

**Vale of Glamorgan Council  
Performance Management Framework 2024**

*(Interim document pending review of PMF arrangements aligned to  
new Corporate Plan 2025-30)*

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## Introduction

The Council's Performance Management Framework is the mechanism through which our key priorities and targets are monitored and realised in order to secure continuous improvement. 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 elected members (including the Executive, Scrutiny Committees, Governance & Audit Committee), the Strategic Leadership Team, Partners (including the Public Services Board) and Council colleagues to understand performance management and the various components that contribute to effective performance within the Council. The guide gives an overview of Performance Management and the approach adopted by the Council to deliver effective and efficient services.

## Purpose of our Performance Management Framework

The Council's Performance Management 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. The framework is illustrated at **Diagram 1** and is applicable to all individuals in the Council.

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*).

## Why is Performance Management Important?

Performance should be managed at an organisational, service, team/operational and individual level, with each informing the other. To know when and what action to take, performance has to be measured, monitored and analysed. To know how to judge performance, criteria must be agreed; aims, objectives and targets. If the Council is going to deliver the outcomes that Vale citizens want, there has to be a performance management framework that:

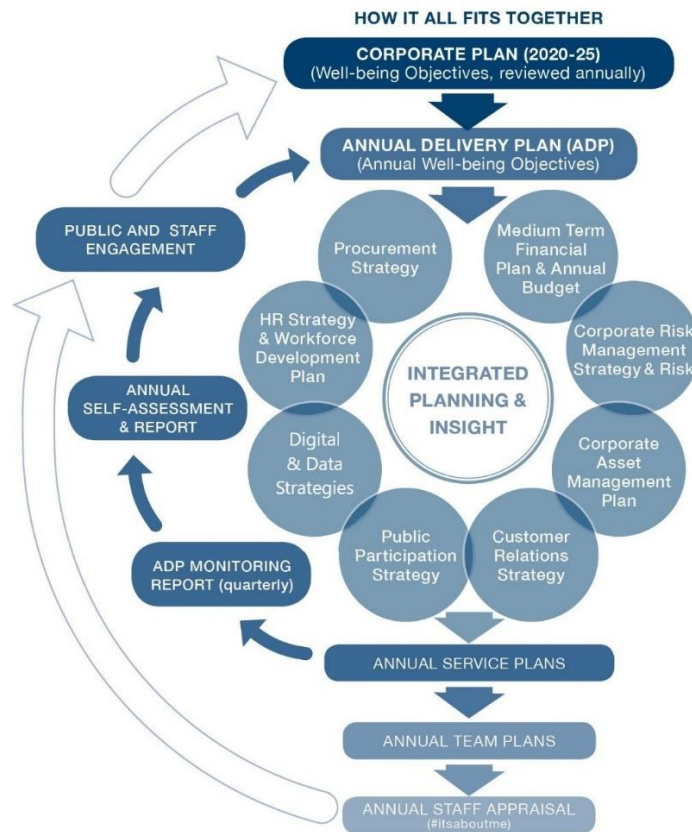
- Is based on key priorities and objectives and helps to measure the right things at the right time;
- Is based on key performance metrics which measure the right things at the right time and frequency;
- Is used to continually improve how we work together, and the way services delivered are performance managed;
- Is based on quality and accuracy of current and forecasted information which produces meaningful measures of how partners and services are performing;
- Enables learning from others, learning from our own experiences and mistakes and listens to partners' needs;
- Meets the needs of all the people involved in delivering outcomes in the Vale of Glamorgan, inside and outside the Council.

Effective Performance Management will help to:

- Clearly articulate our priorities and desired outcomes

- Prioritise what gets done within the resources available;
- Highlight where more resources may be required;
- Provide and demonstrate value for money;
- Provide good services and satisfaction for users and the local community;
- Motivate and manage our staff;
- Identify local, regional and national emerging patterns and trends;
- Respond effectively to existing and new challenges.

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



## The Principles and Benefits of Performance Management

### What are the principles of Performance Management?

The principles of effective performance management are set out in **Diagram 2** below. Based on the model for continuous improvement, the ‘plan, action and measure’ parts of the cycle involve setting clear outcomes, objectives and performance targets that are SMART (specific, measurable, achievable, realistic and time bound) and identifying an appropriate plan of action (in the form of the Corporate Plan, Annual Delivery Plan, Service Plans, Team Plans, #itsaboutme Staff Appraisal) to meet our Well-being objectives and improvement targets. The ‘report and review’ phase involves the monitoring of intended outcomes by assessing progress against performance measures (actions and measures) and other insights to understand how and why outcomes were or were not achieved and utilising the insight we have gained to put in place any corrective action to secure continuous

improvement. This phase also involves using the insight gleaned to take a preventative approach to planning for the future.

**Diagram 2: Principles of effective Performance Management**



The Council achieves its aspirations by using performance information to alter the way that we work. We do this by looking at information we have about our services, 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 well-being objectives, demonstrating accountability to the community, to government departments, our external auditors, managers and colleagues.

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 our vision and guides us in how we plan, deliver and review our services. Our vision at the Vale of Glamorgan is **'strong communities with a bright future'**

The Council's vision and values are communicated in the Corporate Plan and set out in **Diagram 3**. They are also consistent with the five ways of working which underpin the sustainable development principle and are central to the Well-being of Future Generations (Wales) Act 2015 – in terms of looking to the long term, taking an integrated approach, involving and working in a collaborative way. Our values will also support a greater focus on prevention as we work to deliver our vision.

The Council's values are built into our staff appraisal and member development processes to ensure that everyone understands their role and the importance of taking pride in our work, being open and working together to achieve our ambitions.

