

# OVERVIEW AND SCRUTINY COMMISSION PERFORMANCE REPORT QUARTER 2 2024-25



## Contents

<b>1. Our Borough Strategy 2021-30 Priorities</b> .....	3
<b>2. Borough Strategy Priorities and the UN Sustainable Development Goals</b> .....	4
<b>3. Purpose of the Report</b> .....	5
<b>4. Executive Summary</b> .....	5
<b>4. Part 1 - Statistical analysis</b> .....	6
<b>4.1 Performance Against Target</b> .....	6
<b>4.2 The Performance Trend</b> .....	7
<b>4.3 Inter Authority Comparison</b> .....	7
<b>4.4 Summary and conclusion of statistical analysis</b> .....	8
<b>5. Part 2 - Commentary on performance against priority and outcome</b> .....	9
<b>Priority 6 - Be a responsible council</b> .....	9

# 1. Our Borough Strategy 2021-30 Priorities

Performance Management in St Helens Council is focused around achieving the 6 strategic priorities and outcomes outlined in Our Borough Strategy 2021-30.



**Priority 1 - Ensure children and young people have a positive start in life**

**Priority 2 - Promote good health, independence, and care across our communities**

**Priority 3 - Create safe and strong communities and neighbourhoods for all**

**Priority 4 - Support a strong, thriving, inclusive, and well-connected local economy**

**Priority 5 - Create green and vibrant places that reflect our heritage and culture**

**Priority 6 - Be a responsible council.**



## 2. Borough Strategy Priorities and the UN Sustainable Development Goals

The Sustainable Development Goals (SDGs) are a collection of 17 interlinked global goals designed to be a "blueprint to achieve a better and more sustainable future for all". The SDGs were set up in 2015 by the United Nations General Assembly and are intended to be achieved by the year 2030. Making progress towards the global goals by 2030 depends on local action. SDGs fit with Our Borough Strategy Vision and the Council's approach to Reset and Recovery. All 17 Sustainable Development Goals have been mapped against the 'Our Borough Strategy' priorities and outcomes.

 <p>ENSURE CHILDREN AND YOUNG PEOPLE HAVE A POSITIVE START IN LIFE</p>	     	 <p>SUPPORT A STRONG, THRIVING, INCLUSIVE AND WELL-CONNECTED LOCAL ECONOMY</p>	          
 <p>PROMOTE GOOD HEALTH, INDEPENDENCE AND CARE ACROSS OUR COMMUNITIES</p>	   	 <p>CREATE GREEN AND VIBRANT PLACES THAT REFLECT OUR HERITAGE AND CULTURE</p>	      
 <p>CREATE SAFE AND STRONG COMMUNITIES AND NEIGHBOURHOODS FOR ALL</p>	  	 <p>BE A RESPONSIBLE COUNCIL</p>	       

### 3. Purpose of the Report

The purpose of the report is to inform and update Elected Members on performance against the 6 priorities of the Our Borough Strategy 2021-30 and respective outcomes as set out above. The report covers the period Quarter 2 2024-25 providing the performance position reported over the course of the period. The reporting format splits the report into 2 distinct parts:

