

# Performance Management Framework

September 2025

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## Introduction

This document outlines the methods and processes used by Huntingdonshire District Council to address the management of Performance, through its various data collection, manipulation and reporting methods, while also expounding upon the governance involved, the opportunities for scrutiny and various layers of approvals undertaken, replacing the 2023 Performance Management and Data Quality Framework documents previously established.

The refreshing of this document achieves multiple aims: firstly, it complies with the statutory guidelines that ensures that we are continuing to review and update our processes and policies according to the Local Government Act 1999; secondly, it aligns with our corporate plan put in place in 2023 and reaching to 2028, which we know to be the introduction of a new Unitary Authority, as per the Local Government Reorganisation letter sent by Government on December 16<sup>th</sup> 2024; and thirdly, as a response to our Corporate Peer Challenge which highlighted the requirement for a structured document, in addition to the Performance Audit which supports the need to refine and update policies to reflect new best practices which would further incorporate proposed standards and intervention models from the Department for Levelling Up, Housing and Communities (DLUHC)

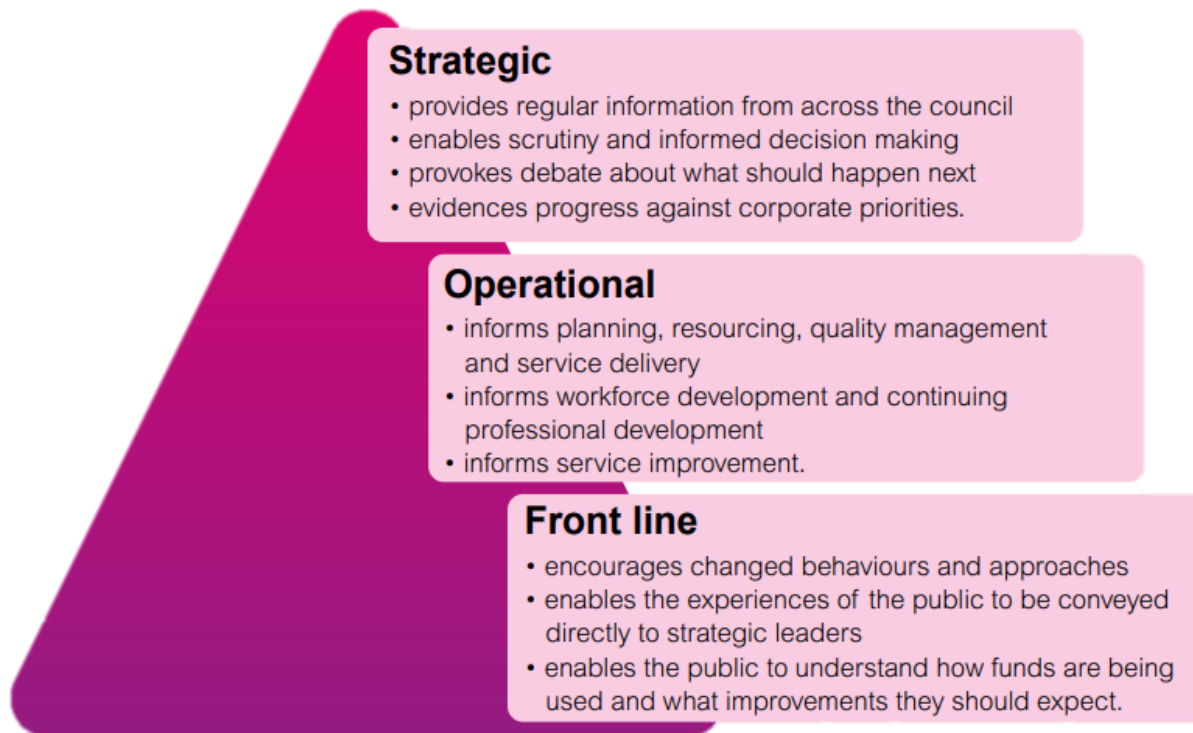
## What is Performance Management?

Performance management involves the monitoring of progress and incorporating data into decision making processes, whereby data is used to measure the effect of changes to business operations. For HDC, performance looks to directly measure the benefit of the council to the residents of Huntingdonshire, and the management of performance is used to ensure that this reaches and maintains a high-quality service. Performance is measured in accordance with our Corporate Plan, a shared strategic goal for the area, using feedback from the Council itself, and the Officers responsible for the delivery of Services to residents.

Performance management is of high value as it demonstrates a high level of accountability through Overview and Scrutiny Boards from the Council, with opportunities for the public and councillors to express their views and concerns where performance is not high enough. This level of transparency is significant to Councillors and Residents, and this document aims to provide greater context to the information provided around information collected, in such a manner that it is clear, accessible and relevant to the reader.

In addition to the above, performance management supports efficient and effective service delivery, ensuring high quality and value for money, by providing traceable and measurable outcomes and allowing greater context to be provided in the progress and successes of the Council in delivering the promised projects.

The measurement of performance enables the Council to identify areas of strong performance to build on and recognise underperformance as opportunities for learning and improvement. The following graphic highlights the different ways in which performance management is beneficial to the Council and its residents.