## Diagram 3: Delivering our Vision for the Vale of Glamorgan

Delivering our vision for the Vale of Glamorgan ‘Strong communities with a bright future’				
Our Council’s Values				
<p><b>Ambitious</b> Forward thinking, embracing new ways of working and investing in our future</p>	<p><b>Open</b> Open to different ideas and being accountable for the decisions we take</p>	<p><b>Together</b> Working together as a team that engages with our customers and partners, respects diversity and is committed to quality services</p>	<p><b>Proud</b> Proud of the Vale of Glamorgan: proud to serve our communities and to be part of the Vale of Glamorgan Council</p>	
Well-being Objectives				
<p>To work with and for our communities</p>	<p>To support learning, employment and sustainable economic growth</p>	<p>To support people at home and in their community</p>	<p>To respect, enhance and enjoy our environment</p>	
The Way That we Work				
<p>Taking an <b>integrated</b> approach – for us this means thinking about the needs of our customers and working with our partners.</p>	<p>Working in a <b>collaborative</b> way – for us this means recognising we can achieve more and deliver better services by working as part of a team, for example by working with the Third Sector, Town and Community Councils and neighbouring authorities.</p>	<p><b>Involving</b> the population in decisions – for us this means engaging with our residents and customers, including the business community and ensuring that we are listening to a wide range of views to inform our thinking.</p>	<p>Understanding the root causes of issues and <b>preventing</b> them – for us this means being proactive in our thinking and understanding the need to tackle problems at source for example by undertaking needs assessments to inform our priorities.</p>	<p>Looking to the <b>long term</b> – for us this means planning for the future and taking a strategic approach to ensure services are sustainable and that we understand the future need and demand for services.</p>

### 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 challenges and providing remedial action. Key benefits are outlined below:

#### For the customer/citizen:

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

#### For the Council:

- Identifies and clearly articulates our corporate priorities and ensures everyone is working 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 within the resources available and skills needed.
- Provides evidence of improved performance and 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.

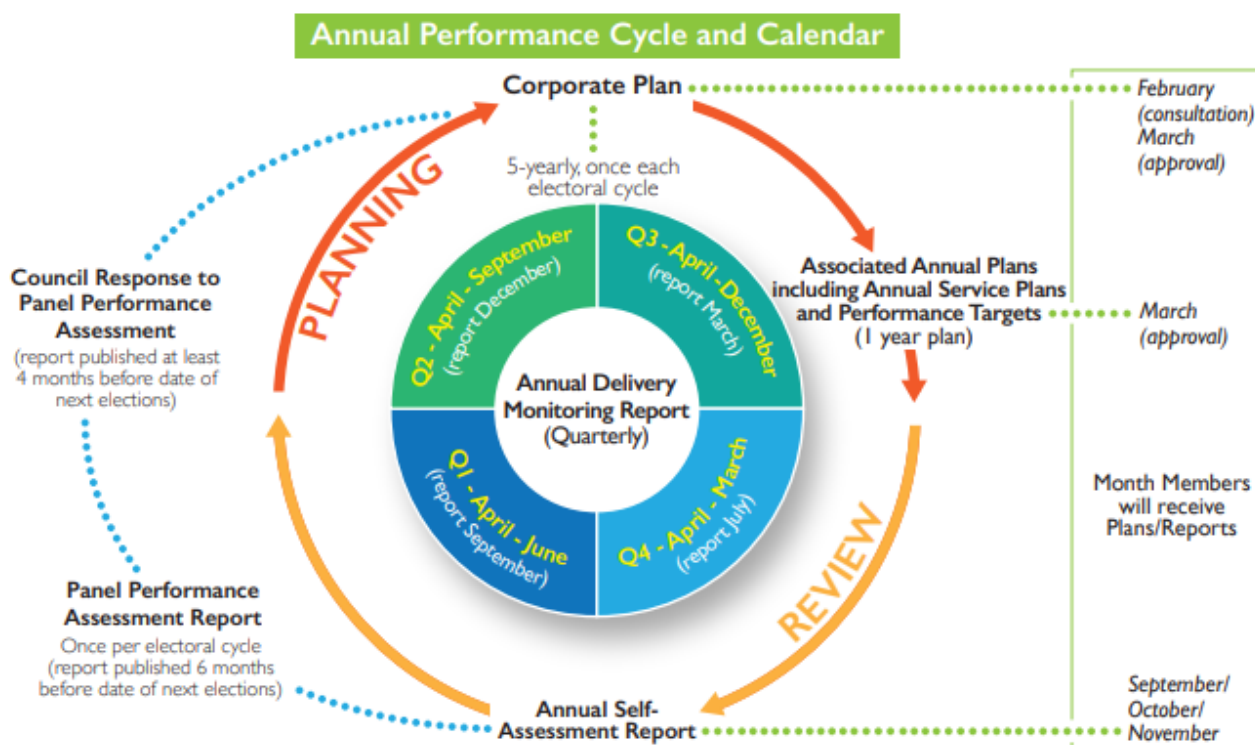
## The Council’s Performance Management Framework

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 (**Diagram 1**), which incorporates:

- The Corporate Plan and Well-being Objectives
- An Annual Delivery Plan
- Service and Team Plans
- Employee (#itsaboutme) and Elected Member Development and Appraisal
- An Annual Council Self-Assessment (plus a Panel Performance Assessment once every 5 years)
- Integrated Corporate Planning and Insight (Strategic Insight Board)
- A Corporate Performance Measures Framework
- Performance reporting and monitoring
- A performance management culture

The above plans and associated activities are integrated within an Annual Performance Calendar and is the Council’s key means of demonstrating progress towards meeting our priorities and statutory duties under the Well-being of Future Generations (Wales) Act 2015 and the Local Government and Elections (Wales) Act 2021. The calendar is reviewed annually informed by best practice across the sector to enable us to further strengthen our performance arrangements thus ensuring we are identifying and taking the necessary actions to improve.