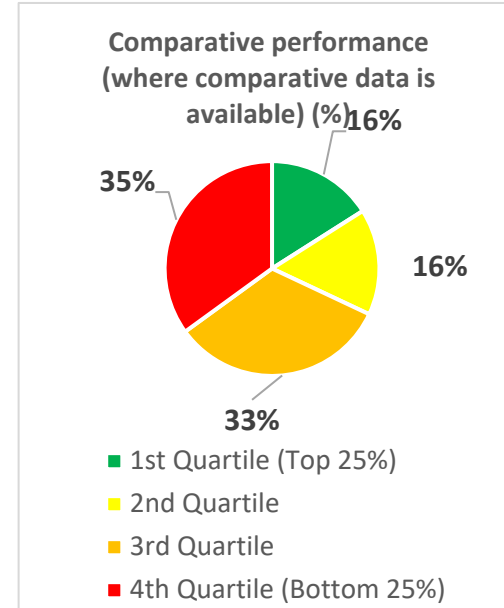
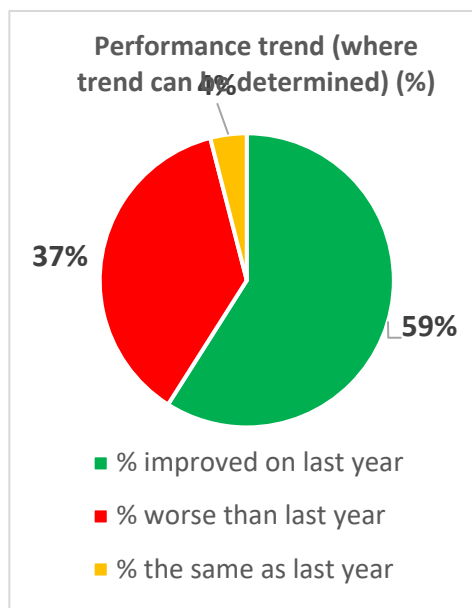
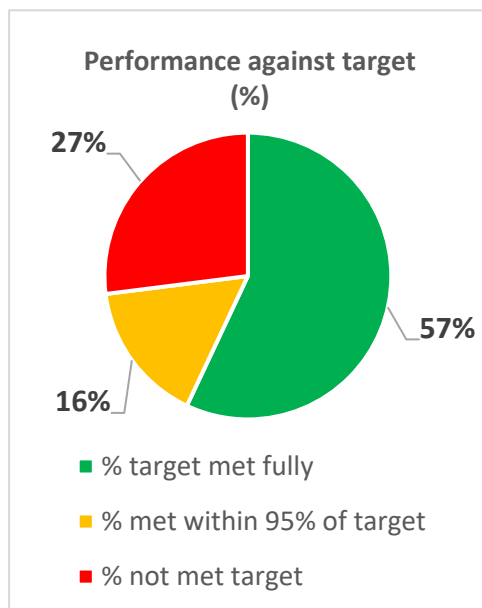
**Part 1** of the report is a statistical analysis of the performance position at Quarter 2 2024-25.

**Part 2** of the report is a commentary on performance against delivery of the 6 strategic priorities and their respective outcomes summarising current performance within the quarter and action being taken to improve performance where required.

### 4. Executive Summary

The charts below provide an overview position of all performance measures across all 6 Borough Strategy priorities as at Quarter 2 2024-25, examining:

- Performance against target.
- Trend - whether performance has improved / worsened since the position 12 months ago.
- Inter Authority performance - how St Helens' performance compares to that of a family group of authorities similar to St Helens.



## 4. Part 1 - Statistical analysis

To measure performance at Quarter 2 2024-25, the Council is reporting against a total of 94 performance indicators, where targets were set. The indicators reported are split between Tier 1 and Tier 2:

**Tier 1** – A set of high-level strategic indicators and targets that constitute the Outcomes Framework of the Borough Strategy 2021-2030.

**Tier 2** – A further set of performance indicators and targets to address key priority areas of performance within Directorates / Departments.

In the supporting scorecards for each priority area, this distinction is maintained and both tiers are shown as they are all relevant to an understanding of overall performance.

The Quarter 1 report statistical analysis looks at performance under 3 areas:

1. Performance against targets
2. Trend over 12-months
3. Inter-authority comparison

### 4.1 Performance Against Target

This measure sets out:

- The percentage of indicators by priority where targets have been fully met or exceeded.
- The percentage of indicators by priority that have not fully met target but are within 95% of target.
- The percentage of indicators by priority that have failed to meet the target by more than 5%.

In the supporting scorecards for each priority area, green, amber, and red colours are used to depict indicators in each of the above three bullet point situations.

