

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	<p>While the development of the dashboards presents significant opportunities for improving organisational insight and accountability, there are several risks to note.</p> <p>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.</p> <p>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.</p> <p>Information governance remains a priority, and all dashboards will be reviewed to ensure no personal or sensitive data is exposed.</p> <p>Dependencies on external systems are being actively monitored, and where required, interim manual processes will be used to ensure continuity.</p>

Cyllid / Finance	<p>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.</p> <p>These posts are expected to be filled from mid-June, at which point the current funding route will no longer be sustainable.</p> <p>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.</p>
Amcan Cynllun Corfforaethol / Corporate Plan Objective	<p>Strategic Objective 5 – Grow and improve as an organisation, and supporting all objectives within Annual Plan 2024 -2025</p>
Ecwiti, Amrywiaeth a Chynhwysiant / Equity, Diversity & Inclusion	<p>This work supports Llais' Strategic Equality Objectives by improving how we track and understand who we are hearing from across Wales.</p> <p>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.</p> <p>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</p>

	underrepresented in health and social care conversations.
Cyfathrebu / Communications	<p>Please tick one of the following boxes if this activity will have an impact on:</p> <p>Internal: our people <input checked="" type="checkbox"/></p> <p>External: our customers/partners/stakeholders <input checked="" type="checkbox"/></p> <p>External: our organisation's reputation <input checked="" type="checkbox"/></p>
Cymeradwyaeth / Approval/Clearance	Ben Eaton
Trafodaethau/ Penderfyniadau Blaenorol / Previous discussions/decisions	<p>Monthly Tim Arwain meetings and regular Executive meetings.</p> <p>Service Delivery Group</p> <p>Board meetings – Jan 2025.</p>
Awdur/ Cyflwyno / Author/presenting	Ben Eaton
Dyddiad / Date	21/05/2025
Cefndir / Background	
<p>Purpose</p> <p>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.</p> <p>Background</p> <p>In line with Strategic Objective 5 – <i>Grow and improve as an organisation</i> – Llais commissioned a Power BI specialist in March 2025 to improve how we measure, track, and understand organisational performance.</p> <p>This work is intended to:</p> <ul style="list-style-type: none"> • 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)	September 2025
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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:

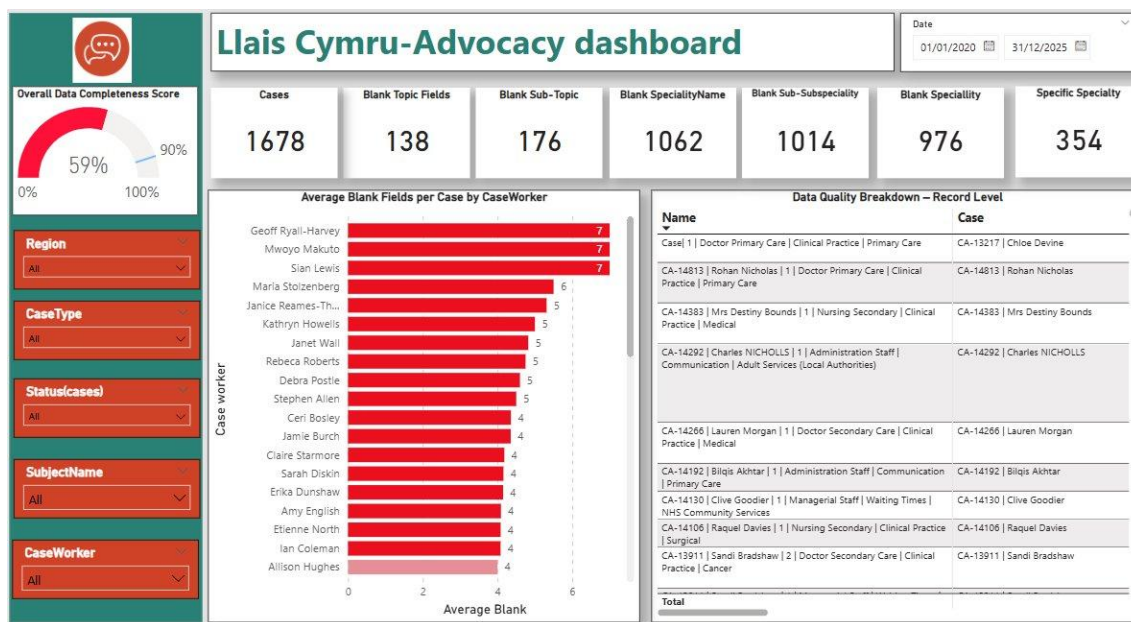
- Reduce manual reporting
- Improve visibility of performance and delivery risks
- Enhance data-driven decision-making at Executive and Board levels
- Provide better equity insight (e.g. who we engage with, where gaps exist)

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.



