

<b>Meeting</b>	OLC	<b>Agenda Item No.</b>	6
		<b>Paper No.</b>	100.5
<b>Date of meeting</b>	28 November 2019	<b>Time required</b>	10 Minutes

<b>Title</b>	<b>Performance Report</b>
<b>Sponsor</b>	Brendan Arnold
<b>Status</b>	OFFICIAL
<b>To be communicated to:</b>	Members and those in attendance

<b>Executive summary</b>
<p>The key points of briefing are:</p> <ol style="list-style-type: none"> <li>1. The report shows operational performance to the end of October 2019.</li> <li>2. Performance has remained above 600 closures October and the business plan target was exceeded; this is the fourth month in a row for which closure has exceeded 600 cases.</li> <li>3. The Customer Journey Time has improved except for High complexity cases where the small number of items closed based on 1% of case load has resulted in a temporary increase in the median figures reported.</li> <li>4. The number of KPIs out of tolerance is three, two relating to the timeliness of closure for high complexity cases; and the KPI for the rate of Staff Attrition has reduced from 22% to 21.3% reflecting the impression over several months that this KPI has broadly stabilised. This is the third KPI that is out of tolerance and despite the improvement noted it has become red rather than amber owing to the methodology used for tolerance</li> </ol>
<b>Recommendation/action required</b>
Board is asked to <b>NOTE</b> the report.

## Performance Report

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### **1. Introduction**

- 1.1. This paper provides an update on performance through to October 2019.

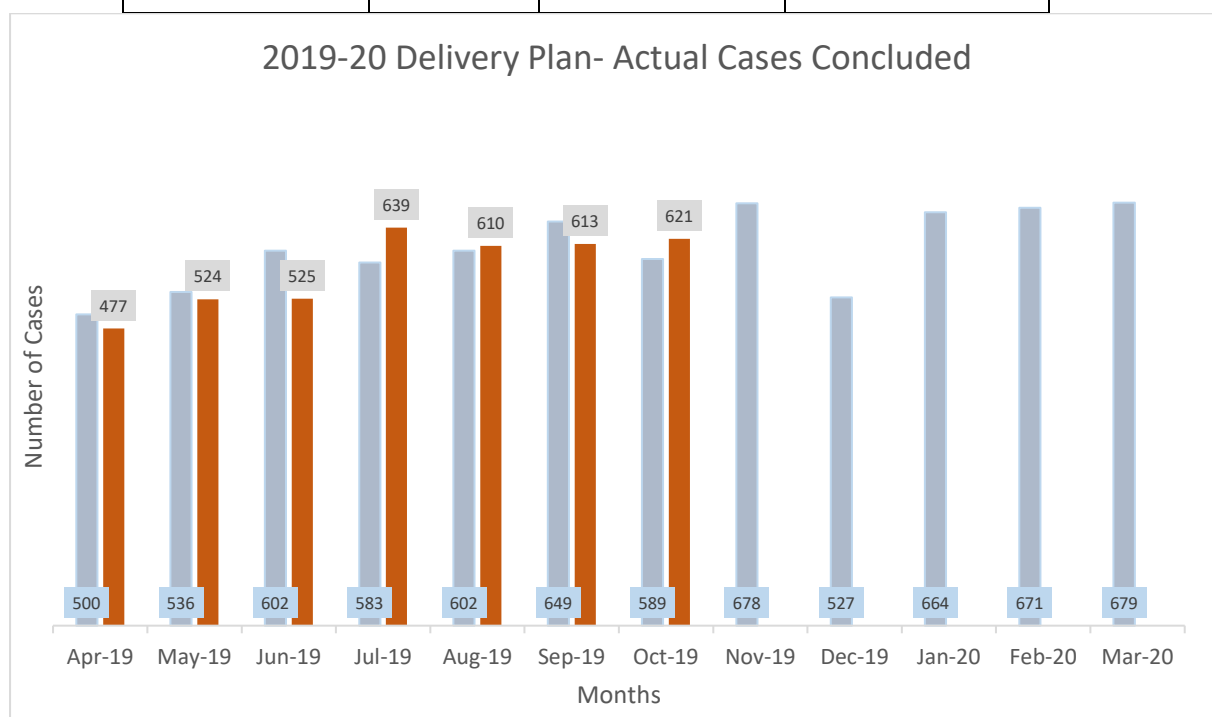
### **2. General observations**

- 2.1. Performance through to October has continued on a positive trajectory with closures meeting and exceeding target in July and August, exceeding 600 closures in September and exceeding target in October. The net shortfall against plan amounts to 52 cases at 31 October compared to 84 cases at the end of September, an improvement of 32 cases.
- 2.2. Performance against KPI's is outlined in the report attached to this paper. This shows that of the KPI's agreed in the 2019/20 Business Plan 3 show a red traffic light, the rest are green.
- 2.3. Of these three 2 relate to completion of high complexity cases which are 1% of case load where small changes can have a large impact on the % of cases closed, and 1 relates to Staff Attrition which has improved in October but attracts a red traffic light due to the methodology used.
- 2.4. Unit Costs remain within target.