Priority	Number of Indicators with data	% target fully met	% target met within 95%	% target not met
1. Ensure children and young people have a positive start	22	64% *(14)	14%* (3)	23%* (5)
2. Health, independence, and care	23	61% (14)	17% (4)	22% (5)
3. Safe and strong communities and neighbourhoods	14	57% (8)	7% (1)	36% (5)
4. Strong, thriving, inclusive and well-connected economy	9	67% (6)	11% (1)	22% (2)
5. Green and vibrant places reflecting our heritage and culture	11	45%* (5)	36% *(4)	18%* (2)
6. Responsible Council	15	47% (7)	13%(2)	40% (6)
<b>Total</b>	<b>94</b>	<b>57% (54)</b>	<b>16% (15)</b>	<b>27% (25)</b>

NB – \* percentages have been rounded to nearest whole number

A listing of indicators, which have met or exceeded target, have met within 95% of target, or have failed to meet target by more than 5% are shown within each of the 6 priority scorecards.

## 4.2 The Performance Trend

This measure compares performance at Quarter 2 2024-25 with performance at Quarter 2 2023-24 by setting out:

- The percentage of indicators where performance compared to last year has improved.
- The percentage of indicators where performance compared to last year has declined.
- The percentage of indicators where performance compared to last year is the same.

In the supporting scorecards for each priority a black arrow pointing up, downwards or sideways is used to depict indicators in each of the above 3 scenarios.

NB. There are a small number of indicators for 2024-25, where performance data in 2023-24 was not available and therefore it is not possible to show a performance trend. Where this is the case N/A appears.

Priority	Number of Indicators with data	% improved on last year	% worse than last year	% the same as last year
1. Ensure children and young people have a positive start	22	64% (14)	36% (8)	0% (0)
2. Health, independence, and care	23	57% (13)	30% (7)	13% (3)
3. Safe and strong communities and neighbourhoods	14	64% (9)	36% (5)	0% (0)
4. Strong, thriving, inclusive and well-connected economy	9	56% (5)	44% (4)	0% (0)
5. Green and vibrant places reflecting our heritage and culture	11	55% (6)	45% (5)	0% (0)
6. Responsible Council	13	54% (7)	38% (5)	8% (1)
<b>Total</b>	<b>92</b>	<b>59% (54)</b>	<b>37% (34)</b>	<b>4% (4)</b>

## 4.3 Inter Authority Comparison

This measure shows how performance in St Helens compares to the performance of a family group of authorities similar to St Helens. It does this by ranking each authority's performance by quartile. The top performing 25 % are in the first quartile and the bottom 25% in the fourth quartile. Authorities in between are placed in either the 2nd or 3rd quartiles. Comparative national data is only available to be used for 43 indicators.

In the supporting scorecards for each priority, where this measure is used, green indicates that St Helens is in the top best performing quartile, red that it is in the bottom quartile or yellow/amber that St Helens is in either the 2nd or 3rd quartile). The England average figure (Eng, Av) is also now presented, as is the statistical neighbour group average (LA Av.) to provide additional context to comparative performance.

Priority	Number of Indicators with data	% in 1st quartile	% in 2nd quartile	% in 3rd quartile	% in 4th quartile
1. Ensure children and young people have a positive start	20	15% (3)	20% (4)	25% (5)	40% (8)
2. Health, independence, and care	13	15% (2)	8%(1)	54% (7)	23% (3)

Priority	Number of Indicators with data	% in 1st quartile	% in 2nd quartile	% in 3rd quartile	% in 4th quartile
3. Safe and strong communities and neighbourhoods	0	0% (0)	0% (0)	0% (0)	0% (0)
4. Strong, thriving, inclusive and well-connected economy	6	33%* (2)	33%* (2)	0% (0)	33%* (2)
5. Green and vibrant places reflecting our heritage and culture	2	0% (0)	0% (0)	50% (1)	50% (1)
6. Responsible Council	2	0% (0)	0% (0)	50% (1)	50% (1)
<b>Total</b>	<b>43</b>	<b>16% (7)</b>	<b>16% (7)</b>	<b>33% (14)</b>	<b>35% (15)</b>

NB - \* Figures rounded to nearest whole number

The latest available picture of inter authority performance largely relates to the 2022-23 financial year. Therefore, St Helens position vis-a-vis its quartile position is based on St Helens performance in that particular year relative to its statistical neighbours. Future reports will be updated to reflect the 2023-24 comparative performance position as and when verified data is published.

