

**SRA BOARD**

27 January 2026

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*This paper will be published***Annual review of performance pack**

<b>Reason for paper</b>	<p>We review our performance reporting annually to identify any improvements that can be made. The focus of the review is usually the balanced scorecard.</p> <p>This paper provides the Board with a summary of the changes proposed to be made to the scorecard for 2025/26 reporting.</p>
<b>Decisions(s)</b>	The Board is asked to agree the proposed changes to the scorecard and share any comments on the wider performance report.
<b>Previous Board and committee consideration</b>	<p>The Board receives performance reports which include a balanced scorecard comprised of a variety of key performance indicators, three times per annum.</p> <p>At its January 2025 Performance meeting the Board considered and approved a number of changes to the balanced scorecard, and these have been reflected in subsequent performance papers.</p>
<b>Next steps</b>	The first performance report for 2025/26 will reflect any agreed changes to be made to the balanced scorecard or wider performance pack. This will come to the Board at its meeting in April 2026.

If you have any questions about this paper, please contact Liz Rosser, Executive Director Operations and Resources, [liz.rosser@sra.org.uk](mailto:liz.rosser@sra.org.uk)

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## Annual review of performance pack

### Purpose

- 1 This paper considers any changes required to the performance pack provided to the Board to allow it to oversee the performance of the organisation.

### Introduction

- 2 The performance pack is presented to the Board three times a year to provide it with the information it needs to hold the Executive to account for organisational performance. It comprises:
  - A covering paper to highlight the most important matters.
  - A finance annex to report on income and expenditure and the balance sheets of the SRA Limited, the Compensation Fund and Solicitors Indemnity Fund (SIF).
  - A balanced scorecard of key performance indicators.
  - A business plan delivery annex.
  - An annex updating on the Legal Service Board (LSB)'s most recent performance assessment, a progress report on delivering actions, and a summary of LSB position papers and consultations and our responses.
  - The Strategic Risk report which is provided as a separate agenda item to the Board but considered within the performance pack analysis.
- 3 All of the performance pack is published apart from the finance annex which includes confidential information (the finance part of the Scorecard is published).
- 4 We have focused this review on our balanced scorecard. However, we would welcome any feedback from the Board on the usefulness of the entire pack and any further evolutions which would improve it further.
- 5 We made a number of changes to the scorecard a year ago, introducing or improving four quality or customer service measures, making the target for another more demanding, introducing two equality, diversity and inclusion (EDI) and four timeliness measures, and removing two timeliness measures. We ensured all five of our regulatory activities had relevant performance measures and simplified the presentation of many of them.
- 6 The scorecard currently has nine timeliness measures across the customer, delivery and finance scorecards, seven quality measures (six in the customer scorecard and one in the delivery scorecard) and two EDI measures (one reported annually), within the customer and delivery scorecards.
- 7 The scorecard is the top tier of our KPI reporting. Below it we have a monthly KPI reporting pack that is reviewed by the Directors Team and Executive Committee, and Power BI KPI dashboards for directorates, reviewed by their leadership teams.
- 8 It is important to achieve the right balance between providing a performance view of the breadth of the organisation's activities and not having too large a scorecard.

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Presenting too much information risks a reduction in focus. Our internal auditors will this year review our corporate performance reporting arrangements.

