

ROLE DESCRIPTION

Job Title	Planning and Performance Reporting Manager
Salary Band	SCP 41-43
Reporting to	Lead Officer Performance, Research and Evaluation
Directorate	Policy and Strategy
Service Area and sub area	Evidence, Research and Intelligence
Team	Performance, Research and Evaluation
Political Restriction	No

1. Primary Purpose of the Post
<p>The Planning and Performance Reporting Manager will play a key role in embedding a culture of performance management, continuous improvement and responsive evidence-based change across the organisation.</p> <p>The postholder will lead the work of the Performance Team, which is responsible for:</p> <ul style="list-style-type: none"> • assisting service areas to develop robust delivery plans which include activities, milestones and outputs. • tracking delivery progress and outcomes achieved against a range of metrics. • identifying and reporting on underperformance and actions needed to address change and risks arising. • presenting data collated in accessible reports and dashboards for a range of audiences including individual teams through to the Executive Leadership Team. • ensuring effective processes and systems are in place to evidence progress in delivering strategic objectives and reporting on operational business management data (via the Corporate Health Dashboards); and • optimising the visualisation of performance data.
2. Your responsibilities
<ul style="list-style-type: none"> • Lead the team in delivering an effective Planning, Monitoring and Performance Reporting function across the CA, reporting internally to the CEX and Executive Leadership Team and externally to the Combined Authority and Overview and Scrutiny committee on progress in delivering the organisation's Corporate Plan. • Liaise with Service Area managers and operational staff to support the implementation of processes that meet the CA's performance framework requirements. • In conjunction with the Lead Officer for Performance, Research and Evaluation, support the preparation of robust annual delivery plans for all service areas across the CA, by advising on appropriate milestones and performance metrics and ensuring that Corporate Plan objectives, Mayoral priorities and other CA Plan activities are embedded within annual delivery plans.

- Lead the ongoing development and continuous improvement of the CA's approach to service planning, monitoring and performance reporting by advising service areas on the development of annual delivery plans, completion of data returns and appropriate remedial action to address under-performance.
- Lead on the development and management of processes and systems to ensure effective monitoring and reporting on the delivery of corporate objectives; and the collection of operational business management information and input into Corporate Health Dashboards. This will include overseeing the implementation of protocols for collecting data (in line with the SOP), quality assurance of data in consultation with data providers, and automation of processes for collating/presenting information on a regular basis (i.e. monthly, quarterly).
- Oversee the analysis of performance data from a range of different sources and present this in a clear, concise and accessible format, based on agreed performance reporting for different audiences.
- Lead and support on the design and development of improved monthly and quarterly dashboards and other reports, embedding the use of Power BI to present data in a more meaningful way.
- Oversee the work of the Performance team, ensuring validity of data and development of accurate performance reports, and high-level analysis of data and interpretation of trends using Microsoft Excel (including the use of formulas and pivot tables to interpret data).
- In conjunction with the Lead Officer for Performance, Research and Evaluation present performance reports to the O/S committee, Cabinet/Portfolio meetings, Delivery Boards and other relevant forums.
- Attend relevant Directorate and Management team meetings to advise on service planning and performance reporting.
- Ensure all monthly and quarterly reports are circulated/uploaded to Mod.Gov in line with agreed deadlines and yearly timetable.

3. General Corporate Responsibilities

- Participate in organisational decision making through membership of formal groups, committees, and project teams.
- Support the monitoring, review and improvement of products and services and their inclusion in performance reporting.
- Engage in the development and maintenance of systems and processes that support the LCRCA in evidencing and reporting its strategic goals, management, and governance requirements.
- Support the Lead Officer for Performance, Research and Evaluation in the development and delivery of effective City Region planning and performance reporting practices.



- Manage the Performance team in line with the CA's Leadership Charter.
- Operate in a manner that places customers first, adopts a can-do approach and focuses on communities and working locally
- Support the Organisation in promoting the work of the LCRCA and the wider LCR.
- In line with the respective role, ensure 'joined up' policy and practice in and across areas of the city region.
- To represent the LCRCA when working with partner organisations.
- To work with relevant bodies to support LCRCA's aims and ambitions.
- To participate in all aspects of training and development as directed and to use all relevant learning opportunities to improve personal skills to improve effectiveness and efficiency of service delivery.
- To ensure the Combined Authority's commitment to equal opportunities is demonstrated through promoting non-discriminatory practices in all aspects of work undertaken.