#### 4.4 Summary and conclusion of statistical analysis

- **73%** of indicator targets have been either exceeded, met fully, or met within 95% of target. This compares to 74% of indicators at Quarter 2 2023-24.
- **27%** of indicator targets were not met. This compares to 26% of indicators at Quarter 2 2023-24.
- The trend measure indicates over the course of the last 12 months **59%** of indicators showed improvement, **4%** of indicators maintained the same performance and **37%** of indicators showed a downward trajectory. The position in Quarter 2 2023-24 was that **47%** of indicators showed improvement, **15%** of indicators maintained the same performance and **38%** of indicators showed a downward trajectory.
- **16%** of all indicators where comparison is possible are in the top quartile, compared to 18% at Quarter 2 2023-24, whilst **35%** are in the bottom quartile, compared to 29% at Quarter 2 2023-24. 16% and 33% of indicators are in the 2<sup>nd</sup> and 3<sup>rd</sup> quartile respectively, compared to 23% and 29% in Quarter 2 2023-24 (NB percentages rounded to nearest whole number in 2023-24).
- Annual targets were set where possible within the context of national, regional, and local authority comparator group data. Equally targets aspire to be challenging but achievable within the context of the available resources. The targets also take account of performance during the last 3 years which has been an unprecedented period due to the impact of the cost-of-living crisis, increasing demand for services and severe financial constraints.
- Performance should therefore be viewed within the context of what has continued to be a challenging operational period for the Council. The impact of the cost-of-living crisis, rising demand for services and the requirement to deliver significant budget savings has impacted the Council's ability to meet targets and demonstrate improvements in performance trends. Equally in many areas the impact of these challenges on performance is yet to be fully realised and understood. However, given the effect on St Helens to date there is the strong likelihood that existing inequalities may be widened. This presents risks for future performance, but particularly in areas such as public health, education and schools and children's services where comparative performance is already challenging.



## 5. Part 2 - Commentary on performance against priority and outcome

### Priority 6 - Be a responsible council



#### Overview of priority performance

The tables below show provide an overview of performance at Quarter1 2023-24 for the indicators reported.

#### Performance Against Target

Number of Indicators with data	% target fully met	% target met within 95%	% target not met
15	47% (7)	13%(2)	40% (6)

#### The Performance Trend

Number of Indicators with data	% improved on last year	% worse than last year	% the same as last year
13	54% (7)	38% (5)	8% (1)

#### Inter Authority Comparison

Number of Indicators with data	% in 1st quartile	% in 2nd quartile	% in 3rd quartile	% in 4th quartile
2	0% (0)	0% (0)	50% (1)	50% (1)

#### Overview Summary of Performance Against Outcomes

- **Communicate, listen, engage, and work in partnership well with our residents, communities, local organisations, and partners recognising the strengths and skills in our community.**

The timeliness of the council's response to complaints remains strong. The number of upheld Ombudsman complaints has however increased and the timeliness of FOI responses a challenge given the volume received.

- **Invest in developing the strengths and skills of our workforce and elected members.**

Performance against the outcome shows areas of good performance and challenge. The number of apprenticeships commencing is lower than anticipated and the completion of mandatory training is marginally below target at the end of Quarter 2.

- **Embrace innovative ways of working to improve service delivery and the operations of the council and meet our community's needs by delivering accessible and responsive services.**

The customer experience measures continue exceed target and work across the transformation programme continues to be closely monitored to ensure delivery of this outcome.

