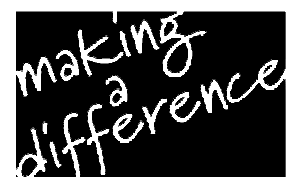


# Overview and Scrutiny Committee

Wednesday, 28th April,  
2010  
7.00 pm

Committee Room Three  
Town Hall  
Redditch



[www.redditchbc.gov.uk](http://www.redditchbc.gov.uk)

# Access to Information - Your Rights

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The Local Government (Access to Information) Act 1985 widened the rights of press and public to attend Local Authority meetings and to see certain documents. Recently the Freedom of Information Act 2000, has further broadened these rights, and limited exemptions under the 1985 Act.

Your main rights are set out below:-

- Automatic right to attend all Council and Committee meetings unless the business would disclose confidential or “exempt” information.
- Automatic right to inspect agenda and public reports at least five days before the date of the meeting.
- Automatic right to inspect minutes of the Council and its Committees (or summaries of business undertaken in private) for up to six years following a meeting.
- Automatic right to inspect lists of background papers used in the preparation of public reports.
- Access, upon request, to the background papers on which reports are based for a period of up to four years from the date of the meeting.
- Access to a public register stating the names and addresses and electoral areas of all Councillors with details of the membership of all Committees etc.
- A reasonable number of copies of agenda and reports relating to items to be considered in public must be made available to the public attending meetings of the Council and its Committees etc.
- Access to a list specifying those powers which the Council has delegated to its Officers indicating also the titles of the Officers concerned.
- Access to a summary of the rights of the public to attend meetings of the Council and its Committees etc. and to inspect and copy documents.
- In addition, the public now has a right to be present when the Council determines “Key Decisions” unless the business would disclose confidential or “exempt” information.
- Unless otherwise stated, all items of business before the Executive Committee are Key Decisions.
- (Copies of Agenda Lists are published in advance of the meetings on the Council’s Website:  
**[www.redditchbc.gov.uk](http://www.redditchbc.gov.uk)**

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**If you have any queries on this Agenda or any of the decisions taken or wish to exercise any of the above rights of access to information, please contact**

**Jess Bayley  
Overview and Scrutiny Support Officer**

**Town Hall, Walter Stranz Square, Redditch, B98 8AH**

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**e.mail: [jess.bayley@redditchbc.gov.uk](mailto:jess.bayley@redditchbc.gov.uk)**

**Minicom: 595528**

# Welcome to today's meeting.

## Guidance for the Public

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### **Agenda Papers**

The **Agenda List** at the front of the Agenda summarises the issues to be discussed and is followed by the Officers' full supporting **Reports**.

### **Chair**

The Chair is responsible for the proper conduct of the meeting. Generally to one side of the Chair is the Committee Support Officer who gives advice on the proper conduct of the meeting and ensures that the debate and the decisions are properly recorded. On the Chair's other side are the relevant Council Officers. The Councillors ("Members") of the Committee occupy the remaining seats around the table.

### **Running Order**

Items will normally be taken in the order printed but, in particular circumstances, the Chair may agree to vary the order.

**Refreshments** : tea, coffee and water are normally available at meetings - please serve yourself.

### **Decisions**

Decisions at the meeting will be taken by the **Councillors** who are the democratically elected representatives. They are advised by **Officers** who are paid professionals and do not have a vote.

### **Members of the Public**

Members of the public may, by prior arrangement, speak at meetings of the Council or its Committees. Specific procedures exist for Appeals Hearings or for meetings involving Licence or Planning Applications. For further information on this point, please speak to the Committee Support Officer.

### **Special Arrangements**

If you have any particular needs, please contact the Committee Support Officer.

Infra-red devices for the hearing impaired are available on request at the meeting. Other facilities may require prior arrangement.

### **Further Information**

If you require any further information, please contact the Committee Support Officer (see foot of page opposite).

### **Fire/ Emergency instructions**

**If the alarm is sounded, please leave the building by the nearest available exit – these are clearly indicated within all the Committee Rooms.**

**If you discover a fire, inform a member of staff or operate the nearest alarm call point (wall mounted red rectangular box). In the event of the fire alarm sounding, leave the building immediately following the fire exit signs. Officers have been appointed with responsibility to ensure that all visitors are escorted from the building.**

**Do Not stop to collect personal belongings.**

**Do Not use lifts.**

**Do Not re-enter the building until told to do so.**

**The emergency Assembly Area is on Walter Stranz Square.**

# Declaration of Interests: Guidance for Councillors

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DO I HAVE A "PERSONAL INTEREST" ?

- Where the item relates or is likely to affect your **registered interests** (what you have declared on the formal Register of Interests)

**OR**

- Where a decision in relation to the item might reasonably be regarded as affecting **your own** well-being or financial position, or that of your **family**, or your **close associates** more than most other people affected by the issue,

you have a personal interest.

WHAT MUST I DO? **Declare the existence, and nature, of your interest and stay**

- The declaration must relate to specific business being decided - a general scattergun approach is not needed
- **Exception** - where interest arises only because of your membership of another **public body**, there is no need to declare unless you **speak** on the matter.
- You **can vote** on the matter.

IS IT A "PREJUDICIAL INTEREST" ?

In general only if:-

- It is a personal interest **and**
  - The item affects your **financial position** (or conveys other benefits), or the position of your **family, close associates** or bodies through which you have a **registered interest** (or relates to the exercise of **regulatory functions** in relation to these groups)
- and**
- A member of public, with knowledge of the relevant facts, would reasonably believe the interest was likely to **prejudice** your judgement of the public interest.

WHAT MUST I DO? **Declare and Withdraw**

BUT you may make representations to the meeting before withdrawing, **if** the public have similar rights (such as the right to speak at Planning Committee).



# Overview and Scrutiny Committee

Wednesday, 28th April, 2010

7.00 pm

Council Chamber Town Hall

## Agenda

### Membership:

Cllrs: P Mould (Chair) W Norton  
D Smith (Vice-Chair) J Pearce  
K Banks D Taylor  
G Chance D Thomas  
R King

<b>1. Apologies and named substitutes</b>	To receive apologies for absence and details of any Councillor (or co-optee substitute) nominated to attend this meeting in place of a member of this Committee.
<b>2. Declarations of interest and of Party Whip</b>	To invite Councillors to declare any interest they may have in items on the Agenda and any Party Whip.
<b>3. Minutes</b> (Pages 1 - 12)	To confirm the minutes of the most recent meeting of the Overview and Scrutiny Committee as a correct record.  (Minutes attached)
<b>4. Actions List</b> (Pages 13 - 14)  C Felton - Head of Legal, Equalities and Democratic Services	To note the contents of the Overview and Scrutiny Actions List.  (Report attached)  <b>(No Specific Ward Relevance)</b>
<b>5. Call-in and Pre-Scrutiny</b>	To consider whether any Key Decisions of the Executive Committee's most recent meeting(s) should be subject to call-in and also to consider whether any items on the Forward Plan require pre-scrutiny.  (No separate report).  <b>All Wards</b>

# Overview and Scrutiny

Committee

Wednesday, 28th April, 2010

<p><b>6. Task &amp; Finish Reviews - Draft Scoping Documents</b></p>	<p>To consider any scoping documents provided for possible Overview and Scrutiny review.</p> <p>(No reports attached)</p> <p><b>(No Specific Ward Relevance)</b></p>
<p><b>7. Task and Finish Groups - Progress Reports</b></p>	<p>To consider progress to date on the current reviews against the terms set by the Overview and Scrutiny Committee.</p> <p>The current reviews in progress are:</p> <ol style="list-style-type: none"><li>1. Local Strategic Partnership – Chair, Councillor W Norton; and</li><li>2. Joint Worcestershire Hub – Redditch representative, Councillor J Pearce.</li></ol> <p>(Oral reports)</p> <p><b>All Wards</b></p>
<p><b>8. Bus Pass Scheme: County Provision - Update</b></p>	<p>To receive an update on progress to date regarding the bus pass scheme for the County.</p> <p>(Oral report).</p> <p><b>All Wards</b></p>
<p><b>9. Gender Equalities - Update Report</b></p> <p>(Pages 15 - 58)</p> <p>C Felton, Head of Legal, Equalities and Democratic Services</p>	<p>To consider a presentation on the subject of gender equalities.</p> <p>(Report attached)</p> <p><b>(No Specific Ward Relevance)</b></p>
<p><b>10. Youth Employment</b></p> <p>(Pages 59 - 72)</p> <p>B Barr, Human Resources Officer</p>	<p>To receive a report on the subject of youth employment at Redditch Borough Council.</p> <p>(Report attached).</p> <p><b>(No Specific Ward Relevance)</b></p>

# Overview and Scrutiny

Committee

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<p><b>11. Medium Term Financial Plan</b></p> <p>(Pages 73 - 110)</p> <p>J Pickering - Exec Director (Finance and Corporate Resources)</p>	<p>To consider best practice in relation to local authority Medium Term Financial Plans.</p> <p>(Reports attached).</p> <p><b>(No Specific Ward Relevance)</b></p>
<p><b>12. Review of the Operation of the Overview and Scrutiny Committee - municipal Year 2009/10</b></p> <p>C Felton - Head of Legal, Equalities and Democratic Services</p>	<p>To invite Members to reflect on the operation of the Committee during the 2009/10 municipal year and propose amendments to current practice if considered appropriate.</p> <p>(No separate report)</p> <p><b>(No Specific Ward Relevance)</b></p>
<p><b>13. Referrals</b></p>	<p>To consider any referrals to the Overview &amp; Scrutiny Committee direct, or arising from:</p> <ul style="list-style-type: none"><li>• The Executive Committee or full Council</li><li>• Other sources.</li></ul> <p>(No separate report).</p> <p><b>(No Specific Ward Relevance)</b></p>
<p><b>14. Work Programme</b></p> <p>(Pages 111 - 116)</p> <p>C Felton - Head of Legal, Equalities and Democratic Services</p>	<p>To consider the Committee's current Work Programme, and potential items for addition to the list arising from:</p> <ul style="list-style-type: none"><li>• The Forward Plan / Committee agendas</li><li>• External publications</li><li>• Other sources.</li></ul> <p>(Report attached)</p> <p><b>(No Specific Ward Relevance)</b></p>

# Overview and Scrutiny

Committee

Wednesday, 28th April, 2010

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## **15. Exclusion of the Press and Public**

Should it be necessary, in the opinion of the Borough Director, during the course of the meeting to consider excluding the public from the meeting on the grounds that exempt information is likely to be divulged, it may be necessary to move the following resolution:

“That, under S.100 (A) (4) of the Local Government Act 1972, the public be excluded from the meeting for the following matter(s) on the grounds that it/they involve(s) the likely disclosure of exempt information as defined in the relevant paragraphs (to be specified) of Part 1 of Schedule 12 (A) of the said Act”.

**(No Specific Ward Relevance)**

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# Overview and Scrutiny Committee

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Wednesday, 7th April, 2010

## MINUTES

### Present:

Councillor Phil Mould (Chair), and Councillors K Banks, G Chance, R King, W Norton and J Pearce

### Also Present:

Councillor C Gandy

### Officers:

J Staniland

### Committee Services Officer:

J Bayley and A Scarce

### 213. APOLOGIES AND NAMED SUBSTITUTES

Apologies for absence were received on behalf of Councillors Smith, Taylor and Thomas.

### 214. DECLARATIONS OF INTEREST AND OF PARTY WHIP

There were no declarations of interest nor of any Party Whip.

### 215. MINUTES

#### RESOLVED that

**the minutes of the meetings held on 17th and 22nd March 2010 be confirmed as correct records and signed by the Chair.**

### 216. ACTIONS LIST

The Committee considered the latest version of the Actions List and specific mention was made of the following matters:

.....  
Chair

# Overview and Scrutiny Committee

Wednesday, 7th April, 2010

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a) Action 4 – Civil Parking Enforcement Scheme

Members confirmed that the tour of the areas where the civil parking scheme was in operation, had still not taken place. It was agreed that Officers should resolve this matter as quickly as possible.

b) Action 8 – Fly Tipping and Security Access Systems

Officers confirmed that the information regarding the impact of the secure access system on levels of fly tipping in the Woodrow Centre had been circulated via email on 1st April 2010.

c) Action 10 – Centre for Public Scrutiny's Annual Conference

Officers advised Members that a place had been booked for Councillor Thomas to attend the conference.

**RESOLVED that**

**the report be noted.**

## 217. CALL-IN AND PRE-SCRUTINY

There were no call-ins.

Members were advised that, at the Executive Committee meeting held on 31st March 2010, the Communications Strategy 2010-2013 had been recommended for approval to full Council. Reference had been made in this strategy to a number of the Neighbourhood Groups Task and Finish Group's recommendations. This demonstrated that action was already being taken to implement the Group's proposals.

The Local Strategic Partnership Task and Finish Group's interim report had been considered at the same meeting of the Executive Committee. The recommendations contained in that report had been referred to the next meeting of the Local Strategic Partnership for consideration.

The appointment of Councillor J Pearce as Vice-Chair of the Crime and Disorder Scrutiny Panel had also been endorsed by the Executive and recommended to full Council.

# Overview and Scrutiny Committee

Wednesday, 7th April, 2010

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**RESOLVED that**

**the report be noted.**

**218. TASK & FINISH REVIEWS - DRAFT SCOPING DOCUMENTS**

There were no draft scoping documents for the Committee to review.

**219. TASK AND FINISH GROUPS - PROGRESS REPORTS**

The Committee received reports in relation to current reviews:

a) Local Strategic Partnership (LSP)

The Task and Finish Group continued to gather evidence and had spoken to two witnesses since the previous report. Some of the wording in the recommendations had been changed and most of the recommendations had been endorsed by the Executive Committee, which had referred the report for the consideration of the LSP.

b) Joint Worcestershire Hub Review

One meeting had taken place since the last report to the Committee. Currently the Group were awaiting reports from the members who had visited the various hubs. The main action of the group seemed to be to review the governance of hub rather than the system in its entirety. There appeared to be some sensitivity amongst Members around looking at area hubs. One of the difficulties seemed to be that there were individual ways in which the area hubs were operated and this would not be conducive to working together as there was no consistency. It was difficult to see what the Group was trying to achieve as they were still in the early stages of investigation.