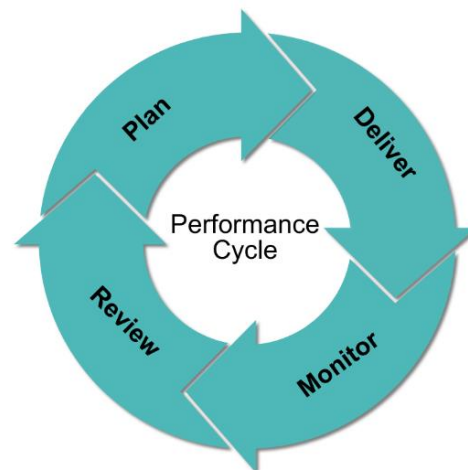


*Value of performance management at different levels*  
[Local Government Association Performance Management Guide For Local Authority Officers](#)  
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## Our Performance Cycle

Effective Performance Management is based on a continual process, or cycle, which follows these key principles:

1. **PLAN** what needs to be done to achieve a set of outcomes
2. **DELIVER** what is in the Plan and establish ways to measure performance
3. **MONITOR** the impact of our work against the outcomes
4. **REVIEW** progress and performance regularly to identify what has gone well or what could have been improved



## Data Quality

All performance information should be underpinned by good data quality and the adherence of robust Information Governance procedures. The Council aims to ensure that across all service areas, there is a consistently high standard of data production and data quality. The Performance Team ensure that there is provision of Standardised Data Quality Templates for any data being collected; an example version being provided as Appendix B.2.

## National Performance Management Framework

There exists many national Government organisations which aim to capture and measure performance and direct struggling Councils in methods to improve performance. The existence of Chartered Institute of Public Finance and Accountancy (CIPFA) and the Local Government Association (LGA) and the tools they provide, such as the Data Maturity Assessment, allow for strong performance infrastructure and provide valuable resources as to how the Council might progress.

Local authorities retain significant freedom in how they organise, deliver, and manage performance, with minimal central reporting. However, they remain accountable to local residents and service users. As such, understanding how the Council will communicate and measure performance is essential, especially when comparing to similar Authorities (CIPFA Nearest Neighbours) and geographical neighbours.

### New National Framework – LGOF:

The Local Government Outcomes Framework (LGOF) is a new model introduced to support performance management in English councils, especially relevant ahead of Local Government Reorganisation.

It shifts focus from inputs and outputs to 15 priority outcomes—such as economic growth, regeneration, and reducing child poverty—providing a shared structure for assessing impact and guiding strategic decisions.

For local authorities, LGOF enhances performance management by:

- Aligning local and national priorities, helping councils demonstrate value and progress.
- Reducing reporting burdens, replacing rigid metrics with flexible, outcome-based evaluation.
- Encouraging collaboration, both between councils and with central government, fostering peer learning and innovation.
- Supporting transition, offering a consistent framework to manage change during reorganisation.

Ultimately, LGOF empowers councils to focus on what matters most to communities, while maintaining accountability and preparing for future structural changes.

### Best Value Duty – Updated Statutory Guidance:

The Department for Levelling Up, Housing and Communities (DLUHC) issued new statutory guidance in May 2024. This replaces the 2015 version and clarifies expectations under the Local Government Act 1999.

The guidance outlines seven themes for assessing compliance:

- Continuous Improvement
- Leadership
- Governance
- Culture
- Use of Resources
- Service Delivery
- Partnerships & Community Engagement

Authorities must demonstrate improvement across these areas and are encouraged to engage with external scrutiny and peer reviews.

## Our Plans and How We Deliver

The Council commits to delivering against priorities set in the Corporate Plan through defined actions and annual performance measures. The Corporate Plan contains a combination of measures and actions which are reviewed and updated yearly to reflect completed work and evolving approaches, informed by engagement with partners and residents.

The Council categorises projects in accordance with their levels of influence:

**Do** directly,

**Enable** through partnerships,

**Influence** via engagement and advocacy.

### Target Setting:

Targets are developed collaboratively by Service Managers, Senior Leadership Team, Elected Members and Portfolio Holders. They help maintain service standards, track progress, and identify areas for improvement. Targets are informed by historical trends, seasonal patterns, benchmarking, and resource availability. They balance ambition with realism, considering external factors and capacity.

## Our Corporate Plan

### Purpose

The Corporate Plan sets out the Council's strategic and operational priorities, with a clear focus on delivering tangible outcomes for the district. It guides both direct service delivery and collaborative partnership working.

### Resource Allocation

It details how resources will be allocated to support these priorities, including planned efficiency improvements and investment in key services. This ensures that resource use is purposeful, targeted, and aligned with organisational goals.

### Annual Refresh

The Plan is refreshed annually to reflect progress, respond to emerging challenges, and incorporate evolving approaches. This keeps the Council's strategic direction current and responsive.

### Alignment with the Medium-Term Financial Strategy (MTFS)

The Corporate Plan is fully aligned with the MTFS, which provides a five-year framework for financial planning and resource management. Annual budget-setting processes are shaped by the Plan's priorities, ensuring funding is directed toward the most impactful activities and service targets.

### Service Plans

Service Plans are developed for all Council services and are closely aligned with both the Corporate Plan and the MTFS. They:

- Define key areas of work and delivery methods
- Identify required resources and associated risks
- Remain flexible and adaptive to changing priorities

These plans translate strategic objectives into operational actions, ensuring services are equipped to deliver effectively and responsively.

### Performance Guidance for Staff

Performance management is guided by a clear “golden thread” that links individual objectives to Service Plans and, ultimately, to the Corporate Plan. This ensures every staff member understands how their work contributes to broader organisational outcomes.