- **Provide value for money and ensure we are financially resilient and sustainable.**

The Council continues to face severe financial pressures as a result of increased service demand (particularly within children's and adult social care) and delays/failure to deliver some of the approved budget savings which have resulted in a net budget overspend of £5.5m forecast for the current year.

## Outcome 1 - Communicate, listen, engage, and work in partnership well with our residents, communities, local organisations, and partners recognising the strengths and skills in our community

### Indicators Exceeding or Meeting Target


Ref	Performance Indicator	Reporting Frequency	Higher / Lower is better?	23/24 Outturn	24/25 Target	Q1 June	Q2 Sept	% Variance from Target	Trend	Comparative Performance
<b>Tier 1</b>										
CS-002	Percentage of Stage 1 complaints responded to within policy timescales.	Quarterly	Higher	77%	75%	82%	84%	11.32%	↑	N/A
<p>A total of 300 complaints were received in Quarter 2, 252 were responded to within agreed policy and statutory timescales, which equals 84% compliance across all directorates combined. Improvements have been made for children's statutory complaints increasing from 88% (Q1) to 100% for Quarter 2. For adult's social care complaints, compliance has decreased with 2 of the 4 complaints received during the quarter responded to late. There have been further improvements for Corporate and Place services with a compliance of 84%.</p>										

### Indicators Not Meeting Target & Action for Improvement

Ref	Performance Indicator	Reporting Frequency	Higher / Lower is better?	23/24 Outturn	24/25 Target	Q1 June	Q2 Sept	% Variance from Target	Trend	Comparative Performance
<b>Tier 1</b>										
CS-001	Number of upheld ombudsman complaints per 100,000 population.	Quarterly	Lower	3.2	5	1.08	4.3	-72%	↓	N/A
<p>Over the course of Quarters 1 and 2 a total of 8 Ombudsman complaints were upheld, with 7 upheld due to fault and justice, a rate of 4.3 per 100,000 population. Over the course of 2023-24 a total of 6 complaints were upheld, with 3 upheld due to fault and justice.</p> <p><b>Action for Improvement</b> – Work continues across all directorates to identify complaint themes and resolve complaints prior to being escalated to the ombudsman. There has been an increase in ombudsman complaints received, with 50% of upheld complaints relating to SEND. Work is ongoing to ensure improved responses are issued and that the council is utilising the remedy guidance published by the ombudsman.</p>										
<b>Tier 2</b>										
CS-013	Percentage of FOIs responded to within policy timescales.	Quarterly	Higher	65%	75%	64%	62%	-18.97%	↓	N/A

The total number of Freedom of Information Requests (FOIs) received in Quarter 2 was 207. Of the FOIs received during the quarter, 122 requests were responded to and closed within timescales, which equals a provisional compliance of 62%. This is a marginal decrease compared to Quarter 2 2023/24, which was recorded as 62.4%. NB Q1 and Outturn Data 2023/24 have been revised.

**Action for Improvement** – Weekly reporting to case managers has been implemented to ensure visibility of FOI cases across all directorates. Plans are in place to extend the distribution of these reports to the wider Senior Leadership Team (SLT) for further oversight. Work is ongoing to identify and assign cases to appropriate officers with the support of the Executive Support Team. Development of an FOI toolkit is ongoing, which will be launched later this year, this will provide additional guidance and support for colleagues responding to FOI requests.


CS-014	The number of users engaging with the Council's social media posts	Quarterly	Higher	97,827	101,740	17881	36139	-28.96%		N/A
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Engagement via social media posts was below target this quarter however was similar to the same period last year.

**Action for Improvement** - We tend to see a decrease in engagement over the summer months but can often mitigate this with the promotion of events. However, a smaller events calendar means we have had far fewer things to promote that would ordinarily attract high levels of engagement. The Communications team continue to actively engage with communities and residents to promote a wide range of subject matter via social media. The launch of our 'With You, For You' campaign has been a success.

