

Report for: Overview and Scrutiny Committee – 8 June 2023

Title: 2022-24 Corporate Delivery Plan and a New Performance framework - update for Scrutiny

Report

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Ward(s) affected: N/A

**Report for Key/
Non Key Decision:** N/A

1. Overview

The Corporate Delivery Plan (CDP) was agreed by Cabinet on 17 January 2023. This paper provides a short update on our new performance framework and next steps, including how we will monitor performance/delivery of the CDP, including timescales

2. Developing a Performance Management Framework for the CDP

Now agreed by Cabinet, the CDP sets out what the council will deliver over the next 18 months. It is important that the CDP is not just left on a virtual ‘shelf’ and is used by services to plan work throughout the year which is regularly monitored. As such a performance management framework for the CDP was developed and will be used to track progress on these commitments.

In line with our wider approach to project and programme management it was agreed that CDP reporting will be via a digital tool called Monday.com. Further detail on Monday.com can be found below.

The CDP and the selection of metrics were developed with senior manager input through a range of cross-cutting workshops that took account of manifesto commitments, existing priorities, and other key deliverables. There was a real focus on outcomes and what we want to change alongside how we measure and evidence the impact of the work we are doing.

Our previous reporting system and performance framework was based on key performance indicators (KPIs) /metric delivery against targets set to measure Borough Plan outcomes over a 3-year period. The new system is more holistic incorporating activity updates and assessment of change on a much more comprehensive basis bringing together data on a suite of metrics with outputs and activity that will contribute to achievement of specified intermediate outcomes.

The CDP performance management framework tracks delivery of activity and change working towards the 170 outcomes stated in the plan, not relying solely on reporting against KPIs and metrics. This more rounded view of performance allows for clearer ownership of actions and delivery so we can be transparent and accountable in our reporting of progress. Monitoring will include achievement of milestones, measurement of metrics and trends, evidencing progress tracking the direction of travel in agreed metrics and a narrative that sets out clearly what has been achieved.

To this end Monday.com is used to provide self-assessed RAG (Red, Amber, Green) rating updates on each of the 170 individual commitments/ lines (intermediate outcomes) in the Corporate Delivery Plan. Leads (i.e., named Assistant Directors) and their teams were asked to provide updates on each of the 170 lines. Although the RAG updates against each commitment involve a degree of subjective assessment, the criteria and other fields mean that the RAG assessment is supported with evidence avoiding the risk or assumption that plans are on track when the evidence suggests otherwise and that change, or delivery does not happen as planned. A clear understanding of the criteria and language used to make the self-assessment judgement (RAG allocation) is an essential ingredient of a performance management system working well.

As such detailed guidance and training have been provided for those making the progress updates on Monday.com to enable updaters to make an honest appraisal of progress and change achieved towards meeting the intermediate outcomes stated in the Corporate Delivery Plan using the stated criteria.

This framework is much more detailed by its very nature than anything we have had before. We are hoping to align the progress tracking with other activity happening across the organisation i.e., change and transformation programme activity also monitored using Monday.com.

3. Reporting using Monday.com

Monday.com is a web-based project and programme management tool, it is the tool for holding all information relating to the CDP and tracking delivery of change and achievement of specified outcomes. Broadly, it has two main parts – boards, and dashboards.

Boards are a bit like a spreadsheet and store all the main information. A CDP Board has been set up, and this is where the Leads/nominees enter their regular updates on a quarterly basis.

Dashboards are the more visual part and most useful for multiple audiences including Senior Officers, the Cabinet and Scrutiny. This is where information about performance and delivery is presented, via graphs and tables. Dashboards present updates and progress against the 8 themes in the CDP and can be interrogated by lead officer or Member. They link to live data, so will always show the most up to date information. Some examples of a Monday.com dashboard can be found at [Appendix 2](#) including some visuals from the CDP dashboard following the initial test round of reporting.

Leads (or their nominees) have been and will continue to be asked to report progress updates directly into Monday.com in line with a timetable that allows for regular review and scrutiny.

Live reporting on Monday.com will be used to facilitate performance discussions across the council. We will publish a dashboard (extract from Monday.com) on our website so that we are open and transparent about the progress we are making against our commitments and metrics as set out in Corporate Delivery Plan.

