plan Summary Published	Improvement Plan monitoring (Half Year): CMT/ Cabinet		Improvement Plan Part 1- Proposals and Consultation: CMT/ Scrutiny/ Cabinet/ External Key Stakeholders	
					Annual Report of Council Performance: CMT/Cabinet - Published						
			Outcome Agreement monitoring (End of Year): CMT/ Scrutiny/ Cabinet/ WG					Outcome Agreement monitoring (Half Year): CMT/ Cabinet			
Corporate Risks Review: Service Plans CRMG/ CMT/Audit Committee			Corporate Risks Review: CRMG/ CMT			Corporate Risks Review: CRMG/ CMT		Corporate Risks Review: CRMG/ CMT/ Audit Committee			Corporate Risks Review: CRMG/ CMT
				Review of annual Service planning arrangements/Agree template: CMT		Service planning workshops/ Draft Service Plans				Service Plans: Scrutiny/ Cabinet Draft Plans published	
	Annual target setting: DMT/ CMT/										

April	May	June	July	August	September	October	November	December	January	February	March
	Cabinet/Scrutiny										
			End-of-year (Q4) Performance Reports: CMT/Scrutiny/Cabinet		Q1 Performance monitoring: CMT/Scrutiny/Cabinet			Q2 Performance monitoring: CMT/Scrutiny/Cabinet			Q3 Performance monitoring: CMT/Scrutiny/Cabinet
End of Year Pls, Internal Audit and data submission				NSI/ PAMs bulletin published	Vale benchmarked Perf. NSIs/PAMs: CMT/ Cabinet						
Draft Team Plans	Final Team Plans published										
	Annual Personal Development Review						PDR: follow up (6 month review)				

## Appendix 5 - Monitoring Mechanisms

Key components of the Performance Management Framework		Accountability	Responsibility for monitoring	When
<b>Community Strategy</b>	Community Strategy Delivery Plan	The Council	Vale Local Service Board	Annual monitoring – 4 yearly review
<b>Corporate Plan</b>	Key priority outcomes and objectives	The Council	Scrutiny, Cabinet	Quarterly and annually
<b>Improvement Plan</b>	Improvement objectives Outcome Agreement with Welsh Government Performance indicators and key actions	Managing Director	Scrutiny, Cabinet	Quarterly, half yearly and annually
<b>Service Plans</b>	including: Links to corporate priority outcomes, Improvement objectives and Outcome Agreement.  Key emerging issues; risks, efficiencies, sustainability, equalities, workforce planning  Key consultation activities  Service self-assessment  Performance measures and targets both local and national  Action plans	Director, Cabinet member with portfolio.	Scrutiny, Cabinet	Quarterly

Key components of the Performance Management Framework		Accountability	Responsibility for monitoring	When
<b>Team Plans</b>	<p>including: Links to Corporate and service outcomes and objectives.</p> <p>Team objectives</p> <p>Action Plan</p>	Head of Service, Operational Manager, Team Leader	Head of Service, Operational Manager	Monthly, quarterly
<b>PDRS</b>	Links individual achievement of objectives and targets to team plan objectives.	Individual members of staff	Line Manager	Annually (6 month follow up)

**Appendix 6 – Member roles and responsibilities for performance management**

ROLE	ACTIVITY	WHO?
<b>Leadership</b>	<ul style="list-style-type: none"> <li>• Leading the development of a community vision and clear priorities for the Council.</li> <li>• Setting the strategic framework for improvement, e.g. identifying improvement priorities through the scrutiny review programme.</li> <li>• Motivating staff to deliver high quality services through emphasising customer and citizen needs and community objectives.</li> </ul>	Executive and Scrutiny
<b>Monitoring</b>	<ul style="list-style-type: none"> <li>• Regular monitoring of performance information that measures progress towards achieving strategic objectives. Monitoring historical data, comparative information and information from other organisations on good practice.</li> <li>• Regular monitoring of national and local performance indicators, particularly variances.</li> <li>• Monitoring of policy outcomes and progress on action/ improvement plans.</li> </ul>	Individual Cabinet members and Scrutiny
<b>Taking action</b>	<ul style="list-style-type: none"> <li>• Making recommendations/ decisions to improve performance, e.g. requesting, approving and monitoring action plans.</li> <li>• making decisions about which performance issues should be prioritised and resourced.</li> <li>• taking account of service performance when allocating resources.</li> </ul>	Executive and Scrutiny
<b>Taking responsibility and ensuring accountability</b>	<ul style="list-style-type: none"> <li>• Individual Cabinet members take an active interest in and report to Cabinet on performance from relevant services.</li> <li>• Encouraging accountability for performance by monitoring and ensuring officers account for and take action to improve poor performance, e.g. service managers report important performance issues to the Executive and/or Scrutiny.</li> </ul>	Executive and Scrutiny
<b>Ensuring a citizen and customer focus</b>	<ul style="list-style-type: none"> <li>• Ensuring citizen and customer needs, views and ideas for improvement are taken into account when assessing performance and planning to improve, e.g. strategic resource planning and budget setting processes make use of resident and customer views and information on minority needs.</li> </ul>	All members

