

# Performance Management

Dorset Council's Performance Management Framework  
January 2026



Dorset  
Council

# Version Control

Version	Date	Status	Author	Change Description
v0.1	22 December 2025	Draft	Michael O'Donovan / Liz Crocker	New framework document
V1.0	14 January 2026	Live	Michael O'Donovan / Liz Crocker	Endorsed by the leader of the Council
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v1.0				

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# 1. Executive Summary

Dorset Council has established a comprehensive performance management framework to ensure a consistent and robust approach across the authority. This framework enables all stakeholders to understand how the council monitors performance, maintains accountability, and delivers best value for the people of Dorset.

The primary purpose of the framework is to support senior leaders, elected members, and decision makers to make informed, evidence-based decisions, as well as provide transparency and identify opportunities for continual improvement. Whilst there is a clear focus on performance management at a strategic level ensuring senior leaders are sighted on strategically important data, it also incorporates service-level performance, operational metrics, and wider business intelligence.

Key features of the framework include:

- A consistent and robust approach to performance management across the organisation, with clear oversight of what is reported where, and an understanding of how teams and individuals contribute.
- Strong alignment with the council's strategic priorities and outcomes
- A structure that drives action, encourages innovation, and supports improvement, to deliver value for money.
- Integration with other business intelligence, including risk management, audit actions, and national benchmarking to strengthen evidence-based decision making.
- A clear governance structure that ensures oversight, accountability and constructive challenge through scrutiny.

Through the framework, performance information is shared with the following key stakeholders:

- Managers and decision makers
- Senior leadership
- Elected members
- All employees
- The public
- Central government



## 2. Performance Management at Dorset Council

The Local Government Association (LGA) defines performance management as “using data to inform action that will improve outcomes for people”<sup>1</sup>. For Dorset Council, this means taking responsibility for our own performance and delivery, ensuring value for money, and being accountable to the public and other bodies, such as central government.

Performance management is more than the process of collating and reporting information. It must be embedded in our systems, our thinking, and organisational culture. True effectiveness requires accountability and action to drive continuous improvement and deliver better services.

Delivered effectively, the performance framework will:

- Enable efficient allocation of resources
- Ensure outcomes and objectives are prioritised
- Improve resident satisfaction
- Promote employee wellbeing and motivation
- Recognise and celebrate good performance
- Identify actions, development and training opportunities
- Provide greater clarity, transparency and accountability

### Why it matters

The importance of performance management is reinforced by key government guidance, including:

**Local Government Act, 1999** – requires services to be: responsive to the needs of citizens, of high quality and cost-effective, and fair and accessible to all who need them.

**Statutory guidance on ‘Best Value Duty’ (2011 and 2015)** – places a duty on authorities to secure continuous improvement, considering economy, efficiency and effectiveness.

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<sup>1</sup> [Performance management guide for local authority officers](#)



## 3. Council Plan

The **Council Plan** is a central component of our Performance Management Framework, setting out the authority's key priorities and guiding how we deliver for residents, communities, and partners.

Our four strategic priorities are:

1. **Provide affordable and high-quality housing**
2. **Grow our economy**
3. **Communities for all**
4. **Respond to the climate and nature crisis**

Each priority within the council plan is structured around the following components, although, for reporting purposes, the framework focuses on target measures and key actions:

- **The Challenge** – this provides context to the priority.
- **Our Approach** – an overarching view of how we will look to tackle the challenge.
- **Target Measures** – how we will manage success and what we want to achieve. These will also be supported by appropriate performance indicators.
- **Key Actions** – linked to the target measures, these are deliverable actions to support in achieving the targets set.
- **Leadership and Partnership** – how we will work with others to deliver.
- **Standing up for Dorset** – how we will give Dorset a voice, especially in lobbying central government and associated bodies.

We have adopted the 'golden thread' model, enabling employees to align their individual work with the council's overarching goals. This model demonstrates the clear connection between operational delivery and achievement of strategic priorities and outcomes.

### Service Plans

Service Plans feed directly into the council plan and form a vital part of the performance framework. They are developed and owned by service leads, they span a three-year horizon aligned to the multi-year financial settlement, with progress reviewed annually.