Word search dashboard

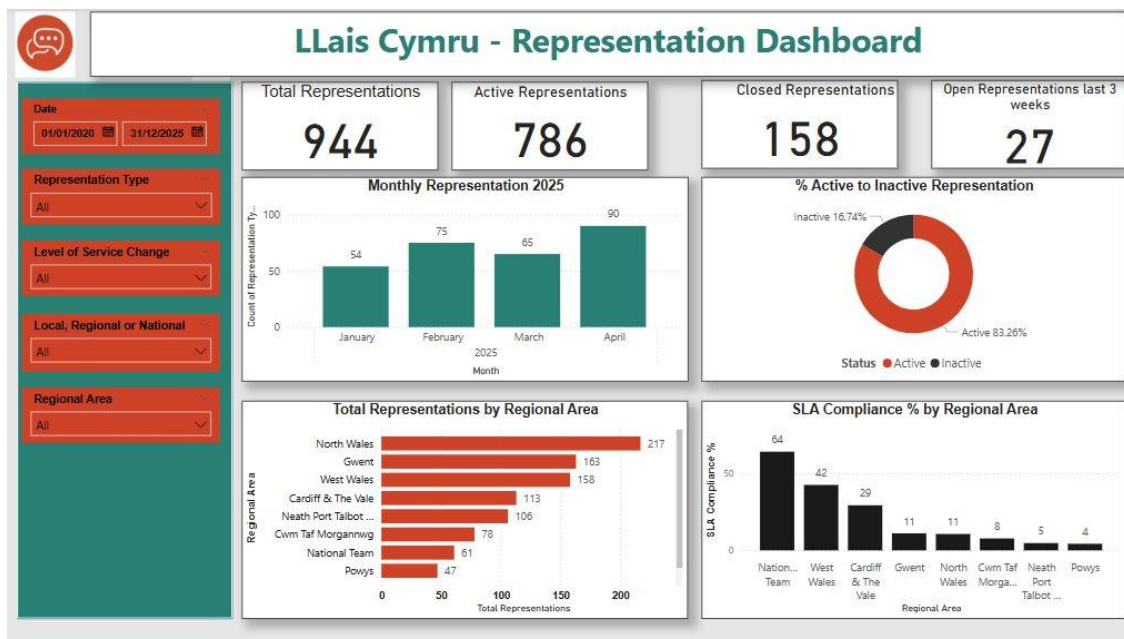
Enabling a search for keywords in CRMs case subjects to enable quicker reports on thematic subjects

Yr Iaith Gymraeg yn ymgyngedig i'r iaith a'r iaith Gymraeg yn ymgyngedig i'r iaith

Representation overview dashboard

Llais Cymru - Representation Dashboard				
<div>Date</div> <div>01/01/2020 31/12/2025</div>	TOTAL	WITHIN SLA	OUTSIDE 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