Councillor Pearce commented that if any members had questions they would like to have raised she would be pleased to pass these on to the Group.

**RESOLVED that**

**the reports be noted.**

**220. CRIME AND DISORDER SCRUTINY PANEL - CHAIR'S UPDATE**

# Overview and Scrutiny Committee

Wednesday, 7th April, 2010

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Since the previous report to the Committee no further meetings had been held. The next scheduled meeting would be on 15th July 2010 and prior to this meeting a training session would take place on 17th June 2010. Invitations to attend would be sent to all members.

It was confirmed that a letter had been sent to West Mercia Police to invite them to nominate a co-opted member to join the Panel. To date no response had been received.

**RESOLVED that**

**the report be noted.**

## **221. BUS PASS SCHEME: COUNTY PROVISION - UPDATE**

There had been no further developments since the previous meeting of the Committee.

The Chair explained that this subject had been put on the agenda as a standing item in view of the implications of the changes which would take place for both the district and the whole of the county. Members discussed the difficulties in monitoring the new scheme and the financial implications, which were likely to be significant.

**RESOLVED that**

**the report be noted.**

## **222. GOOD SCRUTINY AWARDS SUBMISSION**

The Committee noted that the submission had been sent to the Centre for Public Scrutiny and an acknowledgement had been received. The submission had been endorsed by Inspector Ian Joseph of the West Mercia Police, Councillor Gandy and the Chief Executive, Kevin Dicks. Members were advised that the submission deadline had been extended and therefore it was likely that the short listing date would also be affected by this.

Members asked that Councillor Gandy and the Chief Executive note their gratitude. They also agreed that a letter should be dispatched to Inspector Joseph thanking him for his support.

**RESOLVED that**

# Overview and Scrutiny Committee

Wednesday, 7th April, 2010

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the report be noted.

## 223. PORTFOLIO HOLDER FOR COMMUNITY LEADERSHIP AND PARTNERSHIP

The Chair welcomed Councillor Gandy, the Portfolio Holder for Community Leadership and Partnership, to the meeting. Councillor Gandy presented her report in accordance with the questions set out by the Committee.

a) What was your view of the LSP Task and Finish Group's recommendations?

Councillor Gandy explained that many of the recommendations had already been implemented and confirmed that the Redditch Partnership Manager, who had recently been appointed, would assist the LSP with the delivery of work that had previously proved difficult to undertake. The Constitutional Review Working Party had recommended that from May 2010 'Leader's Items' should be a standing item on the agenda for full Council and the minutes of LSP management board meetings attached to the full Council agenda papers.

Concerns had been raised during the Executive Committee meeting over how the recommendations should be presented to the LSP as it was felt that the Council could not tell the LSP that it must adopt the recommendations made by the Overview and Scrutiny Committee. It was therefore felt they should go directly to the LSP for endorsement. This view was subject to question because the Council was the lead organisation for the LSP. However, Councillor Gandy was confident that the recommendations would be accepted.

b) What do you feel should be the priority of your Portfolio?

Councillor Gandy felt that communicating with residents and promoting all the good things that the Council was doing in the town was a priority. This could be either on an individual basis, through the Redditch Community Forum or through third sector organisations. She expressed the view that the Council must continue to explain to residents what it was trying to achieve. Therefore, to date there had been seven road shows and she hoped to organise more of these events after the elections to provide an opportunity to talk to

# Overview and Scrutiny Committee

Wednesday, 7th April, 2010

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residents on a one to one basis. Members were also advised that the Leader's column in the local newspaper had been useful in promoting the good things that had been achieved in the town.

c) What do you believe are the (of working in partnership):

i) Strengths

Councillor Gandy felt that partnership working helped to avoid duplication and provided an opportunity to pool resources and knowledge, gained through input from a wider group of experts. Partnership working also spread the load and helped to encourage a shared ambition. Through working in partnership local organisations could develop greater understanding of local problems.

ii) Weaknesses

A lack of finance and staff capacity together with limited accountability and dissemination of information were felt to be weaknesses.

iii) Opportunities

Councillor Gandy felt the opportunities available included improved joint working and being able to get across a single message that the Council would not be able to achieve alone.

iv) Threats

Financial cuts were a serious threat and there was a possibility under those circumstances that people would retreat to "silo working". Consequently, there was a danger that the partnership would become a talking shop.

d) What approach do you intend to take to disseminate information about and performance details for the Local Area Agreement (LAA)?

The Partnership was committed to introducing a Communications Strategy, which would address the dissemination of information. Local LAA targets had to be

# Overview and Scrutiny Committee

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adhered to and monitored on at least a quarterly basis to ensure they were maintained. However, the Council had no control over the number of LAA targets, which were reported annually to Council. Furthermore, Councillor Gandy confirmed that the Council had no control over the national targets.

e) What has been most challenging about your role as Portfolio Holder for Community Leadership and Partnership?

Councillor Gandy advised that the biggest challenge was to encouraging people to believe that the Council did want to listen to and take notice of them. In addition, she had been working hard to gain a more powerful voice for Redditch at a regional level. In particular, this was being attempted through participating in regional/county partnerships as increasingly this was the most effective way to obtain additional funding for and attention to the area.

After general discussion, the Chair thanked Councillor Gandy for attending the meeting and for providing Members with a comprehensive response to the questions that had been raised.

**RESOLVED that**

**the report be noted.**

**224. OVERVIEW AND SCRUTINY ANNUAL REPORT**

The Committee was advised that the Annual Report encompassed the four key principles of scrutiny as identified by the Centre for Public Scrutiny (CfPS), the organisation set up to promote effective scrutiny in local government. The symbols representing these principles were featured, where appropriate, throughout the report.

Members discussed and agreed that the following points should be retained in the Annual Report:

a) The Council's Budget Setting Process

Attempts had been made during the year to enable the Overview and Scrutiny Committee to contribute to the budget setting process. However, in late 2009 members of the Committee had expressed concern that they had not been provided with an opportunity to pre-scrutinise the reports that had been produced as part of the budget setting process. This

# Overview and Scrutiny Committee

Wednesday, 7th April, 2010

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concern had been recorded in the Annual Report and members agreed to retain the request within the report that the Executive Committee and Officers help to ensure that the Overview and Scrutiny Committee could play a more constructive role in the budget setting process in future years.

b) Areas for further development

The process of Portfolio Holder Annual Reports before the Committee had continued throughout the year. A number of members and Officers had suggested that this process could be strengthened to ensure that the Portfolio Holders were held to account for their work.

The level of public awareness of the scrutiny process in the borough was also considered to be a weakness, though it was acknowledged that the extensive consultation undertaken by the Neighbourhood Groups Task and Finish had started to address this to some extent. Members agreed that further work should be undertaken in the new year to promote scrutiny further and it was suggested that topics of interest to the public would need to be selected for policy reviews to encourage public engagement with the process.

c) Good Scrutiny Awards

It was agreed that on balance the Overview and Scrutiny process in Redditch was operating very effectively and this had been demonstrated through the Council's first submission in the CfPS Good Scrutiny Awards. Members agreed that the Council should continue to submit applications to this awards process in future years to highlight the Council's positive work in this area.

The Committee concluded that although Officer support had been reduced they were happy with the amount of work that the Committee had been able to achieve in the year. The Committee took the opportunity to thank the Scrutiny Officer for her hard work in supporting them over the year. The Committee also thanked the Chair for chairing the meetings and giving members the opportunity for open discussion.

**RESOLVED that**

**the report be noted.**



# Overview and Scrutiny Committee

Wednesday, 7th April, 2010

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## 225. OVERVIEW AND SCRUTINY: WORK PROGRAMME PLANNING EVENT

The Committee was advised that it should plan collectively for the Scrutiny Work Programme Planning Event and it would be helpful if Members could identify suitable dates as early as possible.

Members discussed the following potential topics that could be included on the agenda for the event:

a) The Budget Setting Process:

The Committee agreed that it might be useful to invite a senior Financial Services Officer to attend the event alongside members of the Executive Committee. A full and frank discussion could then be undertaken regarding ways in which the Overview and Scrutiny Committee could realistically contribute to the budget setting process in a constructive manner.

b) Communications

Members commented that it might be appropriate to invite an Officer from the Council's Communications Team to attend the event. This Officer could help to advise Members about ways to increase public awareness and engagement with the scrutiny process.

c) Portfolio Holder Annual Reports

To address one of the weaker elements of the scrutiny process identified in the committee's Annual Report it was noted that the subject of Portfolio holder Annual Reports could be discussed with members of the Executive Committee during the course of the event.

d) Topics for Scrutiny 2010/11

A primary aim of the event would be to discuss and identify topics that could potentially form the focus of policy review and development work during the course of the year.

Members also discussed scrutiny related training opportunities. They agreed that it would not be suitable to suggest this for inclusion on the event's agenda as it could elongate the process and distract attention from planning the Work Programme for the

# Overview and Scrutiny Committee

Wednesday, 7th April, 2010

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year. However, they agreed that, due to the minimal funding available to support individual Councillors' training requirement in house training events provided a greater opportunity for Members to attend.

The Committee felt that the final programme for the event should be agreed by the new membership of the Overview and Scrutiny Committee in the 2010/11 municipal year. They therefore concurred that their suggestions should be noted for consideration at the first meeting of the Committee in 2010/11.

**RESOLVED that**

- 1) **the agenda for the Work Programme Planning event be considered in further detail at the meeting of the Overview and Scrutiny Committee on 2nd June 2010; and**
- 2) **the report be noted.**

**226. WORCESTERSHIRE JOINT SCRUTINY MEETING**

The Committee was informed that this had been a productive meeting producing some good ideas following in depth discussion covering the pros and cons of joint scrutiny. Topics for discussion had included the current Worcestershire Hub Task and Finish review, the Worcestershire Enhanced Two Tier (WETT) process and partnership working.

During the course of the meeting it became apparent that scrutiny operated in different ways in each area. An agreement had been reached that a joint working protocol should be developed as soon as possible. This would be dealt with through the Worcestershire Scrutiny Officers' Network. The Scrutiny Officers met quarterly and it was agreed that the Chair, Vice Chair and Officers' meetings would similarly be held quarterly. It was anticipated that the next meeting would take place in July 2010.

**RESOLVED that**

**the report be noted.**

**227. REFERRALS**

There were no referrals.

**228. WORK PROGRAMME**

# **Overview and Scrutiny Committee**

Wednesday, 7th April, 2010

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It was noted that at a meeting on 24th February 2010 it had been agreed that Executive Committee members be invited to attend the meeting of the Overview and Scrutiny Committee on 28th April 2010. This invitation had been extended to provide an opportunity for both sets of members to consider presentations on the subjects of the Gender Equalities Scheme and Youth Employment at Redditch Borough Council.

Members were advised that an Introduction to Overview and Scrutiny training session would take place on 10th June 2010 and would be delivered by the Scrutiny Officer. In addition, on 17th June training on the subject of Crime and Disorder Scrutiny would be extended to all members as only the members of the Panel had received this training to date. This session would be delivered by the Scrutiny Officer and the Head of Community Services, together with a member's perspective from the Chair of the Panel.

**RESOLVED that**

**the Committee's Work Programme be noted.**

The Meeting commenced at 7.00 pm  
and closed at 8.05 pm



**Actions requested by the Overview and Scrutiny Committee**

<b>Date Action Requested</b>	<b>Action to be Taken</b>	<b>Response</b>
14th October 2009  <b>1</b>	Officers reported an item that had been raised by the Portfolio Holder for Community Safety for the consideration of the Crime and Disorder Scrutiny Panel.	Members agreed that this item should be referred for consideration at the first meeting of the Panel. Lead Officer, Overview and Scrutiny Support Officer, estimated completion date, not specified. (TO BE DONE).
25th November 2009  <b>2</b>	Members discussed NI 192: the percentage of household waste sent for reuse, recycling and composting. They questioned why the figures for September had not yet been provided by Worcestershire County Council.	Officers were asked to investigate the reasons for the delay in obtaining these figures. Lead Officer, Head of Strategy and Partnerships, estimated completion date not specified. (TO BE DONE).
3rd February 2010  <b>3</b>	Members requested further information regarding the convergence between Council rents and RSL rents, in particular the differences between these rents at the present time.	Officers to provide the information requested by Members. Officers have reported that this information should have been circulated for Members' consideration by 19/02/10. Lead Officer, Financial Services Manager and estimated completion date, 19/02/10. TO BE DONE.
24th February 2010  <b>4</b>	Members discussed their concerns about the civil parking enforcement scheme. Officers were asked to arrange and to accompany the Borough and County Councillors for the Central ward on a tour of the areas where the civil parking scheme was in operation.	Officers dispatched invitations to relevant Councillors inviting them to attend a tour of the civil parking enforcement scheme on 13/04/10. DONE.