The plans provide a clear service specific focus for the current year, and beyond. They also establish a direct line of sight from individual objectives, through team and service levels, to the ultimate delivery of the Council Plan.

### Team & Personal Plans

Team and individual plans are linked to key objectives outlined in the Service Plans. This ensures every employee can see how their work contributes to both service-level delivery and the council's wider priorities.



## 4. Performance Framework Structure

Dorset Council uses a hub and spoke model for performance management. The Policy, Intelligence and Performance service acts as the central hub, co-ordinating all strategic activity as part of the framework, including reporting to senior leaders and elected members. It works closely with directorate leads, and subject matter experts embedded within services to support other performance monitoring and reporting requirements. Operational monitoring and reporting are generally managed by individual directorates.

Embedding a good performance culture across the authority is essential due to the variety and complexity of different service areas. Expertise within service areas is a core part of the framework and essential for collaboration with the central team. The central team will support services in applying the framework and building the skills needed to deliver its principles effectively.

**See Figure 1 for a diagram of the Performance Framework**

### Framework Levels

The performance framework is structured into three distinct levels, with additional obligations such as statutory reporting and benchmarking highlighted at the relevant level.

- **Strategic level**

This level focuses on the highest-level strategic indicators, including target measures and key actions linked to the delivery of the council plan alongside key organisational objectives and provision of relevant business intelligence. Strategic reporting includes:

- Quarterly reports to the Extended Leadership Team on Council Plan delivery, key organisational deliverables and relevant business intelligence.
- Quarterly reports to Scrutiny Committees (i.e. People & Health and Place & Resources) on identified performance indicators and risks, via committee reports and public dashboards.
- Quarterly public dashboard updates on Council Plan delivery, with six-monthly Cabinet reports including an end of year report.
- Quarterly risk management and audit updates to the Audit & Governance Committee.



- **Directorate level**

Monthly reporting to support evidence-based decisions at service and directorate level. This will include a combination of strategic indicators, escalated above in the reporting process, and operational measures for local performance management. Directorate level reporting includes:

- Monthly and quarterly directorate management meetings, validating data and accompanying narrative before escalation through the reporting framework.
- Monthly Cabinet Member briefings.
- Coordinating statutory reporting to government and facilitating inspections and visits from audit bodies
- Benchmarking returns and analysis.

- **Operational level**

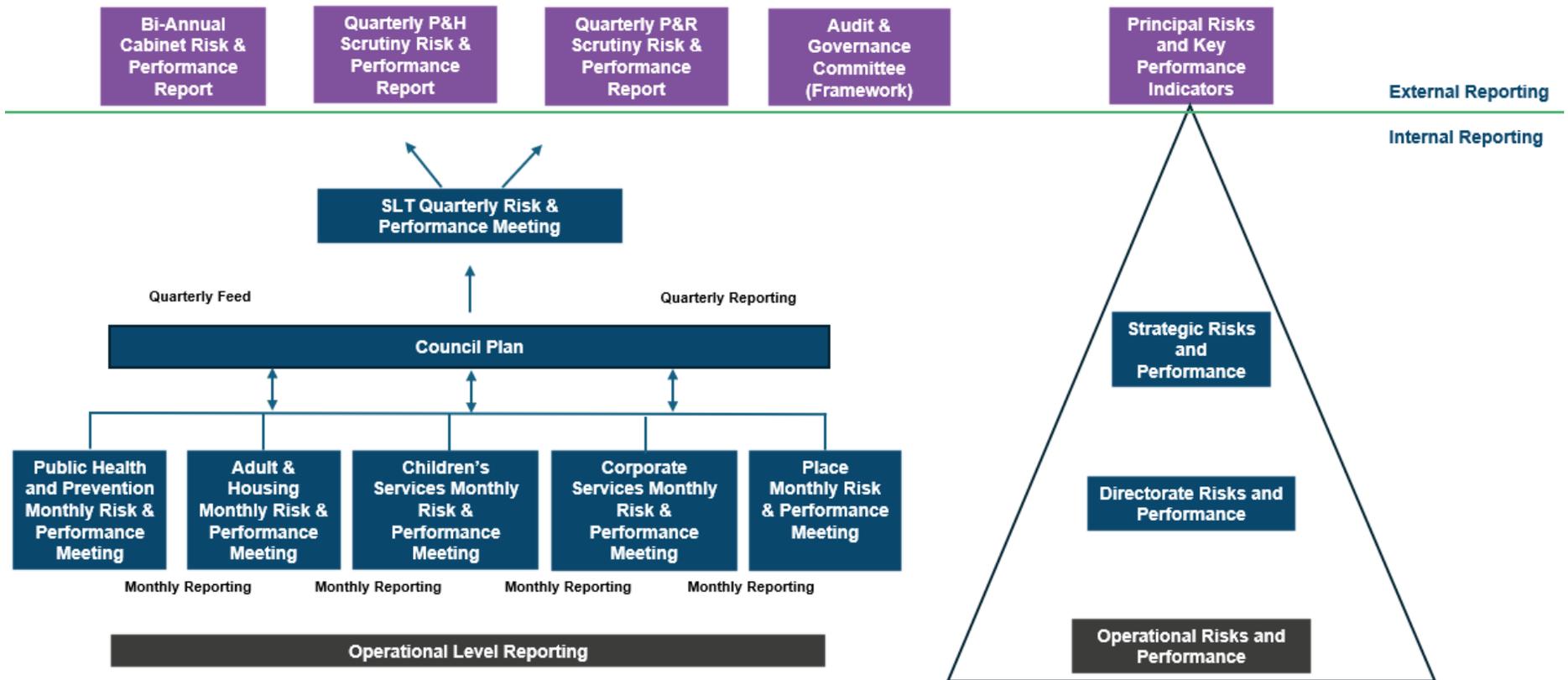
Day to day monitoring of data required to manage operational delivery within services. This is generally managed by individual teams and managers. This can also include monitoring key performance indicators and targets established as part of formal partnership working arrangements. Local partnerships can deliver best value, in terms of skills and expertise, in some service areas.