### 3. Closure output

3.1. Performance against delivery plan is shown below.

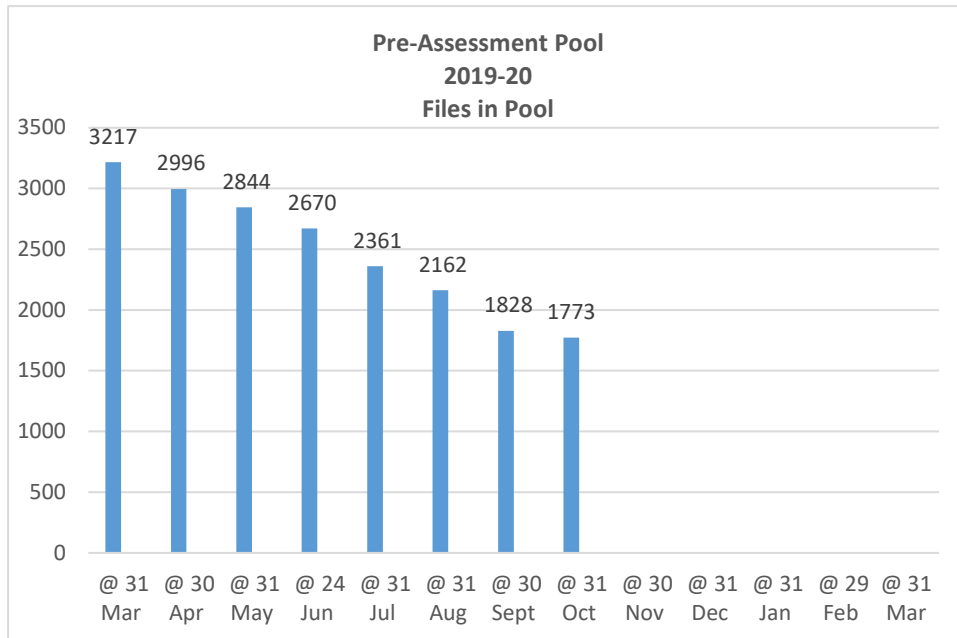
Monthly Performance Against Delivery Plan (2019/20)			
Months	Delivery Plan Target	Actual Closures	Over (+)/Under (-) Attainment of Target
April	500	477	(23)
May	536	524	(12)
June	602	525	(77)
July	583	639	+56
August	602	610	+8
September	649	613	(36)
October	589	621	+32
November	678	-	-
December	527	-	-
January	664	-	-
February	671	-	-
March	679	-	-
Total	7,280	4,009	(52)



Cumulative target closures to October: 4,061, Cumulative actual closures to October: 4,009