## Outcome 2 - Invest in developing the strengths and skills of our workforce and elected members

### Indicators Exceeding or Meeting Target

Ref	Performance Indicator	Reporting Frequency	Higher / Lower is better?	23/24 Outturn	24/25 Target	Q1 June	Q2 Sept	% Variance from Target	Trend	Comparative Performance
<b>Tier 1</b>										
CS-004A	The percentage delivery of the Member Development Programme over 12 months	Quarterly	Higher	100%	100%	100	100	0%		N/A

Member Training has run to plan this quarter and is on target for the year.

CS-004B	Number to plan completion of the Annual Management Development Programme	Quarterly	Higher	42	124.0	57	95	53.23%	N/A	N/A
The target for 24/25 is for 124 staff trained, we currently have 95 staff who have completed or currently undertaking the training by the end of Quarter 2.										
CS-005	The percentage of training outcomes perceived to be above 'Satisfactory'.	Quarterly	Higher	95%	90%	96	96.59	7.32%	↑	N/A
Current feedback data indicates that 19.81% rate the training completed as Good, 46.75% rate it is very good and 30.03% rate it as Excellent giving us an overall average of 96.59% for this quarter, which is higher than our 90% target.										

### Indicators Not Meeting Target & Action for Improvement

Ref	Performance Indicator	Reporting Frequency	Higher / Lower is better?	23/24 Outturn	24/25 Target	Q1 June	Q2 Sept	% Variance from Target	Trend	Comparative Performance
<b>Tier 1</b>										
CS-003	The percentage of staff completing mandatory core E-learning training	Quarterly	Higher	58%	70%	68.8	66	-5.71%	↑	N/A
At the end of Quarter 2, 66% of mandatory training had been completed by staff. The figures account for employees leaving and joining the organisation and the expiration of training modules with a refresher training requirement i.e., Fire Awareness and Data Protection Training.										
<b>Action for Improvement</b> – Reminders to complete Mandatory Training have been shared regularly in All About Us and employees can see their mandatory training to complete and their progress when they log onto My Learning. Managers have been reminded how to access their team dashboard on My Learning which will enable them to monitor mandatory training more effectively within their team. A question relating to completion of Mandatory Training is included in the Time to Reflect & Plan Conversation form as a reminder to both the employee and their manager. It has been suggested to DMTs that they include Mandatory Training as a regular standard agenda item.										
CS-006	The number of apprenticeships commenced in financial year as a percentage of the total workforce.	Quarterly	Higher	1.47	1.9	0.16	0.55	-42.11%	↓	N/A

The September figure 0.55% equates to 24 apprenticeships commencing over this 2nd quarter which is higher than our target but due to not meeting our target in the 1st quarter, we are under target in total for where we would like to be at this point in the year. In Quarter 1 and the beginning of Quarter 2 resources have been primarily focused on transferring existing learners undertaking apprenticeships to new providers where the original provider ceased trading.

**Action for Improvement** – Work is ongoing with directorates to identify and promote suitable apprentice standards which will support the Council to meet the annual target of 1.9% by the end of quarter 4. The ILM L5 Diploma Operational Leaders and Managers Apprenticeship and the ILM L7 Aspiring Executive Leadership Apprenticeship have been successfully launched and these cohorts will feed into figures for Quarter 3.

### Outcome 3 - Embrace innovative ways of working to improve service delivery and the operations of the council and meet our community's needs by delivering accessible and responsive services

#### Indicators Exceeding or Meeting Target

Ref	Performance Indicator	Reporting Frequency	Higher / Lower is better?	23/24 Outturn	24/25 Target	Q1 June	Q2 Sept	% Variance from Target	Trend	Comparative Performance
<b>Tier 1</b>										
CS-008	Customer Satisfaction Score - Customer rating on satisfaction with contact with the Council	Quarterly	Higher	4.1	4	4.22	4.09	2.25%	↑	N/A
Performance is in line with target and expectations, this is based on 1321 surveys completed this quarter.										
CS-009	Customer Effort Score - Customer rating on how easy the Council made it to resolve their issue	Quarterly	Higher	4	4	4.08	4.06	1.5%	↑	N/A
Performance is in line with target and expectations, this is based on 1321 surveys completed this quarter.										
CS-010	Percentage of Customers that have had their call answered within the promised timeframe	Quarterly	Higher	53.10%	75%	75.4	77.46	3.28%	↑	N/A
Performance is in line with target, based on 44139 calls answered this quarter.										