This framework will be continuously reviewed and enhanced through an annual process, ensuring it remains responsive to organisational needs. This includes improving our automation and insight capabilities to allow us to also consider predictive analytics, not just historic and snapshot performance reporting.

**Figure 1** illustrates how each of these levels form part of the framework.



Figure 1. A diagram presenting Dorset Council's performance and risk reporting framework



## Performance Management Cycle

Performance management is a continuous cycle. Our framework follows the Plan, Do, Review, Improve model to deliver services and drive continuous improvement.



**Plan** – we set clear objectives aligned to our strategic priorities, cascading from the Council Plan all the way down to an individual employee level.

**Do** – teams and individuals take action to achieve these objectives.

**Review** – data is used to review progress at regular intervals. This includes performance reviews and check-ins, as well as established processes within the framework for measuring, monitoring and reporting performance.

**Improve** – feedback and data are used to adjust plans, identify improvements, implement corrective actions and learn lessons.

### Performance Indicators

The monitoring of effective performance indicators is essential to a strong performance management framework. In collaboration with the central Policy, Intelligence & Performance team, each directorate has established a core set of strategic indicators, supported by operational measures managed at the directorate and operational levels.

When combined these strategic indicators provide a balanced view across the council, covering internal factors and service delivery.

Strategic indicators are reviewed annually to ensure they remain relevant and fit for purpose, this includes updating targets and maintaining accuracy within our **Performance Indicator Library**, which stores:

- Indicator definitions and interpretation.
- Unit of measurement and data accuracy (e.g. decimal places).
- Formula for calculation.



- Performance target.
- Reporting frequency.
- Data sources and method of data collection.
- Rationale for the indicator's inclusion in the framework.
- Person(s) responsible for the data and associated narrative.
- Where the indicator is reported.
- Links to organisational objectives.
- Links to strategic risks (where relevant).
- When the indicator was last reviewed (and by who).

The library also supports process development, system integration, and automation of data collection.

### **Other Available Data**

Beyond performance indicators, strategic reporting incorporates additional data, in the form of broader business intelligence including:

**Financial** – this includes revenue budget forecasts and current progress against delivery of the capital project programme.

**Council Plan** – progress updates against each of the key actions and target measures established, including narratives and status.

**Risk** – overview of the strategic risks for the authority. This includes risk ratings and updates on progress against controlling the risk. See [Risk Management Framework](#), which has been developed in conjunction with the performance framework, strengthening our ability to identify, analyse, evaluate and treat risks in a consistent manner.