<p>17th March 2010</p> <p><b>5</b></p>	<p>Members were disappointed to learn that there had been a low response level to the consultation process that had been undertaken regarding the communal cleaning contract for Council properties.</p>	<p>Officers to undertake further consultation work with a more localised focus, starting with Winyates and Exhall Close. TO BE DONE. Lead Officer, Head of Housing and estimated completion date, not specified.</p>
<p>17th March 2010</p> <p><b>6</b></p>	<p>Members received an Annual Report from the Portfolio Holder for Community Safety. They requested that the information relating to the performance of the Fire Authority, which was presented at meetings of the Redditch Community Safety Partnership's Tasking Group, be incorporated into the performance reports that were regularly presented for Members' consideration.</p>	<p>Officers to ensure that details about the Fire Authority's performance be incorporated into the performance reports considered by the Executive and Overview and Scrutiny Committee from 2010/11 onwards. TO BE DONE. 27th July for the 8th September meeting of the Executive Committee when the first performance report for 2010/11 is due to be considered.</p>
<p>7th April 2010</p> <p><b>7</b></p>	<p>Members agreed that a letter should be sent by the Chair on behalf of the Overview and Scrutiny Committee thanking Inspector Joseph for his support.</p>	<p>The letter was dispatched Friday 16th April to Inspector Joseph. DONE.</p>
<p>7th April 2010</p> <p><b>8</b></p>	<p>Members agreed that the Committee's suggestions for inclusion on the agenda of the Scrutiny Work Programme Planning event should be considered at the first meeting of the Overview and Scrutiny Committee in 2010/11.</p>	<p>The Committee's Work Programme has been amended accordingly. DONE.</p>

**Overview & Scrutiny  
Committee**

28th April 2010

7.00pm

Committee Room 3, Town Hall

**ITEM 9**

**REDDITCH GENDER EQUALITIES  
SCHEME  
COVER PAGE**

**Extract from the Redditch Single  
Equalities Scheme 2009/12.**





## Gender Equality Scheme

The Sex Discrimination Act 1975 as amended by the Equality Act 2006 makes sex discrimination unlawful in employment, vocational training, education, the provision and sale of goods, facilities, services and premises. In employment and vocational training, it is also unlawful to discriminate against someone on the grounds that a person is married or a civil partner, or on the grounds of gender reassignment.

The Equal Pay Act 1970 makes it unlawful for employers to discriminate between men and women where they are doing the same or similar work; work rated as equivalent; or work which is of equal value though different in nature. It covers both pay and other terms and conditions such as piecework, output and bonus payments, holidays and sick leave

The Gender Equality Duty does not change the law on single sex services and does not mean that the same services must be provided for men and women where their needs are different.

Women are more likely than men to experience domestic abuse and sexual violence.<sup>1</sup>

### General Duty

- To promote equality of opportunity between women and men.
- To eliminate unlawful discrimination and harassment on the basis of gender.

### Specific Duties

- Produce a Gender Equality Scheme identifying gender equality goals and actions to meet them.
- Consult employees and stakeholders in the development of the scheme.
- Consider including objectives to address the causes of any gender pay gap.
- Gather and use information on how the authority's policies and practices affect gender equality in the workplace and in the delivery of services.
- Conduct and publish gender impact assessments of all major policy developments and publish the criteria for conducting assessments.
- Monitor the scheme, publish an annual progress report and review it every three years.

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<sup>1</sup> Violence against women includes rape, sexual assault, domestic abuse, sexual harassment, stalking, trafficking, sexual exploitation, female genital mutilation, forced marriage and crimes in the name of honour.

- Implement actions set out in the scheme within three years, unless it is unreasonable or impracticable to do so.

### **What the Council currently does**

- Maintains equal pay between men and women.
- Implements a robust system for monitoring requirement, training and promotional opportunities.
- Has a flexible working environment.
- Two weeks paternity leave is provided
- Employees Maternity Rights are outlined in the Councils Maternity Leave and Pay Policy
- Raises awareness of gender equality issues within the authority via training for staff, members and key stakeholders.
- Has a robust consultation process which focuses on gender equality.
- Raises awareness of what constitutes sexual harassment and the support networks in place to support staff.
- Acts promptly and appropriately if we receive any complaints about the way we provide services by ensuring that complaints are dealt with sensitively and fairly.
- The Hate Incident reporting process is accessible by all members of the community to report incidents of Hate Incidents and harassment.
- We offer a sanctuary scheme that provides security upgrades at the homes of people experiencing domestic abuse delivering physical and psychological protection.
- Front line staff in key services such as Housing Options, the Homelessness Prevention Team and the Contact Centre are trained in referral pathways for people experiencing domestic abuse and sexual violence.
- Redditch Borough Council rent premises to Stonham for the provision of a women's refuge.
- Redditch Borough Council is an active participant in the Multi Agency Risk Assessment Conferences that deal with high risk domestic abuse cases.
- The Council has developed a specific Gender Reassignment Service Policy and a Gender Reassignment Employment Policy (attached at Appendix 6 to this Scheme).
- Redditch Borough Council recognises the cost of sexual violence and is committed to working to prevent sexual violence, to protect victims from further victimisation and ensure that there is adequate service provision to provide effective support for victims.
- In order to take action on violence against women, and to fulfil our statutory obligations under the Gender Equality Duty, Redditch Borough

Council has secured funding to research and collect data to establish the impact of sexual violence against women locally.

### **The Council aims to:**

- Actively promote agencies which can support domestic violence cases
- Deliver training which focuses on gender, gender reassignment, sexual orientation and domestic violence between April 2010 and March 2011. The training will be repeated on a three yearly basis, primarily targeting front line staff.
- Through Sure Start Childrens' Centres, extend our services to meet the more associated members of the community and also encourage men to access the service on offer at the Centres.
- Offer Opportunities for Women and Girls to engage in Sport and Physical Activity in the following way:
  - To set up Cheerleading sessions for girls aged 2-13 years of age.
  - Raise awareness of opportunities in sport for Women by offering taster sessions.
  - To provide support for young mums with children to access physical activity sessions by providing a crèche.
  - To reduce the levels of Coronary Heart Disease, obesity etc through a weekly programme of classes aimed at women.
  - To provide info on health and well being through the Action Sport instructors.
  - Monitor and evaluate sessions through recognised formal procedures to ensure customers' needs are being met.





**Overview & Scrutiny**  
Committee

28th April 2010  
7.00pm

Committee Room 3, Town Hall

**ITEM 9**

**GENDER EQUALITIES SCHEME  
ACTION PLAN**

**RELEVANT EXTRACT**



**REDDITCH BOROUGH COUNCIL - CORPORATE EQUALITIES ACTION PLAN**

Redditch has one of the most diverse populations across Worcestershire and Redditch Borough Council recognises the importance of embracing these cultural differences to shape the Council. The Council provides a wide range of services and is one of the largest employers within the Borough. As such its actions and decisions affect the lives of everyone in Redditch to some degree. Each member of our community, visitors to the Borough and employees are entitled to expect fair and equal treatment in all dealings with the Council. Therefore, as a provider of services, it is important that it can demonstrate that it upholds the principles of Equality and Diversity.

The Corporate Equalities Action Plan sets out the high level objectives and actions required. This is supported by more detailed objectives and actions contained within individual Directorate Service Plans. The extract below relates specifically to the action plan for gender equalities.

**Gender Equalities Action Plan**

<b>OBJECTIVE: EQ17</b> To reduce the impact and incidence of domestic abuse.		<b>Key Outcomes:</b> A robust process is in place to allow all members within the community to report incidents of domestic abuse.		
<b>Key Actions</b>	<b>Responsibility</b>	<b>Resources additional to base budget</b>	<b>Timescales</b>	<b>Comment</b>
Continue to play an active role in the Worcestershire Forum Against Domestic Abuse	Head of Communities Redditch Community Safety Partnership		2010 -Ongoing	Quarterly meetings are held
Offer a drop in support service for people experiencing domestic abuse.	Head of Housing . Stonham	The use of Redditch Borough Council premises	2010/2011	The frequency of sessions is still to be agreed on. Redditch Borough Council will take the lead to provide premises to facilitate the drop in centre.

To commission research into sexual violence and devise appropriate action plan	Head of Communities Redditch Community Safety Partnership	£15,000 has been secured through Home Office funding	Research to be completed by March 2010. Associated action plan to be developed	Timescales associated with the action plan will need ratification by the Redditch Community Safety Partnership
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<b>OBJECTIVE: EQ18</b> To change an individual's gender on the production of a Gender Recognition Certificate		<b>Key Outcomes:</b> To ensure our services meet the requests of our Community members		
<b>Key Actions</b>	<b>Responsibility</b>	<b>Resources additional to base budget</b>	<b>Timescales</b>	<b>Comment</b>
A training programme to be delivered to front-line staff	Human Resources Equality Champions	The training programme will need to be built into the training budget	2009/10	The training will be delivered on a three year rolling cycle
Service records which are held for an individual will be changed on production of a Gender Recognition Certificate.	Redditch Borough Council		2010/11	Records to be amended within one month following production of the certificate.

<b>OBJECTIVE: EQ19</b> To ensure Child Care Services are made accessible to men	<b>Key Outcomes:</b> All Child Care services made equally available to both males and females.
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Key Actions	Responsibility	Resources additional to base budget	Timescales	Comment
Promotion of Sure Start Children's Centres in areas where males would access the information.	Head of Communities	.	2010/11	In line with impact assessments
Ensure our Leisure Services Family facilities are accessible by men	Head of Leisure Services	.	2010/11	In line with impact assessments
<b>OBJECTIVE: EQ20</b>				
To reduce the Incidence of Hate Crime and Hate Incidents		<b>Key Outcomes:</b> To ensure the hate incident reporting procedure is accessible by all members of the community		
Key Actions	Responsibility	Resources additional to base budget	Timescales	Comment
To ensure the promotion of the Hate Incident Procedure reaches all groups within the community	Hate Crime partnership	To support the promotion of the Hate Incident Procedure within the Community	20010/11	The promotion of the service will be reviewed annually
To ensure that where possible a resolution is found for the victim	Hate Crime Partnership		2010/11- Ongoing	To ensure ongoing confidence from victims of a Hate Incident it is critical that the panel are able to bring a resolution for the victim in a timely manner. Initially contact with the victim will be made within 7 working days of the report being made





**Overview & Scrutiny**  
Committee

28th April 2010  
7.00pm

Committee Room 3, Town Hall

**ITEM 9**

**OVERVIEW AND SCRUTINY  
COMMITTEE MINUTES 25TH  
NOVEMBER 2009**

**RELEVANT EXTRACT: SINGLE EQUALITIES  
SCHEME**





www.redditchbc.gov.uk

# Overview and Scrutiny

## Committee

25th November 2009

### MINUTES

**Present:**

Councillor Phil Mould (Chair), Councillor David Smith (Vice-Chair) and Councillors K Banks, G Chance, R King, W Norton, J Pearce and D Taylor

**Also Present:**

Councillors M Braley, J Cookson, D Enderby, A Fry and G Hopkins.

**Officers:**

A Heighway, T Kristunas, S Skinner, and J Staniland.

**Committee Officers:**

J Bayley and D Sunman

Relevant extract relating to the Committee's consideration of the Single Equalities Scheme 2009/12 and the Gender Equalities Scheme.

**114. SINGLE EQUALITIES SCHEME 2009 - 2012**

The Committee was informed of the Council's statutory duty to publish and adopt Race Equality, Disability Equality and Gender Equality schemes.

Officers reported that the Single Equality Scheme, as detailed in Appendix 1 of the report, outlined the context in which the Council operated and its baseline position in relation to equality and equalities.

Members were informed that the initial deadline of 22nd December 2009 set by the Commission for Equality and Human Rights had been extended to 28th February 2010. The Executive Committee would therefore consider the Single Equalities Scheme on 27th January 2010. This extension would allow more time for consultation and to include amendments.

Members suggested that the Overview and Scrutiny Committee should be fully involved in the process. In particular, Members

.....  
Chair

# **Overview and Scrutiny Committee**

**25th November 2009**

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agreed that this could involve scrutiny of particular equalities strands in turn. The Committee agreed that gender equalities was especially suitable for scrutiny and should be the first topic for review following approval of the Single Equalities Scheme.

**RECOMMENDED that**

**the Single Equalities Scheme be approved; and**

**RESOLVED that**

- 1) following approval of the single Equalities Scheme the Overview and Scrutiny Committee be further involved in the process through reviews of particular equalities strands; and**
- 2) the report be noted.**

## **ITEM 9**

# **BROMSGROVE GENDER EQUALITIES SCHEME**

**(THE BROMSGROVE GENDER EQUALITIES  
SCHEME HAS BEEN ATTACHED AS AN EXAMPLE  
OF HOW THE GENDER EQUALITIES SCHEME IS  
BEING APPLIED AT ANOTHER COUNCIL).**





Bromsgrove District Council | **Legal, Equalities & Democratic Services**



# Draft Gender Equality Scheme

March 2009 to  
June 2011



**Bromsgrove**  
District Council  
[www.bromsgrove.gov.uk](http://www.bromsgrove.gov.uk)







## Bromsgrove District Council Draft Gender Equality Scheme

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# Draft Gender Equality Scheme

## March 2009 to June 2011

### 1. Introduction

The Gender Equality Duty requires Bromsgrove District Council to produce this **Draft Gender Equality Scheme**. It will be revised in June 2011 in the light of new statutory duties set out in the 2008 Equalities Bill.

It has been more than 30 years since the Sex Discrimination Act came into force and more than 35 years since the Equal Pay Act. Since then, great strides have been made in achieving equality between the sexes and tackling sex discrimination and gender based harassment. For example, more women are now in the labour market and they are helped by flexible working patterns and increased childcare provision.

Having said that, there is still a long way to go. Women still come second too often in the workplace and other spheres of life, while men face inequalities too, particularly in their increasingly clear wish to play a full role as fathers and get a better balance between work and personal life.

Nationally, women are still being paid less than men and in some instances face discrimination at work despite record numbers of tribunal cases. In the past 30 years there have been 250,000 employment tribunal cases related to sex discrimination and 67,000 linked to equal pay. Record numbers of cases have been heard in the past five years, but according to the Equal Opportunities Commission ( now merged with the Equality and Human Rights Commission ), gender equality problems remain "stubbornly persistent". They calculated that individuals spent £51 million taking tribunal cases in 2006, while employers paid out £68 million to defend themselves. Equal Pay claims now make up one third of all tribunal claims.

Each year around 30,000 working women are sacked, made redundant or leave their jobs due to pregnancy discrimination. In a survey by the Equal Opportunities Commission of the 441,000 women who are pregnant each year, 45% of those who worked while pregnant say that they experienced some form of discrimination because of their pregnancy.