What Leads were asked to report on (new reporting framework)

Each of the 170 lines in the published CDP has an intermediate outcome (what we hope to achieve), metrics/measurements (how we can measure) and a summary of activity (what we plan to do over the next 18 months).

To get a more rounded view of progress, we are tracking both delivery of activity, and overall change towards achieving each intermediate outcome – so not reporting solely on metrics as we have in the past.

The framework asks for quarterly updates on the following:

- **Delivery of activity** [green/amber/red status update] – this should be based on whether overall delivery is on track, milestones met, specific activities achieved.
- **Achieving intermediate outcome** [green/grey/amber/red status update] – this should be based on movement towards achieving the intermediate outcome – i.e., the overall direction of travel
- **Metrics** – where specific metrics are listed (i.e., percentage of apprenticeships), updates should be provided where the data is available
- **Commentary** – an explanation of progress and how the status updates above were decided is set out here

More detailed information about criteria for the RAG Status allocation is set out at [Appendix 3](#) and was covered in the training sessions for staff.

4. Reporting – the when

As set out above, services will be asked to provide quarterly updates on progress. The first round of quarterly updates was scheduled from 03-21 April and a timetable for future updates has been agreed.

CDP updates will be brought to the Cabinet and Overview and Scrutiny Committee every 6 months. Additional updates can be provided to Scrutiny panels, as necessary.

A more detailed timetable is set out at [Appendix 1](#).

5. First Round of Reporting and Next steps

The first round of reporting has been used to test the approach.

Since the test round a new approval workflow has been set up on Monday.com that will be used in the next round of reporting. With a subjective RAG rating system as the basis for tracking progress, having this additional level of review should help foster a culture of review and feedback with the oversight and quality assurance process driving discussions about performance issues and risks.

The performance discussions at Directorate Management Teams will enable any consistency or quality issues to be ironed out with active conversations about exceptions- good and bad. This will ensure a golden thread aligned to our organisational goals and will support continuous improvement, ownership of actions and accountability.

Dashboards have been created to facilitate interrogation of the data at service level but also at theme level which will help to monitor performance and activity on cross-cutting projects.

Use of Monday.com live automated updates and new processes for monitoring and reviewing performance will help us to be more efficient whilst embedding a robust organisational culture driving improvement.

In the interests of transparency and openness we intend to publish a dashboard on the website that will show progress against the commitments in the CDP with a short update on exceptions.

We have scheduled to take a first report to Cabinet in September 2023.

We hope that providing updates in this way will enable the Overview and Scrutiny Committee and Panels to use the CDP updates as part of their role in scrutinising and supporting performance improvement and to inform the Overview and Scrutiny work programme. Scrutiny Panels will have an opportunity to review delivery and to use these updates to shape and guide conversations with services directly. This should help further embed a culture of service improvement and delivery with a framework focused on measuring impact, including the change that our communities will see.

APPENDIX 1 - Updated Timetable for Reporting

				CDP published
2023	Jan	Q4		• Launch of CDP with wider staff
	Feb			• Monday.com development – setting up systems and processes
	Mar			• Testing, training, and guidance issued
	Apr	Q1		• Services to provide first CDP updates
	May			• Iteration of process & approach as required
	Jun			• Briefing provided to Overview and Scrutiny Committee
	Jul	Q2		• Services to provide CDP updates
	Aug			
	Sep			• Cabinet Meeting • Performance update published on website
	Oct	Q3		• First CDP report to Scrutiny
	Nov			• Services to provide CDP updates
	Dec			
2024	Jan	Q4		• Services to provide CDP updates
	Feb			
	Mar			• Cabinet Meeting • Performance update published on website
	Apr	Q1		• Second CDP report to Scrutiny
	May			• Services to provide CDP updates
	Jun			
	Jul	Q2		• Services to provide CDP updates
	Aug			

APPENDIX 2 - Example of Monday.com Dashboard

View permissions activated in one or more boards connected to this dashboard [Learn more](#)

H@Work - Project Dashboard View Edit

Search Person Filter / 9

Overall RAG



RAG Justific...