**Audit Actions** – a summary of open actions following South West Audit Partnership (SWAP) internal audits. This includes compliance (i.e. overdue or not), as well as updates against the agreed actions.

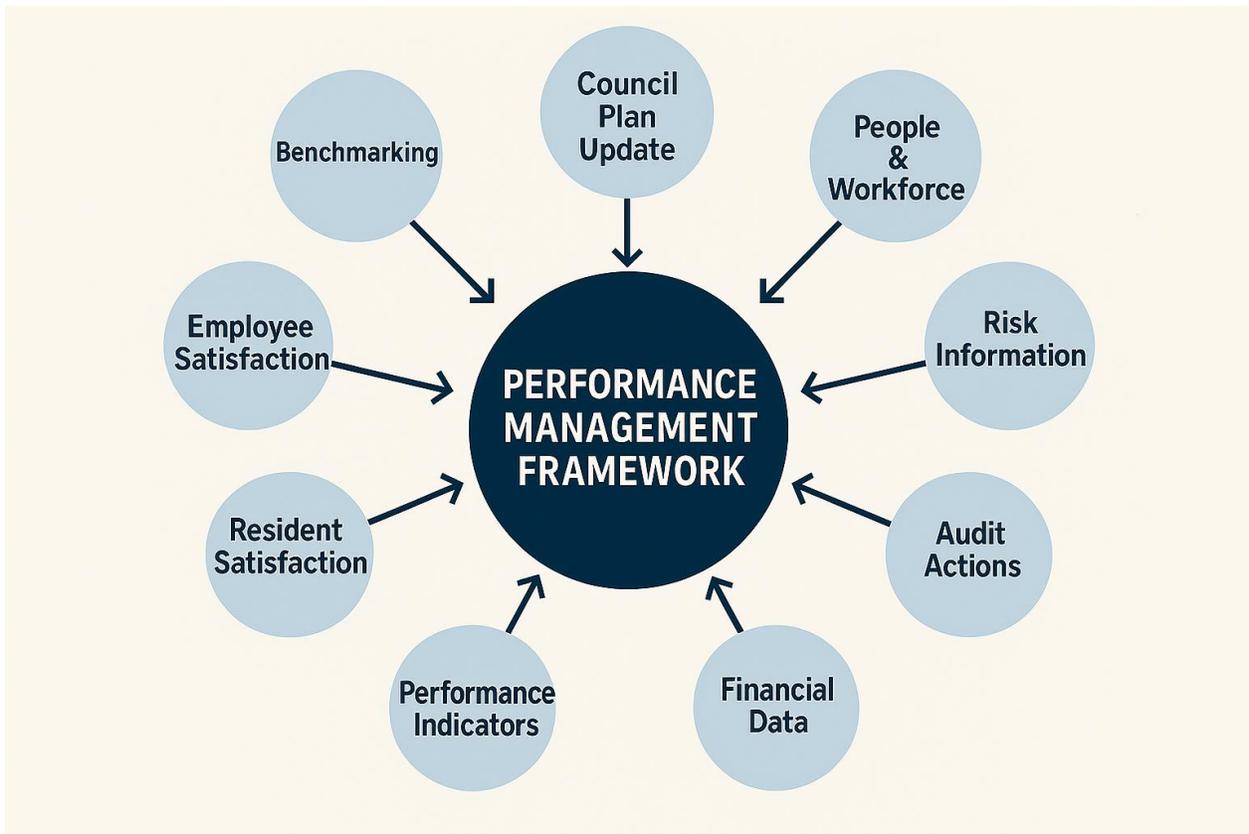
**Resident Satisfaction** – administered biennially, our residents' survey highlights residents' views about the council, where they live, and issues that matter to them. The survey goes to a representative sample, and results are fed into reporting to senior leaders, as well as informing our strategic documents and strategies such as the Council Plan.

**Employee Satisfaction** – pulse surveys are issued to all employees to gather insight on specific topics and to track employee wellbeing over time. As with the resident survey, results are fed into reporting to senior leaders and inform strategies such as the People & Culture Strategy.