**Diagram 4: The Annual Performance Calendar**





## **The Corporate Plan and our Well-being Objectives**

The [Corporate Plan](#) is the Council's key Council policy document and sets out a robust programme of activity covering a period of five years which will enable us to deliver our key priorities (Well-being Objectives). The Corporate Plan priorities also reflect the priorities identified in the Public Services Board (PSB) Well-being Plan (2023-2028) and will complement the work of the PSB going forward.

The Well-being of Future Generations (Wales) Act 2015 introduced statutory Public Services Boards (PSB) across each local authority area in Wales. In line with the Act, the Members of the PSB have developed a [Well-being Plan](#) setting out a series of well-being objectives and identifying the priorities of the partnership. The five year Plan provides the framework for the PSB's core collaborative activities over a five period. The Plan details the three well-being objectives the PSB want to achieve, priority workstreams and the steps that will be undertaken to deliver the intended outcomes of the Plan.

The Corporate Plan sets out the Council's Well-being Objectives as well as its vision and values with reference to the Well-being of Future Generations (Wales) Act 2015 and the Local Government and Elections (Wales) Act 2021 and has been informed by local needs and available resources and incorporates the views of residents, partners and staff.

All Council plans should be consistent with the Corporate Plan Well-being Objectives and the core values in existence at the time of publication of the Corporate Plan.

## **The Annual Delivery Plan**

The commitments we make in our Corporate Plan are long-term in nature, so to provide focus and demonstrate progress, each year we set out the steps we will take to meet them. This is the [Annual Delivery Plan](#) which details the actions we will take over the coming year that will contribute to the delivery of our four Corporate Plan Well-being Objectives and our vision of Strong Communities with a Bright Future.

## **Service and Team Plans**

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

Service Plans are a key building block in the performance management framework. They identify how each service will contribute towards the Corporate Plan. Each Service Plan specifically identifies how each Head of Service will contribute towards achievement of our commitments and Well-being Objectives as outlined in the Annual Delivery Plan by asking two questions:

- "Which Well-being Objectives does the service contribute to and what actions will we take this year to achieve these?"
- "How will we manage our resources to achieve these actions and support our service?"

As one of the Council's key performance monitoring documents, Service Plans include:

- a service self-assessment undertaken as part of the service planning process which identify a series of mitigating actions that reflect the key challenges facing the service in the coming year including risks, resources, workforce, finance, ICT and assets.
- Service improvement actions, measures and targets in line with the our Annual Delivery Plan commitments and the Corporate Plan Well-being Objectives.
- Key corporate and service level risks and proposed mitigating actions;

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.

Annual 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 staff appraisal process (#itsaboutme) and will help identify objectives and actions for individual members of staff. This better aligns the contribution of individuals to our corporate Well-being 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.

## **Employee and Member Development and Appraisal**

### **Employee Appraisal Process - #itsaboutme**

The main principles of the Council's approach to 'employee appraisal' are:

- Quarterly meetings between staff and their manager throughout the year (including two half yearly formal meetings), to review performance, set individual targets and address development needs.
- Emphasis on the link between staff performance and their contribution to delivering their Team / Service Plans.
- Service led approach so that the process makes sense to and supports staff in different areas.
- A quality controlled system with regular monitoring of the approach to ensure that the maximum benefit is gained for staff and managers.

Compliance with the employee appraisal process is monitored and reported annually to ensure the Council meets its commitment for all staff to have opportunities for personal and professional growth to support delivery of our Corporate Plan Well-being Objectives.

### **Member Development Programme**

The following core principles govern the Council's approach to Member Development:

- The process is approved, championed, owned and led by Members themselves.
- Member Development is considered a continuous and evolving process.
- The Member Development Strategy is informed by Personal Support and Development Interviews and Plans for all Members and the production of associated Training Needs Analyses.
- All newly elected Members are properly inducted into the Council and their roles with access to Member Mentors and Officer "Buddies."
- All Members benefit from Information Communications Technology (ICT) in line with the new hybrid approach to working and to assist them in their role and development.
- Provision of training and development balance the needs of the Council, corporate priorities and the individual and group needs of Members.
- The learning programme takes into account individual, and group needs and Members' preferred learning styles.

Compliance with the [Member Development Programme](#) is monitored and reported annually to ensure the Council meets its statutory duties and our commitment to support all elected members to become effective and confident in their role.

## **Annual Council Self-Assessment**

The annual [Council Self-Assessment](#) forms a core part of the statutory local government inspection processes in Wales. [Under Part 6 of the Local Government & Elections \(Wales\) Act 2021](#), the Council is required to keep performance under review, consult and report on our performance through self-assessment, and arrange and respond to a panel performance assessment once in every electoral cycle. The Well-being of Future Generations (Wales) Act 2015 also requires the Council to set and review annually its Well-being Objectives in order to maximise its contribution to achieving the Well-being goals for Wales.

The Vale of Glamorgan Annual Self-Assessment is a position statement on the Council's performance over the past year in delivering its priorities. It draws on a wide range of data, performance and engagement insights to assess the progress made by the Council in meeting its in year Annual Delivery Plan commitments as aligned to our Corporate Plan Well-being Objectives from the previous year. The findings enable us to identify how we can further enhance our internal processes and use of resources to improve and support achievement of our Annual Delivery Plan commitments and our Corporate Plan Well-being Objectives. The information contained in the report, is used to inform the Annual Delivery Plan priorities and associated Service plans for the coming year to drive improvement.

