

<b>Meeting</b>	OLC Board	<b>Agenda Item No.</b>	4
		<b>Paper No.</b>	120.3
<b>Date of meeting</b>	26 May 2022	<b>Time required</b>	25 mins

<b>Title</b>	<b>Power BI Reporting</b>
<b>Sponsor</b>	Sandra Strinati, Chief Operating Officer
<b>Status</b>	OFFICIAL / OFFICIAL SENSITIVE

**Executive summary**

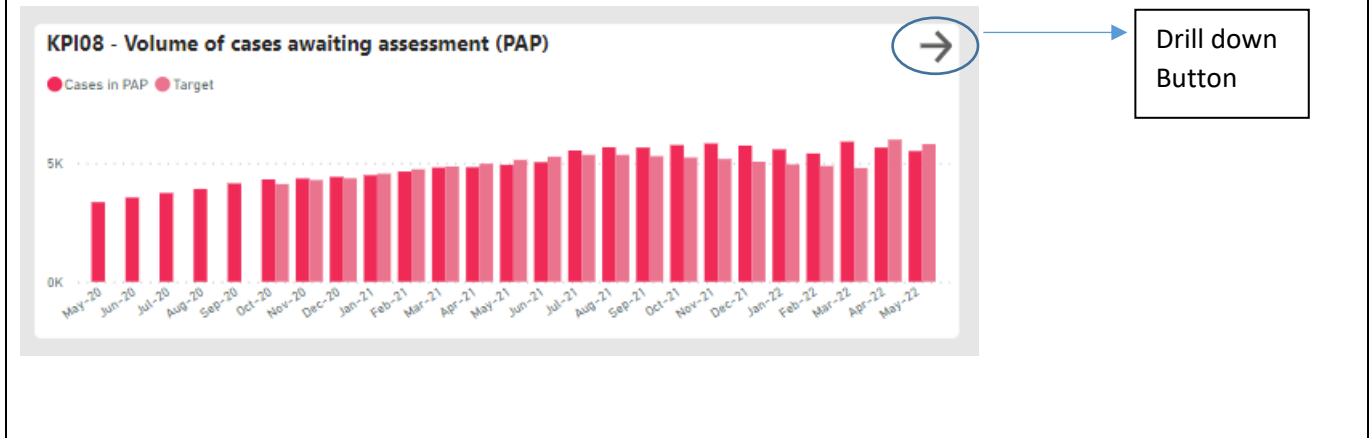
Currently within the Legal ombudsman the reporting tool used to provide OLC Board and MOJ/LSB a full report of LeO performance is the commonly Agreed Data Set (ADS). The version has been reviewed by LSB and MoJ and the visuals are still widely agreed to remain as they are for future reporting.

The proposal from LeO is to move from an offline excel version to a digital platform, namely Power BI. The work to recreate the ADS and all the current agreed visuals is being created by the Power BI developer who works to the performance and BI manager.

To accompany the ADS which will sit as lower level/detailed reporting this, a top level dashboard was proposed to OLC board in February to sit above the ADS, which had LeO’s performance metrics grouped under agreed themes. Each metric would then show a RAG rating based on targets and measures set, providing a new way of reviewing performance for the end user, namely reporting by exception.

A version of how the top level dashboard could look (Wireframe) is available. It shows where the executive summary will sit, then the top level dashboard which has all the metrics from the ADS with a performance RAG status. Each metric is grouped to a theme that has been agreed by OLC board in February. These groupings are a proposal and can be moved as board and exec deem appropriate.

The Top Level Dashboard will be dynamic. This allows the user to drill down into the lower level reporting (ADS) to view in more details the relevant metric. (see below)



