



Cherwell District Council Corporate Performance and Insight Strategy

Performance Team Leader
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1. Introduction

For Cherwell District Council, integrating performance, finance and risk is essential to making sound, evidence-based decisions that protect services and deliver the best outcomes for local residents and businesses. By viewing these elements together, we can target our resources more wisely, address issues early and ensure plans and budgets genuinely reflect the council's priorities and risk appetite. To achieve this integration an Annual Business Planning process has been established, encompassing Budget and Service planning.

The strategy is a fundamental output of our Annual Business Planning process together with the Budget and the Corporate Risk Management Strategy, whilst these documents stand alone, joining the process of yearly reviewing and periodically reporting on them ensures an integrated view and analysis of all elements, allowing for informed decision making and effective scrutiny.

Performance and insight management is one of the foundations of a successful organisation, it goes beyond meeting targets, ensuring meaningful outcomes, align services with strategic and cost-effective plans, and creates a balanced, consistent, and community-focused organisation. Through this practice, we translate strategy into achievable goals, provide assurance, and evidence the outcomes being delivered to meet the ambition of the Vision and Strategy to 2030.

Our approach is to make data accessible, accurate, timely, and relevant, enabling continuous improvement. This means supporting staff, partners, and communities to feel informed and engaged, fostering trust, transparency, and participation. Performance management, together with data analysis, reinforces our commitments and guides cultural change, compliance, and accountability. It helps us to plan for the future, manage change, and create a resilient organisation aligned with people's needs, while cultivating pride in our district.

Performance and insight management is not just numbers and reports; it is about understanding what truly makes a difference to people. By gathering insight and benchmarking, we focus on service quality, track delivery against our commitments and priorities.

2. Purpose

The council's Corporate Performance and Insight strategy forms the foundation of strong governance, service innovation, and public trust. It provides clarity and direction, enabling teams to navigate uncertainty and achieve results.

Cherwell is committed to embedding a culture of awareness and compliance with policies and principles, ensuring ethical leadership and strategic agility. This approach promotes inclusive engagement and champions equality, diversity, and fairness—guided by honesty and clarity. Decisions are informed not only by data but by meaningful insight and robust performance management, ensuring outcomes that reflect real community needs.

Through this strategy, the council aims to anticipate challenges, adapt to change, and deliver services that build resilience and public confidence. It goes beyond numbers—focusing on impact, improvement, and trust—so that every action strengthens its ability to serve communities effectively.

In line with this ambition, the council's approach to performance reporting aims to place greater emphasis on outcomes rather than simply counting outputs. While outputs record the tasks completed or services delivered, outcomes demonstrate the real-world difference these activities make for our residents, communities, and the local economy. By prioritising outcome-focused reporting, Cherwell can better understand whether its interventions are achieving the intended impact, ensure that resources are directed where they add most value, and provide a more honest and meaningful account of progress. This shift strengthens transparency, supports improved decision-making, and reinforces the council's commitment to delivering tangible benefits for the people it serves.

3. Principles

Grounded in statutory duties (e.g., Local Government Act 1999), it implies simplicity, transparency, and accountability into everything it does. With this in mind, our strategy is designed to translate collective priorities into meaningful actions, with ongoing dialogue and feedback throughout the organisation's financial year.

Involving everyone in co-designing service standards and solutions, within each measure defined, we ensure that improvement is driven by insight, from live and participant voices, exposing shared responsibility, and presenting meaningful impact to our residents, not just dashboards.

Cherwell's strategy aims to help services identify issues early, supporting development through constructive feedback, and aligning resources with community organisation and community needs; all whilst maintaining compliance, reinforcing confidence, and fostering ethical, responsive governance.

Supporting and enabling services, and senior staff, to use appropriate, compliant, and well-structured dashboards, reports, insights, and challenging services performance through a central management tool, in turn enabling and optimising plans, consequently, helping everyone to come to better decisions. This includes:

- Strategic Direction: Establishing clear, long-term goals using frameworks like the golden thread from the Vision, Strategy, Annual Delivery Plans, and Service Plans.
- Collaboration & Governance: Preventing siloed working, aligning resources, and supporting ethical leadership, and enhanced transparency.
- Data-Driven Decisions: Leveraging data collaboration for evidence-based policy and resource allocation.
- Performance Management: Using Key Performance Indicators (KPIs), a traffic light monitoring system and benchmarking, when possible, to drive efficiency and continuous improvement.
- Sustainability & Inclusion: Promoting environmental resilience, equality, diversity, and inclusion while fostering community engagement and legitimacy.
- Leadership Development: Equipping leaders with reliable data to navigate complexity and build strategic thinking and adaptability.