The Self-Assessment process incorporates the following activities, and the process is reviewed each year to further enhance our approach to self-reflection and challenge in accordance with the Local Government & Elections (Wales) Act:

- 5 Directorate Self-Assessments (DSAs) with judgements on use of our resources.
- DSA Internal Peer Challenge (Peer Director, Chief Executive, Cabinet member(s) and relevant Scrutiny Chair(s) which provides a 'critical friend' challenge of the findings of the Directorate Self-Assessment in order to inform further improvement and learning.
- Moderation of DSA findings and summary of Corporate judgements in relation to the use of our resources to ensure consistency in approach and judgments.
- End of Year Performance Assessment on achievement of our Annual Delivery Plan commitments aligned to the Corporate Plan Well-being Objectives.
- DSAs and Performance Assessment findings inform the evidence base for producing the Council's Annual Governance Statement
- Draft Annual Self-Assessment (ASA) Report produced.
- Engagement on the self-assessment findings and judgements (Scrutiny Committees, Cabinet, Governance & Audit Committee, Vale citizens, Council employees and key partners with their views informing the final Annual Self-Assessment report.
- Approvals and publication of Final Annual Self-Assessment Report (including formally responding to G&AC recommendations on the ASA findings and approval at Full Council) with copies sent to External Regulators, the Welsh Local Government Association and Welsh Government.

## **Panel Performance Assessment (PPA)**

Once in every electoral cycle (5 years), we will also make arrangements for an independent panel of peers appointed by the Council, to assess as the council does through its own self-assessment, the extent to which the Council is meeting performance requirements under the Local Government & Elections (Wales) Act - a panel performance assessment. The [Panel Performance Assessment](#) will assess the extent to which the council:

- is exercising its functions effectively;
- is using its resources economically, efficiently and effectively; and
- has effective governance in place for securing the above.

The Council will receive and must prepare a response to the panel performance assessment report outlining the extent to which it accepts the conclusions in the report; the extent to which the council intends to follow any recommendations contained in the report; and any actions it proposes to take to increase the extent to which it meets the performance requirements. The conclusions and recommendations from the assessment will be used to by the Council to inform its improvement plans.

## **Integrated Corporate Planning and Insight**

The Strategic Insight Board (established in 2016) continues to enhance and streamline the corporate governance arrangements relating to integrated planning activities and reports to the Strategic Leadership Team (SLT) and Cabinet. It provides a forum for all corporate priorities to be discussed while evidencing a direct link to the Corporate Plan and the five ways of working (sustainable development principles) as outlined by the Well-being of Future Generations (Wales) Act. The Board also serves as a useful mechanism to keep under review our enabling strategies (suite of corporate planning documents, which together support the delivery of the Corporate Plan) to ensure consistent alignment between these interrelated documents and our Corporate Plan priorities. The work of the Board contributes to more integrated business planning practices and the promotion of, ‘One Council’ working across the Council. The Board considers integrated planning activities under the themes of:

- |   |  |   |
|---|--|---|
| <ul style="list-style-type: none"> <li>• Corporate planning including performance, risk, self-assessment and peer review</li> <li>• Financial planning including procurement</li> </ul> | <ul style="list-style-type: none"> <li>• Equalities, Welsh Language and Socio-Economic Duty</li> <li>• Insight and Evidence-based Decision Making</li> <li>• Partnership and collaboration</li> <li>• Digital</li> </ul> | <ul style="list-style-type: none"> <li>• External funding</li> <li>• Legislation, Member relations and Member Development</li> <li>• Communication, engagement and Participation</li> </ul> |
|---|--|---|

The work of the Strategic Insight Board aligns with the annual performance calendar and corporate performance monitoring arrangements for the Annual Delivery Plan and our Corporate Plan Well-being Objectives. This enables consideration of a variety of key performance, engagement and other data insights (including our Insight Data and Research Portal which has information and statistics pertinent to the Vale of Glamorgan) in an integrated way, further strengthening our corporate planning evidence base. Aligning our approach in this way will enable us to continue to effectively meet both regulatory and statutory performance and reporting requirements using the same insight and evidence sources. Our enabling strategies are outlined below.

## **Medium Term Financial Plan**

The Council’s rolling [Medium Term Financial Plan](#) (3 year) allocates resources to support achievement of the Council’s Well-being Objectives as outlined in the Corporate Plan informed by extensive internal and external data and insight. Resource allocation takes into account key insights which include demographic changes, future service pressures and associated risks, residents views and priorities and the current climate of budget reductions.

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's [Risk Management Strategy](#) 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.

Corporate Risk is managed via the Corporate Risk Register. A risk analysis in the form of a Corporate Risk Summary Report is produced every quarter and provides a concise summary of headline issues and risk considerations. This allows the Council to have a good overview of the status of risks across the Register as well as the emerging issues. Governance and Audit Committee, the Strategic Insight Board, Strategic Leadership Team, Scrutiny Committees and the Executive Cabinet all have oversight of the Corporate Risk Summary Report to ensure overall effectiveness of the Council's risk management processes. 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. The Governance & Audit Committee has a key role through its remit to seek assurance that the Council is effectively identifying and addressing its key risks through the Risk Management Strategy and associated processes. Scrutiny Committees also monitor the implementation of Service Plan actions to manage service risks on a quarterly basis.

## **People Strategy and Workforce Plan**

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. The [People Strategy and Workforce Plan](#) provide a framework for the Council to achieve its Corporate Plan Well-being Objectives through the talents, energy and commitment of our staff.

A key aspect of performance management is to promote and improve employee effectiveness. Together the performance management framework and the People Strategy and Workforce Plan 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.

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.

## **Corporate Asset Management Plan (CAMP)**

The [Corporate Asset Management \(valeofglamorgan.gov.uk\)](http://valeofglamorgan.gov.uk) sets out how we intend to align our property assets with the Council's Well-being Objectives and provides an overview of how we will manage our property assets, and more importantly details the mechanism for co-ordinating our approach to asset management. The CAMP outlines the programmes being implemented to optimise our property assets and provide the strategic direction required to ensure we have fit for purpose property.