## Lower Level Report (Example)

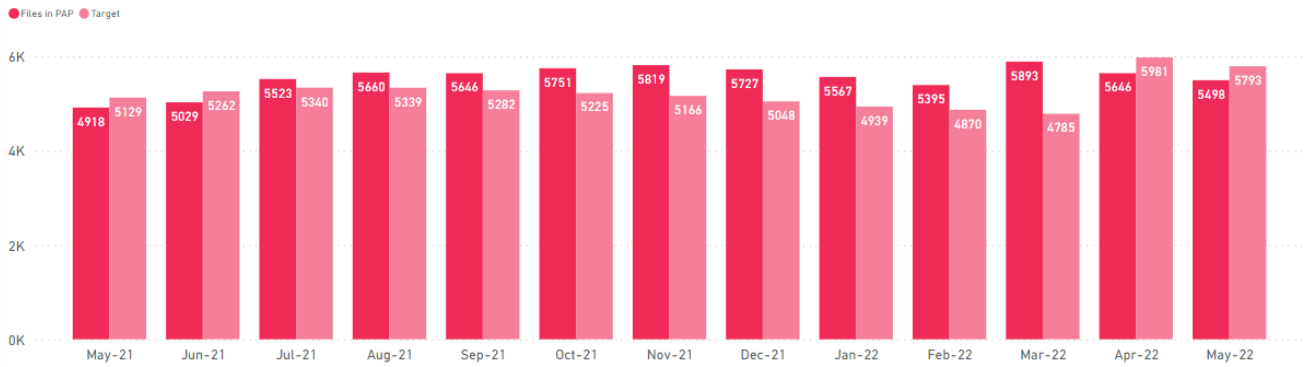
1001 - AGREED DATASET

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### KPI08 - Volume of cases awaiting assessment (PAP)

The number of cases in the Pre-Assessment Pool (PAP) over time. Cases are initially triaged by the General Enquiries Team (GET) before awaiting a final assessment by an investigator as to whether the case falls within our jurisdiction to investigate. The target numbers are our forecast projections, based on incoming demand and our productive capacity



	May-21	Jun-21	Jul-21	Aug-21	Sep-21	Oct-21	Nov-21	Dec-21	Jan-22	Feb-22	Mar-22	Apr-22	May-22
Files in PAP	4918	5029	5523	5660	5646	5751	5819	5727	5567	5395	5893	5646	5498
Target	5129	5262	5340	5339	5282	5225	5166	5048	4939	4870	4785	5981	5793

### Recommendation/action required

Board is asked to **note** the paper and whether this meets Board needs or whether the groupings and or supporting data meets need.

# Legal Ombudsman - Top Level Dashboard

## Customer Experience

Case Closures	Average caseholding per investigator	Timeliness of cases	Average time in PAP for cases taken out	Files closed prior to investigation
Customer Journey Time - Low	Customer Satisfaction	Cases added to PAP	Cases accepted for investigation	Average wait time from date information
Customer Journey Time - Med	Customer Journey - Investigation time	Cases taken from PAP	Average age of open WIP by stage	Average wait time for written contact to be
Customer Journey Time - High	Service complaints - total remedies	Current average wait time in pre-assessment	Volume of open cases in open WIP by stage	Total volume of files awaiting triage

## Impact

Quality - Reasonable Outcome	% of completed internal audits rated moderate or	Volume of cases awaiting assessment	Service Level - GET
% of service providers agree that LeO provides useful and relevant	Number of best practice engagement activities	Productivity per EST investigator	Quality - Reasonable Outcome
Stakeholder satisfaction	Volume of cases awaiting assessment (PAP)	% of completed Audits	

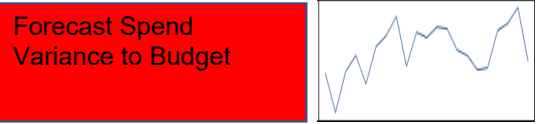
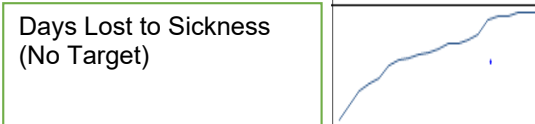
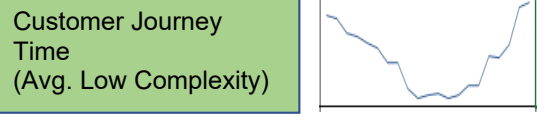
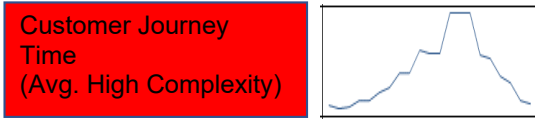
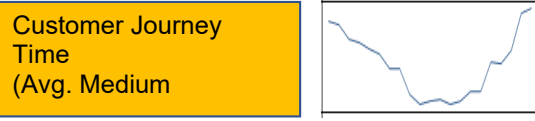
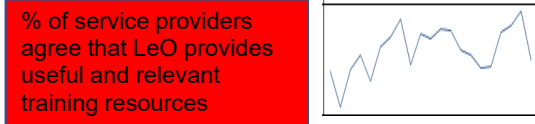
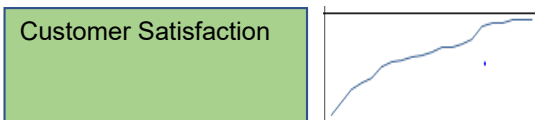
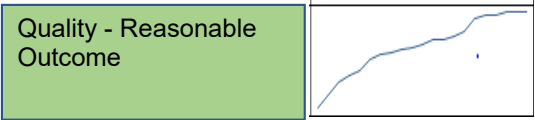
## Our People

