

SUBJECT: PANEL PERFORMANCE ASSESSMENT AND SELF-ASSESSMENT

MEETING: Cabinet

DATE: 20 May 2026

DIVISION/WARDS AFFECTED: All

1. PURPOSE:

- 1.1 To provide Cabinet with the Panel Performance Assessment report and the authority's draft response to the recommendations to enable Cabinet to consider the response ahead of it being presented to Governance and Audit Committee and Council in June.
- 1.2 To provide an update on the annual self-assessment process that will be followed to produce a draft evaluation of the council's performance due to be considered by scrutiny committees in July and presented to Council in September.

2. RECOMMENDATIONS:

- 2.1 That Cabinet note the Panel Performance Assessment report attached at appendix 1.
- 2.2 That Cabinet endorse the draft response to the recommendations (appendix 2) ahead of presentation to Governance and Audit Committee and a subsequent decision by full Council.
- 2.3 That Cabinet note the process being followed to produce the annual self-assessment and propose any further adjustments to ensure the approach leads to a robust evidence-based evaluation of the authority's performance.

3. KEY ISSUES:

- 3.1 In February 2026 the Council underwent a peer Panel Performance Assessment that followed a scope agreed by Cabinet in November 2025. Following the conclusion of the Assessment, an independently chaired group of peers concluded that:

"Monmouthshire is an ambitious, well-run Council with communities at its heart and a reach that transcends boundaries."

- 3.2 This report provides Cabinet with the full report of the panel. This provides the opportunity for Cabinet to consider the recommendations and the Council's response to the panel's findings ahead of these being considered by the Governance and Audit Committee in June 2026.

- 3.3 For our organisation to be successful it's important that we are clear about what we are aiming to achieve, make sure it's delivered and has the desired impact. The council's unifying purpose is for Monmouthshire to be a zero-carbon county, supporting well-being, health and dignity for everyone at every stage of life. This is set in the Community and Corporate Plan along with six underpinning objectives.
- 3.4 We have clear and established performance management framework in place to ensure we can deliver our agreed purpose and be held to account. These arrangements are overseen by the independently chaired Governance and Audit Committee with oversight from regulators including Audit Wales. The legislative basis for performance management in Welsh local authorities is set out in the Local Government and Elections (Wales) Act 2021. This establishes specific performance requirements. These include:
- Duty to produce an annual self-assessment report assessing how effectively we exercise our functions, use resources efficiently, and ensure effective governance.
 - Requirement to arrange a Panel Performance Assessment (PPA) to conduct a statutory evaluation at least once per electoral cycle to examine how the council is meeting its performance requirements.

These are part of the Council's ongoing commitment to transparency and accountability for councillors and residents.

The Panel Performance Assessment

- 3.5 Monmouthshire's first peer panel assessment since the enactment of the legislation took place between 24th – 27th February 2026. The panel was chaired by Bev Smith, a former local authority chief executive who has subsequently held a number of non-executive roles. Details of other members can be found within the report.
- 3.6 The panel worked to a scope developed by Cabinet and approved at its meeting on 27th November. The scope was:
- how well does the council align across directorates to optimise delivery of the priorities set out in the Community and Corporate Plan?
 - what opportunities are there to further develop the council's emerging person centred and preventative approaches to working with its communities, local businesses and other stakeholders, (including town and community councils)?
 - how well are we able to demonstrate the intended outcomes and emerging impacts of our Community and Corporate Plan and, how well do we communicate them to councillors, residents and other stakeholders, including town and community councils and local businesses?
- 3.7 The legislation that guides the assessment also requires the panel to assess the extent to which the council is meeting the performance requirements specified in the Act. Namely:

