Item: 9
Title: Performance against our annual plan Quarter 3

Gweithredu / Action required -	Noting.
Amseru / Timing	Routine
Argymhelliad / Recommendation	To note and discuss as required.
Risg / Risk	Any risks relating to our inability to effectively deliver, report on, and communicate, our impact will have significant reputational damage in addition to failure to meet our obligations within the Health and Social Care (Quality and Engagement)(Wales) Act and our Framework Document with our Partnership team within Welsh Government. These risks are monitored through the performance and risk reporting frameworks and escalated through the appropriate sources of assurance. There are currently 8 initiatives/projects that are red risks for delivery in this financial year, and 23 that are amber / behind. More detail on these is contained within the paper.
Cyllid / Finance	Within budget
Amcan Cynllun Corfforaethol / Corporate Plan Objective	All objectives within Annual Plan 2024 -2025
Cydraddoldeb / Equality	Any major policy, process changes, project or events are assessed for their impact on different communities using our updated Integrated Impact Assessment.
Cyfathrebu / Communications	Please tick one of the following boxes if this activity will have an impact on: **Internal:** our people ☒

	External: our customers/partners/stakeholders ☒
	External: our organisation's reputation ☒
Cymeradwyaeth / Approval/Clearance	Ben Eaton
Trafodaethau/ Penderfyniadau Blaenorol / Previous discussions/decisions	Standing agenda item on senior leadership and Board meetings.
Awdur/ Cyflwyno / Author/presenting	Ben Eaton
Dyddiad / Date	22 January 2025

Cefndir / Background

The Board has previously received updates on organisational performance. This report is the first to reflect the introduction of the Objectives and Key Results (OKR) framework, which the Board approved to enhance planning, performance monitoring, and assurance processes.

This report aims to provide the Board with a comprehensive overview of organisational performance for the year to date, including detailed performance data and outcomes from the final quarter of 2024 (Q3). It presents a more detailed analysis of activities, measurable achievements, and the impact of our work on individuals and communities.

Work is underway to develop a suite of dashboards that will visually summarise and represent key information. These dashboards will support future Board reports by enabling a sharper focus on the most significant highlights.

Manylion / Detail

Progress against our strategic objectives within the Annual Plan.

	Status
1. Drive a national conversation about the future of health and social care services	🟩
2. Push for services that meet people's needs	🟧
3. Work together better	🟧

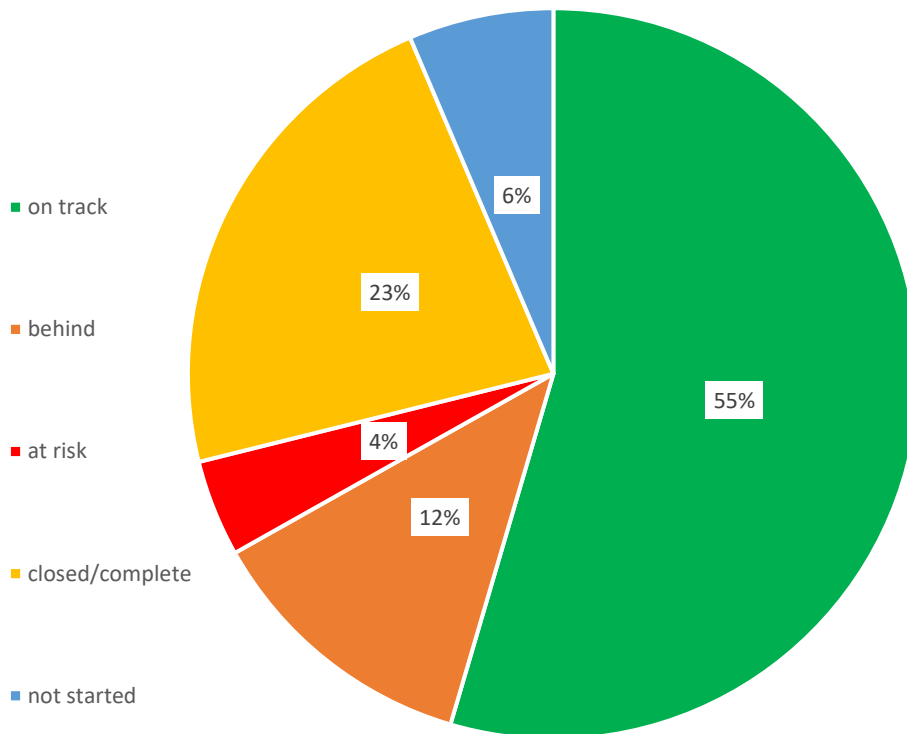|	
4. Help people and services use technology in ways that work for them	
5. Grow and improve as an organisation	

There are a total of 146 specific objectives outlined in the Annual Plan for 2024-2025. For the OKR framework, objectives include both strategic aims and metric-based key results. Of these 146 objectives:

- 108 are on track
- 19 are marked as 'behind'
- 7 are categorised as 'at risk'
- 5 have been completed or closed.