**Benchmarking** – benchmarking exercises are utilised to compare Dorset’s performance against our peers across the country. This allows us to identify areas for improvement and learn from good practice, as well as seek assurance in areas we are performing strongly. Results are fed into strategic reporting narratives. Some specific exercises are carried out by services, whereas we also utilise central tools such as LG Inform.

Figure 2. A summary of the types of information which form part of, and flow through, the performance reporting framework.



## 5. Performance Reporting

We use a red, amber and green (RAG) scale to monitor how we're performing.

- Green - on or above target; progressing well
- Amber - slightly below target and/or needs some attention
- Red - below target, requires urgent corrective action

Each RAG status is paired with a Direction of Travel (DOT), showing whether performance is improving, staying the same, or worsening.

To provide context, every data point is supported by a performance narrative from the responsible officer. For indicators that are off track (Amber or Red RAG ratings), the narrative will cover:

- **Performance update** – current position, including reasons, any trended information, benchmarking (comparisons with our peers), and any potential forecasts where applicable.
- **Approach** – how we plan to address the performance issue, return to target
- **Future plans** – upcoming actions likely to support progress towards the target.
- **Issues** – known challenges, with transparent commentary on how these will be managed.

We use an exception-based escalation approach to performance reporting. Items flagged as off track (red RAG rating) or as a cause for concern (amber RAG rating) are discussed at the relevant meetings and escalated where appropriate. Time is also dedicated to recognising and celebrating areas of strong performance, sharing learning and best practice in line with our test-and-learn approach.

Strategic reporting is supported via Power BI performance reports or “dashboards”, built for different audiences.

Dashboard	Description	Reported
<a href="#">Council Plan</a>	Tracks delivery of the Council Plan, including key actions, target measures, and strategic risks.	Quarterly
<a href="#">People &amp; Health Scrutiny Committee</a>	Focuses on performance and risks related to people-based services, health, and wellbeing.	Quarterly



<u>Place &amp; Resources Scrutiny Committee</u>	Covers performance and risks linked to infrastructure, environment, place services and resource management.	Quarterly
Leadership [INTERNAL]	Provides a combined view of the above dashboards, alongside other relevant business intelligence.	Updated monthly (where data is available) presented to Extended Leadership quarterly

These dashboards are supported by accompanying Committee and Cabinet reports, which provide additional insights such as survey results, benchmarking, and contextual data.

Any actions that arise from strategic reporting are tracked via a dedicated performance actions tracker with updates provided at the relevant meetings, with an escalation process in place if required.



## 6. Roles and Responsibilities

Performance management is a shared responsibility across Dorset Council, embedded at all levels of the organisation, from individual employees to senior leaders and elected members, including committees. This collective approach ensures effective service delivery, value for money, and oversight of delivery against key priorities, such as the Council Plan.

The following table provides an overview of the roles and responsibilities across the organisation.

Group	Role & Key Responsibilities
Full Council	Ultimately responsible for setting the strategic direction of the authority, including approving the key priorities for the council, adopting the Council Plan and approving annual budgets.
Cabinet Members	Each member of the cabinet has a specific portfolio of responsibility. They work closely with responsible officers within their portfolio considering key activities and performance, as well as present performance reports to Cabinet and attend relevant Scrutiny Committee meetings.
Scrutiny Committees	Responsible for holding the authority and decision makers to account, serve as the council's critical friend, investigating areas of poor performance, providing constructive challenge and recommendations to support continuous improvement.
Senior Leadership Team (SLT)	Lead on the delivery of services across the council in collaboration with elected members. Accountable for overall organisational performance, responsible for ensuring performance issues are identified and actions put in place to rectify them.
Extended Leadership Team (ELT)	Responsible for performance management across the directorates, ensuring alignment with the council's overall position. ELT leads service delivery, identify issues and ensure corrective actions are implemented.
Directorate Management Teams (DMT)	Responsible for the management of their respective directorates and the performance of service areas within them, including service planning. Will work with their respective cabinet member, as well as escalate to SLT when required.
Policy, Intelligence & Performance Service	Acts as the central hub for strategic performance management, maintaining the framework and coordinating reporting to senior leaders and elected members. The service works closely with directorate leads and subject matter experts embedded within services to provide context and support wider performance monitoring and reporting requirements.



