

### Item: 08a Title: Performance dashboards

Gweithredu / Action required -	To note and discuss
Amseru / Timing	Routine
Argymhelliad / Recommendation	That the Board considers the matters identified in this report.
Risg / Risk	While the development of the dashboards presents significant opportunities for improving organisational insight and accountability, there are several risks to note.
	The delivery timeline has been adjusted to reflect the limited developer capacity and the complexity of the dashboard suite. There is also a risk that data quality issues, particularly from the CRM and manually maintained trackers, could affect the reliability of outputs.
	This is being mitigated by developing a dedicated data quality dashboard and early engagement with data owners. To support adoption, guidance and support will be provided alongside each dashboard release, with users involved throughout the design process.
	Information governance remains a priority, and all dashboards will be reviewed to ensure no personal or sensitive data is exposed.
	Dependencies on external systems are being actively monitored, and where required, interim manual processes will be used to ensure continuity.



a gofal cymdeithasol and social care	
Cyllid / Finance	Initial funding for the Power BI development resource has been identified from underspend within the Strategy Directorate (Communications, Engagement, and Insights), specifically from vacancies that remained unfilled during the early part of the year.
	These posts are expected to be filled from mid-June, at which point the current funding route will no longer be sustainable.
	The Executive Team recognises the strategic value of this work and will meet in the coming weeks to consider options for securing the necessary budget to enable delivery of the full dashboard suite through to completion.
Amcan Cynllun Corfforaethol / Corporate Plan Objective	Strategic Objective 5 – Grow and improve as an organisation, and supporting <i>a</i> ll objectives within Annual Plan 2024 -2025
Ecwiti, Amrywiaeth a Chynhwysiant / Equity, Diversity & Inclusion	This work supports Llais' Strategic Equality Objectives by improving how we track and understand who we are hearing from across Wales.
	Several of the dashboards, particularly those focused on engagement, representation, and service themes, will allow us to identify gaps in participation by geography, demographic group, or service type.
	Over time, this will strengthen our ability to target outreach, tailor our engagement methods, and ensure we meet our duty to represent the voices of people from all backgrounds, including those often



	underrepresented in health and social
	care conversations.
Cyfathrebu /	Please tick one of the following boxes if
Communications	this activity will have an impact on:
	Internal: our people 🛛
	External: our
	customers/partners/stakeholders 🗵
	External: our organisation's reputation
	$\boxtimes$
Cymeradwyaeth /	Ben Eaton
Approval/Clearance	
Trafodaethau/	Monthly Tim Arwain meetings and regular
Penderfyniadau Blaenorol /	Executive meetings.
Previous	
discussions/decisions	Service Delivery Group
	Board meetings – Jan 2025.
Awdur/ Cyflwyno /	Ben Eaton
Author/presenting	
Dyddiad / Date	21/05/2025
Cefndir / Background	
Purpose	

#### Purpose

To update the Board on progress in developing a suite of internal dashboards designed to support real-time monitoring of organisational performance, and to provide assurance regarding the phased approach, delivery timeline, and intended outcomes.

## Background

In line with Strategic Objective 5 – *Grow and improve as an organisation* – Llais commissioned a Power BI specialist in March 2025 to improve how we measure, track, and understand organisational performance.

This work is intended to:

 Provide live visibility of performance against our Annual Plan and Objectives and Key Results (OKRs)



- Enable clear oversight of engagement, advocacy, and representation activity
- Improve data quality and standardisation within the Customer Relationship Management (CRM) system
- Create a single view of organisational performance across functions.

### Manylion / Detail

#### Approach taken

The work has been structured into 4 clear phases:

Phase 1: Discovery and scoping (March–April 2025)

- Consulted with leads across People, Finance, Audit, Governance & Risk, Communications, Engagement, Representations, Complaints Advocacy and the Executive Team.
- Confirmed available data sources (e.g., Dynamics CRM, Viva Goals, Oracle, ESR, Excel trackers)
- Identified initial performance indicators aligned to Annual Plan and OKRs
- Defined user roles and dashboard access needs.

Output: Dashboard requirements specification (Completed)

Phase 2: Data integration and automation (April 2025)

- Power Automate workflows developed to connect Dynamics CRM and other systems
- Initial data cleansing and validation undertaken
- Data quality dashboards trialled for ongoing use

Automated data flows established (Completed)

Phase 3: Dashboard development and release (May–July 2025)

Agile delivery process in place (2-week sprints per dashboard or theme)



- Dashboards prioritised in 3 waves (see next section)
- Regular feedback from users being built in iteratively

Output: Minimum Viable Product dashboards in live testing; incremental release underway

Phase 4: Advanced reporting and data quality enhancement (June– August 2025)

- Focused on improved CRM reporting (advocacy, representations, engagement)
- Data quality dashboards embedded in monthly reporting to regional teams
- Development of advanced thematic dashboards (e.g., cancer, word search, demographic reach).