Managers are encouraged to:

- Align team and individual objectives with strategic priorities
- Assess staff contributions to service and corporate goals
- Use key performance indicators from both Corporate and Service Plans to monitor progress

This approach engenders accountability, clarity, and a shared sense of purpose across the organisation.

## Our ICARE Values

These values fit with the Council’s ambitions and are key enablers for our Corporate Plan.

**Inspiring:** We have genuine pride and passion for public service; doing the best we can for customers.

**Collaborative:** We achieve much more by working together, and this allows us to provide the best service for customers.

**Accountable:** We take personal responsibility for our work and our decisions, and we deliver on our commitments to customers.

**Respectful:** We respect people’s differences and are considerate to their needs.

**Enterprising:** We use drive and energy to challenge the norm and adapt to changing circumstances. We are always ready for challenges and opportunities, and we embrace them.



## Working Together

We will develop and report annually on a range of contextual outcome measures to monitor how outcomes for the district and its residents are changing. Most outcome measures will be based on external data sources published less frequently than our own operational performance indicators and provide a reflective view of what has happened in the district. Results will be presented against our preferred direction of travel but will not have targets since we will not have direct control over performance. However, monitoring them will allow us to identify trends over time and changes the Council and our partners may need to react to in the future.

## How We Monitor and Review

### Internal Monitoring:

The delivery of key projects, initiatives, performance indicators, and action plans are regularly monitored and reviewed through a range of internal Boards. Cabinet Members also monitor the performance of projects and services through meetings with the relevant Corporate Directors and Service Managers.

### Transformation Board:

The Transformation Board ensures the effective execution and assurance of all council strategic transformation initiatives, programmes, and projects. The board judges the impact of projects and approves, prioritises, or terminates them based on their impact across the Council or District in line with the Corporate Plan. Additionally, the board oversees the transition of projects to business as usual.

### Operational Performance:

The Operation, Performance and Efficiency Board ensures that business-as-usual services are delivered efficiently and effectively. This is tracked using actions and performance metrics from the Corporate Plan. The actions covered not just what we do directly, but what we are doing to enable and influence others. Additionally, the board looks for continual improvement by identifying opportunities for service improvement and supporting them with any changes that would need to be made.

### Quarterly Reporting:

Quarterly reports focus on the outcomes, actions, projects, and performance indicators outlined in the Corporate Plan. These are aligned with our seven key corporate plan priorities. The reports are presented to the Overview and Scrutiny for Performance and Growth, allowing Cabinet Members to be held accountable for their portfolios. Feedback raised from the Overview and Scrutiny meeting is then reported to Cabinet meetings with the report.

### Staff Performance:

Managers are expected to monitor the performance of their staff on a regular basis, ensuring that all performance goals set out for their staff are on track for achievement.

### Performance Indicators:

Performance indicators are collected monthly, with the data and context being provided by a stakeholder. Each piece of data is manually reviewed for inconsistent results and a lack of context for deviances in trends. If either of these is present, the reviewer will contact the stakeholder and ensure that any mistakes are rectified. Discussions will also take place to ensure better practices are implemented in the future to avoid errors.

### Corporate Plan Actions:

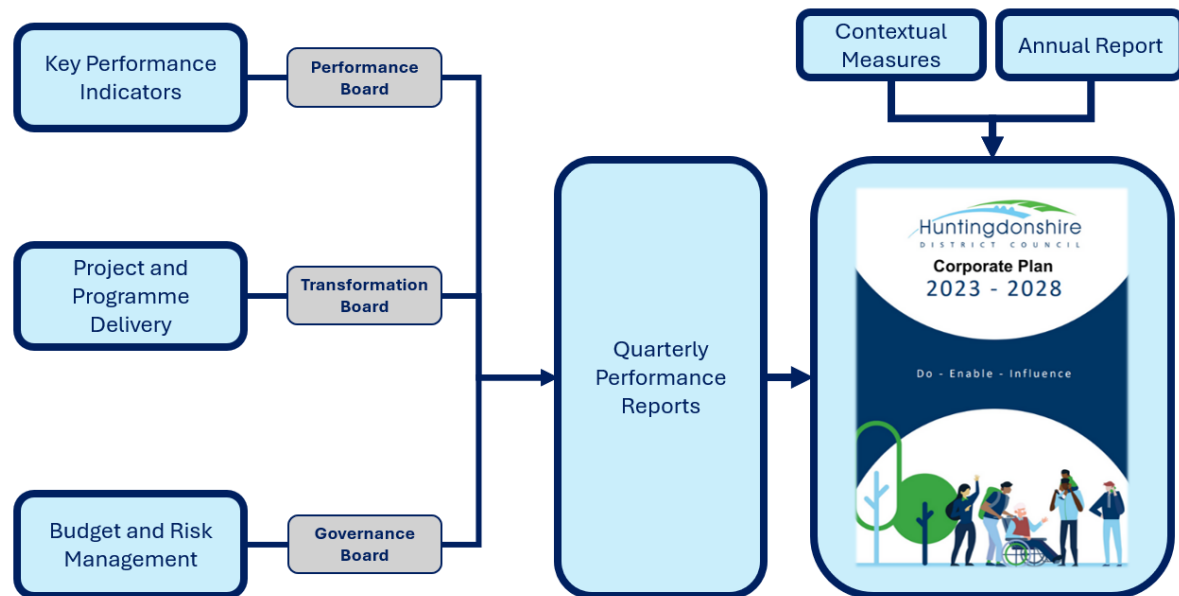
The Council's progress in alignment with its Corporate Plan is reviewed with a set of Corporate Plan Actions. Each action will receive an update, RAG status, and an impact each quarter. Each action is scrutinised to ensure enough information is provided and that the comments conform with the RAG