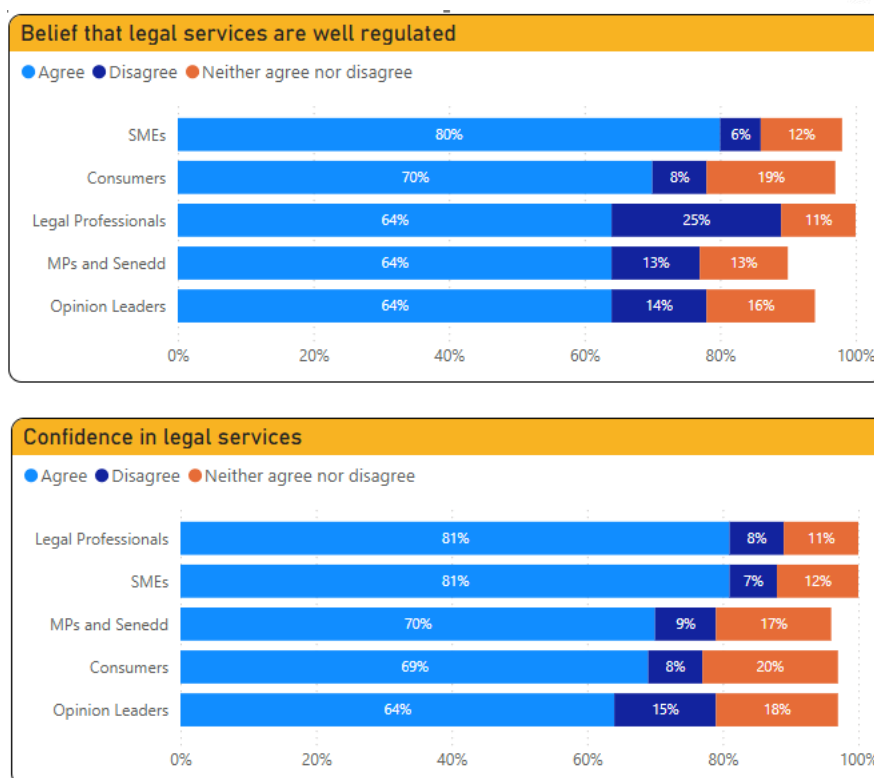
- 9 Benchmarking indicates that we provide more key performance information in our publicly published scorecard than most regulator peers. We include ten customer measures, ten delivery measures, two to five people measures and three to four financial measures. Some people and financial measures are only reported annually. However, it is vital that we continue to ensure the information presented is of most use to the Board and other users.

**Drivers for change**

- 10 The unprecedented increase in the number of reports we receive is a major business change for us, that leads to considering whether our existing scorecard measures provide the Board with what it needs to consider this challenge. We propose two changes to address this.
- 11 We have considered whether there are any performance indicators being reported at levels below the balanced scorecard that might merit escalation onto it. We consider that our performance in our important Adjudication work should be included within the Delivery scorecard.
- 12 We have also considered whether there are any measures that may be appropriate to remove from the scorecard and concluded one measure in the customer scorecard is no longer meaningful.
- 13 The Board at its April performance meeting noted that we could consider including measures around quality and customer service as well as timeliness. We are continuing to consider further measures for both quality and customer service as we evolve our approaches to these. There are some current limitations such as sample sizes and response rates that mean the data is not yet meaningful to include. But further changes will follow as these are matured.

**Proposed changes**Customer scorecard

- 14 We propose to include a new over-arching **outcome** measure, to report on our performance against our overall mission of building trust and confidence in legal services. We now obtain key survey data annually from Thinks, sourced from key stakeholder groups, and its inclusion will enable all readers to see the direct connection between our mission and what we do and our related performance reporting. One of many benefits could be its motivational impact for our people.
- 15 This would include the below two charts, reporting the survey data for the surveyed groups of legal professionals, consumers, SMEs, MPs and opinion leaders, for these questions:
  - a) I have trust in legal services.
  - b) I believe legal services are well regulated.