Rolling Annual Turnover	Quarterly and rolling	% established /
Rolling Annual Turnover Rate - Operations	Recruitment effectiveness - time to	Staff retention - average length of service
employee Engagement Index (annual figure)	Staff retention - rolling annual voluntary	Number of professional
Days Lost to Sickness (No Target)	Staff retention - wastage (all leavers)	Productive Established FTE

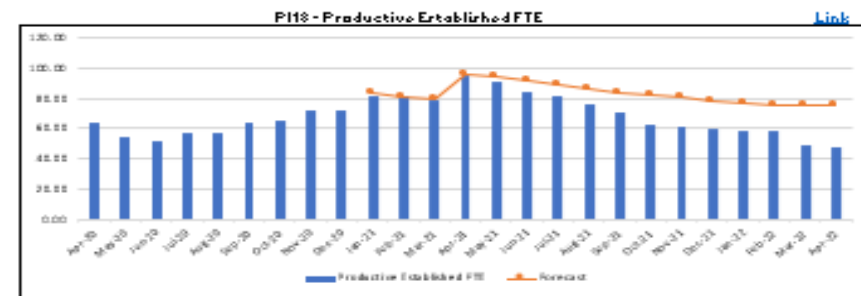
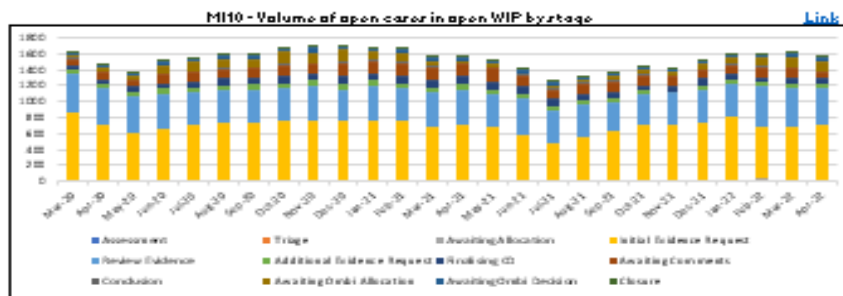
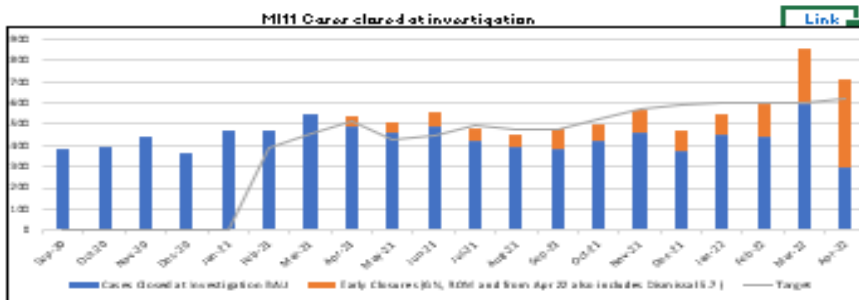
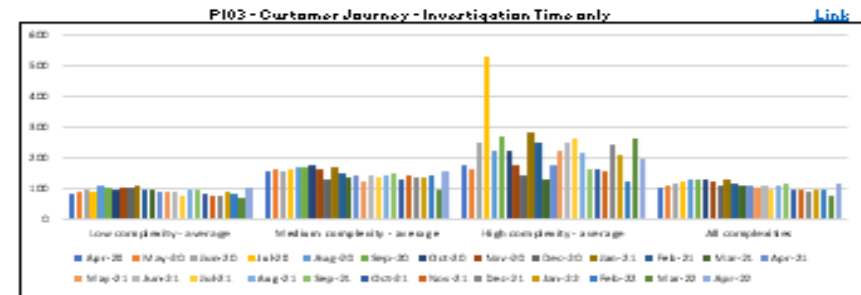
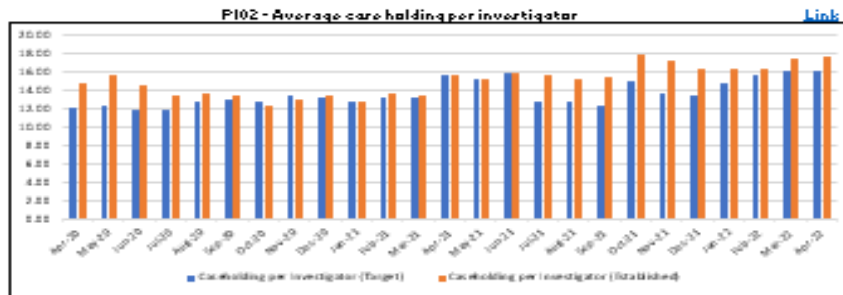
## Value For Money

