

**TITLE OF REPORT:** Performance Management and Improvement Framework –  
Year End Performance Report 2023/24

**REPORT OF:** Dale Owens, Chief Executive

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### **Purpose of the report**

1. To report to Cabinet the 2023/24 Year End assessment of performance against the Council's Performance Management and Improvement Framework (PMIF) along with the comments made at Overview and Scrutiny Committees. Cabinet is asked to approve the 2023/24 Year End performance report at Appendix 2 and note the key discussion points from the Council's Overview and Scrutiny Committees at Appendix 3.

### **Background**

2. The corporate approach to performance management and improvement was approved by Cabinet on 20 April 2021 and agreed by Council on 27 May 2021 with the draft measures and interventions agreed by Cabinet in October 2021. The PMIF has a clear focus on policy and priorities, delivery, measurement, and analysis of impact to support effective resource allocation and is based on the Thrive agenda and the Health and Wellbeing Strategy.

### **Year End Reports 2023/24**

3. Analysis of performance has been undertaken for 1 April 2023 to 31 March 2024, against each of the six policy objectives of the Health and Wellbeing Strategy and the Corporate Balanced Scorecard. High level analysis of performance highlighted several cross-cutting key issues which are set out in Appendix 1.
4. The 2023/24 Year End performance report is at Appendix 2. The reports outline the challenges, achievements, actions, and resources for each policy objective. It also contains performance data including strategic and operational measures and is informed by qualitative and quantitative assessment to inform policy and resource decisions. These have been informed by services.
5. Council services provide this information and use this evidence to compare and analyse trend and craft appropriate action and responses. Where performance is highlighting a deviation from expected position this is highlighted in the analysis section with defined mitigation provided by services.

6. Each of the Council's Overview and Scrutiny Committees considered the Year End performance report in its entirety and received a written report highlighting some of the key areas of performance that are pertinent to the role and remit of the committee. A summary of the discussions at each OSC is also set out in Appendix 1.
7. A copy of the draft minutes from each Committee is at Appendix 3.

## **Proposal**

8. It is proposed that Cabinet consider and agree the performance report at Appendix 2 including the analysis, areas for improvement, and the key issues highlighted during discussions by Overview and Scrutiny Committees, which are summarised in Appendix 1.
9. The suggested areas for improvement will be taken forward and the PMIF will be aligned to the Budget approach agreed by Cabinet. Further development will take place to address comments made by Overview and Scrutiny Committees, in preparation for the new reporting cycle, which commenced in April 2024.
10. The development of the PMIF is iterative. Ultimately it is a tool used throughout the year to manage performance and improvement against priorities and see the impact of policy and resource decisions.

## **Recommendation**

11. It is recommended that Cabinet:
  - (i) Approves the 2023/24 Year End performance report at Appendix 2.
  - (ii) Notes the key discussions and from the Council's Overview and Scrutiny Committees at paragraph 8 of Appendix 1 and in the minutes at Appendix 3.
  - (iii) Notes the ongoing development work and upcoming review being undertaken at paragraphs 9-11 of Appendix 1.

For the following reason:

- To ensure performance supports the delivery and achievements of Making Gateshead a Place Where Everyone Thrives.

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**CONTACT: Iain Burns - Extension 2184**

### Policy Context

1. The proposal supports the Council's priorities for Thrive by setting out a framework to manage performance against its key priorities for thrive, tackle inequalities and the impact being made on delivery of the Health and Wellbeing Strategy. The Performance Management and Improvement Framework (PMIF) analysis in the report informs future policy decisions as well as resource allocation to ensure these are focused on Council priorities as part of a broader evidence-based approach.
2. The Council's Medium-Term Financial Strategy sets out the financial context for the Council's resource allocation process and budget setting. The proposals support the aims within the Strategy by aligning performance with the overall approach to the budget to support the financial sustainability for the Council ensuring that resources are deployed on the outcomes for making Gateshead a place where everyone Thrives.

### Background

3. Local authorities use performance management to identify how well they are delivering outcomes for local people. The Council's performance framework has been in place for several years and has evolved over time.
4. The PMIF was agreed by Cabinet (20 April 2021) and Council (27 May 2021) that better reflects the priorities of the Council – the delivery of the Council's Thrive policy and Health and Wellbeing Strategy.
5. The engagement along with research into best practice was used to develop the PMIF and was agreed by Council in June 2021. The initial draft measures were considered and agreed by Cabinet in October 2021, with further updates to several measures agreed by Cabinet in July 2022. Since then, progress has been focused on the ongoing implementation and embedding of the framework and the reporting of performance to members, as well as working with services to ensure measures remain meaningful.

### Year End Performance Reports 2023/24

6. The analysis of performance for the Year End stage against each of the six policy objectives of the Health and Wellbeing Strategy and the Balanced Scorecard is set out at Appendix 2. It outlines the challenges, achievements, actions, and resources for each policy objective. It also contains performance data including strategic and operational measures, resources, and risks.
7. Cross-cutting key areas highlighted by services are:
  - Budget pressures continue to provide a significant challenge across the Council.
  - Continuing demand pressures being faced by services with increased complexity and conflicting priorities in many areas.
  - There are ongoing issues with recruitment and retention across all areas.