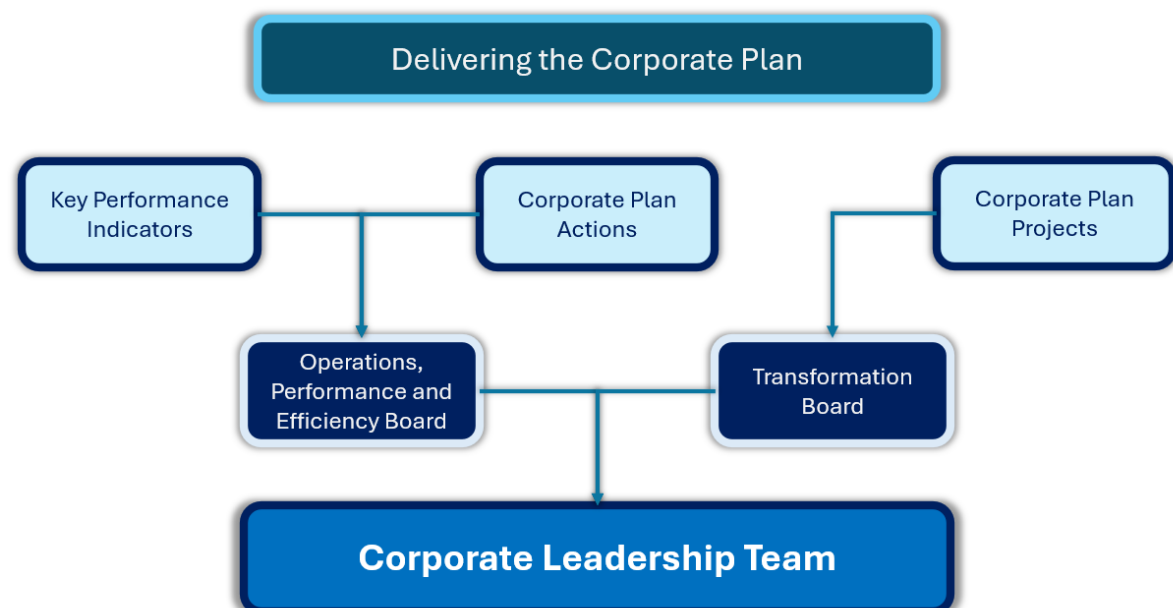
status. Any stakeholder who has not completed their Actions adequately is then contacted for additional information and reminded of the guidelines on giving updates on their Actions

## Visuals of Corporate Plan Flows

### Corporate Plan Creation



### Corporate Plan Delivery



## Acting on Performance Information

Opportunities for improvement are identified through various processes.

The Business Performance and Insights team, along with the Finance team, Internal Audit, and members of the Transformation Board, Programme Boards, and the Operations, Performance, and Efficiencies Board, work together to ensure that financial and performance decisions are aligned, focusing is on directing resources towards key priorities. Board members collaborate with service managers and elected officials to address any performance issues that may arise. They also share best practices and lessons learned to ensure that value-for-money considerations remain at the forefront of decision-making.

The Business Performance and Insights team conducts regular reviews of corporate performance, and targets are assessed and stretched, where possible, every six months.

Huntingdonshire District Council is dedicated to continuously improving how it operates. Opportunities for improvement are identified through various channels, including audits, internal reviews, and research into best practices. Key insights and successful strategies are shared with other local authorities and organisations through networking and collaboration events.

Where appropriate, Peer Challenge Processes are utilised to help drive continuous improvement. Most recently taking place in 2024, this involves inviting another council or an improvement group to review our processes, helping us identify issues and providing recommendations for our improvement plan. The consultation on Best Value Guidance outlines a new expectation that Local Authorities should conduct corporate or finance peer challenges at least every five years.

In addition to evaluating service performance, we also assess their efficiency through benchmarking and monitoring unit costs. The Operations, Performance, and Efficiencies Board, along with individual service managers, are responsible for reviewing efficiency.

Where possible, benchmarking allows us to compare our performance with that of similar local authorities, highlighting how our services measure up in a larger context. This comparison helps us identify our strengths and focus on areas that need improvement.

Feedback from staff and residents is valuable in identifying opportunities to enhance services and performance. Staff feedback can be gathered through team meetings, consultations, one-on-one meetings with managers, temperature checks, and exit interviews. Resident feedback can be obtained from focus groups, community engagement, consultations, complaints, and compliments. This information is then reviewed by management and used to inform decisions regarding performance improvements.

The Cabinet can ask managers to provide information about performance issues and may request additional work to address specific concerns. Additionally, the relevant Overview and Scrutiny Panel can also request that performance information be supplied and clarified further.

## Corporate Governance

The Council operates a well-established governance framework that ensures transparency, accountability, and effective decision-making across all levels of the organisation. The Council follows a Leader and Cabinet model, supported by Overview and Scrutiny Panels and the Corporate Governance Committee, which oversees internal control, risk management, and financial accountability.

Governance responsibilities are clearly defined through the Council's Constitution and a Local Code of Corporate Governance, aligned with CIPFA's "Delivering Good Governance in Local Government" framework. These structures are regularly reviewed and verified by external auditors to ensure compliance and continuous improvement.