Bromsgrove District Council recognises that we have an opportunity to make a contribution towards removing the barriers to equal opportunities for women and men. We will do this by looking at how we offer our services and how we employ people. We can influence the community at large by requiring leisure, housing and other service providers to show that they offer their services in ways that are equally accessible for women and men, or when women and men have different needs, these needs are met accordingly. The needs of women and men going through gender re-assignment will also be met.

Bromsgrove District Council is committed to fulfilling this new duty in the delivery of all our services because we know that nationally, part-time women workers earn almost 40% less per hour than full-time men, a figure which has barely changed since the 1970s. And most part-time women workers are stuck in jobs below their potential, partly because of lack of flexible working at more senior levels.

The Gender Equality Duty should also be seen in its context of fitting into the broader equality picture. Women and men, including trans-sexual people, will experience different forms of disadvantage depending on their age, ethnicity, colour, religion and belief, sexual orientation, marital or civil partnership status and whether or not they are disabled. For example, only 47% of disabled women are in employment, compared with 53% of disabled men. Of the disabled women in employment, only 52% work full-time. This compares with an employment rate of 75% for non-disabled women and 86% for non-disabled men.

Through implementing the gender equality duty at Bromsgrove District Council we will benefit in the following ways :

- better informed decision making and policy development
- clearer understanding of the needs of service users
- better quality services which meet varied needs
- more effective targeting of policy and resources
- better results and greater confidence in public services
- more effective use of talent in the workforce

Meeting the gender equality duty will help us to :

- achieve a more representative workforce at all levels and in all occupations
- improve staff morale and productivity
- improve staff management
- improve our reputation

## **2. The Equality Act 2006**

The Equality Act 2006 amends the Sex Discrimination Act 1975 so that it now requires Bromsgrove District Council to adopt a proactive approach to mainstream gender equality into all decisions and activities. It requires us to

- eliminate unlawful discrimination based on gender
- eliminate unlawful harassment based on gender
- promote equality of opportunity between women and men
- produce a Gender Equality Scheme demonstrating how we intend to fulfill the general and specific duties
- consider the need to include objectives to address the causes of any gender pay gap

- gather and use information on how our policies affect gender equality in the workplace and in the delivery of our services
- consult stakeholders including employees, service users, trade unions and others
- take account of relevant information when determining our gender equality objectives
- assess the impact of our current and proposed policies on gender equality
- implement the actions set out in our Scheme within 3 years
- report against our Scheme every year
- review our Scheme at least every three years

We have written a detailed action plan which shows how we intend to implement these Gender Equality Duties which you will find at the end of this section on pages 9 to 22. The glossary on page 23 explains the meaning of the abbreviations used in the action plan.

### **3. Our ongoing actions in relation to gender equality**

#### **3.1 For employees**

- Maternity leave – we provide up to 52 weeks maternity leave, paid maternity leave is based on length of service. As well as Statutory Maternity Pay, we also provide additional maternity benefits
- Paternity leave – we provide two weeks of paid paternity leave
- Parental leave – provide the statutory number of weeks of parental leave on request for each child and for each parent
- Flexible working hours help full and part time staff with childcare or other care responsibilities
- There is a job sharing policy which is available to all
- The Council operates a salary sacrifice childcare voucher scheme administered by Busy Bees.
- The Council participates in a scheme to support employees who are victims of domestic violence.
- Council Departments have identified areas of occupational segregation based on gender and are working with the Human Resources department to bring about change over a period of time
- For outdoor maintenance jobs suitable clothing is provided for men and women and the department concerned provides shower facilities for all employees

#### **For service users**

- The Customer Service Centre in Bromsgrove has a play area for children
- Sports development activities are set up to encourage girls to continue to play sports when they reach adolescence
- Sports activities are provided to encourage girls and boys to participate in sports which are not traditional for their sex

- Arts and drama activities are offered to school children to help to develop confidence and team building skills
- With our partner, Bromsgrove District Housing Trust we support the Sanctuary Scheme for female and male victims of domestic violence and provide financial support for women’s refuges
- We work in partnership with the Youth Service to address school bullying with the aim of increasing awareness through education and reducing the risk of domestic violence in later life
- The implementation of an access survey of polling stations will assist parents with children when attending to vote
- The new toilet block in Bromsgrove Town Centre will include a baby changing room and a personal care suite available to parents and carers of both sexes
- The design of the new leisure centre for Bromsgrove will provide family friendly changing facilities which are equally accessible by women and men
- We support women only consultation events organised by the County Council in North Worcestershire
- We run a day long event in March every year to mark International Women’s Day

#### 4. Contact us

If you have any questions or comments or would like to get involved in the various equality groups and activities run by the Council contact us as follows :-

Mrs Claire Felton	Head of Legal and Democratic Services	01527 881429
Miss Fiona Scott	Equality Officer	01527 881719
Mr Kevin Dicks	Chief Executive	01527 881487

You can write to any of us at:

The Council House, Burcot Lane, Bromsgrove, B60 1AA or email us on [equalities@bromsgrove.gov.uk](mailto:equalities@bromsgrove.gov.uk)



## Gender Equality Scheme

### Action Plan

#### The General Duty

##### 5.1 The Council has a duty to eliminate unlawful discrimination based on gender. We will do this by :

Action	Who?	When by?	How will we know we have achieved it?
<p>Monitoring the gender of service users by collecting information</p> <ul style="list-style-type: none"> <li>• at point of delivery</li> <li>• from customer surveys</li> <li>• from focus groups</li> <li>• from analysis of complaints</li> <li>• from feedback from the Equality and Diversity Forum, the Disabled Users Group and the Gender Equality Working Group</li> <li>• from information from suppliers</li> </ul>	<p>Service departments</p> <p>Chief Executive's Office</p> <p>The Equality Officer BDC</p> <p>The Equality Champions Working Group BDC</p> <p>The Equality and Diversity Working Group BDHT</p>	<p>Monitoring is a continuous process and reports</p> <p>The Equality and Diversity Forum meets every alternate month and will receive reports of the results of monitoring information</p> <p>Customer satisfaction surveys and focus groups are carried out on a regular basis by BDC and BDHT and the results of these will be reported to the Forum</p>	<p>Service users will see that services are more accessible and better tailored to their needs</p> <p>Service outcomes by gender begin to improve</p> <p>Women and men are making greater use of services that their sex had previously under-used</p>
<p>Changing an individual's gender record when requested on the production of a Gender Recognition certificate or other appropriate evidence</p> <p>Issuing a confirmation to the individual</p>	<p>HR</p> <p>The Customer Service Centre</p>	<p>On request from an individual or on joining the organisation</p>	<p>Trans people will have their needs recognised and will feel supported</p>

## The General Duty ctd.

### 5.1 ctd. The Council has a duty to eliminate unlawful discrimination based on gender. We will do this by :

Action	Who?	When by?	How will we know we have achieved it?
Assessing the Equality Impact of services to ensure that they are designed to take account of the needs of users with caring responsibilities	Service departments  Equality Officer – BDC  Equality Champions Working Group - BDC  Equality and Diversity Working Group - BDHT	Equality Impact Assessments are planned and carried out in a continuous 3 year rolling programme	Service users with caring responsibilities are receiving appropriate support
Assessing new and existing policies for Equality Impact on gender equality including trans-gender  Equality impact assessments are informed by <ul style="list-style-type: none"> <li>● collection of gender information on service delivery</li> <li>● from surveys</li> <li>● focus groups</li> <li>● analysis of complaints</li> <li>● feedback from the Equality and Diversity Forum, Disabled Users Group, Gender Equality Working Group</li> <li>● information from suppliers</li> </ul>	As above	Equality Impact Assessments including are planned and carried out in a continuous 3 year rolling programme  The Equality and Diversity Forum has an Equality Impact Assessment Working Group which meets twice a year to scrutinise completed assessments and when appropriate is involved in the actual assessment process  The annual business planning cycle includes equality objectives and identifies resources needed to provide services or make changes to existing services	Gender equality issues and their budgetary implications are considered at the beginning of policy making

## The General Duty ctd.

### 5.1 ctd The Council has a duty to eliminate unlawful discrimination based on gender. We will do this by :

Action	Who?	When by?	How will we know we have achieved it?
<p>Consulting women and men from all sections of the community on new policies and any proposed changes to policies through</p> <ul style="list-style-type: none"> <li>• the Equality and Diversity Forum, the Disabled Users Group and the Gender Equality Working Group</li> <li>• surveys and focus groups</li> <li>• work with partners in the District and in the County</li> <li>• work with suppliers</li> </ul>	<p>All service departments</p> <p>Chief Executive's Office</p> <p>The Equality Officer – BDC</p> <p>The Equality Champions Working Group - BDC</p> <p>The Equality and Diversity Working Group - BDHT</p>	<p>The Equality and Diversity Forum meets in every alternate month and is consulted on new policies, services and initiatives</p>	<p>Women and men from all sections of the community feel effectively engaged in decision and policy-making around issues that have a direct effect on them</p> <p>Women and men from all groups can see that changes have been made in service delivery as a direct result of their involvement in the consultation process</p>
<p>Designing services and facilities to take account of men with childcare responsibilities</p> <p>Advertising childcare services and facilities in ways that ensure men are made aware of them</p> <p>Designing childcare services and policies to take account of all types of working patterns including job sharing and shift-work where this is possible</p>	<p>All service departments</p>	<p>The customer service centre in Bromsgrove has a children's play area</p> <p>The town centre toilets will be refurbished with a parent and baby changing unit accessible to both men and women</p> <p>Leisure facilities provide family friendly changing rooms which are accessible to both men and women</p>	<p>Fathers receive greater support for their childcare responsibilities from public services</p>

## The General Duty ctd.

### 5.1 ctd      The Council has a duty to eliminate unlawful discrimination based on gender. We will do this by :

Action	Who?	When by?	How will we know we have achieved it?
Raising awareness of the needs of individuals in the transitioning stage of gender re-assignment by working with managers, front line staff, service users and organisations with expertise in trans issues	Street Scene and Community  The Equality Officer, BDC	To start in 2009 and then on an ongoing basis as and when needs are identified	Trans people will be able to access services and facilities which are provided for all
Appropriate training and information will be provided to managers, front line staff and service users to explain these needs	Street Scene and Community  The Equality Officer, BDC	As above	As above

## The General Duty ctd.

### 5.1 ctd The Council has a duty to eliminate unlawful discrimination based on gender. We will do this by :

Action	Who?	When by?	How will we know we have achieved it?
<p>Encouraging girls and boys to participate in non traditional sports for their gender</p> <p>Encouraging girls to continue to participate actively in sports during their adolescent and teenage years and in so doing, recognise that communal changing rooms can be a barrier to continued participation</p> <p>Providing arts and drama activities that encourage the participation of girls and boys which improve levels of confidence, self esteem and team working and leadership skills</p>	<p>Street Scene and Community</p>	<p>Sports development programmes are an ongoing activity of the Council</p> <p>The new leisure centre under development will be designed to accommodate these needs</p>	<p>Girls and boys have higher aspirations for their future careers</p>

## The General Duty ctd.

### 5.2 The Council has a duty to eliminate harassment based on gender. We will do this by :

Action	Who?	When by?	How will we know we have achieved it?
Ensuring that the Hate Incident procedure through the Bromsgrove Hate Incident Partnership is available to all residents of, and visitors to the Bromsgrove District	The Customer Service Centre	The procedure was launched in July 2007 and is now fully functional accepting and resolving reports of hate incidents	Harassment and sexual harassment of staff, service users and others are dealt with promptly and systematically according to agreed procedures
	Community Safety Officer		
	Community Safety Partnership  Bromsgrove District Multi-Agency Panel and the Hate Incident Reporting Centres in Bromsgrove District	The full range of Reporting Centres are fully functioning	Tolerance of harassment drops within the District

## The General Duty ctd.

### 5.2 ctd The Council has a duty to eliminate harassment based on gender. We will do this by :

Action	Who?	When by?	How will we know we have achieved it?
Supporting domestic violence initiatives and making information available about services for those women and men who may be experiencing domestic violence	<p>The Customer Service Centre</p> <p>Community Safety Officer</p> <p>Community Safety Partnership</p> <p>Bromsgrove District Multi-Agency Panel including BDHT, West Mercia Police, CAB, Age Concern, Victim Support and others agencies</p> <p>Hate Incident Reporting Centres in Bromsgrove District</p>	Current initiatives include support of the Sanctuary Scheme and the funding of women's refuges in partnership with BDHT and other agencies	<p>Harassment and sexual harassment of staff, service users and others is dealt with promptly and systematically according to agreed procedures</p> <p>Tolerance of harassment drops in the District of Bromsgrove</p>

## The General Duty ctd.

### 5.3 The Council has a duty to promote equality of opportunity between men and women. We will do this by :

Action	Who?	When by?	How will we know we have achieved it?
Collecting equality monitoring data from job applicants and working towards the ability to analyse this data to identify potential gender bias whether intentional or otherwise	HR	Ongoing	Women and men are represented at all levels of the workforce and in all areas of work within the Council
Investigating the setting up of a system to Monitoring employees by gender and by grade for <ul style="list-style-type: none"> <li>● training</li> <li>● development</li> <li>● promotion</li> <li>● exits</li> </ul> to look for potential gender bias whether intentional or otherwise	HR	Ongoing	Women and men are represented at all levels of the workforce and in all areas of work within the Council
Monitoring the level of grievances and their outcomes from pregnant employees and employees returning from maternity and parental leave to evaluate the levels of discrimination and harassment they may have experienced	HR	Ongoing	The level of awareness of discrimination that may be experience by pregnant staff and staff returning from maternity leave is raised.