Corporate Performance and Insights' Management extends beyond measurement of key performance indicators, it shapes culture, drives collaboration, and strengthens governance; It acts as a proactive mitigation against risks, supports strategic agility, and ensures resources are used effectively. By embedding transparency and evidence-based decision-making, we enhance public trust and democratic legitimacy, fostering learning, innovation, and adaptability, enabling the organisation to respond confidently to changing priorities while demonstrating value for money and informed policy development.

4. Background

Our organisation's Corporate Plan (set for 2024–2026) is constituted of four strategic priorities:

- **Economic Prosperity**
 - Focus on creating vibrant economic centres and thriving rural villages by:
 - Revitalising town centres and supporting rural businesses.
 - Promoting green initiatives and sustainable growth.
 - Enhancing skills, attracting investment, and boosting tourism.
- **Community Leadership**
 - Strengthen community collaboration and resilience by:
 - Promoting health and wellbeing with an emphasis on reducing inequality.
 - Encouraging active lifestyles, cultural development, and crime reduction.
 - Advancing equality, diversity, and inclusion.
- **Environmental Stewardship**
 - Safeguard the environment and promote biodiversity by:
 - Committing to net-zero goals and improving air quality.
 - Driving circular economy principles: reduce, reuse, recycle.
 - Supporting green economy initiatives and partner-led sustainability projects.
- **Quality Housing and Place-Making**
 - Deliver sustainable and strategic development by:
 - Providing high-quality, secure, and affordable housing for diverse needs.
 - Enforcing standards, preventing homelessness, and supporting vulnerable residents.
 - Promoting green building practices and long-term community planning.

5. Methodology

The council sets annual priorities to guide resource allocation and strategic direction. Cherwell District Council's performance and insight strategy integrates planning, governance, and evidence-based analysis to ensure accountability, transparency, and effective service delivery. It is structured around four components: strategic alignment, governance and assurance, evidence-based analysis, and transparent reporting.

Cherwell District Council's performance management methodology is built on a structured, evidence-based approach, combining strategic planning, supportive governance, and robust quality assurance to maintain accountability, transparency, and effective service delivery. Acting as checks and balances, this framework enables informed decision-making and strong recommendations through rigorous analysis.

The methodology is organised into four key components:

1. Strategic Alignment – Linking objectives to corporate priorities and resource allocation – the ‘golden thread.’
2. Governance and Assurance – Applying quality checks and challenge mechanisms for accountability, through a two-fold approach: Service level management and monitoring and CLT/Democracy monitoring and reporting quarterly.
3. Evidence-Based Analysis – Using data-driven insights to inform decisions and improve outcomes.
4. Transparent Reporting – Ensuring clarity and openness in performance results and recommendations.

5.1 Delivery & Performance Framework

To achieve successful performance management delivery, recommendations are made proficiently and accurately, to define and clarify processes which must be carried out by collecting, challenging and confirming data and the impact it brings to the organisation strategy table, in turn so that plans can be reviewed and re-framed, and this may occur monthly, quarterly, or yearly where input for reporting is agreed, with a view to:

- What happens: when KPIs (goals), feedback, and complaints performance data are collected, from diverse sources and tools within the organisation for each pre-determined period.
- Why: there is a need to give a quick view of each service goal (KPI/measure), and its alignment with the delivery of service priorities, determined by a RAG (Red/Amber/Green) status, helping leadership and members understand how each service is doing, what is working and what needs to be done to improve.
- Who sees it: depending on the stage of the cycle, monthly at service/director level, and quarterly presenting the relevant results to Corporate Leadership Team, Executive and Overview & Scrutiny Committee.