## **Digital Strategy**

The [Digital Strategy](#) sets the vision for improving digital capability across the organisation. The Strategy focuses work through four key themes: Community and Involvement, Organisation and Processes, Digital People and Skills and Data and Insight. Each theme has a series of key actions and activities required to ensure that these themes are embedded within the organisation's approach to delivering digital outcomes. The Strategy also sets out a series of indicators to monitor progress and how this progress will be reported through quarterly performance reporting.

## **Data Strategy**

The [Data Strategy](#) aligns with the Digital Strategy and the recognition of the importance of Data and Insight as one of the Digital Strategy's key themes. The Data Strategy sets out a framework for the organisation to be innovative and improve the use of data across the organisation. The Strategy sets out four key themes to take forward data work in the organisation, these are: Embedding a Data Culture, Taking Forward Insight Analytics, Ensuring Robust Data Governance and Management, and Designing Infrastructure for Data. A number of key commitments are set out against these key themes to support the delivery of the strategy.

## **Customer Relations Strategy**

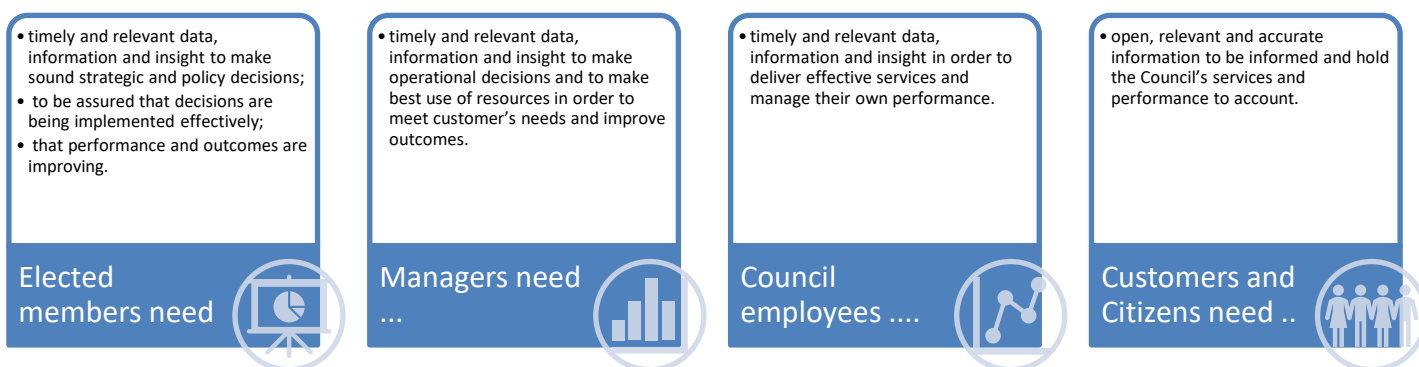
The Council's Customer Relations Strategy enables the Council to deliver on its ambition to provide high quality, responsive, accessible value for money services which are effectively targeted to meet local needs. It acknowledges that in order to improve services and deliver the standard of customer 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. Our approach to these issues is detailed in the Digital Strategy (2023-2028) which outlines key elements of our approach to customer relations. A new Customer Relations Strategy will be produced setting out our commitment to enhance the service we provide for our customers.

## **Public Participation Strategy**

The [Public Participation Strategy](#) details the actions that will be undertaken by the Council to encourage and facilitate all stakeholders to take part in the decision-making process in order to provide better outcomes for both the Council and stakeholders. By harnessing citizen feedback, promoting participatory decision-making, and encouraging collaborative performance tracking and review of progress, we can unlock the full potential of collective insight to enable us to develop and deliver valued and sustainable services for the future.

## **Corporate Performance Measures Framework (CPMF)**

The Performance Management Framework requires effective information management systems to support the process. The Council's Corporate Performance Measures Framework comprise a suite of performance indicators and actions aligned to the Annual Delivery Plan and our Well-being Objectives which supports corporate and service level performance monitoring, as well as partnership performance reporting in areas of shared priorities. The outputs (data analysis, performance dashboards, reports) provide the tools needed to support effective challenge by key stakeholders including elected members, service managers, council employees, partners, and customers in order to secure continuous improvement (**Diagram 5**).



The Council is currently using a manual system developed in MS Excel to collate and report performance information. Power BI is growing in use across the Council and with MS Office 365 now the standard software in use, there is an opportunity to move aspects of current performance reporting arrangements into Power BI to maximise its opportunities for integrated performance reporting. There are currently a number of partnership and departmental level frameworks already existence and exploiting the ability to visualise and report on existing performance data and other insights using this technology, this is changing the nature of our approach to performance management. Not only is this allowing us to understand what current performance is, it is providing richer data for predictive analytics, which will support more responsive decision-making. The technology will also enable us to allow customers and other stakeholders to access and interact with the most current and relevant data and information in the ways that they want. The Council currently publishes its open data to promote transparency and encourage innovation around that data. Developing and maximising our use of data, information and insight is a key area of focus going forward as part of developing the council's internal insight function.

The current Corporate Performance Measures Framework reflects the Council's Well-being Objectives and Service Plan structures and enables:

- Performance information to be cascaded throughout the organisation via quarterly updaters sheets and reports. Each quarter, performance 'updaters' are prompted to enter their performance data into pre-populated Excel spreadsheets. This data then self populates a master spreadsheet (the annual corporate performance measures 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 that 10% below target]. Quarterly dashboard style presentation reports are then created from this data which employs the traffic light system to reporting progress. A similar process is applied to progress against Service Plan actions, with both accompanied by analysis;
- Identification of performance trends and exceptions;
- Performance comparisons to be made locally and nationally where data is available;
- Setting and tracking of annual service improvement targets;
- Focused reporting against key priorities such as our critical challenges, corporate risks, Strategic Equalities Plan and regulatory recommendations for example as all our improvement actions are integrated within the framework. These means we ask for the information once and use this to meet multiple data an insight requirements.