## The General Duty ctd.

### 5.3 ctd      The Council has a duty to promote equality of opportunity between men and women. We will do this by :

Action	Who?	When by?	How will we know we have achieved it?
Undertaking Positive Action initiatives to address demonstrable under-representation either in the organisation as a whole, certain occupations or at certain levels	HR	Ongoing	Women and men are represented at all levels of the workforce and in all areas of work within the Council
Encouraging any employee or potential employee considering gender re-assignment to approach their line manager for support during the period of re-assignment	HR	Will be provided when a need is identified	Barriers to the recruitment and retention of transgender people will have been identified and removed
Changing the gender of an individual's personnel record on the production of a Gender Recognition Certificate or other appropriate evidence	HR	On request from an individual or on joining the organisation	Transgender people feel supported and valued as employees and potential employees
Issuing a confirmation to the individual			
Providing appropriate training on an identified needs basis to managers, colleagues, mentors and partners	HR OD	Will be provided when a need is identified	Managers will feel enabled and supported when they are required to deal with this situation
Providing support for trans-people through the Occupational Health Counselling Service	HR	Our Occupational Health Services are trans-aware	The culture of the workplace will have been changed to one that is welcoming and accepting of transgender people

## The General Duty ctd.

### 5.3 ctd      **The Council has a duty to promote equality of opportunity between men and women. We will do this by :**

Action	Who?	When by?	How will we know we have achieved it?
Conducting Annual Staff Surveys to establish the level of satisfaction or otherwise with working arrangements for employees with caring responsibilities including those who work part time or job share	HR OD	The staff attitude survey is carried out in annually year and the results and are presented to the Executive Cabinet, the Performance Monitoring Board and the Corporate Management Team	The analysis of the Annual Staff Surveys shows that employees with caring responsibilities feel they are receiving greater support from the Council including flexible and part time/ job sharing opportunities at all levels where this is feasible
Conducting Stress Surveys to established whether levels of stress are greater for employees with caring responsibilities	Health and Safety Adviser	The Stress Survey is carried out bi-annually and will take place in 2009	As above
Participating in the Job Evaluation Exercise to achieve Single Status and remove inequality of pay between women and men for work of equal value	HR	The Job Evaluation Exercise has been completed and will be implemented in 2009	The gap between women and men's pay narrows and is eventually eliminated
Monitoring the pay structure every two years to ensure the application of the Corporate Framework across all departments	HR	ongoing	As above

## The General Duty ctd.

### 5.3 The Council has a duty to promote equality of opportunity between men and women. We will do this by :

Action	Who?	When by?	How will we know we have achieved it?
Initiating an awareness campaign and a training programme in 2009 to promote understanding and support for the Gender Equality Scheme and its aims and objectives	HR OD The Equality Officer Heads of Services Elected Members District Partners	By end of December 2009	Employees, partners and elected Members are aware of the Gender Equality Duty, understand how it affects their work and have the skills to implement the duty in their work
Including the Gender Equality Scheme in the induction process and in equality and diversity training for all staff and elected Members	The Equality Officer and the Learning and Development Manager	Ongoing	As above
Marking the International Women's Day every year with an event for the community in Bromsgrove	The Equality Officer/ Spadesbourne Suite Operations	March every year	Members of the community will be more aware of Gender Equality and the services and facilities available

### The Specific Duties

**5.4 The Council has a duty to prepare and publish a Gender Equality Scheme showing how we intend to fulfil the general and specific duties and setting out our gender equality objectives. We will do this by :**

<b>Action</b>	<b>Who?</b>	<b>When by?</b>	<b>How will we know we have achieved it?</b>
Prepare and publish a revised Gender Equality Scheme	The Equality Officer	6 <sup>th</sup> March 2009	The Revised Draft Gender Equality Scheme will be circulated to all key partners and published on the Council's website
Providing the Scheme in a range of alternative formats and any languages when requested	The Equality Officer	As and when required	A record of requests will show that they have been met and within a reasonable timescale
Including objectives to address the causes of any gender pay gap	HR OD	Included under the section of the action plan to implement the General Duties	The Gender Equality Scheme includes achievable objectives to reduce and eliminate any gender pay gap
Including objectives to ensure that once any gender pay gap is eliminated that equality of pay is maintained	HR OD	As above	As above
Gathering and using information on how our policies and practices affect gender equality in the workplace and in the delivery of services	HR OD The Equality Officer All Service Departments	Equality Impact Assessments are carried out on a 3 year rolling programme	It is easy to find a wide variety of data and information to assess effectively how certain actions will affect women and men

### The Specific Duties ctd.

#### 5.4 The Council has a duty to prepare and publish a Gender Equality Scheme showing how we intend to fulfil the general and specific duties and setting out our gender equality objectives. We will do this by :

Action	Who?	When by?	How will we know we have achieved it?
Consulting stakeholders – employees, service users and others with a view to sharing best practice and joining partners in their initiatives	The Chief Executive  Heads of Service/ all Service Departments  HR OD  The Equality Officer  BDHT	The Gender Equality Working Group has been involved in the design and the rewriting of the Scheme from early 2007 to Autumn 2008 and will be involved in monitoring the progress of the current scheme and preparing to review and revise it in time for the publication of the next Inclusive Equalities Scheme in June 2011	The Gender Equality Scheme clearly reflects the views of employees, service users and key partners
Disseminating relevant information to service departments and partners in the District	Heads of Service/ All Service Departments  BDHT	Equality Impact Assessments are carried out on a 3 year rolling programme	It is easy to find a wide variety of data and information to assess effectively how certain actions will affect women and men
Assessing the impact of our current and proposed policies and practices	Heads of Service/ All Service Departments	Equality Impact Assessments are carried out on a 3 year rolling programme	It is easy to find a wide variety of data and information to assess effectively how certain actions will affect women and men
Implementing the actions set out in this Scheme within 3 years	Heads of Service/ all Service Departments  HR OD  The Equality Officer	Ongoing	Reports of gender based discrimination and harassment and staff turnover will be reduced and staff surveys and staff feedback in PDRs will show increasing levels of satisfaction

## The Specific Duties ctd.

**5.4 The Council has a duty to prepare and publish a Gender Equality Scheme showing how we intend to fulfil the general and specific duties and setting out our gender equality objectives. We will do this by :**

Action	Who?	When by?	How will we know we have achieved it?
Reporting progress against the aims and objectives of the Scheme every year	The Assistant Chief Executive  The Equality Officer  The Gender Equality Working Group	In "Council Results" every June  In Together Bromsgrove  On the Council Website  To the Equality and Diversity Forum which meets every eight weeks	Employees, service users and key partners will be informed of the progress we are making to achieve Gender Equality
Reviewing the Scheme every three years including any changes in legal requirements	Heads of Service HR  The Equality Officer	6 <sup>th</sup> March 2009	The Revised Draft Gender Equality Scheme will be launched at the International Women's day event on 6 <sup>th</sup> March 2009

## Acknowledgements

This revised Draft Gender Equality Scheme has been produced with the support and in depth involvement of the community led Gender Equality Working Group. If you would like more information about the Group, please contact Fiona Scott, Equality Officer on 01527 881719 or email [equalities@bromsgrove.gov.uk](mailto:equalities@bromsgrove.gov.uk)

For their ideas and contributions and for their continuing support for the producing and implementing of this scheme Bromsgrove District Council would like to thank

The Equality and Diversity Forum, Bromsgrove District Council

The Equality and Diversity Working Group – Bromsgrove District Housing Trust

The Gender Equality Working Group which has met regularly over the last 18 months who are:-

Joan King  
John Tempest  
Ann Sowton  
Councillor Mrs Caroline Spencer  
Jo Wright  
Elaine Mortimore

The Gender Trust  
Worcestershire Mental Partnership  
Bromsgrove and Redditch Network  
Bromsgrove District Council  
Bromsgrove Resident  
Bromsgrove Youth Homelessness  
Forum  
Bromsgrove Resident

Sarah Kelsey

## Glossary

<b>BDC</b>	<b>Bromsgrove District Council</b>
<b>BDHT</b>	<b>Bromsgrove District Housing Trust</b>
<b>CAB</b>	<b>Citizens Advice Bureau</b>
<b>HR OD</b>	<b>Human Resources and Organisation Development</b>
<b>PDR</b>	<b>Performance and Development Review</b>











**This document can be provided in large print, braille, CD, audio tape and computer disc.**



**Bromsgrove**  
District Council  
[www.bromsgrove.gov.uk](http://www.bromsgrove.gov.uk)



**Legal, Equalities and Democratic Services**

Bromsgrove District Council, The Council House, Burcot Lane, Bromsgrove, Worcestershire B60 1AA.  
Telephone: (01527) 881288, Fax: (01527) 881414, DX: 17279 Bromsgrove  
e-mail: [equalities@bromsgrove.gov.uk](mailto:equalities@bromsgrove.gov.uk)

## Overview and Scrutiny

Committee

No specific Ward  
Relevance

28th April 2010

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### YOUTH EMPLOYMENT AT REDDITCH BOROUGH COUNCIL

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(Report of the Head of Resources)

1. **Summary of Proposals**

To bring to Members' attention the current youth employment statistics and to outline current initiatives in place and potential developments.

2. **Recommendations**

**Members are asked to RESOLVE that**

**the report be noted.**

3. **Financial, Legal, Policy, Risk and Climate Change /  
Carbon Management Implications**

Financial

3.1 There is a corporate apprenticeships budget allocated until 2011/12.

Legal

3.2 There are no legal implications.

Policy

3.3 There are no policy implications.

Risk

3.4 There are no risk implications.

Climate Change / Carbon Management

3.5 There are no climate change or carbon management implications

# Overview and Scrutiny

Committee

28th April 2010

## Report

### 4. Background

- 4.1 At the Overview and Scrutiny Committee meeting on 3rd February 2010 Members requested a report outlining the current situation regarding youth employment at Redditch Borough Council.

### 5. Key Issues

- 5.1 Details of current young people statistics are shown in Appendix 1.

- 5.2 Currently 24.7% of all employees are under the age of 30, however over half of these are employed on casual contracts based in Leisure and Cultural Services. Excluding casual employees 11.3% of staff are under 30. There is a more even balance of young employees distributed among the remaining service areas excluding Business Transformation where there are no employees are under the age of 30.

- 5.3 The retention rate for young employees is positive with many remaining in employment at Redditch Borough Council for a number of years.

- 5.4 Currently 3 of the 117 permanent employees under 30 are fourth-tier managers, which represent 6.4% of all fourth-tier managers.

- 5.5 During 2009 a third of leavers were under the age of 30 with the main reason for leaving being cited as 'Personal Circumstances'. Just one employee left due to promotion elsewhere.

- 5.6 The overall age profile of Redditch Borough Council is similar to that of all Local Authorities with similar percentages of the workforce in the 16-24 and 25-34 age brackets. Where casuals are included the Council has substantially more employees within the 16-24 bracket.

- 5.7

<b>Excluding Casuals</b>		
	<b>16-24</b>	<b>25-34</b>
RBC	5.5%	18.9%
All Local Authorities	6.4%	17.2%

# Overview and Scrutiny

Committee

28th April 2010

5.8

Including Casuals		
	16-24	25-34
RBC	14.4%	18.2%
All Local Authorities	6.4%	17.2%

5.9 There are a number of reasons why it is less desirable to employ a large number of young employees. There is increased Health and Safety legislation to protect younger workers, in particular those aged under 18. This is due to the increased risk associated with employing those who are inexperienced.

## 5.10 Existing Initiatives: Apprenticeships

5.10.1 Last year Members agreed £80,000 to supplement the existing base budget of £10,000 per year over a three year period;

- a) 2009/10 £20,000 Department of Work Pensions (DWP) funding and £10,000 base budget;
- b) 2010/11 £30,000 DWP funding and £10,000 base budget; and
- c) 2011/12 £30,000 DWP funding and £10,000 base budget.

5.10.2 Redditch Borough Council has been one of three Council's acting as a pilot for the West Midlands Leaders Board (WMLB) Skills Shortages Project to encourage and ensure consistency in Apprenticeships and Work Experience across all Local Authorities. As part of the project we have committed to providing two Apprenticeships and 20 work experience placements during 2010/11.

5.10.3 The allocation for the corporate apprenticeships budget was determined by CMT following submissions from managers using: workforce planning data (% of staff under 25, % of staff over 60); whether it was in a difficult to recruit area; and whether there had previously been apprenticeship within the service.

5.10.4 Redditch Borough Council now employ two apprentices (Electrician and Bench Joiner), with additional funding for a third apprentice in place for recruiting in the summer.

## 5.11 Existing Initiatives: Work Experience

5.11.1 Work experience placements are offered to students across the Authority. During 2009 and 2008 RBC offered 50 placements each year. There are currently 40 placements arranged for 2010 across a

# Overview and Scrutiny

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range of departments including the Palace Theatre, Kingsley Sports Centre and Economic Development. The placements range from a one week placement to one day per week over the summer period. Feedback from previous placements has been positive, with students stating that they found the placements valuable in helping them to make career choices.

## 5.12 Current Developments: Diplomas

5.12.1 We are currently looking into supporting schools and colleges which are running the Diploma in Public Services which is being introduced in September 2010 as part of the reform of 14-19 year old education. As part of the diploma students are required to complete at least 10 days work experience in addition to their formal studies. There are a number of ways in which RBC could support students undertaking this diploma:

- a) Work Experience – providing 10 day placements;
- b) Extended Projects – as part of the Diploma some students will have to complete a project which could be supported by work experience placements;
- c) Work shadowing – students can shadow Redditch Borough Council Officers for a day to provide them with an opportunity to see the job in action;
- d) Industry days – an Officer spends a day with a school or college and talks about the industry and their job role;
- e) Visits – Work-based visits for small groups of learners can help to develop their understanding of the workplace;
- f) Mentoring - mentoring a student undertaking the Diploma;
- g) Contact information - providing industry knowledge and support to teachers or young people, by being available for advice on current and emerging practice; and
- h) Questions and answers - Offering the opportunity for young people to quiz Officers on Local Government.

5.12.2 There is no minimum requirement for involvement in the Diploma; Redditch Borough Council can choose in what ways (if any) it wishes to support students. There are no cost implications other than Officers' time and resources.