The OKR system automatically flags objectives as 'behind' or 'at risk' based on progress against the planned timeline. For example, in a 4-month project, the system expects 50% completion by the end of month 2.

Achieving many objectives requires multiple supporting projects or initiatives, and the OKR reflects these dependencies. Currently, there are 187 such projects or initiatives.

Projects and Initiatives

Legend:
- on track
- behind
- at risk
- closed/complete
- not started

Pie chart values: 55%, 12%, 4%, 23%, 6%

Projects at risk and actions taken

The Director of Operations and the Strategic Director for Organisational Strategy and Engagement have reviewed the 8 projects marked as 'at risk' and the 23 flagged as 'behind,' engaging with project owners to address challenges. Out of the 8 'at risk' projects, 2 are unlikely to be completed, or not to the level anticipated, by April 2025:

2.5.6.1 - Unconscious bias and cultural competency training

This project aims to design or procure training linked to the objective of ensuring a fair and accessible workplace. However, after reviewing the organisation's current position under the Strategic Equality Plan (SEP), it was identified that some areas are less mature than expected. As a result, this project will be deferred to next year to avoid overwhelming staff while continuing foundational awareness campaigns and sessions in the interim.

3.5.1 - Sharing good practice

Efforts to spotlight and share good practices have been insufficient this year. At the Board development session on 18 December 2024, it was agreed that action would be taken in the final quarter to identify and celebrate good practices, starting with actions to address delays in neurodevelopmental assessments, a key concern for people and communities.

For other 'at risk' projects, the delays are primarily due to capacity issues, and these are being addressed to get them back on track.

Key projects behind schedule

Some projects flagged as 'behind' are significantly delayed, including:

Regional projects (Priority 2 - Services that meet people's needs): Absences in key roles in regions like Cwm Taf Morgannwg, North Wales, West Wales, and Powys have impacted progress. These projects are expected to be completed by April, although this will require an intense effort in the final quarter.

Digital projects: Initiatives such as the Digital Strategy, Cyber Accreditations, and implementation of internal audit recommendations have been delayed due to capacity constraints and unexpected priorities (e.g., office moves, telephony switchovers). To address this, the Executive Team has approved bringing in specialist support and reviewing the team structure to ensure it meets future needs.

Complaints summit: This initiative, aimed at learning from people's experiences, has been delayed due to competing demands. Specialist support will be engaged to plan and facilitate the summit in quarter 4.

Efforts are ongoing to ensure all remaining objectives and projects are delivered within the agreed timelines.