Overall status is Green. Resources dropped to Red to reflect lack of clarity on project & BAU support resourcing. (see Risk-729882)

RAG Summary

Portfolio - RAG Summary | Portfolio - DPMO

Live Highlight Report

Project	Project RAG	New Report	Report Date	Time	Scope	Budget	Resources	Benefits
H@Work	Amber	New	Jan 23	Green	Green	Amber	Red	Green

Archive Highlight Reports

Project	Project RAG	New Report	Report Date	Time	Scope	Budget	Resources	Benefits
H@Work	Green	New	Oct 12, ...	Green	Green	Amber	Green	Amber
H@Work	Green	New	Nov 11, ...	Green	Green	Amber	Green	Amber
H@Work	Green	New	Dec 2, ...	Green	Green	Amber	Amber	Green
H@Work	Amber	New	Jan 16	Green	Green	Amber	Red	Green

Narrative Summary

- Primary focus of the project is on deploying Portfolio Management System to additional council PMOs: CPMO & Regen currently underway, with Kick-Offs held for Parks, Capital Projects, and E&N PMO
- Bid submitted to Local Digital Fund, for cross-council Portfolio Management Solution project in 2023
- Transition to BAU Support Model scheduled to run for 6 months from Feb-23 through to Aug-23 to be fully live in BAU support before Project Resourcing ends in Oct-23

Risks & Issues

Below you can find the Project Risk Log & Issue Log.

- The Overall Risk level will calculate automatically when you enter a

Risk Portfolio



Open Risks

6

Risk Categories



Category	Count
High	2
Medium	2

APPENDIX 3 - Performance Framework: Criteria for RAG assessment of progress/scoring for Corporate Delivery Plan updates

This approach to performance and project management allows wide visibility, which is critical to the engagement and progress tracking of the actions set out in the plan. When this new framework and associated governance is fully embedded, we will be able to report openly on performance and achievement of outcomes.

2 assessment/scoring updates to RAG rate to reflect progress made:

- 1) **Achieving intermediate outcome** – this is based on movement towards achieving the intermediate outcome – i.e., the delivery of change and overall direction of travel on agreed metrics supporting evidence of change delivered.
- 2) **Delivery of activity** – this is based on whether delivery is on track, milestones met, specific activities achieved.

Scoring Criterion:

Achieving Intermediate Outcome measuring the delivery of change towards achievement of outcome:

- **Green** = metrics/measurable outputs show positive direction of travel & there is evidence of change/progress in line with what was planned for this reporting period
 - Main objective/goals met with evidenced accomplishments/ successful achievement of intermediate outcome
 - You could explain change achieved and impact on the resident/progress towards achieving desired outcome.
- **Amber** = metrics showing progress in the right direction, but activity or deliverables/desired change not yet achieved or behind planned schedule
 - Some evidence of progress/accomplishments heading towards partial achievement of intermediate outcome
 - You could explain change achieved and impact on the resident alongside partial progress towards achieving desired outcome.

Intermediate Outcome Not achieved

- **Red** = metrics not yet evidencing change or desired DOT (direction of travel), milestones not met, change not evidenced or activity not delivered in line with plan timescales
 - There is a negative direction of travel overall and no evidence to support delivery of intermediate outcome or accomplishment related to deliverables as specified in CDP.
 - You would struggle to explain change achieved and/or positive impact on the resident or progress towards achieving desired outcome.
- **Grey** =no update on change or measurables available at this stage

Delivery of activity measuring project activity:

- **Green**= Project/activity on track
 - Delivery of project activity **on track** in specified timescale supported by evidence.
 - All milestones met for the period being reported on
- **Amber**= Project/activity slightly off-track/ behind plan
 - Some progress made against objectives/ delivery outputs but Not as specified in plan/timescale or evidenced by metrics.
 - Not all milestones met for the period being reported on
 - There is a positive direction of travel overall and mitigation for project/delivery delays.
- **Red**= Project/ activity not delivered as planned
 - No real progress made since previous period and no evidence to support successful delivery of objective or goals in specified time.
 - Milestones not met or very few milestones achieved for the period being reported on
- **Grey**=no update on activity or measurables available at this stage, project has not started.