5.12.3 CMT fully endorse supporting local schools and colleges with Diplomas.

# Overview and Scrutiny

Committee

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## 5.13 Current Developments: Expand Work Experience Programme

Although Redditch Borough Council offers many work experience placements to schools and colleges throughout Redditch, the placements continue to be offered in the same departments year on year. It is not always possible to offer a placement for every request. We would encourage all managers to commit to a minimum number of placements per year.

## 5.14 Possible Future Developments: National Graduate Development Programme

5.14.1 The National Graduate Development Programme recruits and develops graduates with the potential to fill local government senior management roles within 10 to 15 years. The programme is a three way partnership between:

- a) the participating local authority;
- b) their national management trainee; and
- c) the Improvement and Development Agency (IDeA).

5.14.2 Graduates are employed on two year fixed term contracts and are given work placements, projects and development opportunities.

5.14.3 Benefits of participating include:

- a) quality staff with leadership potential and the capacity to modernise and improve services and service delivery;
- b) development of existing managers that are assigned to line manage trainees;
- c) capacity support to feed into longer-term succession planning;
- d) involvement in a local authority network and a boost to the council's local, regional and national profile;
- e) highly capable staff – graduates work at a high level delivering significant outputs;
- f) graduate pool – as part of a national programme, local authorities will attract graduates to fill mainstream vacancies; and
- g) supporting management development – graduate recruitment should be used to support ongoing management development in the Council.

# Overview and Scrutiny

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28th April 2010

- 5.14.4 88% of trainees remain in the public sector once their contract has expired and 54% remain with their host authority.
- 5.15 Possible Future Developments: Internships
- 5.15.1 These are 12 month placements for undergraduates in their third year at university. Internships are usually paid (although they can be unpaid), and interns are given projects / tasks to undertake during their placement. Due to the nature of roles that graduates will be looking for the placements need to be in areas where they are exposed to a level of responsibility and are not at an administrative level.

## 6. Other Implications

- Asset Management - There are no asset management implications.
- Community Safety - There are no community safety implications.
- Health - There are no health implications.
- Human Resources - Resources are required to support managers and liaise with schools and colleges.
- Social Exclusion - There are no social exclusion implications.
- Environmental / Sustainability / - There are no environmental or sustainability implications.

## 7. Lessons Learnt

No lessons have been learnt.

## 8. Background Papers

None Identified

## 9. Consultation

This report has been prepared in consultation with relevant Borough Council Officers.



# Overview and Scrutiny

Committee

28th April 2010

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## 10. Author of Report

The author of this report is Becky Barr (Human Resources Development Manager), who can be contacted on extension 3385 (e-mail: [becky.barr@redditchbc.gov.uk](mailto:becky.barr@redditchbc.gov.uk)) for more information.

## 11. Appendices

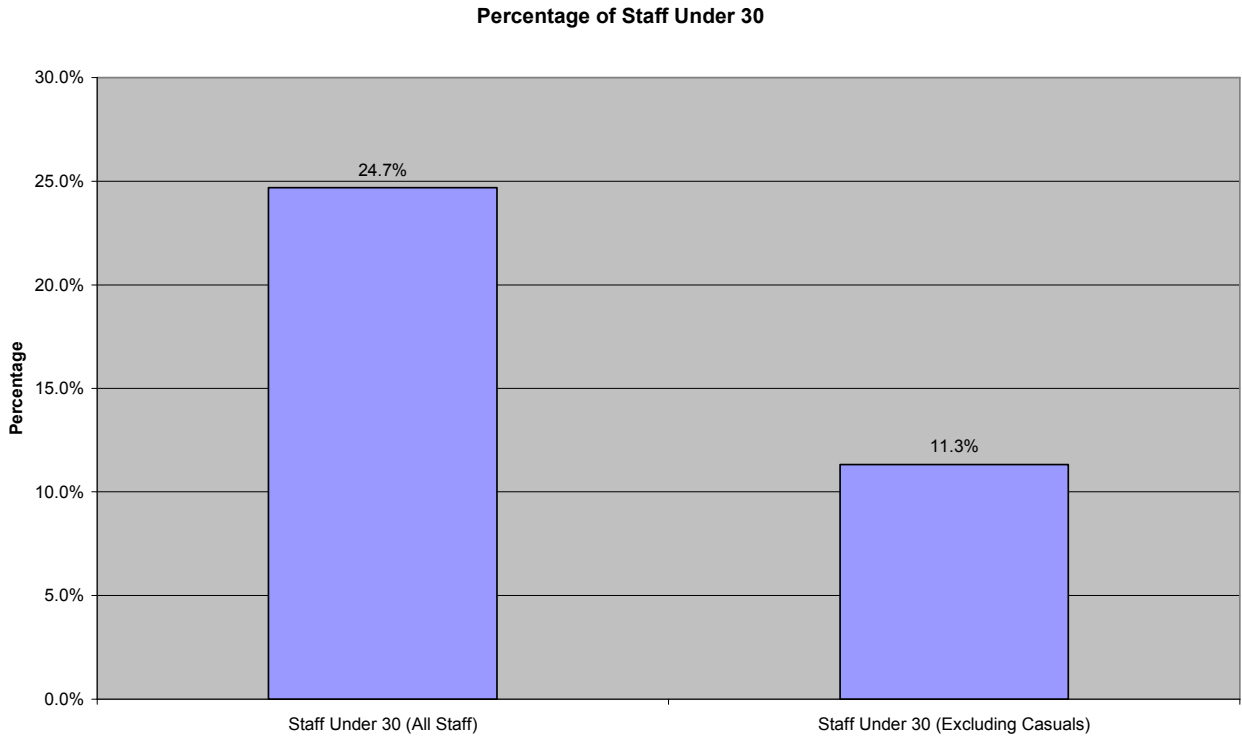
Appendix 1 – Employees Under the Age of 30 Summary



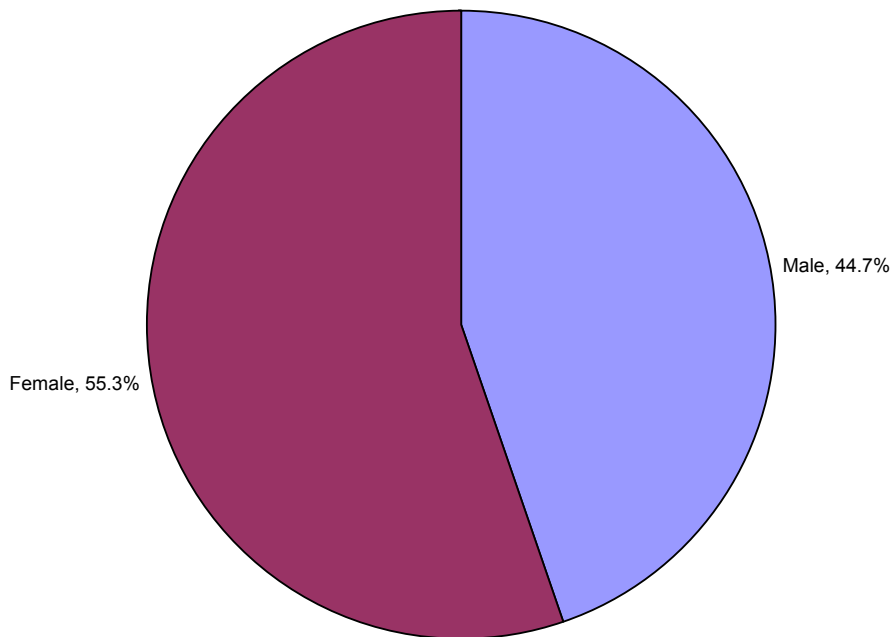
Page 67  
**Appendix 1**

**Employees Under the Age of 30**

Percentage of Employees Under 30

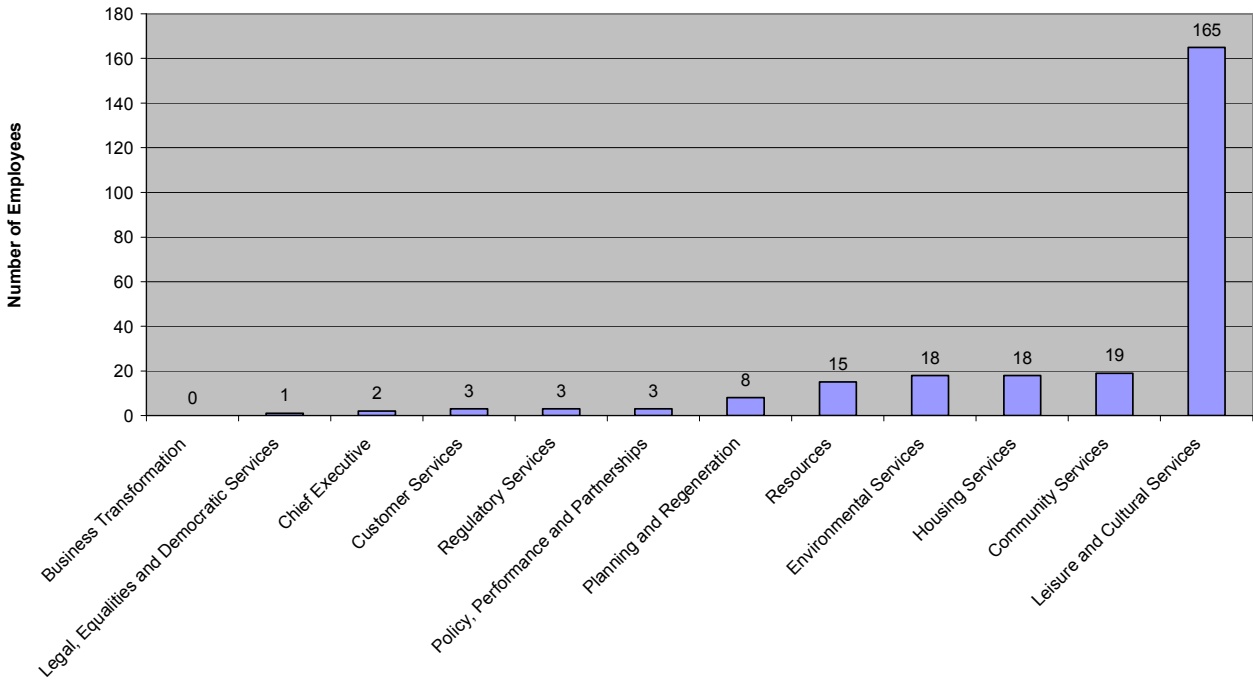


Male / Female Split



Departmental Split

**Number of Employees Under 30 by Head of Service**



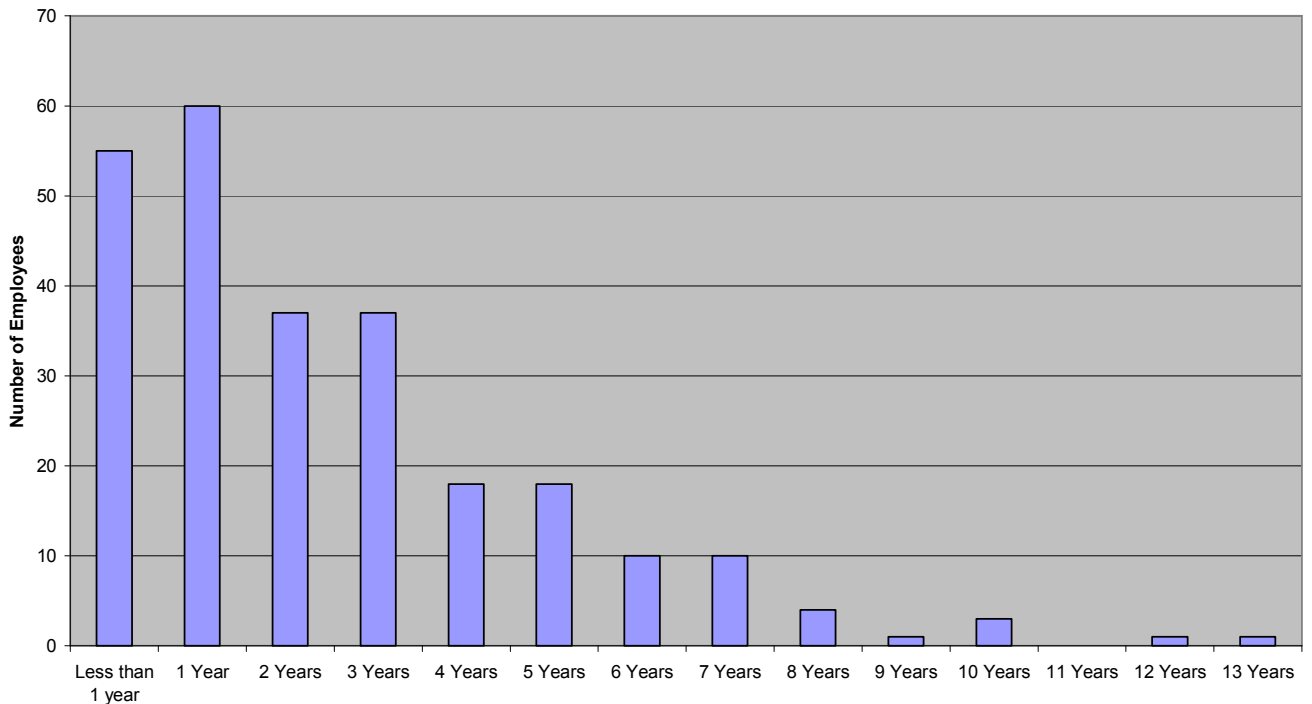
Management Responsibility

3 of the 117 permanent employees under 30 are fourth-tier managers.