## Indicators Not Meeting Target & Action for Improvement

Ref	Performance Indicator	Reporting Frequency	Higher / Lower is better?	23/24 Outturn	24/25 Target	Q1 June	Q2 Sept	% Variance from Target	Trend	Comparative Performance
<b>Tier 1</b>										
CS-007	Percentage of transformation programmes with delivery confidence as 'on track'	Quarterly	Higher	83%	80%	66	66	-17.5%	N/A	N/A
<p>Eight out of 12 programmes (66%) are on track to be delivered within timescale (Digital, People, Commissioning, Customer, Commercial, Finance, SEND Transport, ASC Transformation).</p> <p><b>Action for Improvement</b> – Progress across the transformation programme continues to be closely monitored and the PMO team continue to actively support programme leads to progress projects. A draft Power Bi Dashboard has been produced to assist with future programme monitoring.</p>										

## Outcome 4 - Provide value for money and ensure we are financially resilient and sustainable

### Indicators Not Meeting Target & Action for Improvement

Ref	Performance Indicator	Reporting Frequency	Higher / Lower is better?	23/24 Outturn	24/25 Target	Q1 June	Q2 Sept	% Variance from Target	Trend	Comparative Performance
<b>Tier 1</b>										
CS-011	Percentage of council tax collected	Quarterly	Higher	94.19%	94.75%	27.1	52.9	-1.12%	↓	3rd Quartile Eng Av. 96 LA Av. 95.2 (2022/23)
<p>In year performance is slightly below target at the end of Q2.</p> <p><b>Action for Improvement</b> - Work is continuing to recover outstanding debt, in accordance with debt recovery procedures.</p>										
CS-012	Percentage of non-domestic rates due for the financial year received by the authority	Quarterly	Higher	97.15%	96.2%	29.5	56.7	-0.53%	↑	4th Quartile Eng Av. 96.8 LA Av. 97.1 (2022/23)

In year performance is slightly below target at the end of Q2.

**Action for Improvement** - Work is continuing to recover outstanding debt and review large assessments.

### **Finance Commentary**

- The Council's external auditors, Grant Thornton, have substantially completed their work on the audit of the Statement of Accounts and have provided a draft opinion, that was presented to Audit & Governance Committee on 23 September, giving an unqualified opinion on the financial statements. Subsequently, Grant Thornton have undertaken extensive work to assess the Council's arrangements for securing economy, efficiency and effectiveness in the use of its resources (Value for Money) and their report was presented to Audit & Governance Committee on 4 November.
- The CIPFA Financial Resilience Index compares a range of financial measures across comparable authorities and movement between years. Whilst it is not a definitive measure, it facilitates review and Member participation in a crucial measure of the status of the Council. The annual report to the Finance to Audit & Governance Committee on 29 July 2024 examined the current position of the Council and the status. It concluded that whilst there are continued pressures, the Council maintains its resilience.
- The Financial Monitoring Report showing the Council's Quarter 2 position against the 2024/25 budget and delivery of approved savings is due to be considered by Cabinet on 20 November 2024. The Council continues to face severe financial pressures as a result of increased service demand (particularly within children's and adult social care) and delays/failure to deliver some of the approved budget savings which have resulted in a net budget overspend of £5.5m forecast for the current year. Individual directorates continue to implement in-year measures to reduce expenditure and mitigate ongoing budget pressures, and Council wide instruction has been issued in relation to the cessation of all non-essential expenditure, a review of agency workers and a recruitment freeze.