### Delivery prioritisation and timeline

Following discovery and consultation with senior leaders, the following development sequence was agreed for sprint delivery:

Wave	Focus area	Live release
Wave 1	Annual Plan and OKR Delivery Dashboard (Viva Goals & Planner)	Mid–June 2025
	Complaints Advocacy Performance Dashboard	Mid–June 2025
	Engagement and Representation Overview	Late June 2025
Wave 2	HR and People Dashboard	Mid–July 2025
	Finance and Budget Monitoring	Late July 2025
	Communications and Campaign Activity	Early August 2025
Wave 3	Governance & Risk (incl. Audit Tracker)	Mid–August 2025
	Regional Comparison and Insight View	Late August 2025



Advanced CRM Reporting (e.g. Cancer, Word Search, Themes)

This allows:

- 2–3 weeks per dashboard including design, build, stakeholder feedback, and refinement
- Time for quality assurance, version control, and dependencies (e.g., data from Finance or People)
- A small contingency buffer if support is limited to one core developer.

Each dashboard will go through a cycle of minimum viable product (MVP) release, staff feedback, refinement, and roll-out. Training and standard operating procedures will accompany release where necessary.

## Progress to date

As of early May:

- Phases 1 and 2 are complete
- Elements of Phase 3 are live in MVP format
- Dashboards in testing include:
  - Advocacy data quality
  - Representation overview
  - Word search (CRM keyword reporting)
  - Cancer-specific dashboard (in support of Tenovus project)
- Feedback loops with operational leads are embedded in the next
   6–8 weeks of delivery

\*Screenshots of the dashboards are included for your information below.



#### Benefits and next steps

The dashboards will:

- Reduce manual reporting
- Improve visibility of performance and delivery risks
- Enhance data-driven decision-making at Executive and Board levels
- Provide better equity insight (e.g. who we engage with, where gaps exist)

#### Next steps:

- Wave 1 dashboards (OKRs, advocacy, engagement and representation) will be finalised and embedded by mid–June 2025
- Waves 2 and 3 will be delivered between July and September 2025, aligned with resourcing capacity
- Data quality improvements and user testing will run in parallel to ensure robust, reliable outputs
- The final dashboard suite will support delivery and oversight of the 2025–2026 Annual Plan and feed into Board performance reporting from Quarter 2 onwards.



# Data quality dashboard

Looking at cases missing key topics and specialities for Regional managers to receive monthly and action the updating of cases with the relevant advocate.

	Llais Cyr	nru-Adv	ocacy d	ashboard	í .	Date 01/01	/2020 🖾 31	/12/2025 🖾	
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	Stephen Allen								
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	Claire Starmore		4	Practice   Medical					
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## Word search dashboard

Enabling a search for keywords in CRMs case subjects to enable quicker reports on thematic subjects

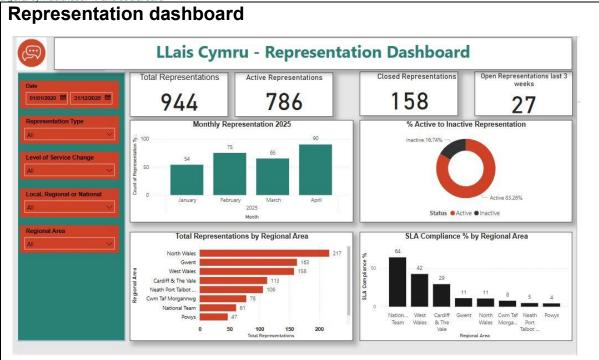


earchFilter				CaseType	* Status(cases), Case	eType
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ase  1   Doctor Secondary Care   Clinical Practice   Surgical	CA-12840   Shelley Phelps	Clinical Practice	Treatment (Clinical Practice)	Surgical		
Case  1   Doctor Primary Care   Clinical Practice   Primary Care	CA-13217   Chloe Devine	Clinical Practice	Prescribing/Me dication	Primary Care		
Case  1   Doctor Primary Care   Clinical Practice   Primary Care	CA-13291   Amanda Collins	Clinical Practice	Treatment (Clinical Practice)	Primary Care		
Case  1   Doctor Primary Care   Clinical Practice   Mental Health & earning Disabilities	CA-13195   Alex Webb	Clinical Practice	Prescribing/Me dication	Mental Health & Learning Disabilities		
ase  1   Administration Staff   Clinical Practice   Primary Care	CA-12785   Kay Jones	Clinical Practice	Diagnosis (Clinical Practice)	Primary Care		
Case  1   Administration Staff   Clinical Practice   Primary Care	CA-13046   Francis Dare	Clinical Practice	Diagnosis (Clinical Practice)	Mental Health & Learning Disabilities		

# Representation overview dashboard

	LLais Cymru	- Representat	ion Dashboard	k
Date 01/01/2020 🔤 31/12/2025 🖼	TOTAL	WITHIN SLA		SLA COMPLIANCE %
REPRESENTATION TOTAL	331	51	280	15.41
EXTERNAL REPRESENTATION	277	45	232	16.25
LOCAL,REGIONAL AND NATIONAL	7	(Blank)	7	(Blank)
SERVICE CHANGE	47	6	41	12.77





# **Representing Llais dashboard**

Separating out when we represent, instead of representations. CRM updates are programmed to show this more clearly in the future.