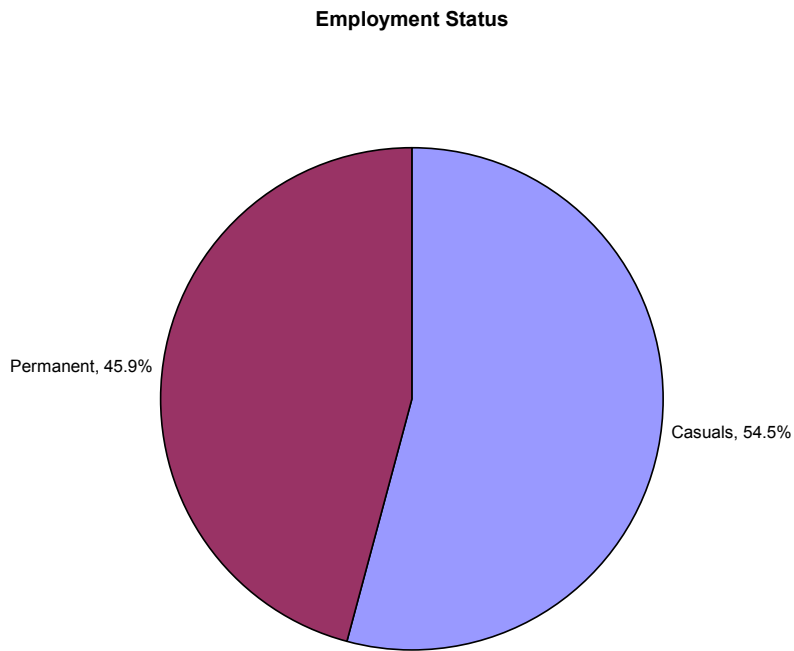
6.4% of all fourth-tier managers are under 30.

Service Length

**Service Length**



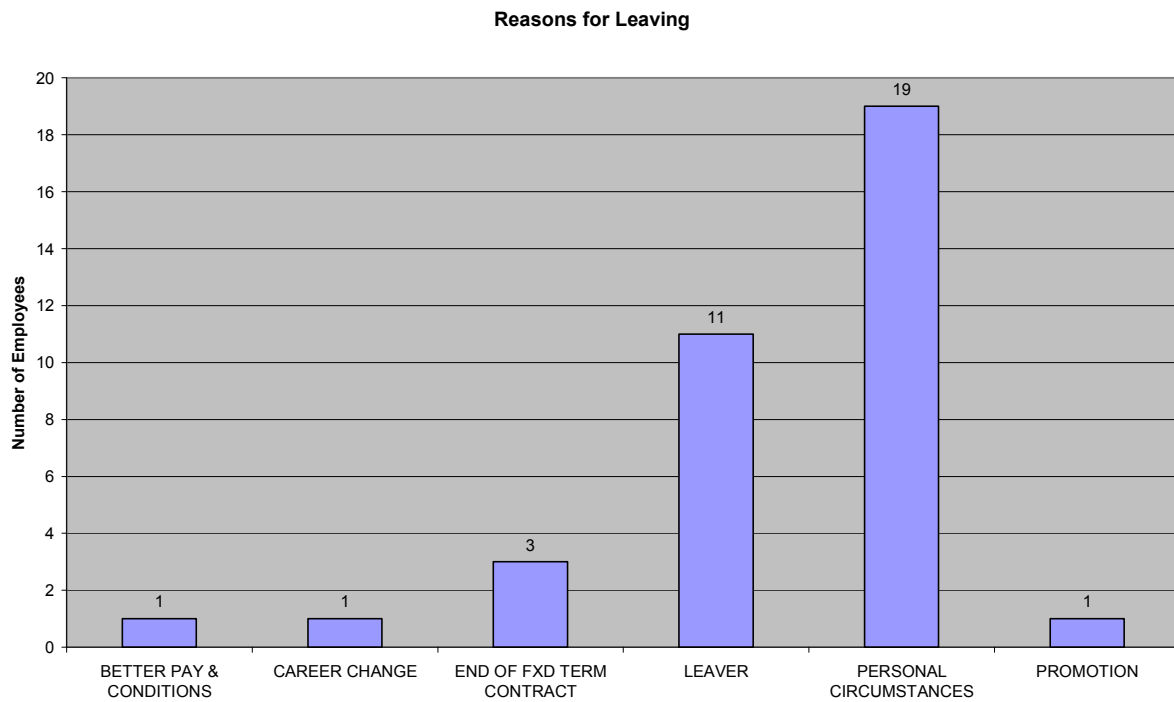
Employment Status



Leavers

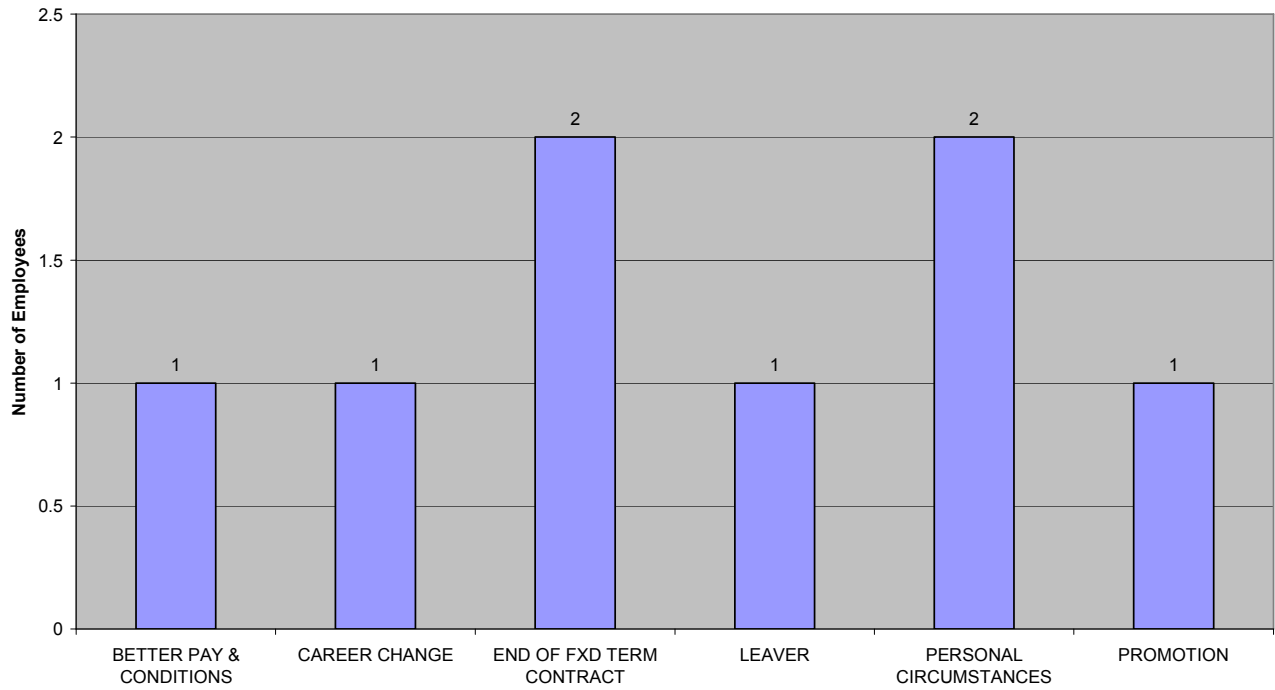
33% of all leavers during 2009 were aged under 30.

Reasons for Leaving



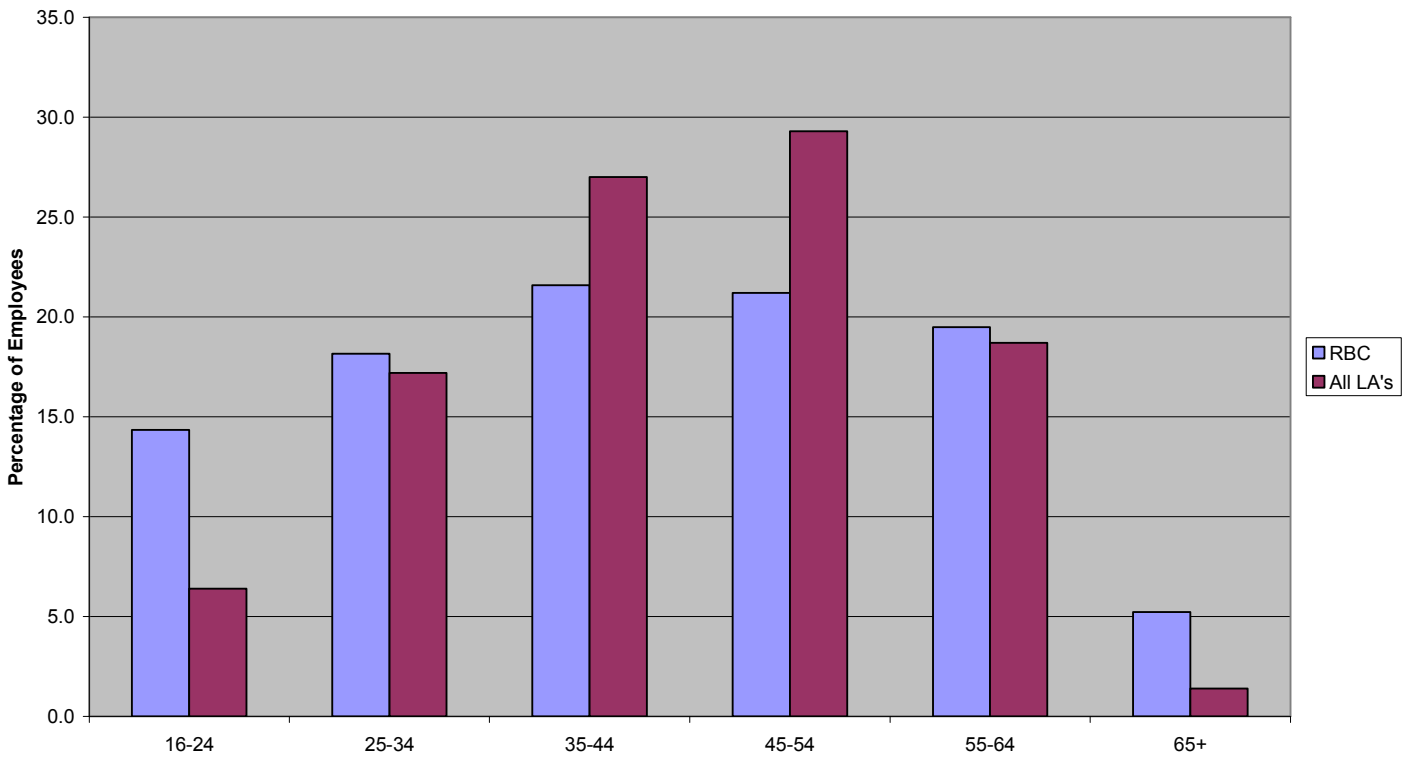
Page 70  
**Appendix 1**

Reasons for Leaving (excluding casuals)

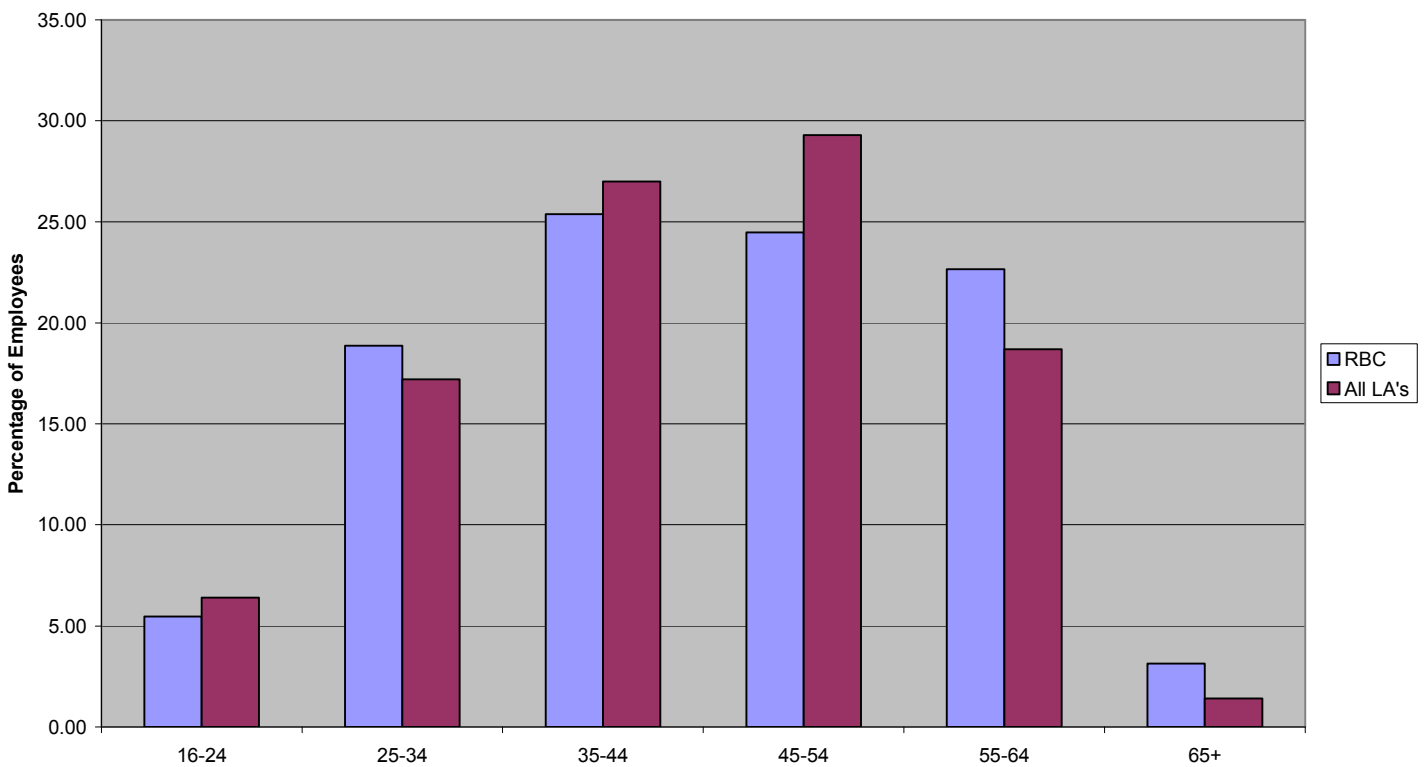


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**Appendix 1**

**Age Profile (Including Casuals)**



**Age Profile (Excluding Casuals)**







## Overview and Scrutiny No direct ward relevance Committee

28th April 2010

### MEDIUM TERM FINANCIAL PLAN: UPDATE REPORT

(Report of the Head of Legal, Equalities and Democratic Services)

#### 1. Summary of Proposals

The Overview and Scrutiny Committee considered the content of the Council's Medium Term Financial Strategy and Plan in July 2009. The Committee considered this document when discussing the Council's budget strategy and budget deficit. They concluded that it would be useful to compare the Council's Plan to examples of best practice that had been produced by other local authorities.

