



Briefing Note

ISLE OF WIGHT COUNCIL

Committee	CORPORATE SCRUTINY COMMITTEE
Date	16 JULY 2024
Topic	PERFORMANCE MANAGEMENT FRAMEWORK

Purpose

1. To update the committee on the progress made in relation to improvements to the Isle of Wight Performance Management Framework, specifically the further improvements made in the process and delivery of information to include automation, metric refresh, Power BI licencing and working across directorates.

Background

2. In July 2023, the Cabinet Member for the then Finance, Climate Change and Biosphere presented the report which provided an update on the research, findings, and work programme in place to improve the performance management processes within the council.
3. The report was welcomed, and the committee requested to review the matter again when the new processes had been embedded. It was agreed that a progress update would be provided in early 2024 financial year.

Findings

4. Next steps identified and progress update:
 - **1. Apply the learning from other council's and the LGA best practice to the Isle of Wight Council performance management framework.**
5. **UPDATE:** A full review of best practice including research into processes and timescales used by other local authorities took place, the Framework was reviewed and published January 2024.

6. Training sessions were undertaken with service areas to ensure that the data teams were fully aware of the changes made, how the information is collected and published the responsibilities of services to review their metrics and performance regularly. The corporate performance lead attended the LGA Performance Round Table in January and will take lessons learned there into the next corporate plan refresh and into the development of the new directorate plans that reflect how services will deliver the council's key priorities.
 - **2. Work with directors and service updaters to streamline the metrics required for service level reporting (service boards / leadership meetings) and strategic reporting (QPMR).**
7. **UPDATE:** A comprehensive review of all the metrics that are provided within the cabinet's quarterly performance management report (QPMR) took place between September 2023 and March 2024.
8. The corporate performance lead worked with Strategic and Service Directors to check the relevance and accuracy of the metrics in place. Significant changes were made to Adult Social Care and Public Health key performance indicators (KPIs), smaller changes were supported within Community Services and Corporate Services. We continue to work with Children and Family Services Directorate, following the exit from the Hampshire partnership.
9. All KPI's currently remain aligned with the council portfolios and the administration's priorities.
 - **3. Bring the reporting up to date and into the management teams, using the principles in the performance management framework. Link in with the corporate plan refresh, organisational change and develop reporting for Q1 of 2023/24.**
10. **UPDATE:** The planned corporate plan refresh did not take place, but a full roll out of the new format for the QPMR quarter one report will take place in July 2024. The planned format has been shared with corporate management team and the service leads and feedback has been taken on board to develop the final layout.
11. This is to provide the report using the Power BI functionality that enables users to drill down into the data and to better compare current and past results.
12. Power BI is a collection of software services, apps, and connectors that work together to turn our unrelated sources of data into coherent, visually immersive, and interactive insights. That data might be an Excel spreadsheet, or a collection of cloud-based and on-premises hybrid data warehouses. Power BI

lets us connect to our data sources, visualise, and discover what is important, and share that with anyone.

13. The final Dashboard and Apps designs will be shared at Corporate Management Team. A full communications plan will ensure that Directorate Management Teams are fully aware of the new products and how to use them to manage performance in their areas. This will include attendance the Directorate Management Teams and updates through the council's digital communication channels such as The Vine and Managers Alert for wider awareness.
14. The Transformation Manager for Business Intelligence will work with portfolio holders to support them to use the reporting functionality effectively. The leader and deputy leader already access, and use Power BI reporting so will be more familiar with its operation.
 - **4. Where possible and appropriate develop performance dashboards with service areas.**
15. **UPDATE:** Directorate performance dashboards have now been rolled out for Community Services and Corporate Services whilst Financial Services is still in development. The Adult Social Care dashboard is in development by the Business Information Team and Children's Services Data and Information Team will be supported to develop their reporting once the project to bring in Mosaic and their data warehouse has been implemented.
16. In line with the [Data Strategy 2023-2027](#) the Transformation Manager and the Business Intelligence Officer have developed Power BI service dashboards for Licensing, Environmental Health, and Planning. She is working on a new project for Learning and Development which commenced in May 2024, in addition interactive Power Bi reports are in development for Parking, Road Safety and the Local Council Tax Scheme.
17. There are a range of HR Power BI dashboards being developed by the data specialist in HR which will be accessible to managers for people performance management.
18. Priority four of the [Digital Strategy 2022-2027](#) is supported through our Power BI-driven automation, we can streamline reporting and get more value from our data, other benefits include:
 - Increased accuracy and reliability - data consistency in that the underlying datasets can be linked to multiple reports (single source of truth).
 - Greater efficiency, saving time in locating and viewing key metrics.
 - Faster creation of reports.
 - More insights from data – some reporting is now held in a central repository with information from several sources (a one stop shop).

- Better decision-making.
- Improved compliance and auditing.
- Increased customer satisfaction.

Way Forward

19. The Transformation Manager manages a council wide Analyst/PBI network. She also maintains a regular presence at directorate management teams and is linked in with various digital projects that cross over to Power BI.
20. The future development is multi-pronged and is part of the data strategy. This includes developing awareness through a communications plan and the network, we will ask users of the reports to provide feedback/testimonials, and will talk to services about their needs, especially on the back of the ad-hoc requests we get and build on those.
21. We will develop the training offer to services with an 'overview of PBI sessions' to show what is possible and develop the Power BI training to enable services to skill up and build their own reports.

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