The Council's governance framework is further strengthened by external validation through the Local Government Association's Corporate Peer Challenge, most recently completed in 2024, with a Progress Review in 2025. This process provided independent assurance and constructive feedback on strategic leadership, governance, financial planning, and continuous improvement. The Council responded with a comprehensive action plan, demonstrating its commitment to transparency, accountability, and learning.

At the officer level, governance is supported by the Senior Leadership Team and operational management groups, with regular meetings to plan, review policy, and oversee strategic delivery. Statutory officers (Head of Paid Service, Section 151 Officer, and Monitoring Officer) meet monthly to ensure alignment and accountability.

Performance and project delivery are monitored through structured governance boards. Internal Audit and Risk Management functions provide independent assurance, with a risk-based approach to auditing and a commitment to continuous improvement.

This governance framework underpins the Council's strategic planning and performance management processes, ensuring that services are delivered effectively, resources are used responsibly, and outcomes for residents are continuously improved.

## Conclusion and Commitments

The Performance Maturity Framework highlights the systems that the Business Performance and Insights Team operate within the governance structure of the Council. It gives us a clear structure to assess how effectively we design, deliver, and improve the mechanisms that support performance reporting across the organisation.

We use this framework to provide a clear, structured approach to performance management with the purpose of providing the greatest transparency and accountability for our services to the residents of Huntingdonshire.

The framework supports regular reflection and adjustment, ensuring that our systems evolve in line with organisational needs and ambitions; this framework builds on the processes set forward in the 2023 Performance Management Framework. The Business Performance and Insights Team are constantly assessing better ways to deliver the outcomes established within this framework, focusing on the reports for Councillors and residents, and minimising the additional impact that tracking performance may have on officers.

## Appendix A: Roles and Responsibilities

Our approach relies on us all to take performance management seriously and ensure the Council makes its plans, policies and decisions based on good quality information. Roles and responsibilities are outlined below:

### **Council**

Elected Members are ultimately accountable to the electorate for the overall performance of Council services. Council is responsible for approving the budget and MTFS.

### **Executive Leader of the Council**

Has overall political accountability and is ultimately responsible for the Council's performance.

### **Cabinet**

Is the executive body of the Council. Key actions within each Cabinet Member's portfolio are set out in the Corporate Plan and Service Plans, and the associated resources needed are within the annual budget setting and prioritisation process.

### **Portfolio Holders**

Each Cabinet Member is given a portfolio of services and activities for which they take responsibility. Portfolio Holders are actively involved in reviewing performance and setting targets in relation to their portfolio. The Executive Councillor for Customer Services has portfolio responsibility for the Council's performance management arrangements. However, performance management is an integral part of every Portfolio Holder's responsibility.

### **Overview and Scrutiny Panels**

The role of these bodies is set out in the Council's Constitution. The Panels identify areas of the Council's work that need to be scrutinised and challenge performance and service improvement initiatives. The Performance and Growth Panel receives the quarterly Performance Monitoring reports for discussion and comment. Overview and Scrutiny Panels may choose to convene task and finish groups to investigate a specific performance issue.

### **Corporate Governance Committee**

The Committee monitors the risk management and governance arrangements at the Council to help ensure the effective delivery of services and the achievement of objectives. This Committee ensures the Council has adequate controls in place. The Committee reviews, and should contribute to the development of, the Annual Governance Statement.

### **Senior Leadership Team**

Senior Leadership Team advise Members regarding the setting of strategic direction and performance improvement priorities. They recommend targets and standards for performance and identify and manage strategic and performance issues and opportunities facing the Council. They are responsible for resources, budgets and risks within their remit.

Senior Leadership Team receives regular information on performance from service managers and considers reports on key strategic performance issues, including achievement against the Corporate Plan. Senior Leadership Team has responsibility for ensuring that services have effective data processes for monitoring performance indicators and ensuring that operational responsibilities for data quality have been delegated to individuals.

They also have responsibility for promoting the integration of performance management into the culture of the Council and for ensuring that performance information used in decision making is fit for purpose and reliable.

### **Service Managers**

Service Managers are responsible for the overall operational performance of their service, for developing Service Plans and are accountable for the contribution that their service makes to the strategic priorities and objectives within the Corporate Plan. They are responsible for resources, budgets and risks within their specific service areas.

They are also responsible for contributing to the integration of performance management into their area and for ensuring the quality of all data collected and reported within their areas of responsibility. Service Managers should consider how their service performs in the wider environment and proactively seek continuous improvement through benchmarking against comparable local authorities.

Where performance targets are not achieved, Service Managers are required to explain this and consider what remedial action is required; for corporately monitored performance indicators this is reported in the quarterly monitoring reports. Service Managers are required to provide assurance on the effectiveness of controls in place to mitigate/reduce poor performance in their service and ensure the involvement of staff in setting relevant and appropriate targets through the Service Planning process.

### **Business Intelligence & Performance Management Team**

Support and guidance are provided to Senior Leadership Team and Service Managers in delivering the performance management framework, and on elements such as performance indicators, monitoring of achievement against corporate priorities, target setting and data quality. This includes collating and presenting the quarterly Corporate Performance Reports. Support is also provided to services in the creation of data processes that support monitoring, including advice and guidance regarding the collection and calculation of performance indicators and the maintenance of the performance section of the Council's intranet system.

### **Strategic Insights and Delivery Team**

This team supports Service Managers with service planning and Transformation activities as well as overseeing the delivery and monitoring of corporate projects. Business Analysts identify opportunities within the Council to improve business processes.