People Managers and Team Leaders	Responsible for setting, monitoring and reviewing operational performance including team and individual plans to ensure all employees understand their role in delivering the service and whole-authority priorities. This includes following the processes outlined in the <u>People &amp; Culture Strategy</u> , such as holding effective 1 to 1 conversations to enable employees to feel inspired to grow and enable them to adapt, thrive, and make a difference.
Responsible Officers	Responsible officers have a duty to provide timely, high-quality, performance data and supporting meaningful narrative (informed by our good narrative guidance). They are supported by the directorate Business Intelligence Managers and the Policy, Intelligence & Performance Service.
All Employees	All employees are accountable for delivering efficient council services as subject matter experts in their relevant service areas. Using local knowledge to look to continually improve and provide value for money, feeding back to management and leadership teams as required.
All Elected Members	Responsible for keeping a watching brief of overall performance, particularly areas of poor performance, as well as areas of good practice. Share feedback from their communities.
Southwest Audit Partnership (SWAP)	Conducts internal audits to provide assurance and insight into the effectiveness of service delivery, internal controls and processes. This includes the development of improvement action plans where necessary.



## 7. Data Quality

Robust decision making relies on the methodical use of evidence and data to make informed choices by understanding what's really happening, spot patterns, assess risks, and evaluate outcomes. This ensures we're not guessing or just relying on opinions, but using real information to guide our actions, which is essential when trying to improve our performance, set priorities, decide where to focus efforts or allocate resources effectively.

The use of high-quality data is important in performance management. Poor-quality data can lead to misinformed decisions, inefficiencies, poor value for money, and potential reputational risks to the authority. Whereas high-quality data gives us confidence that we're making the right decisions and are capturing the full, and accurate, picture as we strive for continuous improvement. In short, high-quality data is the foundation of a strong performance management framework.

High-quality data can be characterised by accuracy, completeness, timeliness, consistency, and relevance.

Characteristic	Detail
Accuracy	Data should correctly represent the activity it describes and for its intended purpose. It should be captured once, although it may serve multiple purposes.
Completeness	All necessary data is available, and no fields are missing, incomplete, or invalid.
Timeliness	Data is up-to-date and available when required, with data collection taking place as soon as possible after the event/activity.
Consistency	Data is uniform across all systems and datasets. It should conform to relevant formats, definitions, methodologies, and standards, as well as be reliable throughout its lifecycle.
Relevance	Data should be relevant and applicable to the specific task and purpose for which it is being used. If not, is it time or cost-efficient to be collecting it?

All employees who input, extract or analyse performance data from our core systems share responsibility for its quality and integrity, ensuring compliance with the General Data Protection Regulation (GDPR) and that data is fit for purpose.

For strategic performance monitoring, our Performance Indicator Library is key to ensuring clarity and consistency in data and reporting methodology. It includes clear, up-to-date definitions, an audit trail of changes, a designated owner, and details of data sources and collection methods.



## Current Position

Whilst we have a vision to become a truly data driven, intelligent council, we still have work to do. Since Dorset Council's creation in 2019, our performance management framework has evolved, and the use of performance dashboards has expanded. However, there has been a clear focus on performance and operational reporting, and there is significant scope to do more, including advancements into predictive analytics and better utilise data warehousing for storage, access and insight.

Whilst we take a proportionate approach to strategic performance management, the authority holds a vast range of data, that must be transformed into actionable intelligence.

Our 2022 data maturity assessment placed us between intermediate and advanced, describing us as "data aware" but not yet sophisticated in our use and understanding of data.

A further data maturity audit is scheduled for 2026. Its findings will inform our Data and Technology Strategy, guiding cultural change and investment in technology, automation, and advanced analytics to strengthen performance management and decision-making.



## 8. Further Information

For further information on Performance Management at Dorset Council, the following sources provide further details:

- Internal [Strategic Performance, Intelligence & Risk Hub](#)
- External: [Performance & Risk Management Webpages](#)
- Email: [performanceandresearch@dorsetcouncil.gov.uk](mailto:performanceandresearch@dorsetcouncil.gov.uk)

Our framework has been established following the performance management guidance published by the Local Government Association (LGA):

- [Performance management guide for local authority officers | Local Government Association](#)
- [Performance management guide for councillors | Local Government Association](#)