Each Directorate has an identified Performance Management Co-ordinator, and it is their role to ensure that quarterly performance returns are accurate and submitted in a timely manner. It is the responsibility of the owner of the performance measure to ensure that the appropriate management system(s) are developed to collect and validate the information needed to measure each performance indicator/progress with activities. Verification of both data and appropriate management systems for recording the data is undertaken each year by Internal Audit as part of data quality assurance checks and based on a sample selection.

The Council has identified a suite of performance measures aligned to each of the Corporate Plan Well-being Objectives. These are important in demonstrating the progress being made to achieve our Well-being Objectives. Each year we review our Corporate Performance Measures Framework to ensure the framework provides the best representation of the wide range of activities being undertaken by the Council and reflects the Well-being Objectives and our commitments in the Corporate Plan.

As part of the annual corporate and service planning process, we set a wide range of performance targets to demonstrate how improvements will be made. This is particularly important where priorities have not been achieved in the past. The Council's [target setting guidance](#) ensures a challenging approach to target setting that involves an assessment of performance trend data, our performance against previous targets and making best use of external benchmarking data (where this available). This is balanced against how much of a priority the indicator is to the Council and whether there is capacity to improve performance. All proposed targets must have an accompanying rationale that clearly explains the reasons for setting the targets at that level.

## **Performance Monitoring and Reporting**

There is little merit in measuring our performance if we do not intend to monitor it and to take action where necessary to make improvements. This is where performance monitoring comes in. Providing there is a balanced set of measures and actions, we can use monitoring reports to assess performance at service, directorate and at corporate level by Well-being Objective on a regular basis.

Performance monitoring cannot take place in isolation, results must be fed back to the planning process to ensure that learning and experiences from the last set of planned and achieved results can be used to further improve performance. These observations must be fed back to inform future developments. This 'positive feedback loop' is essential for a successful performance management system.

Performance monitoring is more meaningful if it is set in context, for example, by reflecting on previous performance (trend data) and benchmarking. Benchmarking is about building on the success of others rather than re-inventing the wheel. By regularly benchmarking our performance where possible, we can be in touch with current good practices. By comparing ourselves with others, we can identify areas for improvement and practical solutions. It also provides contextual information so the public can assess our performance. There is currently limited national benchmarking data available due to the removal of our national data obligations by the Welsh Local Government Association (WLGA) and Welsh Government (WG). Consequently, services are encouraged to use their various regional and national professional networks as opportunities to benchmark their activities and learn from best practice.

Performance reports identify progress towards achieving the Annual Delivery Plan commitments as aligned to our Corporate Plan Well-being Objectives and identify 'performance gaps,' highlighting if and where remedial action is required in order to improve performance. This is not the end of the process; it is a continuous cycle of review and action. It is important to regularly monitor and report



on performance so any remedial action can be taken as soon as it is required, ensuring that there is a greater chance of making a positive impact.

In line with the Council's Performance Management Framework, quarterly performance reports:

- outline progress made towards achieving the ADP priorities as aligned to the Corporate Plan Well-being Objectives;
- provide a picture of what is most important;
- provide information that is accurate, reliable and valid;
- are unambiguous in the message they convey regarding performance; and,
- pinpoint areas where action to improve performance is best directed.

Alongside a detailed report, quarterly performance reports are supplemented with a presentation that includes:

- An overall performance summary of the Annual Delivery Plan;
- An overview of achievements specific to each scrutiny committee's remit across all 4 Well-being Objectives.
- A performance snapshot specific to each scrutiny committee's remit, including the overall status of actions and performance measures with hyperlinks to detailed performance commentary for all actions and measures including performance exceptions which are embedded within the presentation. These are the areas we need to improve in relation to our Annual Delivery Plan activities as aligned to the Corporate Plan Well-being Objective.
- An overview of areas for improvement specific to each scrutiny committee's remit across all 4 well-being objectives.
- Emerging areas of development and activity and areas of concern specific to each scrutiny committee's remit across all 4 well-being objectives to enable effective scrutiny and inform their work program.

Annual Delivery Plan progress is reported quarterly in line with the annual performance calendar (**Diagram 4**), culminating in an End of Year assessment that dovetails with and informs the Council's Annual Self-Assessment.

## Quality Data, Information and Insight to support decision making

Effective performance management is based upon the use of accurate and reliable data, information and insight and is essential for sound decision making at every level. This helps us to make decisions about how we can most effectively manage the services we provide, and also to account for their performance. We know that if our performance data, information and insight is not of a high quality, then the resulting decisions and actions may be flawed. There is also a possibility that poor services and under performance will not be correctly identified preventing additional support from being provided to support service improvement. External users of our data e.g. Regulators and Welsh Government, also require assurance that the data they have been provided is accurate before making judgements about the Council's performance. Consequently, it is vital that the data, information and insight used to inform, manage and plan activities is accurate and reliable.

The Council is committed to ensuring it maintains the highest standards of quality when it comes to performance data and information. In order to achieve this, our objectives are as follows:

- To ensure collection, recording, analysis and reporting of performance data and information is accurate, reliable and consistent to inform the decision making process.
- To ensure that data is of high quality, consistent, timely, comprehensive and held securely and confidentially.
- To ensure arrangements are in place at a senior level to secure the quality of the performance data and information we use to manage our services and demonstrate our performance.
- To put in place systems, policies and procedures to ensure the highest possible data quality, inclusive of data sharing with partners.
- To ensure performance data is communicated and transparent to all stakeholders and the public.
- To ensure that performance data is stored, used and shared in accordance with corporate standards and relevant legislation (such as the Data Protection Act and the Freedom of Information Act).
- To ensure performance data meets external inspection/audit standards.