### **Finance**

This team is responsible for providing guidance and the correct allocation of costs and income to budgets, as well as the production of all financial reports.

**Internal Audit**

The audit team informs the Annual Governance Statement, provides audit services and guidance and acts on risk management information provided by service managers. If data quality issues are identified through the course of an audit, this will be raised in the audit report. They also provide independent review of the corporate approach to performance management and data quality.

**Human Resources Team**

This team supports managers within the Council by co-ordinating the approach to employee performance management.

**Managers / Supervisors / Team Leaders**

All levels of staff with managerial responsibility are responsible for the operational performance of their team and for the two-way communication of corporate initiatives and performance issues. This group are responsible for ensuring they meet with their staff regularly and reviewing the training and skills needed.

**Individual staff**

All staff have a responsibility to manage their own performance and understand how their work contributes to their service plan and the overall performance of the Council. Managers and staff discuss and identify actions and targets for the current year as well as relevant training/personal development needs. Formal procedures exist to address continual and serious cases of under-performance.

## Appendix B: Data Quality Template (DQT)

### B.1 Data Quality Template Requirement

High standards of data quality are fundamental to ensuring that all performance data collected, presented, and published by HDC is fit for purpose. Across all services, HDC aims to ensure that the production, transformation, collection, and presentation of data are kept to a rigorous standard in line with the Government Data Quality Framework. By maintaining these high expectations, HDC can utilise data to support informed decisions, ensuring that residents receive the best possible services.

To uphold exemplary standards of data quality through HDC, a variety of methods are employed to produce and collect data. To ensure efficient and consistent methodology is maintained, most services rely on automated or semi-automated software systems to generate data related to their KPIs. Where there are limitations, data is gathered from trustworthy external sources, such as from Cambridgeshire County Council or Home-Link. Additionally, depending on the nature of the KPIs, some performance data is manually inputted by internal teams or derived from dependable projections.

To ensure data quality is kept to the standards set out in the Government Data Quality Framework, HDC ensures that key data quality dimensions are observed. Before each year of reporting, a data quality template is completed by key stakeholders for each KPI. The reporting frequency is agreed upon to guarantee that the most current information is available. To confirm that the data is unique, consistent, and complete, a clear step-by-step method for collecting the data is established and laid out. If applicable, the source database for the KPI is identified, and contacts for updating data sources and providing statistics are laid out. Accuracy is achieved by using reliable pieces of software to produce data and ensuring that any external databases used are up-to-date and reputable. To affirm that the data quality dimensions are being sustained throughout the reporting period, data quality reviews will be undertaken with services. It will be confirmed that all agreed-upon guidelines from the data quality template are being followed, and observations will be noted to ensure that data quality management is being improved in the future.

To maintain rigorous data quality standards across HDC, all stakeholders involved in the KPI reporting process are responsible for ensuring all data quality dimensions are upheld. With service managers and their teams collecting data and the Business Performance and Insights presenting the data, the process has been streamlined to allow efficiency and accuracy in performance reporting. Continual improvements are being evaluated and tested to ensure that the data used to help make decisions is of the highest quality and upholds the values of the Government Data Quality Framework. Examples of this include the data quality reviews, along with assessing alternative options for data collection software.

HDC aims to uphold consistently exceptional data quality across all service areas to not only align with the Government Data Quality Framework but also to ensure that key stakeholders are well informed to make decisions. To achieve this, individuals involved in the performance reporting process complete data quality templates before the reporting period to allow services to be aligned with each other at a high standard, and data quality reviews will be undertaken to confirm that the methodology agreed upon in the template is followed consistently.

### B.2 Template Document

Service	
Proposed KPI	



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Who is responsible for collecting the monthly statistics for this KPI?	
Who is responsible for producing an end of year forecast for this KPI?	
Who is responsible for providing commentary of the performance of this KPI?	
<p>In the absence of the above officer(s), which colleague(s) can access and provide performance results?</p> <p><i>Please ensure that this person has access to all the relevant systems and databases to provide the statistics, forecasting, and commentary.</i></p>	
<p>Please link systems / databases / spreadsheets used to collect the data.</p> <p><i>Please ensure that all officers and back-up officers have access to all the relevant systems and databases to provide the statistics, forecasting, and commentary.</i></p>	

<p>Please detail how the data is collected and how the result is calculated.</p> <p>Please ensure this is in enough detail so that a different officer could complete this process.</p> <p>If a document is already available detailing this process, a link to this document is sufficient.</p>	
<p><b><u>Service Manager sign-off:</u></b></p> <p><i>"I confirm that the above documented procedure is an appropriate and robust procedure that will ensure that the produced results are accurate and reliable for this indicator. I also confirm that the instructions are detailed enough for another officer to be able to generate the same result in the event of an absence."</i></p>	
<p>Name:</p>	
<p>Date:</p>	

<p>Why is it important for this metric to reach its target and be established as a corporate KPI shared with members and the public?</p> <p><i>Please ensure that you have considered residential wellbeing and political interest.</i></p>	
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Will seasonality affect this monthly outcome of this metric? If yes, why?	
Please outline any smaller contributing factors or variables that may prevent this metric from reaching its target level (Performing Amber)	
Please outline any significant contributing factors or variables that could cause this metric to perform below the	

intervention level (Performing Red)	
If this metric stays below the intervention level for an extended period, what actions can be taken to raise it into the minimum acceptable range (Amber)?	
Is there any Local/National Benchmarking data available for this metric?	