## **Appendix 7 – Officer and Member roles and responsibilities for Performance Management**

<b>WHO</b>	<b>WHAT</b>
<b>Scrutiny Members</b>	<ul style="list-style-type: none"> <li>• Monitor and challenge progress made against service and corporate priority outcomes and objectives.</li> <li>• Challenge service improvement targets.</li> <li>• Question performance slippage.</li> <li>• Review whether action plans deliver intended community outcomes.</li> <li>• Attend briefing sessions.</li> <li>• Make specific recommendations regarding performance.</li> </ul>
<b>Corporate Management Team</b>	<ul style="list-style-type: none"> <li>• Takes a view on service underperformance and oversees delivery of the corporate Plan.</li> </ul>
<b>Directors</b>	<ul style="list-style-type: none"> <li>• Ensure Service Plans set the right ambitions and are fit for purpose.</li> <li>• Ensure the Directorate has effective data processes for monitoring against PIs.</li> <li>• Verify and sign off performance reports relating to their directorate.</li> </ul>
<b>Cabinet member with portfolio</b>	<ul style="list-style-type: none"> <li>• Question poor performance and keep Cabinet informed.</li> <li>• Use performance data to inform Cabinet policy.</li> </ul>
<b>Service Plan owners (Directors/ Heads of Service)</b>	<ul style="list-style-type: none"> <li>• Use data to drive improvement across the service.</li> <li>• Agree PIs, targets and actions that demonstrate achievement of service and corporate priorities.</li> <li>• Jointly agree targets on shared PIs.</li> <li>• Identify and agree appropriate Updaters.</li> <li>• Keep relevant Cabinet member informed about performance.</li> <li>• Report on performance to Scrutiny Committee quarterly/ annually.</li> <li>• Take action on slippage of PI targets and key actions.</li> <li>• Agree systems to record performance data, including definitions.</li> <li>• Verify and authorise data for inclusion in quarterly performance reports and annual returns.</li> <li>• Are accountable for the accuracy and quality of performance data and information within their service.</li> </ul>
<b>PI owners (normally Operational or Team Managers)</b>	<ul style="list-style-type: none"> <li>• Use performance data to drive improvement.</li> <li>• Ensure there are robust systems to measure performance, and that the data is recorded consistently and accurately</li> <li>• Verify performance data for each quarter.</li> <li>• Keep Service Plan owners informed of any slippage (if owner different).</li> <li>• Develop good lines of communication between updaters, escalators and themselves.</li> <li>• Identify the source of data quality problems and ensure that necessary corrections are made to inaccurate data.</li> </ul>
<b>Updaters</b>	<ul style="list-style-type: none"> <li>• Establish systems to measure performance.</li> <li>• Insert quarterly and annual data onto Updater spread sheets in line with agreed timescales as set out in annual performance monitoring timetable.</li> <li>• Collect working papers and scan onto trim evidence folder.</li> <li>• Write clear definitions for local PIs and contact the Data Unit if there is</li> </ul>

WHO	WHAT
	<p>any lack of clarity on national PIs.</p> <ul style="list-style-type: none"> <li>• Apply the correct definitions to national and local performance indicators on a consistent basis.</li> </ul>
<b>Escalators</b>	<ul style="list-style-type: none"> <li>• Ensure that performance data is reported in a timely manner</li> </ul>
<b>Performance Management Coordinators</b>	<ul style="list-style-type: none"> <li>• Check and verify definitions of local PIs.</li> <li>• Develop expertise to better understand their PIs.</li> <li>• Have an overview of definitions.</li> <li>• Co-ordinate performance returns.</li> <li>• Play active role in co-ordination meetings to improve the PMF.</li> <li>• Check performance returns are correct and in-line with calculations and definitions.</li> <li>• First point of contact for queries from the service, IDT, auditors.</li> <li>• Build performance reports to inform service/operational areas.</li> </ul>
<b>Improvement and Development Team</b>	<ul style="list-style-type: none"> <li>• Review annual planning framework.</li> <li>• Agree service plan arrangements and template annually.</li> <li>• Facilitate service plan development.</li> <li>• Improve links between service plans and team plans.</li> <li>• Ensure content of service plans is SMART.</li> <li>• Ensure challenging and realistic target setting with service plan owners.</li> <li>• Advise on PIs/risks/actions in service plans.</li> <li>• Ensure that PIs are of high quality.</li> <li>• Co-ordinate quarterly performance monitoring and reporting.</li> <li>• Provide support for the Annual Corporate Assessment.</li> <li>• Develop the role of the Performance Management Co-ordinator.</li> <li>• Develop improved links between IDT and internal auditor regarding end-of-year performance.</li> <li>• Undertake an initial quality check on performance data for end of year returns.</li> <li>• Submit data to the Data Unit and Welsh Government.</li> <li>• Assist scrutiny members in challenging performance, where requested.</li> </ul>
<b>Internal Auditor</b>	<ul style="list-style-type: none"> <li>• Verify performance calculations and working papers to ensure integrity of the data (data quality review).</li> <li>• Develop links with coordinators directly to solve problems.</li> <li>• Advise owners/IDT/PI updaters of anomalies in verified data.</li> <li>• Inform coordinators and IDT of any issues in relation to end of year PIs (qualified PIs, incorrect calculations, etc.)</li> </ul>
<b>Corporate Risk Management Group</b>	<ul style="list-style-type: none"> <li>• Regularly review and update the Corporate Risk Register.</li> <li>• Review risks following publication of service plans.</li> <li>• Oversee risk management in the Council – provide advice and guidance to managers and members.</li> <li>• Review and revise scoring.</li> <li>• Provide information on risks for the annual Corporate Assessment.</li> <li>• Translate relevant service level risks to corporate risks where appropriate.</li> <li>• Identify large cross-cutting risks that arise from more than one service plan.</li> </ul>



<p><b>Democratic Services</b></p>	<ul style="list-style-type: none"> <li>• Minute meetings to record performance monitoring to enable accurate scrutiny tracking.</li> <li>• Develop Scrutiny timetable to ensure no overload of performance monitoring information.</li> <li>• Ensure performance reports are available to appropriate members.</li> <li>• Ensure Scrutiny work programmes reflect the annual Regulatory work programme and the Council's plans for improvement.</li> </ul>
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