Underpinning this corporate PMF is a commitment to the importance of quality; that is in, collecting, monitoring and reporting quality performance data and information. To embed this commitment within working processes, the Council has adopted six key principles, accepted as best working practice:

- **Accurate:** data should be sufficiently accurate for the intended purposes, enabling robust decision-making at all levels. Data should be captured once only, although it may have multiple uses.
- **Valid:** data should be recorded and used in compliance with all statutory requirements, enabling true analysis to be made over time.
- **Reliable:** data should reflect consistent collection processes, ensuring progress is 'real' rather than due to changes in calculation.
- **Timely:** data should be captured quickly and reported within a reasonable and relevant period aiding informed decision making.
- **Relevant:** recorded material should be relevant to the purpose for which it is used and those it is intended for. This entails periodic review of requirements to reflect changing needs.
- **Complete:** data requirements should be clearly specified based on the information needs of the council and include all services areas.

In working to deliver the highest possible quality of performance material to effectively manage services and demonstrate continuous improvement, the following series of practical measures have been established:

- **Awareness:** ensure all officers, Members and partners involved in the collection, monitoring and reporting of corporate performance, know the expected standard of performance practice.
- **Procedure:** responsible reporting officers will complete PI definition templates for the collecting, monitoring and reporting of all corporate performance indicators. These are essential to the robust governance of the Performance Management Framework.
- **Verification:** at year-end, the Corporate Performance Team in conjunction with Internal Audit Colleagues will carry out a risk-based verification process involving all corporate performance indicators. Indicators assessed as 'high risk' will be subject to an in-depth review with recommendations made as appropriate.
- **Intervention:** in establishing a continuous cycle of development in performance quality controls, the Corporate Performance Team will undertake in-year interventions reactive to identified risks to performance information or proactively enabling new performance indicators to be adopted into the Corporate Performance Measures Framework as required.

The Council has approved a new Data Strategy to further align its data and insight functions to effectively enable better and more robust decision making to transform our services and deliver our well-being goals and build trust with our residents.

## A Performance Management Culture

Performance Management should take place in an environment of learning. In a positive learning culture, performance data is discussed openly and honestly and used by everybody to make better-informed decisions, and to take actions that positively affect future performance.

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 Chief Officers of the Council will take a leading role and will explain and reinforce our vision, values and performance management approach at every opportunity through direct communication with staff.

All Chief Officers should promote the use of performance data and 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.

The involvement of staff and Elected 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. Elected members through their roles are accountable to all community stakeholders for the performance of council services and should hold officers to account for successful delivery of identified commitments. The roles and responsibilities of key stakeholders in the Council's performance management are described in **Diagram 5**.

<b>Diagram 5: Officer and member roles and responsibilities for performance management</b>	
<b>Who</b>	<b>Roles and responsibilities</b>
<b>Full Council</b>	<ul style="list-style-type: none"> <li>• Approve key Council Plans and Strategies.</li> <li>• Agree the Budget and confirm our priorities in the Corporate Plan and Annual Delivery Plan.</li> </ul>
<b>Executive Leader</b>	<ul style="list-style-type: none"> <li>• Responsible for the overall policy direction and performance of the Council. As Chair of Cabinet, the responsibility of the Leader ties all other cabinet portfolios together.</li> </ul>
<b>Executive/Cabinet</b>	<ul style="list-style-type: none"> <li>• Have overall responsibility for the approval and accountability of the Annual Delivery Plan and Corporate Plan and associated policy framework.</li> </ul>

<b>Diagram 5: Officer and member roles and responsibilities for performance management</b>	
<b>Who</b>	<b>Roles and responsibilities</b>
	<ul style="list-style-type: none"> <li>Responsible for taking executive decisions affecting Council performance overall.</li> </ul>
<b>Cabinet member with portfolio</b>	<ul style="list-style-type: none"> <li>Monitor and challenge underperformance and keep Cabinet informed.</li> <li>Use performance data to inform Cabinet policy and to improve service delivery.</li> <li>Work with Chief Officers to develop and challenge Service Plans and set targets.</li> <li>Meet regularly with Chief Officers to review and discuss performance issues and monitor delivery of the Corporate Plan and Service Plans.</li> </ul>
<b>Scrutiny Members</b>	<ul style="list-style-type: none"> <li>Monitor and challenge progress made against the Annual Delivery Plan commitments and our Corporate Plan Well-being Objectives.</li> <li>Scrutinise and challenge the annual Service Plan in terms of content, quality of actions and whether the right performance measures are in place to demonstrate achievement of intended outcomes.</li> <li>Challenge service improvement targets.</li> <li>Question performance slippage throughout the year including through quarterly Annual Delivery Plan performance monitoring.</li> <li>Review whether action plans deliver intended outcomes.</li> <li>Attend performance briefing sessions.</li> <li>Make specific recommendations regarding performance to Cabinet/ Executive.</li> <li>Conduct evidence-led performance reviews on services and make recommendations to Cabinet/Council.</li> </ul>
<b>Strategic Leadership Team</b>	<ul style="list-style-type: none"> <li>As 'custodians' of the Corporate Plan, the Strategic Leadership Team oversees delivery of the Corporate Plan and Annual Delivery Plan commitments.</li> <li>Takes an overview of performance ensuring that the right priorities are being attached to the actions contained within the relevant service plans and improvement plans.</li> <li>Takes a view on service underperformance and ensures remedial action is being taken to address these.</li> <li>Identify and manage strategic and cross cutting performance issues and opportunities across council services.</li> <li>Ensure the integration of performance management into the culture of the organisation.</li> <li>Champion the need for an outcome focused approach as part of the Council's performance reporting</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 its performance measures.</li> <li>Verify and sign off performance reports relating to their Directorate.</li> <li>Consider emerging priorities along with proposed activities to determine whether Well-being Objectives are still relevant.</li> <li>Take the lead in ensuring improvement actions are being progressed.</li> <li>Use performance and data insights to drive service improvement and communicate significant performance issues to SLT.</li> <li>Ensure that performance reporting is outcome focused and demonstrates impact.</li> </ul>
<b>Departmental Management Teams</b>	<ul style="list-style-type: none"> <li>Discuss service performance issues and apply the learning across the Directorate as applicable.</li> <li>Use performance data to drive service improvement in their areas.</li> <li>Have oversight of the performance information reported corporately each quarter.</li> </ul>