Quarterly and Rolling	Customer Satisfaction	Direct cost per contact and cost per case	Service complaints - volume Resolved
Customer Journey time	Unit Cost	Service complaints - volume received at	Budget variance against forecast
% of organisational / strategic risks rated critical / high	Stakeholder satisfaction	Forecast Spend Variance to Budget	EDI - No Target yet set

# Legal Ombudsman - Performance Reporting

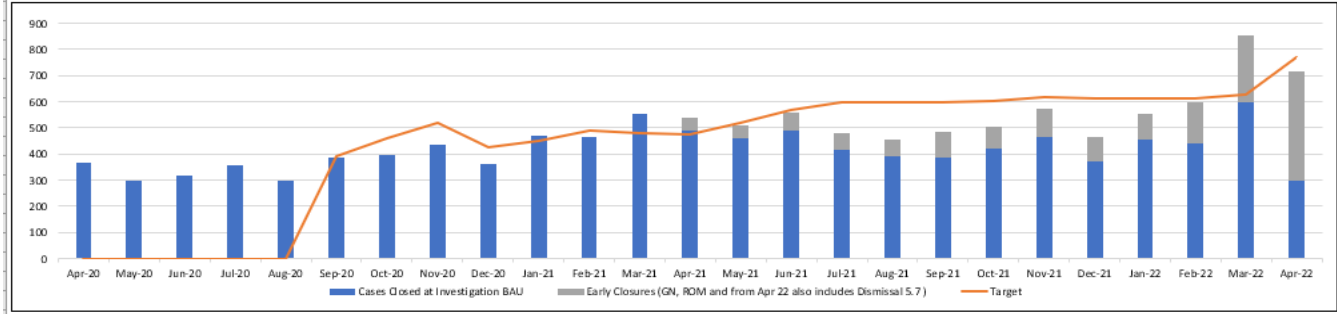


# Performance Reporting - Customer Experience



**Cases closed at investigation**

The number of cases closed at investigation each month, and the percentage of cases closed by closure type



Title	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21	Mar-21	Apr-21	May-21	Jun-21	Jul-21	Aug-21	Sep-21	Oct-21	Nov-21	Dec-21	Jan-22	Feb-22	Mar-22	Apr-22
Cases Closed at Investigation BAU	367	300	318	358	299	385	396	437	363	468	466	552	488	458	491	418	393	388	419	465	371	455	440	600	299
Early Closures (GN, ROM and from Apr 22 also includes Dismissal 5.7 )	-	-	-	-	-	-	-	-	-	-	-	-	53	53	69	64	61	97	84	106	95	97	159	252	415
Target	-	-	-	-	-	393	459	519	426	451	491	479	473	520	569	596	600	600	602	619	611	611	629	772	
Total of BAU and Early Closures													541	511	560	482	454	485	503	571	466	552	599	852	714
Agreed Outcome % of BAU	44%	41%	53%	42%	36%	38%	40%	42%	39%	37%	40%	38%	36%	38%	39%	34%	36%	37%	39%	38%	35%	37%	26%	28%	30%
Ombudsman Final Decision % of BAU	31%	39%	25%	32%	41%	36%	32%	38%	34%	40%	35%	40%	38%	33%	36%	39%	35%	34%	31%	28%	25%	25%	28%	22%	18%
Other	25%	20%	22%	26%	23%	25%	28%	20%	27%	23%	25%	22%	26%	29%	26%	27%	28%	29%	30%	34%	40%	38%	46%	50%	52%