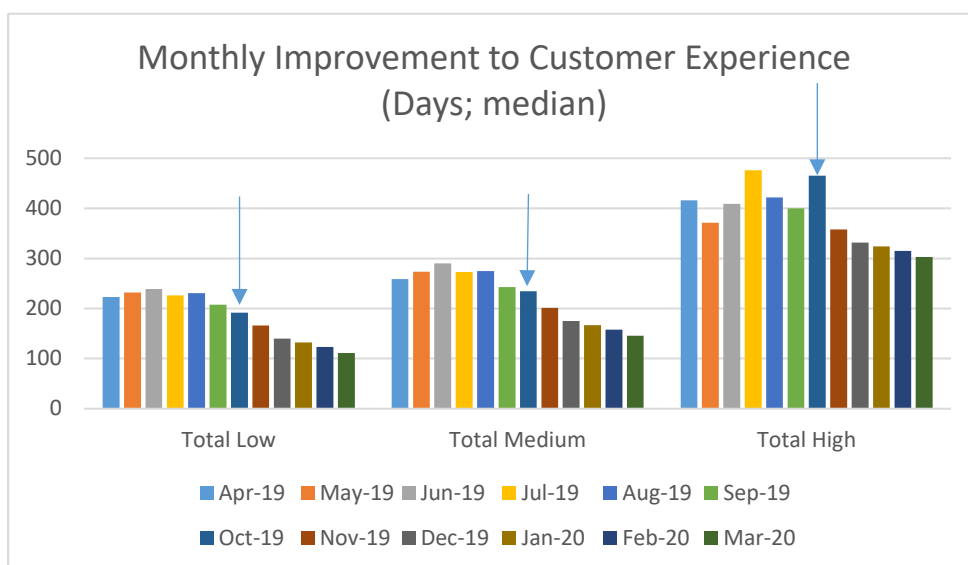
## 4. The Pre-Assessment Pool

4.1 The Pre-assessment Pool has continued to reduce showing a balance of 1,773 files at the end of October a reduction of 1,444 files or 44.9%. The reductions are shown below:



## 5. The Customer Journey Time

Median Days	Apr-19	May-19	Jun-19	Jul-19	Aug-19	Sep-19	Oct-19	Nov-19	Dec-19	Jan-20	Feb-20	Mar-20
Low	223	232	239	226	231	208	192	166	140	132	123	111
Medium	259	274	290	273	275	243	235	201	175	167	158	146
High	416	371	409	476	422	400	465	358	332	324	315	303



5.1 The above table shows the actual Customer Journey Times (median) recorded between April and October 2019; significant improvements are shown for cases of low and medium complexity over this time period and -in particular - since July 2019.

5.2 Compared with the previous month, the figures for low complexity (68% of case load) are showing an improvement of 1 day against the target figures and for medium complexity (31% of case load) the figures have fallen below target. These will be closely monitored in the weeks ahead. For cases of high complexity in October the Customer Journey has increased for the first time since July.

5.3 As reflected elsewhere in this report this reflects the fact that the number of high complexity cases is just 1% of case load and only 23 such cases were closed in October. Accordingly a small number of cases can change the metrics quoted significantly.

5.4 The progress in shortening the Customer Journey so far is also shown on the above graph. The vertical arrows indicate the position reached for each level of complexity.

## Appendix 1: Monthly KPI and tolerance report – October 2019

Target met:		Target not met but within tolerance:		Target not met & outside tolerance:	
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Measure	KPI	Tolerance	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Notes	
<b>% cases concluded in new CMS (CEQ2a)</b>															
90 days (low)	65%	10% off target for more than 2 consecutive months or 2 months out of 4, in any category	89%	83%	83%	86%	86%	85%	77 %					The items that are showing Red are for High Complexity cases which comprise 1% of case load. Relatively few of these are closed monthly and so a small variance can impact the % significantly. It is not anticipated that this will persist.	
90 days (med)	40%		54%	50%	45%	52%	45%	49%	41%						
90 days (high)	0%		25%	11%	8%	13%	18%	0%	4%						
180 days (low)	90%		98%	99%	99%	98%	98%	98%	99%	98%					
180 days (med)	85%		92%	91%	85%	85%	84%	90%	85%						
180 days (high)	33%		75%	56%	33%	20%	27%	30%	9%						
365 days (low)	99%		100%	100%	100%	100%	100%	100%	100%						
365 days (med)	95%		100%	100%	98%	100%	100%	99%	99%						
365 days (high)	85%		100%	100%	83%	93%	88%	91%	57%						
<b>% cases (all complexity) concluded (CEQ2a)</b>															
Within 90 days	45%	10% off target for more than 2 consecutive months or 2 out of 4	48%	51%	50%	59%	67%	67%	63%					As predicted, with the closure of the Legacy cases these KPI's are now in line with plan..	
Within 180 days	78%		63%	72%	70%	74%	84%	89%	89%						
Within 365 days	95%		69%	78%	77%	83%	94%	96%	96%						
<b>Turnover (PLC2a/b)</b>															
Quarterly rolling annual turnover rate	Rolling annual turnover <18%	>2% above rolling annual target for two consecutive quarters	18.7%	20.2%	21.8%	21.6%	21.6%	22.0%	21.3%					Turnover continues to vary incrementally as management of performance, capability and behaviours proceeds and has fallen slightly in October. The traffic light is Red because tolerance has been exceeded.	
<b>Unit Cost per case (IRE8)</b>															
Legal all complexities – net of estates income and gross costs	£1695	>£100 over target – 3 month rolling average	£2118	£2047	£1952	£1554	£1574	£1665	£1657					Unit costs are once again within target in October.	