- exercising its functions effectively;
 - using its resources economically, efficiently and effectively; and
 - having effective governance in place for securing the above.
- 3.8 The panel met with more than 120 people over the course of the week including: a politically balanced focus group of backbench councillors nominated by group leaders; focus groups of officers at all tiers of the organisation; volunteers; business leaders; town and community councillors; trade unions; leaders of other public sector organisations and most importantly focus groups of local people. They also considered the results of the 2025-26 residents' and staff surveys.
- 3.9 Their findings have been included in a report which is attached as appendix one. The headline conclusion was:
- Monmouthshire is an ambitious, well-run Council with communities at its heart and a reach that transcends boundaries.*
- 3.10 The panel made the following recommendations:
- Prioritising major opportunities to deliver better outcomes for residents at lower costs.
 - Strengthening community resilience and shared understanding.
 - Completing the development of Workforce and Succession Planning.
- 3.11 The authority cannot amend the panel's report but does get the opportunity, and is required to, produce a response to it. This must include:
- The extent to which it accepts the conclusions in the report;
 - The extent to which the council intends to follow any recommendations contained in the report; and
 - Any actions it proposes to take to increase the extent to which it meets the performance requirements.
- 3.12 The council must make a draft of its response to the panel performance assessment available to its governance and audit committee, which must then review the draft response and may make recommendations for changes. The panel's report and the authority's response to it will be presented to full council ahead of formal publication.

Self-Assessment

- 3.13 The council also produces an annual self-assessment report evaluating its performance in the previous financial year. As well as being an incredibly useful tool for councillors and officers, the production of a self-assessment is a legal requirement under the Local Government and Elections (Wales) Act 2021. The Act requires each local authority in Wales to keep under review the extent to which it is meeting the performance requirements defined in the Act. This means the extent to which: it is exercising its functions effectively; is using its resources economically, efficiently and effectively and its governance is effective for securing these as set out in para 3.7 above.

- 3.14 Monmouthshire's approach to self-assessment is well-established and is embedded as part of the performance management framework. This ensures it can help the council continually learn and achieve sustainable improvement and better outcomes for citizens, service users and its own workforce.
- 3.15 The assessment follows a set process that has been developed and adjusted over recent years informed by a range of feedback, including from regulators, scrutiny committees and the Governance & Audit Committee. Our assessment commences with a desk-based evaluation of a wide range of available evidence including service business plans, scrutiny findings and audit and inspection reports. The initial evidence is tested and performance challenged through a series of workshops with Directorate Management Teams before being subject to challenge by Strategic Leadership Team. The draft assessment along with the scores for each of the objectives is presented to Performance and Overview Scrutiny Committee and Governance and Audit Committee to scrutinise the robustness of the process and the council's performance against its objectives. The final assessment is subject to approval by full council.
- 3.15 We continue to develop the process year-on-year, learning from what has worked well, feedback received, alongside best practice from other organisations. The adjustments that will be made to the process this year are:
- Continuing to strengthen the evaluation of the impact and outcome of the Council's work, including the use of residents' views and case studies to assess lived experience.
 - Sharing findings with Cabinet Members individually to inform their role in reviewing the performance of services in their portfolio.
 - Increase resident involvement in the process through sharing the draft report with the *Let's Talk* resident forum.
 - Enhance trade union involvement in line with our commitment to embedding the social partnership duty.
 - Build on the summary versions developed in recent years to ensure the assessment is accessible to residents.
- 3.16 The outline timetable for completion of this work is:

April	Collation of performance data and other evidence to prepare for workshops
May-June	Workshops in each directorate
16 th June	SLT workshop
17 th June – 26 th June	Individual Cabinet member and Chief Officer performance sessions
29 th June	Joint Advisory Group Consultation
30 th June	SLT sign-off of the draft assessment
7 th July	Business Cabinet sign-off of draft assessment
Date tbc	Resident Engagement through <i>Let's Talk</i> forum
Date tbc	Performance and Overview Scrutiny

23 rd July	Governance and Audit Committee
August	Refinement to assessment to reflect input of committees and residents
24 th September	Council

- 3.17 The Panel Performance Assessment findings will inform the Self-assessment process. These two processes enable councillors, residents, regulators and Welsh Ministers to form a clear view of how the organisation is seeking to continuously improve and deliver the best possible outcomes for the residents and businesses of Monmouthshire.

4. EQUALITY AND FUTURE GENERATIONS EVALUATION (INCLUDES SOCIAL JUSTICE, SAFEGUARDING AND CORPORATE PARENTING):

- 4.1 A full impact assessment is not required for this decision. The Panel Performance Assessment is expected to have a positive impact by strengthening accountability and supporting better outcomes for all residents, including future generations.