- Many services across the Council are working closely with key partners and local communities to deliver support to residents in need.
  - The cost-of-living and high interest rates are continuing to impact the financial challenges already facing some residents.
  - The economic climate continues to make things difficult for many businesses in the borough, as well as the global economic and political uncertainty impacting level of business investment.
  - Many services are actively engaging with customers to improve their offer and/or customer experience.
8. Each Overview and Scrutiny Committee considered the Year End performance report in its entirety and received a report detailing some of the key highlights most relevant to the role and remit. The Committee were also informed of the proposed review of the PMIF which will be taking place over the coming 12-months. A summary of the discussions at OSC is set out below:

#### *Corporate Resources OSC*

- There were no direct questions arising from the report, and no further areas for scrutiny were identified.

#### *Care, Health & Wellbeing OSC*

- Members sought clarity on:
  - The impact that the recent shift in government policy relating to the skill-level and salary required for migrants will have on Gateshead, and how this might affect our ability to perform.
  - What is driving the increased length of time to deal with care assessments.
  - The importance of keeping people in home environments rather than in hospital, and the impact this has on residential homes, as well as the current position of residential care provisions across the sector.
  - The national issue of a lack of social housing, and how this is impacting Gateshead and the Council.
  - How the Council is supporting residents who are having to sell their home and go into residential care, as well as the challenges surrounding residents who don't or can't sell their property, and those renting their home.

#### *Housing, Environment & Healthier Communities OSC*

- Members discussions focussed on:
  - It would be helpful if the performance report included more specific targets as well as additional data such as comparisons with other local authorities or relevant organisations, particularly in relation to tracking measures.
  - The increase in expenditure for Bed & Breakfast and temporary accommodation, and it was asked how the Council plan to reduce this cost going forward.
  - The increase in employee resignations was highlighted, and further information was requested into why it has increased. The committee noted

that a leaver survey has been operating for only a few months and once the Council has received the data and results, this can be fed back.

### *Families OSC*

- Members comments and discussions focussed around:
  - Readiness for school, and the reasons behind why some children are not achieving a good level of development by the end of reception.
  - How much control the Council has over issues such as school exclusions, and the Council's ability to influence this, particularly in relation to academies.
  - Schools that aren't currently Ofsted rated as good or outstanding, and the work that the school improvement service undertake.

### **Further development and review**

9. The approach will be continually reviewed to ensure it is effective in enabling performance management and improvement towards better outcomes. The flexible, iterative approach that has been adopted to develop the PMIF, reflects the changing circumstances that the Council works within and aims to ensure that performance against priorities can be managed in the most efficient and pragmatic way being responsive to changing needs to ensure it will remain fit for purpose. Over the coming twelve-month period the current PMIF will undergo a review to ensure that the information provided by the framework continues to add value to decision making process and reflects advancements in technology and the introduction of the Office for Local Government.
10. A review of the presentation of performance reports was undertaken with a reduction in narrative and an expansion in the number of data sets to improve trend analysis, so it meets the request of the Corporate Resources OSC for data to include as a minimum the baseline, previous, and latest data sets.
11. An online/digital format is in its development phase. This will aim to cluster measures around key priority areas and present a visual representation of the performance data to be used alongside the analysis. This is a complex task and will involve areas across the Council, link to existing data approaches such as Local Index of Need (LlON) but will provide performance data at various levels from strategic to operational in an accessible way. It is proposed that this will be accessible via the intranet initially, and internet eventually.

## Alternative Options

12. An alternative option would be to identify alternative actions to address performance, however the activities recommended in the report are based on analysis of performance data and would support delivery of the Council's Thrive policy.

## Consultation

13. All Overview and Scrutiny Committees have considered the Year End performance reports. A copy of the minutes of each Committee is attached at Appendix 3. The Leader and Deputy Leader of the Council have also been consulted on the proposal.

## Implications of Recommended Option

### 14. Resources

- a. **Financial Implications** – The Strategic Director, Resources and Digital confirms that the proposal will have no direct financial implications as a result of this report. The proposal aims to align performance with resources and enable better informed decision making.
- b. **Human Resource Implications** – There are no Human Resource implications arising directly from this report, although there are areas relating to employees highlighted in the report.
- c. **Property Implications** – There are no property implications arising directly from this report.

15. **Risk Management Implication** - The proposals will reduce the risk of the Council not achieving its priorities by enabling effective performance management across strategy corporate priorities.

16. **Equality and Diversity Implications** – There are no direct equalities and diversity implications arising from this report, however the framework has a focus on addressing inequalities.

17. **Crime and Disorder Implications** – There are no crime and disorder implications arising directly from this report.

18. **Health Implications** – While there are no direct health implications arising from this report, the PMIF is based on the six policy objectives within the Health and Well-being Strategy so will help to manage performance at a strategic level across a range of wider determinants of health.

19. **Climate Change and Sustainability Implications** – There are no climate change implications arising directly from this report, though the PMIF will seek to manage

performance across a range of strategic priorities including climate change. There are no sustainability implications arising directly from this report.

20. **Human Rights Implications** – There are no human rights implications arising directly from this report.

21. **Ward Implications** – There are no implications for a specific ward arising directly from this report, though the framework will include a geographical focus on performance where appropriate.

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CONTACT: **Iain Burns - Extension 2184**