Representation dashboard



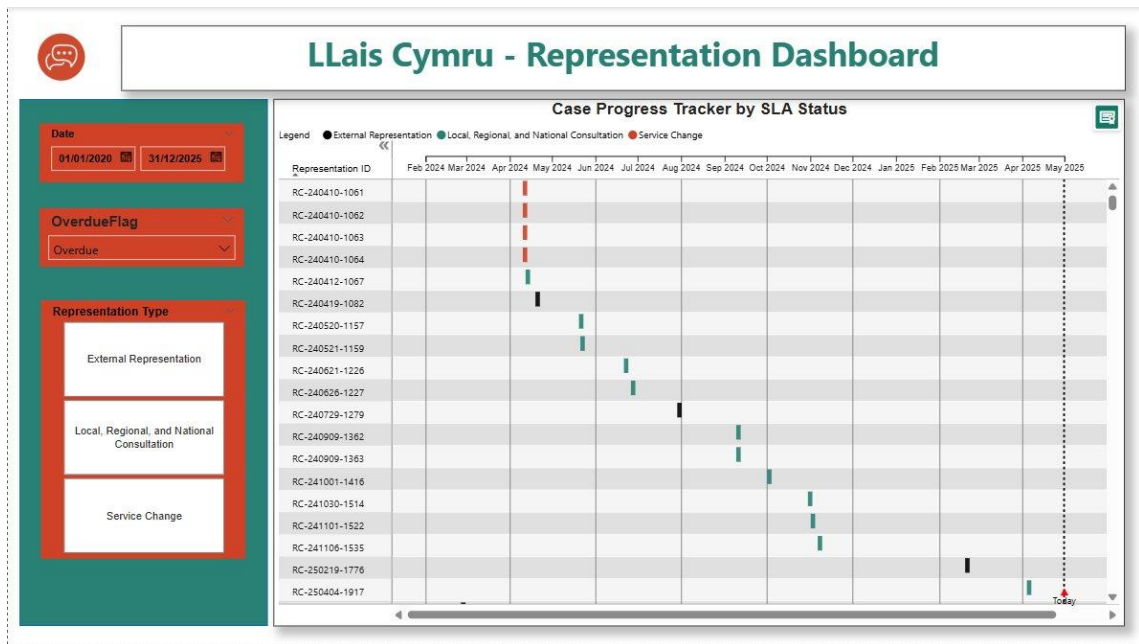
Representing Llais dashboard

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

Representing Llais → **COUNT 472**

Representation ID	Representation	Regional
RER-240918-1386	Ysbyty Gwynedd Emergency Department Waiting times and WAST Waiting times External Representation RER-240918-1386	North Wal
RER-241025-1502	Ysbyty Gwynedd Emergency Department External Representation RER-241025-1502	North Wal
RER-250117-1705	Ysbyty Gŵynedd - Water Supply External Representation RER-250117-1705	North Wal
RER-240903-1351	WWRPB Citizen and Third Sector Engagement Board External Representation RER-240903-1351	West Waile
RER-250414-1935	WW NHS App External Representation RER-250414-1935	West Waile
RER-240611-1200	WW HDUHB Quality, Safety and Experience Committee Meeting External Representation RER-240611-1200	West Waile
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 Por
RER-250211-1743	Winter Planning for Mental Health Services External Representation RER-250211-1743	Swansea B
RER-250211-1742	Winter Plan (SB UHB Board Meeting November 2024) External Representation RER-250211-1742	Neath Por
RER-250107-1682	Winter Care External Representation RER-250107-1682	Neath Por
RER-250106-1677	WG Funded Saturday Dental Scheme External Representation RER-250106-1677	National T
RER-241108-1542	WG Digital Inclusion Unit External Representation RER-241108-1542	North Wal
RER-240925-1401	West Wales Regional Partnership Board C&Ssect External Representation RER-240925-1401	West Waile
RER-240926-1403	WEST WALES GP CHARGES FOR TEST RESULTS External Representation RER-240926-1403	West Waile
RER-240823-1337	Welsh Ambulance Trust Service External Representation RER-240823-1337	National T
RER-250320-1846	Welsh Ambulance Services University NHS Trust's Board Meeting External Representation RER-250320-1846	National T
RER-240906-1361	Welsh Ambulance Service Trust - conduct External Representation RER-240906-1361	Neath Por
RER-250103-1673	Welsh Ambulance Service External Representation RER-250103-1673	National T
RER-240923-1400	Welsh Ambulance Service External Representation RER-240923-1400	National T
RER-250110-1695	WAST Critical Incident External Representation RER-250110-1695	West Waile
RER-240222-1003	Ward visiting times - Bronglais External Representation RER-240222-1003	West Waile
RER-250307-1827	Ward 3 Ysbyty Gŵynedd External Representation RER-250307-1827	North Wal
RER-250204-1731	Ward 3 Ysbyty Gŵynedd External Representation RER-250204-1731	North Wal
RER-250401-1876	Wales Screening Committee External Representation RER-250401-1876	National T
Total		

Representation dashboard



Cancer cases dashboard

Produced to support the upcoming Tenovus advocate.

Llais Cymru- Cancer cases dashboard

Date: 01/01/2020 31/12/2025

incident.cap_consentobtainedname: All

incident.cap_currentstagenname: All

FilterChoice: Cancer Only

Status(cases), CaseType: All

Data Quality Breakdown -- Record Level			
Name	Case	Topic	Sub-Topic
CA-02028 Phillip Davies 1 Doctor Secondary Care Services Provided (Datix) Cancer	CA-02028 Phillip Davies	Services Provided (Datix)	Inadequate (Datix)
CA-02451 Richard James Cooper 1 Information Not Provided Standards of Care (Datix)	CA-02451 Louise Cooper	Standards of Care (Datix)	Fundamentals of Care
CA-03603 Janice May Angeli 1 Doctor Secondary Care Clinical Practice (Datix) Cancer	CA-03603 Sasha Angeli	Clinical Practice (Datix)	Treatment (Datix)
CA-04124 Heather Mills 2 Doctor Secondary Care Clinical Practice (Datix) Cancer	CA-04124 Allan Mills	Clinical Practice (Datix)	Prescribing (Datix)
CA-04400 ANONYMOUS CONTACT 1 Doctor Secondary Care Waiting Times (Datix) Cancer	CA-04400 Diana Rees	Waiting Times (Datix)	Appointments (Datix)
CA-06012 Gregory Franklin DAVIES 1 Doctor Secondary Care Clinical Practice (Datix) Cancer	CA-06012 Eira GREEN	Clinical Practice (Datix)	Treatment (Datix)
CA-06012 Gregory Franklin DAVIES 2 Nursing Secondary Communication (Datix) Cancer	CA-06012 Eira GREEN	Communication (Datix)	Attitude (Datix)
Total			