It must be understood that every employee has a responsibility to ensure that their work complies with all statutory requirements and with Standing Orders and Financial Regulations of the Combined Authority, and to ensure that all work functions are undertaken in accordance with health and safety legislation, codes of practice, and the Combined Authority's safety plan.

This job description is not intended to be prescriptive or exhaustive; it is issued as a framework to outline the main areas of responsibility at the time of writing.

4. Recruitment Plan

Competency Based Interview
Assessment



PERSON SPECIFICATION

Job Title: Planning and Performance Reporting Manager

Criteria		
Qualifications and Training	E = Essential D = Desirable	Identified By
<ul style="list-style-type: none"> Relevant degree (numerate subject) and/or management qualification 	E	A
<ul style="list-style-type: none"> Evidence and commitment to continuous personal and professional development. 	D	A

Experience and knowledge	E = Essential D = Desirable	Identified By
<ul style="list-style-type: none"> Experience of leading/managing a team, working collaboratively and building effective strategic working relationships 	E	A,I
<ul style="list-style-type: none"> Significant experience of working in a performance monitoring and management role 	E	A, I
<ul style="list-style-type: none"> Experience of developing, designing and implementing effective measurement frameworks and processes associated with tracking and improving performance 	E	A, I, P
<ul style="list-style-type: none"> Knowledge and experience of interpreting both quantitative and qualitative data. 	E	A,I
<ul style="list-style-type: none"> An understanding of the importance and role that data and performance monitoring/reporting plays in managing an organisation and underpinning the design of new policy and improved interventions. 	E	A,I
<ul style="list-style-type: none"> Working knowledge of public sector and experience of operating in a complex policy environment, preferably in local and/or central government. 	D	A,I
<ul style="list-style-type: none"> An ability to balance competing demands and priorities, whilst at the same time delivering high quality support 	E	A,I
<ul style="list-style-type: none"> An understanding of the Liverpool City Region devolution agreement, local government, central government and their roles, structures and relationships. 	D	A,I

Skills and abilities	E = Essential D = Desirable	Identified By
<ul style="list-style-type: none"> Excellent data analysis, report writing and presentation skills. 	E	A,P,I
<ul style="list-style-type: none"> Determination to succeed and the ability to proactively manage robust challenge and form agreed ways forward. 	E	A,I
<ul style="list-style-type: none"> Strong communication skills and an ability to present complex findings in a concise manner and format that engages a range of audiences. 	E	A,P,I
<ul style="list-style-type: none"> Effective interpersonal skills and the ability to work across teams, collaborate effectively with colleagues, and use discretion and initiative. 	E	A,P,I
<ul style="list-style-type: none"> Ability to meet challenging deadlines and work with internal clients and external providers to meet them 	E	A
<ul style="list-style-type: none"> Strong IT skills, including a good working knowledge of Microsoft Office (Word, Excel, PowerPoint) and Teams. 	E	A
<ul style="list-style-type: none"> Experience using a range of other software for quantitative and qualitative analysis, including for example Power BI. 	D	A

Personal Attributes	E = Essential D = Desirable	Identified By
<ul style="list-style-type: none"> Strong interpersonal skills with the ability to lead others, develop effective teamwork, work collaboratively with colleagues across the organisation; and develop effective relationships with external stakeholders. 	E	P, I
<ul style="list-style-type: none"> Willingness to work flexibly as and when required to meet objectives and timescales 	D	A,I
<ul style="list-style-type: none"> An understanding of and a personal commitment to the Vision and Aims of Liverpool City Region Combined Authority. 	E	A,I
<ul style="list-style-type: none"> Commitment to and understanding of equal opportunities 	E	A,I
<ul style="list-style-type: none"> A commitment to providing a high-quality customer service and ensuring service standards are met 	E	A,I



Core Behavioural Competencies	E = Essential D = Desirable	Identified By
Leadership skills – ability to lead a team by giving clear directions and setting expectations; trusting and empowering team members; having honest conversations; providing constructive feedback; developing team members; and valuing all inputs	E	A,I
Analytical ability – attention to detail; logical thinking; effective planning and organisation	E	A,I
Interpersonal skills – effective communicator; active listener; good team working; effective presentation	E	A,I,P
Time management – ability to prioritise workloads and meet challenging deadlines	E	A,I

Key to Assessment Methods:

KO – Knockout question	A - Application	P – Presentation	T - Test
FQ – Filter Question	I – Interview	E – Exercise	AC – Assessment