5. OPTIONS APPRAISAL

- 5.1 Not conducting a Panel Performance Assessment was not an option as it is a statutory requirement. The process has identified recommendations which are shown in para [add number]. The learning has generated of options related to both performance management and service delivery with the final options being subject to a future decision of Council.

6. EVALUATION CRITERIA

- 6.1 The effectiveness of For Purpose, On Purpose will be overseen by the Project Assurance Board Chaired by the Chief Executive. The Board will oversee the development of a benefits realisation framework. This will include:
- Financial: Operational cost savings: Cost avoidance / liability reduction; Income generation / improved recovery
 - Service & Customer Experience: Service performance; Accessibility & inclusion; Customer satisfaction & trust
 - Environmental & Social Value: Environmental impact; Social/community impact Strategic: Regulatory and policy compliance; Operational and organisational resilience; Sustainable organisational capability; Positive effects on staff capacity and moral.
- 6.2 The evaluation of the community resilience actions will initially form part of the measurement framework for F-POP. The evaluation of workforce and succession planning will form part of the evaluation of the People Strategy which is embedded in the whole authority self-assessment. This includes key metrics from the staff survey.

7. REASONS:

- 7.1 To provide independent assurance on the Council's ambitions and delivery, support continuous improvement, and meet the statutory requirements of the Local Government and Elections (Wales) Act 2021.

8. RESOURCE IMPLICATIONS:

- 8.1 The costs associated with the panel were be met by The Welsh Local Government Association. There are no direct costs associated with the assessment.

9. CONSULTEES:

Cabinet
Strategic Leadership Team

10. BACKGROUND PAPERS:

Statutory Guidance - <https://www.gov.wales/sites/default/files/publications/2021-03/performance-governance-of-principal-councils.pdf>

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Appendix 2

Monmouthshire County Council response to Panel Performance Assessment Report February 2026

The statutory guidance under the Local Government and Elections (Wales) Act 2021 requires the council to complete a response to the panel performance assessment report. In its response, the council is required to state:

- the extent to which it accepts the conclusions in the report;
- the extent to which the council intends to follow any recommendations contained in the report; and
- any actions it proposes to take to increase the extent to which it meets the performance requirements.

This action plan sets out the council's response to each of the recommendations in the Monmouthshire County Council Panel Performance Assessment Report February 2026.

Ref	PPA Recommendation	Council response & action	Timescale & responsibility holder
1.	Prioritising major opportunities to deliver better outcomes for residents at lower costs. The Panel recommends that the Council focus and prioritise major opportunities that will deliver better outcomes for residents at a lower cost. The Council must establish a clear mechanism to identify, assess and exploit these opportunities, supported by a structured plan to be completed by the end of 2026/27. The plan should include: • A robust assessment of the investment required; • Consideration of organisational capacity to deliver; • Expected returns, including both financial savings and improved outcomes; • Alignment with the Medium-Term Financial Plan (MTFP).	<u>Context</u> For Purpose, on Purpose (F-POP) provides the council's clear mechanism to identify, assess, prioritise and govern major change opportunities to deliver better outcomes and/or lower costs. The Programme Assurance Board oversees the whole change portfolio ensuring it is aligned with our purpose. This includes: identifying and scoping challenges and opportunities, developing business cases, managing risks and dependencies, ensuring organisational readiness, monitoring benefits/value realisation, and ensuring alignment with the Medium-Term Financial Plan (MTFP).	Chief Executive

	Realising these opportunities requires discipline, sequencing and a strong organisational narrative linking change to outcomes and financial resilience	A structured delivery plan has been developed and is overseen by the Programme Assurance Board. <u>Actions</u> • Establish and maintain a single, live change portfolio within FPOP (including major opportunities), with clear entry criteria, stage-gates and decision papers routed via the Programme Assurance Board (PAB). • Apply the FPOP Benefits and Value Framework to assess investment required, organisational capacity, expected returns (financial and non-financial) and delivery confidence; use this to prioritise opportunities and sequence delivery. • Strengthen programme management discipline through the FPOP Programme Management Office (PMO), including consistent templates, reporting, risk management and a portfolio dashboard to support early intervention where delivery is off-track. • Ensure opportunities that require Member decisions progress through existing approval routes (Cabinet/Council) with clear business cases and benefits realisation expectations.	Short Term: now – September 2026 Short Term: now – September 2026 Medium Term: October 2026 – March 2027 Long Term: April 2027 – December 2027
2.	Strengthening Community Resilience and Shared Understanding. The Panel recommends that the Council works with communities and partners to develop a shared understanding of “community resilience” within the Monmouthshire context. This shared definition will enable better measurement of impact and help clarify the difference the Council and its partners aim to make. Key points include:	<u>Context</u> We will adopt Resilient Communities as a single, consistent framing for this work. This provides a shared and strengths-based narrative aligned to the council’s values and responds directly to the PPA’s call for a clear, Monmouthshire specific understanding of community resilience.	Head of Customer, Communication and Engagement.