Our performance monitoring structure is set into three levels of reporting:

- **Service and Directorate level:** this is when performance management happens at an individual service level with any issues being escalated as required. This monitoring includes operational and directorate level KPIs and projects.
- **Corporate level:** this is when performance management is reviewed at a strategic leadership level and through the democratic cycle. This review includes strategic level KPIs and Annual Delivery Plan Actions), and those escalated (performance exceptions) from the Directorate level. At this level Performance is reported and scrutinised quarterly by the following:
 - DLT (Departmental Leadership Team) – reviews operational performance at department level.
 - CLT (Corporate Leadership Team) – consolidates departmental reports for corporate oversight.
 - ELT (Extended Leadership Team) – aligns performance with the organisation’s four strategic priorities.
 - O&S (Overview & Scrutiny Committee) – Formal report where members conduct a deep-dive into performance outcomes, with call-in powers for decisions, and comments to the Executive.
 - Executive (Executive Committee) – Formal report including performance results, financial updates, and risk register status for the period, for executive to intake O&S comments and make final decisions or take note of the presented outcomes.

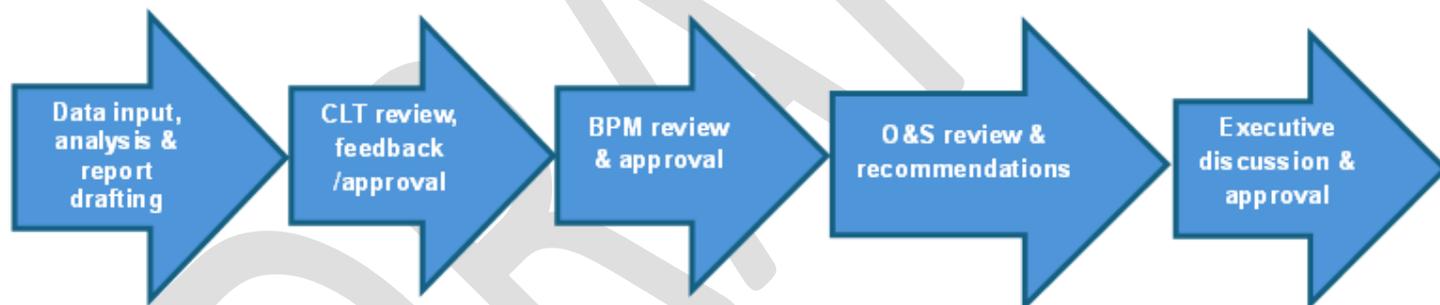
- **End of Year Report:** Additionally, an End of Year Performance Report is presented during the first quarter of the financial year, this is a report summarising not just the performance position for year-end, but also the achievements across the council during the year.

5.2 Performance Reporting Cycle

Cherwell District Council has a comprehensive performance reporting cycle that ensures accuracy and transparency throughout the organisation. This cycle progresses from operational monitoring to leadership oversight, then to governance review, and ultimately to public accountability through quarterly and annual reports, reinforcing compliance with transparency standards and providing a clear structure for reporting and decision-making.

The quarterly cycle begins with reminder emails prompting services to update their Corporate and Strategic KPIs, followed by data submission into the Performance system. The Performance and Insight Team analyses the data and drafts the report for the Corporate Leadership Team (CLT), who review, challenge, and approve it.

A combined performance monitoring report, including Finance and Risk, and reflecting CLT feedback, is then taken to the BPM meeting for further review and recommendations ahead of the Performance element of the report being scrutinised by the Overview and Scrutiny Committee, who send comments, questions and recommendations to be ultimately discussed and answered by the Executive Committee who sees the full report (Finance, Performance and Risk). As per below:



5.3 Performance Management Tools

- **Performance Management System (currently Unity by Ideagen):** Repository for Key Performance Indicators' data. Performance indicators are reported quarterly (except for a small number reported annually); their status progression is scored using a RAG rating (Red, Amber, Green), by defining Green as on/above target or within the agreed tolerance, Amber as slightly behind target (as determined by the set tolerance, with an average of less than 10%); and Red very behind target (as determined by the set tolerance, with an average of more than 10%).
- **Annual Delivery Plan:** Cherwell's Annual Delivery Plan translates the council's long-term vision and corporate priorities into specific yearly key actions aligned with strategic goals such as economic growth, environmental sustainability, and community well-being. The plan provides clear direction, ensures accountability through quarterly monitoring and governance oversight, and enables the council to respond effectively to local and national challenges while maintaining transparency and progress tracking. The ADP yearly actions are broken down for reporting purposes into quarterly milestones, which are included in the Quarterly Performance Reports.