## Appendix C: KPI Governance

Key Performance Indicators, or KPIs, are measured behaviours to be tracked and traced throughout the year to provide a level of quality assurance for the services provided. These enable internal and external review and challenge to the operation of our services, offering context to discern if the Council is performance as expected.

### C.1 Setting KPIs for the Upcoming Financial Year

Each year, the KPI holders review their metrics and determine if they fulfil the following criteria:

- Statutory Reporting Metric
- Relevant to Political Motive
- Concerning Local Stakeholders
- Of high importance to the Council

These will then be collated for the upcoming year, given expected Targets and a level of acceptable performance, and approved by Heads of Service, CLT and Councillors, before being implemented for the upcoming year.

#### C.1.1 Setting KPI Metrics

Once per year, there is window of opportunity to review the existing KPIs. This review is undertaken by Service Leads and Heads of Service. Between them, they propose the KPI for the upcoming year and will fill out a Data Quality Template as evidenced in [Appendix B](#).

#### C.1.2 Setting KPI Targets and Tolerances

After identifying the desired KPI, and during the process of filling out the DQT, the Target Value for the year is set. The methodology changes depending on the context of the KPI, where it may be a growth KPI, setting the KPI to be previous year plus some percentage, a maintain KPI to keep the target the same, or a reduction KPI where the target is reduced from the previous year, or the aim is to keep it low.

#### C.1.3 Identifying Sensitivities and Interventions

The DQT includes sections that provide context to the KPI: this may be a direction of travel, aim of KPI, or the reasons why it is being measured if not before. Often, there are external factors that affect the performance of an indicator which historically would have been researched if performance dips.

By addressing the sensitivities of the Indicator at the setting of the target, intervention methods can be planned in the case that the external factors significantly impact the Indicator. Intervention methods will be provided for an indicator, though practice may vary due to added complexities. Any Intervention processes will be highlighted through the KPI Intervention Form.

### C.2 Monthly KPI Process

Each month, the progress of the KPIs is reviewed by the Operations, Performance and Efficiency Board run by the Director of People. In this session, stakeholders are encouraged to celebrate, challenge and comment further on their KPIs. These review sessions provide context for the Performance Team ahead of the Quarterly Overview and Scrutiny Panels.

#### C.2.1 Collection Method

KPI values are collected using an Excel document, which is prepared by the Performance Team, and restricted so that only the relevant fields can be updated. It is expected that Stakeholders fill in a quantitative value of progress, and comment on the progress of that month.

#### C.2.2 Validation and Checks

These values are sense-checked by the performance team, and the comments checked for spelling errors, grammatical errors and general legibility, before being automatically extracted into the Report.

#### C.2.3 Reporting Outputs

Our standard reporting outputs are a Power BI report, presented internally to the Operations and Efficiency Board. Quarterly, this is exported into a PDF and incorporated into the Corporate Performance Review document that is presented to Overview and Scrutiny.

## Appendix D: Service Planning

### D.1 Gathering Service Planning Information

#### Gathering Service Planning Information – Method of Collation

To ensure a consistent and efficient approach to collecting service planning data, the following tools and methodology will be used:

#### Tools Utilised

##### Microsoft Power Forms/Power Lists

- Includes pre-populated fields to support validation and reduce input errors.
- Enables automated capture of new entries (e.g., actions, projects) for streamlined reporting and approval workflows.

#### Approach to Collation

- Designed to be simple and intuitive for service managers.
- Data is maintained as a live dataset, reviewed biannually to ensure relevance and accuracy.
- Accessibility is ensured in line with organisational data governance standards.

**Timeline of Activities for Gathering Service Plan Report:** A structured sequence of activities will guide the collation and review process:

1. Distribute Planning Instructions: Service managers receive guidance documents and templates to initiate planning.
2. Raise Awareness: Service planning is introduced and discussed at the Managers Meeting to ensure alignment and understanding.
3. Data Entry by Managers: Managers input
  - Core service information
  - Planned projects and initiatives
  - Optional SWOT analysis to support strategic insight
4. Quality Review:
  - The Transformation Team conducts quality assurance checks.
  - Collaborative reviews are held with managers to refine and validate submissions.
5. Strategic Review
  - Heads of Service and the Corporate Leadership Team (CLT) assess:
    - Scope and ambition of plans
    - Potential organisational impact
6. Approval Stage
  - Service budgets and transformation plans are reviewed and formally approved.

7. Finalisation

- Final approval is granted.
- Completed service plans are published and made accessible to relevant audiences.

## D.2 Assistance Available

To support in completing each section of the Service Planning, a range of resources and help options are available:

- **Pre-Populated Templates:** Each Microsoft List is pre-filled with relevant information from previous years' Service Plan to help get started quickly. This content should be reviewed and updated as necessary.
- **Step-by-Step Guidance:** Clear instructions are provided within each section to guide through the required actions. Additional guidance on using Microsoft Lists is available [here](#).
- **Bookable Support Sessions:** Meetings can be booked for those requiring assistance with any part of the Service Plan. Access the [booking link here](#).
- **Contact for Queries:** For general enquiries or technical issues, please email: [performance@huntingdonshire.gov.uk](mailto:performance@huntingdonshire.gov.uk)