	Representation ID	Representation	Regiona
Date	RER-240918-1386	Ysbyty Gwynedd Emergency Department Waiting times and WAST Waiting times   External Representation   RER-240918-1386	North W
01/01/2020 📾 31/12/2025 📾	RER-241025-1502	Ysbyty Gwynedd Emergency Department I External Representation   RER-241025-1502	North W
	RER-250117-1705	Ysbyty Glan Clwyd - Water Supply   External Representation   RER-250117-1705	North W
	RER-240903-1351	WWRPB Citizen and Third Sector Engagement Board   External Representation   RER-240903-1351	West Wa
Regional Area	RER-250414-1935	WW NHS App   External Representation   RER-250414-1935	West Wa
	RER-240611-1200	WW HDUHB Quality, Safety and Experience Committee Meeting   External Representation   RER-240611-1200	West Wa
All 🗡	RER-250401-1882	Working with the LA   External Representation   RER-250401-1882	Powys
	RER-250106-1679	Women's Health   External Representation   RER-250106-1679	Neath P
Representation Type	RER-250211-1743	Winter Planning for Mental Health Services   External Representation   RER-250211-1743	Swansea
	RER-250211-1742	Winter Plan (SB UHB Board Meeting November 2024)   External Representation   RER-250211-1742	Neath P
	RER-250107-1682	Winter Care   External Representation   RER-250107-1682	Neath P
	RER-250106-1677	WG Funded Saturday Dental Scheme   External Representation   RER-250106-1677	National
Status	RER-241108-1542	WG Digital Inclusion Unit   External Representation   RER-241108-1542	North W
	RER-240925-1401	West Wales Regional Partnership Board C&3sect   External Representation   RER-240925-1401	West Wa
All 📉	RER-240926-1403	WEST WALES GP CHARGES FOR TEST RESULTS   External Representation   RER-240926-1403	West Wa
	RER-240823-1337	Welsh Ambulance Trust Service   External Representation   RER-240823-1337	Nationa
	RER-250320-1846	Welsh Ambulance Services University NHS Trust's Board Meeting   External Representation   RER-250320-1846	Nationa
	RER-240906-1361	Welsh Ambulance Service Trust - conduct   External Representation   RER-240906-1361	Neath P
	RER-250103-1673	Welsh Ambulance Service   External Representation   RER-250103-1673	Nationa
	RER-240923-1400	Weish Ambulance Service   External Representation   RER-240923-1400	Nationa
	RER-250110-1695	WAST Critical incident   External Representation   RER-250110-1695	West Wa
	RER-240222-1003	Ward visiting times - Bronglais   External Representation   RER-240222-1003	West Wa
	RER-250307-1827	Ward 3 Ysbyty Glan Clwyd I External Representation I RER-250307-1827	North W
	RER-250204-1731	Ward 3 Ysbyty Glan Clwyd   External Representation   RER-250204-1731	North W
	RER-250401-1876	Wales Screening Committee   External Representation   RER-250401-1876	National
	Total		



9	LLais Cyn	nru - Repr	esentation	Dasnboard	
		Case	Progress Tracker by	SLA Status	
Date 01/01/2020 🔤 31/12/2025 🔤	Legend  External Representation	Local, Regional, and National Consul	tation 🔵 Service Change		
01/01/2020 W3 31/12/2025 W3		Mar 2024 Apr 2024 May 2024 Jun 2	024 Jul 2024 Aug 2024 Sep 2024 Oc	t 2024 Nov 2024 Dec 2024 Jan 2025 Feb 2	025 Mar 2025 Apr 2025 May 2025
	RC-240410-1061 RC-240410-1062				
OverdueFlag	RC-240410-1063	i			
Overdue 🗸	RC-240410-1064	1			
	RC-240412-1067	1			
Representation Type	RC-240419-1082				
	RC-240520-1157 RC-240521-1159	i			
External Representation	RC-240621-1226		1		
	RC-240626-1227				
Local, Regional, and National	RC-240729-1279		1		
Consultation	RC-240909-1362 RC-240909-1363		- i		
	RC-241001-1416				
Service Change	RC-241030-1514				
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