Headline Achievements Year to Date

Over 16,000 people have engaged with us ~~this~~ since April 2024.
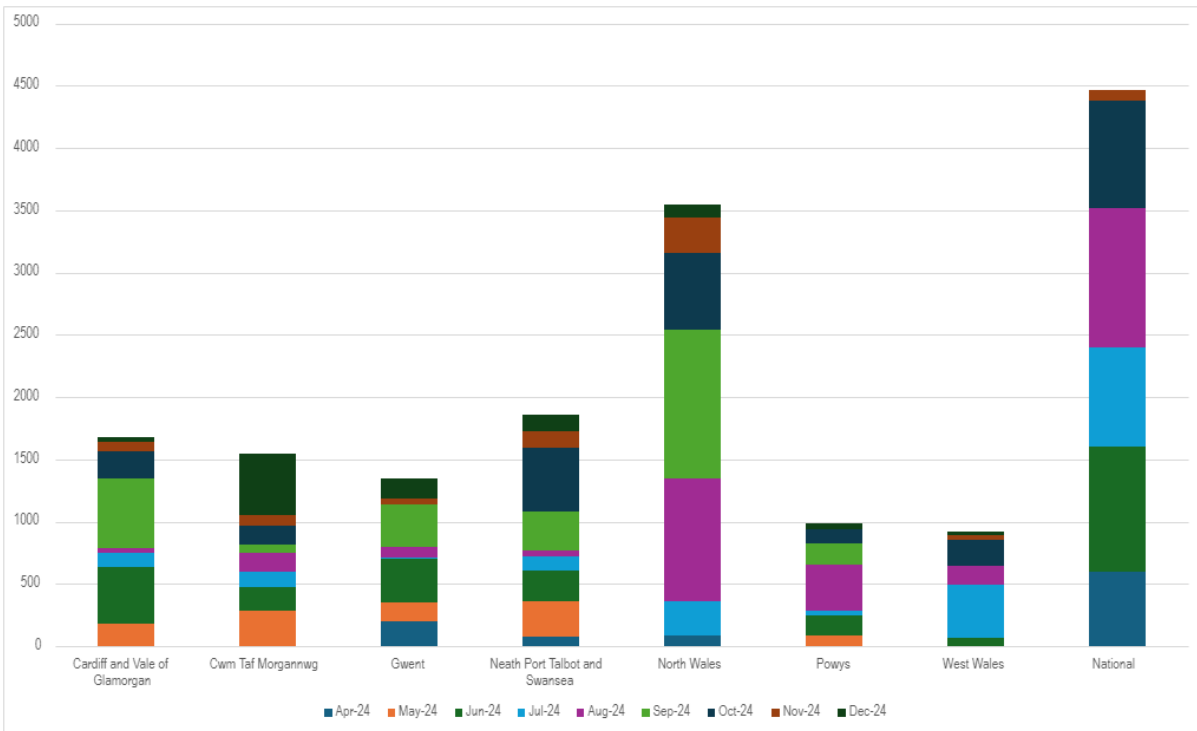
We have:

- taken part in 598 engagement activities

- carried out 142 on site engagement visits

- Made 371 representations

- Responded to 15 consultations or calls to for evidence

- Commissioned and completed 7 pieces of research

- Been involved – on average - in 37 service changes each month

- On average, worked with around 130 partners per month

- Responded through our Complaints Advocacy Service to over 1100 enquiries

- supported people to take forward over 3,400 concerns through our complaints advocacy service.

Overview of quarter 3 2024

Region	Engagement activities	Visits	Representations	Open consultation	Average Open advocacy cases	No. engaged with
Cardiff & Vale	18	10	4	49	119	335
Cwm Taf Morgannwg	24	22	0	39	103	731
Gwent	13	19	22	5	160	208
Powys	12	10	6	1	70	162
NPT & Swansea	29	12	18	0	161	777
North Wales	33	17	46	1	274	1006
West Wales	12	16	30	0	181	276
National	4	0	0	2	0	941
TOTALS	158	192	171	148	3161	6095

The themes of what people have told us during this period are:

Needs improvement

Theme	Key Issues and Insights
GP Services	- Accessibility issues, long wait times for appointments, and challenges with repeat prescriptions.
	- Lack of support for neurodivergent individuals in GP settings.

	- Limited multilingual and Easy Read materials for patients with sensory impairments or language barriers.
Mental Health Services	- Insufficient access to Community Mental Health Teams and Child and Adolescent Mental Health Services.
	- Gaps in trauma-informed care and tailored mental health support for neurodivergent individuals.
	- Lack of proactive support for individuals in crisis.
Cancer Care Pathways	- Inconsistent treatment scheduling and communication gaps between providers (e.g., Velindre and health boards).
	- Limited support for family members during cancer care.
Waiting Times	- Long delays for diagnostics, including neurodevelopmental assessments and treatment for endometriosis.
	- Extended wait times for planned care and chronic condition treatments.
Transport and Accessibility	- Rural patients face inadequate public transport options and high costs of private travel.
	- Recommendations for mobile healthcare units to improve access.
Social Care Challenges	- Lack of clarity in social care funding and assessment processes.
	- Insufficient support post-hospital discharge and for unpaid carers.
Staffing Concerns	- Staff shortages impacting service delivery across sectors.
	- Positive feedback on staff dedication, with concerns about burnout and retention.
Integration of Services	- Fragmented coordination between health and social care providers.
	- Need for holistic approaches to address patient needs effectively.
Complaints Advocacy	- 494 new cases opened, focusing on GP accessibility (82 cases), mental health services (50 cases), and cancer care (25

Cases (Quantitative)	cases). Waiting times for diagnoses and treatment also feature.

What's working well

Across the final quarter of 2024, several positive trends emerged. The dedication and professionalism of healthcare and social care staff were consistently praised, particularly in oncology and mental health services.

Third-sector collaborations, including partnerships with Alzheimer's Society and Neurodivergent Wales, facilitated impactful changes and enhanced support for vulnerable groups.