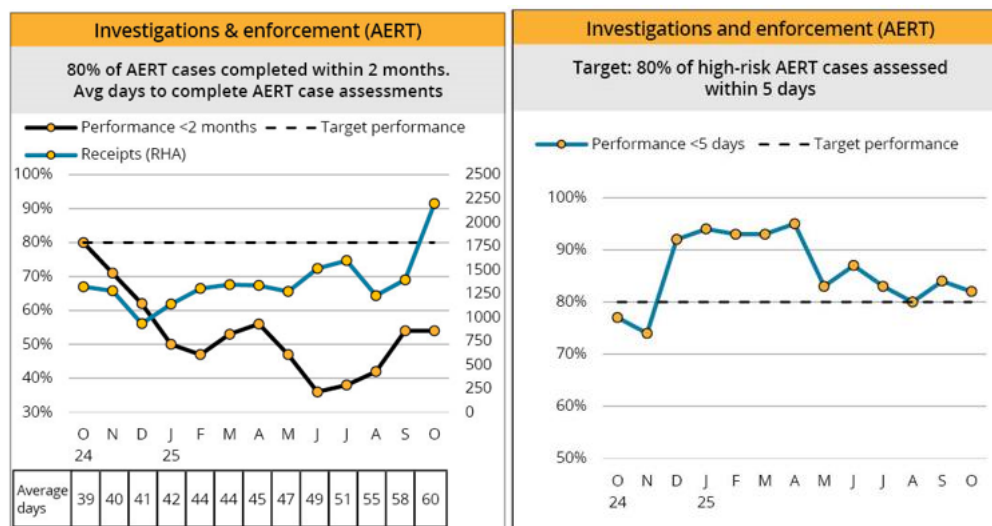
- 16 We propose removing the measure on click-throughs to our website from Google searches, because of significant uncertainty which makes it harder to set reasonable targets. We have identified that our reduction in Google search impressions from around 13 million per month in early 2025 to around 5 million per month in late 2025 has been experienced by owners of many large websites, as a result of a change in approach by Google. Sites such as the Solicitors Register are not being indexed by Google at the same rate as they were previously and therefore are not appearing in Google search results and so cannot generate click throughs.
- 17 We propose removing the section entitled Board Correspondence from the scorecard. This is not a measure but a section giving the Board assurance that correspondence sent to them is being correctly dealt with in accordance with the organisation's complaints policy. The Director of Corporate Complaints will continue to provide this assurance to the Board by email three times a year.

#### Delivery scorecard

- 18 We propose to contextualise and widen the view of performance in the assessment and early resolution team (AERT), by providing some additional information to the existing measure, and adding a new one, as shown in the charts below.

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- 19 The objective of the first chart is to provide in an easily understandable manner the volume context for the evolution in our performance on completing assessments.
- 20 The objective of the second chart is to inform the Board of our performance in completing rapid assessments of high risk reports. We feel this is very important to help consider the degree of risk we face on the substantial backlog of reports.
- 21 We also propose to adjust the scorecard's Authorisation KPI chart from presenting two to four measures to reflect a restructure in this large directorate and thereby enable future performance versus resourcing analysis.
- 22 We propose escalating a timeliness measure for Adjudication given the importance of this activity. This is performance against a target that 90% of Adjudication first instance decisions are completed within 20 days.

Finance scorecard

- 23 We have removed the visual chart called "Expenditure for regulatory activities which have a surplus/deficit impact". This reported on the variance of actual expenditure from the budget by regulatory activity, for the three of the five activities that have such an impact.
- 24 This is because we consider it may be difficult for some readers to easily follow and could give a misleading view of financial performance. The organisation's growth trajectory means the Board has chosen to spend significantly more than the funding envelope fixed for this 2025/26 year for justifiable reasons.
- 25 While we have removed the visual chart, this information would however remain available in the table of numbers that will continue to be reported in the financial scorecard.

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### Board feedback

- 26 We would welcome the Board's view on whether the balanced scorecard as proposed to be expanded and amended will continue to provide it with what it needs for overseeing the performance of the organisation.

**Recommendation: the Board is asked to agree the proposed changes to the scorecard and share any comments on the wider performance report.**

### Next steps

- 27 The first performance pack for 2025/26 will reflect any agreed changes to the balanced scorecard. This will come to the Board at its meeting in April 2026.