	• Using community insight to understand impact and well-being outcomes; • Ensuring prevention plans maximise social capital, which stakeholders identified as a major strength; • Strengthening purposeful communication and engagement with communities, drawing on the placemaking model; • Ensuring all communities - particularly in a large rural county - have a voice in shaping local priorities. Stakeholders are ready and willing to work with the Council and that co-design is essential for meaningful progress.	The approach complements the Living Well Strategy by providing the community level conditions that support prevention, early help and independence. <u>Actions</u> • Co-produce a clear, practical definition of Resilient Communities with communities, partners, Town and Community Councils and frontline officers, with equity embedded throughout the process. • Undertake proportionate mapping of existing community assets, networks and activity, focusing on strengths and gaps that matter for prevention. This will include a digital community asset map, supported by local points of contact for residents who are less digitally enabled. • Move from broad engagement to targeted action by identifying a small number of priority places and/or themes where strengthening Resilient Communities can deliver the greatest preventative and equity benefit. • Establish a Resilient Communities Network to support alignment, shared learning and reduced duplication across the Council, partners, health, the voluntary sector and Town & Community Councils. • Use a proportionate mix of lived experience, qualitative insight and proxy measures to demonstrate progress, reflecting the PPA's expectations for meaningful short and medium term evidence. <u>FPOP linkage</u> Where the Resilient Communities approach translates into specific change projects (e.g., digital community	Short Term: now – September 2026 Medium Term: October 2026 – March 2027 Long Term: April 2027 – December 2027
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		asset map, priority place-based interventions), these will be captured within the FPOP change portfolio so progress, risks and benefits can be tracked consistently through corporate governance.	
3.	Workforce and Succession Planning The Panel recommends that the Council complete the development and implementation of its workforce and succession plan to underpin future delivery and organisational resilience. The emphasis is on: • Ensuring the Council has the skills and capabilities required for future challenges; • Addressing identified workforce gaps; • Supporting leadership development and retention of critical knowledge; • Strengthening organisational capacity to deliver its priorities. Workforce planning is essential to sustaining improvement, reducing single points of failure, and supporting innovation.	<u>Context</u> We established a commitment to embed workforce planning across the organisation in the People Strategy and accompanying action plan approved by Cabinet in June 2024. The actions relating to workforce development were scheduled to commence once other building blocks has been put in place. These include: the development and launch of a new employee review and development scheme, conducting a training needs analysis and establishing a training budget. With these now in place, or in the process of being rolled out, work has commenced on workforce planning, which is being taken forward under the heading of a Future Focused Workforce. <u>Actions</u> • Run a development session for managers on succession planning with the LGA • Upskill HR Business Partners in strategic workforce planning' • Produce a workforce development plan to sit underneath the People Strategy to provide clarity on the steps that need to be taken to ensure a future focused workforce • Implement the workforce of the future through expanding talent entry points, including work experience, apprenticeships, traineeships and graduate opportunities	Chief Officer – People, Performance and Partnerships. December 2026 Short Term: now – September 2026 Medium Term: October 2026 – March 2027

		• Develop a training pathway for all job roles to ensure existing staff are developed to maximise their capability • Undertake research to understand the future skill requirements across the authority and develop or commission training to future proof our workforce <u>FPOP linkage</u> Workforce and succession planning will be treated as a core organisational readiness enabler within the FPOP change portfolio, supporting delivery capacity, reducing single points of failure and strengthening the Council's ability to deliver its priorities. Progress will be tracked through the same programme reporting discipline.	
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