

**Report To:** Overview and Scrutiny

**Date of Meeting(s):** 12/07/23

**Report Title:** Performance Monitoring Quarter 4 2022/23 and update on Q1 Performance Indicators

**Report By:** Stephen Dodson – Head of Strategic Programmes

**Key Decision:** N/A

**Classification:** Open

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### **Purpose of Report**

1. To provide a summary of performance for Quarter 4 (Jan – April) 2022/23
2. To enable Senior Managers, Portfolio Holders and O&S to agree and finalise performance indicators for Q1-Q4 23/24 against the updated corporate plan and agreed delivery plan.

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### **Recommendation(s)**

1. That the Overview and Scrutiny Committee review performance for Quarter 4 2022/23
2. To note that the report provides performance information one quarter behind actual quarters.
3. That O&S are content with the agreed Q1 and ongoing quarters PI's for 23/24.
4. That staff be thanked for their hard work and achievements to date.

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### **Reasons for Recommendations**

1. To assist the council to undertake performance and financial monitoring arrangements.
2. To ensure that senior management, officers, and Portfolio Holders (Lead Cllrs) have ownership of performance of the service areas under their responsibility.
3. That O&S and the public can review performance and highlight both achievements and areas of concern.
4. That due to committee cycles the data provided to O&S is for Q4 but Q4 has been completed therefore some data may not represent the up-to-date information on performance.
5. That O&S are sighted on and agree performance indicators for Q1 and ongoing quarters for 23/24.

## Introduction

1. The Council updated its four year [corporate plan \(2020/24\)](#) in February 2022. This update took into account new or changed activities brought about as a result of the pandemic.
2. This report sets out a summary of council performance for Quarter 4 (Jan – April 2023), however it should be noted that due to committee cycles the information provided will be presented to O&S is at the end of Q4. Therefore, some data may not represent the most up-to-date information on performance.
3. Performance reporting and updates continue to be reported in a Dashboard format and the intention remains to build and improve the performance reporting including financial information from Quarter 1 23/24. These will include the reassessed performance indicators, following the Corporate Plan update for 23/24 which will be provided at the end of Q2.
4. O&S have agreed that Q1 23/24 would provide a transition period to revise the performance indicators against the corporate plan update (23/24) and that the key areas of focus for O&S would be finance and housing and statutory returns, where applicable only for Q1.

## Performance reporting

1. That Overview and Scrutiny are aware of and recognise performance measures are duly covered.
2. Performance measures and targets are set out by service area at the link below in dashboard format and have been available to the public from the 24 May 2023  
  
Public Performance monitoring. [Performance monitoring - Public - Smartsheet.com](#)
3. On the dashboard, a snapshot of overall performance per quarter is given before presenting performance by each service area in bar charts.
4. A RAG rating is used to determine progress where Green reflects performance on track, and Red and Amber are 'exceptions' – will not (Red) or might not (Amber) meet expected performance.
5. When you click on Red, Amber or Green in the bar charts you will then be given further detail on the associated key activities or PIs from within that service area.
6. Where performance is Red or Amber (an exception) an explanation should be provided outlining why expected performance is not being met.
7. In line with the request from the Overview and Scrutiny committee to report by exception, comments would be welcome on Green, Amber, Red
8. Where the target is a Performance Indicator (PI) you will be able to view a target where set.
9. At the top of the Dashboard there is a link that will show all service area performance exceptions with a Red or Amber status at quarter one.

## Performance Reporting 23/24

10. O&S have agreed that a transition period for Q1 (April -June) would allow us time to review all KPI's and PI's with SLT, Service Managers and portfolio holders – but any mandatory statutory PI's would still be required and reported on asap after the completion of Q1 these will also need to be aligned with budget monitoring.

11. This will mean the Strategic Programmes team need to rewrite the SmartSheet dashboard as soon as KPI's and PI's are agreed in Q1 so that for Q2-Q4 we are reporting against these new measures. These will be aligned to the updated corporate plan and agreed delivery plan.

12. In addition to the usual report dashboard to O&S they will be seeking to call for more detailed reports on Finance and Housing our two priority areas – which may include additional/separate O&S working group meetings.

### Options

13. No alternative options were considered. Regular performance monitoring is required to ensure the Overview and Scrutiny Committee can undertake its scrutiny function as set out in the Constitution.

### Timetable of Next Steps

14. Please include a list of key actions and the scheduled dates for these:

Action	Key milestone	Due date (provisional)	Responsible
Record and collate views of O and S on performance	Minutes and associated actions drafted and approved.	26/07/23	Committee Administrator
Coordinating feedback on questions, queries & issues raised but not addressed at this meeting	O and S Chair approval that issues raised were addressed.	TBD	Democratic Services Officers

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### Wards Affected

ALL

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### Policy Implications

Reading Ease Score:

**Please identify if this report contains any implications for the following:**

Equalities and Community Cohesiveness	Y
Crime and Fear of Crime (Section 17)	Y
Risk Management	Y
Environmental Issues & Climate Change	Y
Economic/Financial Implications	Y
Human Rights Act	Y
Organisational Consequences	Y
Local People's Views	Y
Anti-Poverty	Y
Legal	Y

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**Additional Information**

See links in the main body of the report.

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**Officer to Contact**

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