- **Dashboards:** Service, Directorate and Corporate level dashboards are currently under development, with the longer-term aspiration to compile all performance data with updates in real time, aiming to support managers to monitor, manage and discuss their correspondent performance with their teams, portfolio holders, and/or line manager.
- **Benchmarking:** An annual benchmarking process is undertaken to compare the council's services, processes, and outcomes against other councils or recognised best practices to identify areas for improvement and ensure value for money. It helps set realistic service delivery targets, improve efficiency, and enhance community satisfaction by learning from high-performing councils. By analysing indicators such as waste collection rates, planning application turnaround times, or customer service responsiveness, benchmarking provides a clear reference point for continuous improvement and supports transparency and accountability in local government operations.

6. Roles and Responsibilities

Accountability is embedded through documented approvals, compliance checks, and audit trails to ensure all performance and engagement activities meet statutory and corporate standards as follows:

- **Service Leads:** Initiate, define and align performance objectives linked to the council's Vision and Strategy, Annual Delivery Plan, and Service Plans. They must ensure activities meet best value, equality, GDPR, and transparency requirements, and retain legal ownership or responsibility for consultations and engagement, even when delegated. This is also applicable for reporting, where services must submit outcomes to the performance management system, and integrate findings into monthly and quarterly performance reports, additionally to provide feedback to participants, where consultations were used. Ultimately, own their service performance end-to-end from creating proposing the service, and corporate and directorate KPIs to monitoring them through the service performance dashboard.
- **Performance & Insight Team:** Holds benchmarking, analysis and quality assurance roles. Providing advice to guide services on legal standards, best practice, and question or challenge design for performance, insight and consultations, using tools and support to provide approved platforms (e.g. Citizen Space, Unity, JADU), templates, and best use and application of strategies. The team owns the performance management system, developing tailor-made dashboards and reports, and providing training for services to manage their own dashboards. Overall, the team provides an internal challenge function, offering the checks and balances that strengthen decision-making and continuous improvement across the council.
- **Senior Officers, Assistant Directors and Executive Directors:** Are responsible for formal approvals, authorising plans, and ensuring alignment with strategic priorities, maintaining accountability, and retain ultimate responsibility for compliance and integrity of processes. Although able to delegate protocols, ultimately continue to hold responsibility for tasks while maintaining oversight, and ensure performance integration outcomes, of priorities informed through monthly dashboards, quarterly reports, and annual governance reviews.
- **Leadership Team:** Collectively the Leadership Team is responsible for championing and embedding the principles this strategy across their services from the top down.

Clear roles and responsibilities, are defined and established to:

- Strengthen Performance Reporting: Innovative tools (e.g., Unity dashboards, Citizen Space) allow better integration of non-data insights into monthly, quarterly, and annual cycles.
- Drive Continuous Improvement: Learning from past consultations and complaints ensures services adapt and improve, meeting Best Value Duty¹ and governance standards.
- Support Strategic Outcomes: Embedding lessons learned into the Annual Delivery Plan and risk reviews enhances decision-making and accountability.
- Build a Learning Culture: Encourages teams to challenge existing processes, adopt best practice, and benchmark against other councils via LG Inform².

7. Culture, Awareness and Training

To ensure Performance and Insight are effectively implemented, all Cherwell District Council members and officers, should have a clear understanding of this strategy. Performance management awareness should integrate into everyone's everyday thinking, behaviours, and actions.

Having developed a robust strategy with defined roles, responsibilities, and reporting lines, it is vital to equip members and officers with the knowledge and skills necessary to manage performance processes effectively. A training plan is being developed to meet organisational needs, including e-learning modules, workshops, and formal compliance training.

8. Strategy Review

The Corporate Performance and Insight Strategy will be reviewed annually as part of the council's Annual Business Planning Process. Each review will consider:

- The national and local context, including emerging trends and developments.
- Relevant policy and legislative changes that may influence our priorities or ways of working.
- The council's evolving business needs, ensuring the strategy continues to support effective decision-making and service delivery.

Once the review is completed it will be approved through the Democratic cycle ahead of the end of the Financial Year.

¹ Statutory guidance on the Best Value Duty for local authorities in England, issued under section 26 of the Local Government Act 1999. <https://www.gov.uk/government/publications/best-value-standards-and-intervention-a-statutory-guide-for-best-value-authorities>

² LG Inform is the local area benchmarking tool from the Local Government Association <https://lginform.local.gov.uk/>