<b>Diagram 5: Officer and member roles and responsibilities for performance management</b>	
<b>Who</b>	<b>Roles and responsibilities</b>
	<ul style="list-style-type: none"> <li>Assess the Directorates overall performance as part of the Council's Annual Self-Assessment.</li> <li>Monitor progress with implementation of action plans and determining corrective action where necessary.</li> </ul>
<b>Strategic Insight Board</b>	<ul style="list-style-type: none"> <li>Takes an overview of corporate performance monitoring (including ADP, Corporate Risk Register, Regulatory report tracking, financial etc.) and improvement planning including the Annual Delivery Plan, Service Plans and Team Plans.</li> <li>Has oversight and provides challenge on the Council's annual Self-Assessment findings and peer reviews.</li> <li>Has oversight and ensures development of integrated enabling strategies to support delivery of the Corporate Plan Well-being Objectives.</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 service 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 and Escalators.</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 any lack of clarity on national PIs.</li> <li>Apply the correct definitions to national and local performance indicators on a consistent basis.</li> </ul>
<b>Performance Management Co-ordinators</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>Corporate Performance Partners</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> </ul>

**Diagram 5: Officer and member roles and responsibilities for performance management**

Who	Roles and responsibilities
	<ul style="list-style-type: none"> <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 Council's Annual Self-Assessment.</li> <li>• Develop the role of the Performance Management Co-ordinator.</li> <li>• Develop improved links between the Corporate Performance Team and Internal Audit regarding end-of-year performance.</li> <li>• Undertake an initial quality check and verification on performance data for end of year returns.</li> <li>• Submit data to the Data Cymru to support national benchmarking of performance.</li> <li>• Assist Scrutiny Committee members in challenging performance, where requested.</li> </ul>
<b>Internal Audit</b>	<ul style="list-style-type: none"> <li>• Verify a sample of performance calculations and working papers at end of year to ensure integrity of the data (data quality review based on risk).</li> <li>• Develop links with coordinators directly to solve problems.</li> <li>• Advise owners/Corporate Performance Partners/PI updaters of anomalies in verified data.</li> <li>• Inform PM co-ordinators and Corporate Performance Partners of any issues in relation to end of year PIs (qualified PIs, incorrect calculations, etc.)</li> </ul>
<b>Democratic Services</b>	<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> <li>• Support performance related reviews as part of the scrutiny work programme.</li> </ul>
<b>All Council Colleagues</b>	<p>Staff at all levels staff need to know and understand:</p> <ul style="list-style-type: none"> <li>• Their own targets and objectives contained in their #itsaboutme appraisal</li> <li>• Their Team's targets and objectives contained in their Team Plan.</li> <li>• How their team is performing in relation to their Team Plan.</li> <li>• How performance information is collected, recorded and monitored.</li> <li>• The importance of team meetings to identify and drive service improvements.</li> <li>• Their responsibility for quality of any performance data they handle and collect.</li> <li>• The importance of reporting on outcomes delivered.</li> </ul>
<b>Councils Partnerships</b>	<ul style="list-style-type: none"> <li>• Contribute to plans and strategies as appropriate.</li> <li>• Monitor and report progress on joint priorities.</li> <li>• Take corrective action to improve performance where necessary.</li> </ul>

For further information and support in relation to all aspects of performance management please contact colleagues in the Strategy & Insight Strategic Group:

**Julia Archampong** Corporate Performance Manager  
[jarchampong@valeofglamorgan.gov.uk](mailto:jarchampong@valeofglamorgan.gov.uk)

**Emma George** Corporate Performance Partner  
[emgeorge@valeofglamorgan.gov.uk](mailto:emgeorge@valeofglamorgan.gov.uk)

**Nathan Miller** Corporate Performance Partner  
[ncmiller@valeofglamorgan.gov.uk](mailto:ncmiller@valeofglamorgan.gov.uk)

## Links to Key Performance Documents

Vale of Glamorgan PSB Well-being Plan 2023-2028

Corporate Plan 2020-2025

Annual Delivery Plan 2023-24

Service Plans 2023-24

Team Plans Guidance

#itsaboutme

Medium Term Financial Plan 2023-24 to 2028-2029

People Strategy and Workforce Plan 2023-2025

Corporate Asset Management Plan 2023-2028

Corporate Risk Management Strategy and Risk Register

Procurement Strategy 2022/23 – 2026/2027

Digital Strategy (Draft) 2023-2028

Customer Relations Strategy (Refer to Draft Digital Strategy 2023- 2028. This incorporates key elements of our approach to customer relations. The Customer Relations Strategy will be reviewed once the new Digital Strategy has been adopted)

Public Participation Strategy 2022-2025

Annual Self-Assessment Report 2021-22

Member Development Strategy

Performance Reporting Guide for Updaters

Target Setting Guide

Quarterly Performance Reporting Timetable

PI Definition Library

Actions and Measures Guidance

## Some Benchmarking Data Sources

[Stats Wales](#)

[Nomis](#)

[InfoBaseCymru](#)

<https://www.dataunitwales.gov.uk/eng/DataCymru>

[Insight Data and Research Portal](#)

[Mylocalcouncil](#)

[Self-Assessment Performance Data Tool \(SAPDT\)](#)