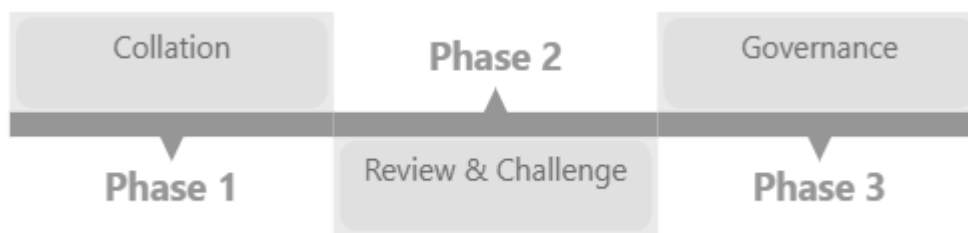
## Appendix E: Service Reporting Cycles

### E.1 Monthly KPI Cycle

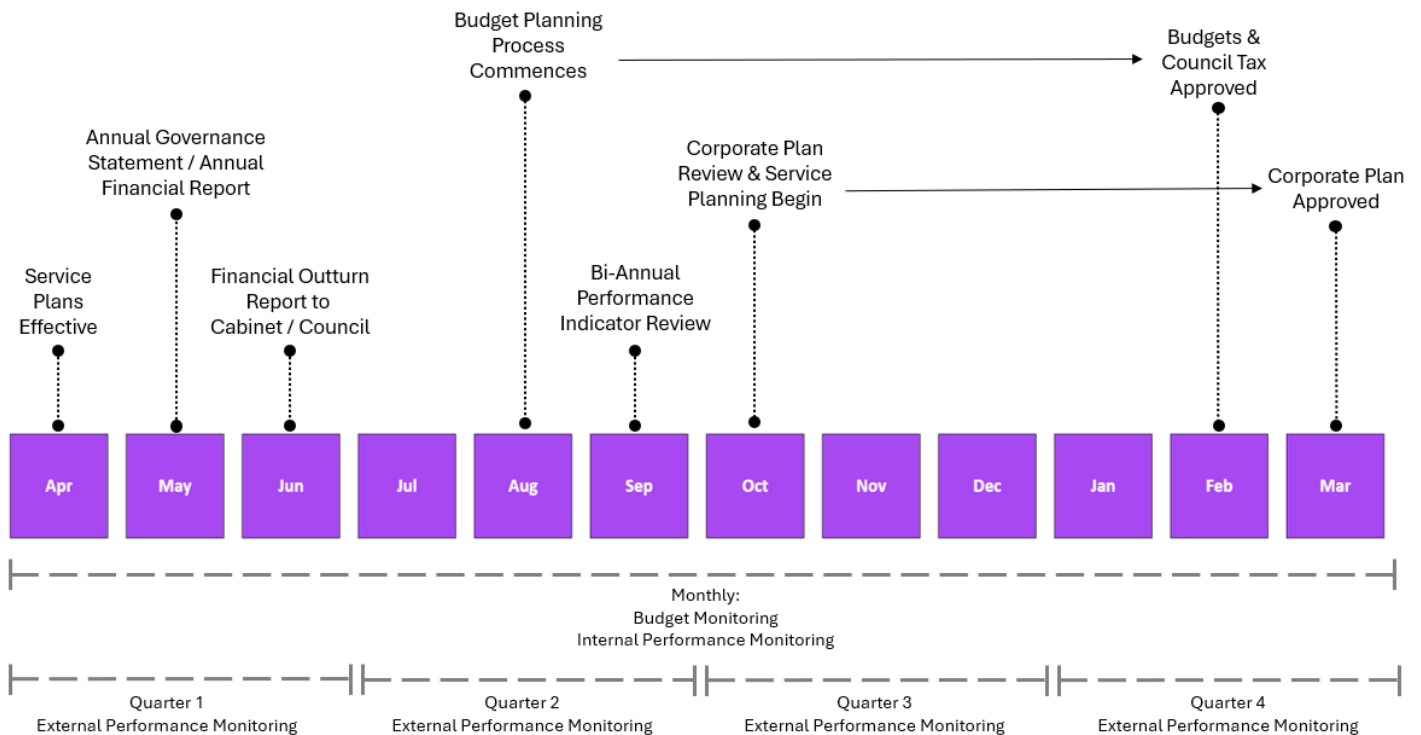
The monthly cycle begins with the Performance team reaching out to stakeholders to request updates on their performance the previous month. Stakeholders are asked to state what their performance was, compared to their target, add a comment explaining what has happened and why and then to forecast how their performance will impact the year-end target.

This data is then reviewed and challenged by the Performance team to ensure validity, reliability and consistency. The comments are also screened to ensure they are appropriate and descriptive. Where discrepancies occur, there is open dialogue between the Performance team and stakeholders to ensure resolution – this is raised to the Performance board where this is not possible.

The monthly process is governed by the Performance Board, headed by the Corporate Director of Communities. At these meetings stakeholders have the chance to comment on and scrutinise the performance of the organisation. Following these meetings, the board can recommend changes to performance reports, distribute follow-up actions and recommend further investigations.



## E.2 Annual Service Cycle



## Appendix F: KPI Intervention Form

This form is to be filled in when Performance is below expectations and not considered a temporary lapse. This should be identified by the Operations and Efficiency board, and this is an additional component to understand how this metric is being addressed.

<b>KPI Addressed</b>	
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## Progress

	Target	Actual	Further Intervention Required?
Month 1			
Month 2			
Month 3			

## Approvals

	Name	Date
Head of Service		
Director		
Portfolio Holder		