Innovative engagement methods, such as virtual forums and Llais Local events, expanded the reach of our initiatives, enabling more inclusive participation and feedback. Dementia-friendly support groups and streamlined cancer care pathways received high praise from participants, showcasing the effectiveness of tailored, person-centred approaches.

Representations

Through our complaints advocacy service and engagement efforts, we have made over 170 representations to health and social care services during this period. In Quarter 4, we will focus on developing **Llais Standards**, which will include a clear framework of standards focused on ensuring our representations are impactful.

We believe these standards will lead to greater consistency in our approach and an increase in the number of representations reported.

A summary of the themes, issues and actions / representations are:

Theme	Key issues	Actions taken
Staff shortages in key services	Critical shortages in general practice, oncology, and mental health teams.	Representation for workforce planning, staff retention

		strategies, and targeted recruitment.
Dementia-friendly care gaps	Lack of tailored environments and insufficient staff training for dementia-related needs.	Discussions with health boards to implement training and expand dementia-focused initiatives.
Transport challenges	Inadequate public transport in rural areas affecting healthcare access.	Representation for mobile healthcare units, localised clinics, and improved rural transport funding.
Specialist care waiting times	Delays in neurology, orthopaedics, and endometriosis treatments.	Discussions with service designers to address backlogs and streamline patient pathways.
Communication gaps	Poor communication from providers, including unclear treatment explanations and inconsistent updates.	Recommendations to health boards to enhance communication protocols and establish feedback loops.
Neurodivergent Accessibility	Settings not accommodating sensory or communication needs of neurodivergent individuals.	Called for sensory-friendly environments and staff training in neurodiversity awareness.
Post-hospital discharge support	Insufficient guidance and delays in accessing domiciliary care or complex needs support.	Representations for improved discharge planning and robust community support systems.

Project highlights and outcomes:

- **Living with cancer:** Engagements in the Cardiff & Vale and Gwent regions focused on improving staff continuity and treatment scheduling. Patients emphasised the importance of consistent care teams and clearer communication about treatment options, which have shaped local service improvements.

- **Neurodivergent community support:** Open Door events in Cwm Taf Morgannwg and North Wales identified barriers in diagnosis and support for neurodivergent people. Feedback has driven tailored initiatives,

including staff training programmes and a call for standardised service approaches across Wales.

- **Urgent and emergency care in hospitals:** Engagements across Wales involved over 736 participants and visits to 94 Emergency Departments, Minor Injury Units, and Medical Assessment Units. A need for urgent action has been discussed with stakeholders focused on better triaging, shorter wait times, and clearer communication in emergency care.

  A meeting has also been agreed with the NHS Executive to share qualitative data to inform discussions on performance and action.

- **Dementia-friendly services:** Community forums in Cwm Taf Morgannwg and Neath Port Talbot and Swansea regions highlighted the value of dementia-friendly support groups but also identified gaps in care home availability and staff training. These findings have informed collaborations with health boards to expand dementia-focused initiatives.

- **Rural access challenges:** People in North Wales and Powys regions raised significant concerns about healthcare access due to limited transport options. Representations have focused on supporting mobile healthcare units and increasing funding for rural transport services.

- **Children and young people's mental health needs:** Engagements in Cardiff & Vale and Gwent regions identified delays in accessing CAMHS and a lack of mental health support in schools. Recommendations to address these gaps have been shared with education and health stakeholders.

- **Community integration projects:** Collaborative projects in West Wales and Neath Port Talbot and Swansea regions, in partnership with Alzheimer's Society and Neurodivergent Wales, have enhanced the delivery of person-centered care and better supported underserved populations.

Conclusion

The progress we've made so far reflects the hard work and commitment to improving health and social care services. With most of our objectives on track, and clear plans to address those that need extra support, we're steadily moving closer to achieving our goals.

Quarter 4 is a chance to build on this foundation. The introduction of new Llais specific standards will help us ensure more consistency in how we represent people's needs, while our focus will remain on tackling key challenges like access to GP services, support for mental health, and improving healthcare in rural areas.

From engaging with over 16,000 people this year, to working with over 130 partners a month such as the Alzheimer's Society and Neurodivergent Wales, we've seen the real impact of listening, acting, and collaborating. Whether it's through our complaints advocacy service, involvement with service change, or sharing best practices, the voices of people and communities are being represented and heard.

As we head into the final stretch of the year, our priority is to keep this momentum going while at the same time responding to a clear need to support the well-being of our people in delivering our broad agenda, addressing barriers and building on what's already working well.