This meeting of the Committee will provide members with an opportunity to undertake this comparison and to identify measures, if any, that could be taken to improve the Council's Medium Term Financial Strategy and Plan in future years.

#### 2. Recommendations

**The Committee is asked to RESOLVE that**

**subject to Members' comments, the report be noted.**

#### 3. Financial, Legal, Policy, Risk and Climate Change / Carbon Management Implications

##### Financial

3.1 There are no direct financial implications to this report.

##### Legal

3.2 A statutory framework exists to ensure that Local Authorities set a balanced budget. In order to comply with the statutory requirement, it is necessary to consider the availability of resources and the demand on those resources over the medium term. Appropriate action may then be taken in a timely manner to enable a balanced budget to be set year on year.

# Overview and Scrutiny

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## Policy

- 3.3 The Plan provides a framework for future budget processes.

## Risk

- 3.4 The Plan is key to ensuring the priorities of the Borough Council are properly funded and therefore deliverable.

## Climate Change / Carbon Management

- 3.5 There are no climate change or carbon management implications.

## Report

### 4. Background

- 4.1 The Overview and Scrutiny Committee received a presentation on the subject of the budget strategy and budget deficit in July 2009. During the course of the presentation Officers explained that the intention of the Medium Term Financial Strategy and Plan was to advise elected members and other Officers about the forecast position and what actions the Council would need to take based on assumptions detailed in the document. At the time, Officers forecast that there would be a deficit and that there would probably be a need for the Council to make savings during the financial year in order to secure a balanced budget.
- 4.2 The Committee agreed that this topic was suitable for further scrutiny. They concluded that scrutiny could add value by comparing the contents of the Council's Plan to versions that had been produced by other local authorities, particularly examples of best practice. Based on this comparison the Committee could, if considered necessary, suggest amendments to improve the Council's Plan in future years.

### 5. Key Issues

- 5.1 The Audit Commission's Use of Resources Key Lines of Enquiry (KLOE) process has clearly set out the requirement for a local authority to manage the financial health of the organisation effectively. The Medium Term Financial Strategy and Plan is one measure that is used by many Councils to address this responsibility.
- 5.2 Medium Term Financial Plans are produced by Finance Officers at the Council and considered by Councillors during the course of the year. The contents of the Plan are based on Officers' estimations as well as on information obtained from other sources, such as financial experts working at other local authorities.

# Overview and Scrutiny

Committee

28th April 2010

- 5.3 The content and presentation of a Medium Term Financial Strategy and Plan varies between Councils. Some local authorities produce one page reports which are produced in a simple format. Other Councils produce large reports which are designed to be considered by a variety of audiences including elected Councillors, Council Officers and external partner organisations.
- 5.4 At the request of the Overview and Scrutiny Committee in February 2010 the Audit Commission provided a number of case study examples of Medium Term Financial Plans that were considered to represent best practice. These include: the London Borough of Brent's Plan (published in February 2009); Cambridge City Council's Plan (published in October 2008); and South Gloucestershire Council's Plan (published in December 2009).
- 5.5 The Overview and Scrutiny Committee considered that it was appropriate to compare the best practice examples to Redditch Borough Council's Plan as soon as they were available. This should ensure that any recommendations made by the Committee on this subject will inform the planning process from 2010/11 onwards.

## 6. Other Implications

- |                                  |   |  |
|----------------------------------|---|--|
| Asset Management                 | - | The Medium Term Financial Strategy and Plan influences the Asset Management Strategy and Plan. |
| Community Safety                 | - | There are no community safety implications.  |
| Health                           | - | There are no health implications.  |
| Human Resources                  | - | There are no human resources implications.   |
| Social Exclusion                 | - | There are no social exclusion implications.  |
| Environmental / Sustainability / | - | There are no environmental or sustainability implications.                                     |

## 7. Lessons Learnt

No lessons have been learnt in the preparation of this report.

# Overview and Scrutiny

Committee

28th April 2010

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## 8. Background Papers

Case Study – Medium Term Financial Plan: London Borough of Brent February 2009.

Case Study – Medium Term Financial Plan: Cambridge City Council October 2008.

Redditch Borough Council, Medium Term Financial Strategy and Plan 2010/11 – 2012/13, Report to the Executive Committee (22nd July 2009).

Redditch Borough Council Medium Term Financial Plan and Strategy (July 2009).

South Gloucestershire Council – Medium Term Financial Planning (Released 17th December 2009).

## 9. Consultation

There has been no consultation other than with relevant Officers.

## 10. Author of Report

The author of this report is Jess Bayley (Overview and Scrutiny Support Officer) extension 3268 (e-mail: [jess.bayley@redditchbc.gov.uk](mailto:jess.bayley@redditchbc.gov.uk) ) for more information.

## 11. Appendices

Appendix 1 – Redditch Borough Council Medium Term Financial Plan

Appendix 2 – Extract from the minutes of the Overview and Scrutiny Committee meeting that took place on Wednesday 8th July 2009.

Appendix 3 - Case Study – Medium Term Financial Plan: London Borough of Bury.

Appendix 4 – Case Study – Medium Term Financial Plan: Cambridge City Council October 2008.

Appendix 5 – South Gloucestershire – Medium Term Financial Planning



# Overview and Scrutiny Committee

Wednesday, 8 July 2009

## MINUTES

### Present:

Councillor Phil Mould (Chair), Councillor David Smith (Vice-Chair) and Councillors K Banks, G Chance, R King, W Norton, J Pearce, D Taylor and D Thomas

### Also Present:

Councillor M Braley  
M Collins (Vice Chair, Standards Committee)

### Officers:

S Hanley and T Kristunas

### Committee Services Officer:

J Bayley and H Saunders

Relevant extract relating to the Committee's consideration of the budget strategy and budget deficit.

## BUDGET STRATEGY AND BUDGET DEFICIT - DISCUSSION

Members considered the budget strategy and deficit item on the agenda. The Chair informed the Committee that questions had been proposed for Officers to answer regarding the budget strategy process. Members asked the first question which referred to the intention of the Council when setting the three year Medium Term Financial Plan (MTFP). Officers explained that the intention of the MTFP was to advise Members and other Officers of the forecast position and what actions the Council would need to take based on assumptions in the Plan. Members would be requested to take action for the forthcoming financial year in order to achieve a balanced budget in time for Council Tax setting. Members were informed that for the current year the Council's forecast was for a deficit and the need for the Council to make savings over time.

Members enquired what the deficit was. Officers explained that at the time of the report, the Plan had identified a budget gap of £630k

.....  
Chair

# Overview and Scrutiny Committee

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Wednesday, 8 July 2009

for the years 2009 to 2010, £720k for the years 2010 to 2011, and 130k for the years 2011 to 2012. Members asked for the current position regarding this deficit. Officers explained that owing to the savings that had already been approved by the Council, there would not be the need to make further savings until 2012 and 2013. The reason for this was because when the original budget setting took place it was assumed that there would be 2.9% pay increase, however this had now been set at 1.5%. It was important to note that the Council would need to take into consideration the costs assumed through the Job Evaluation exercise in 2010.

In response to question two, regarding the rules for setting the MTFP, Officers explained that it was possible for deficits to exist within the MTFP but these had to be addressed in the budget setting process. The Audit Commission's Use of Resources Key Lines of Enquiry (KLOE) process also had clearly set out the requirement for the Council to manage the financial health of the organisation effectively. Members asked whether the MTFP process was based on a formula or on Officers own assumptions. Officers explained that it would be based on their estimations and on other sources. These sources included using information gathered from regular meetings with other treasurers from other local authorities.

For question three, Officers confirmed that the Council had to have taken steps to seek a balanced budget by 11 March each year for the Council Tax setting. With regards to question four, Officers confirmed that there was not any maximum level of deficit which could be set in the Plan each year of the MTFP. Officers confirmed for question five, that was no maximum level of planned surplus which could be set in the Plan for each year of the MTFP.

Officers confirmed for question six that it was common for other local authorities to have a MTFP and that for these Plans to contain a deficit. Question seven asked if it was possible to see examples of Plans from other local authorities. Officers informed Members that there were many examples of MTFPs on the webpages of different authorities. These ranged from simple one page reports to large reports aimed at a variety of audiences such as Councillors, Officers or for external partners. Officers offered to ask Officers in the Audit team for examples of good practice of MTFP of other authorities.

In response to question eight, Officers explained that the Council had already taken steps to address the deficit. Members asked if the recent interest rate drop would be likely to increase the deficit. Officers explained that this was unlikely as they had factored in

# Overview and Scrutiny Committee

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Wednesday, 8 July 2009

decreases for interest rates falling when the current economic situation began to impact on interest rates. In response to question nine, Officers explained that with regards to current projections of the MTFP, the Council would not need to make savings until 2012. However, this forecast would need to take into account the findings of the consultants SERCO business case. The Chair questioned what would be likely to happen if inflation or wages were to rise before 2012. Officers explained that there was a £200k margin for 2011 and 12 that could cover for this eventuality. However, if circumstances were to significantly change, Officers would report a revised forecast to Members.

Members commented that similar questions regarding the MTFP process had been asked by Members on previous occasions and at other meetings. They agreed that this process should be open and transparent and Members should take the opportunities that are provided to input into the process. In response to question ten, Officers explained that they would have to report any major changes to the MTFP as soon as they occurred. Members asked what percentage pay award would result in utilisation of the £200k margin. Officers confirmed that a rise in 1.5% would impact significantly on this margin assuming that the Job Evaluation had an impact on the salary bill of 3%.

## **RESOLVED that**

- 1) Officers to provide best practice examples of MTFP documents from other local authorities; and**
- 2) the report be noted.**

The Meeting commenced at 7.00 pm  
and closed at 8.15 pm



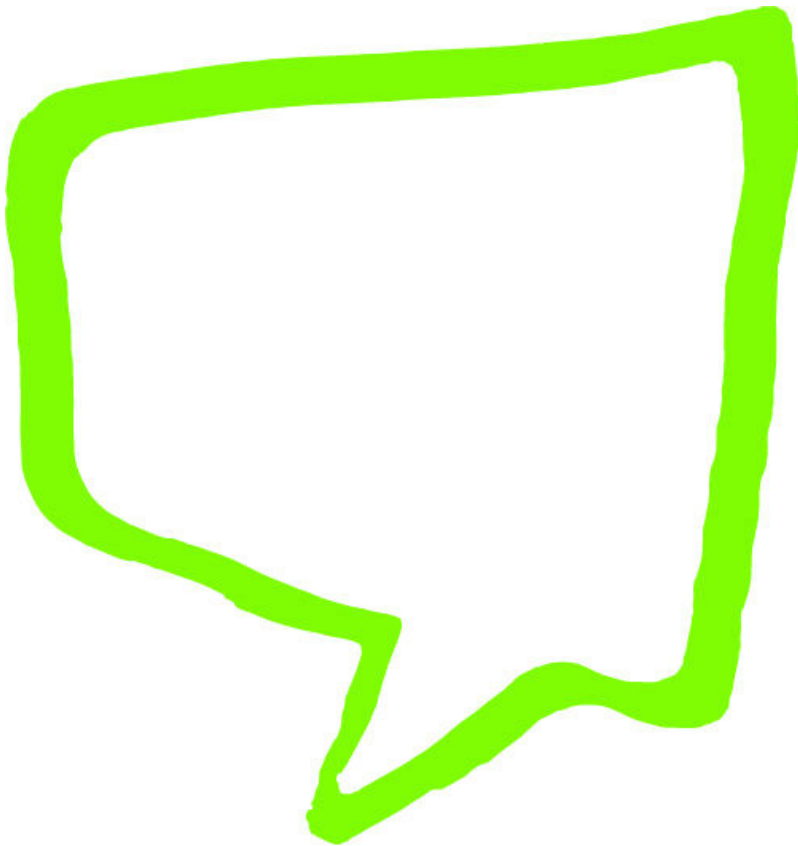


# Notable Practice

## Case Study – Medium Term Financial Plan

London Borough of Brent

February 2009



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# Executive summary

- 1 London boroughs face particular and major financial challenges in meeting rising demand for social care and other services. These challenges result from the demands of changing demographics and the need to conform to more rigorous inspection systems and expectations of improved performance.
- 2 Brent had a medium term financial strategy (MTFS) in place since the late 1990s, but it proved inadequate because it relied on limited data available to measure the impact of changing demographics. This led to the Council unexpectedly overspending on adults' and children's care. As a result, balances fell to as little as half a million pounds in the early 2000s.
- 3 Brent decided to renew and strengthen its MTFS in 2003 by using reliable and tested activity data, backed by developing a risk-based approach to setting and maintaining balances. It also put in place 'high-level monitoring' arrangements which meant that measures to reduce overspends were subject to corporate overview and challenge by a high-level group chaired by the chief executive.
- 4 Brent matched this rigorous approach to activity monitoring and financial risk management with efficiency and 'invest to save' initiatives. Together, these enabled the Council to:
  - achieve financial stability;
  - make significant savings; and
  - simultaneously become one of England's fastest improving councils.

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## Local context

- 5 The London Borough of Brent is situated in the west of London, with a high level of deprivation and a majority BME population. It had serious problems in the 1990s of political and financial instability. It made strong progress in overcoming these through a shared commitment by members and officers. However, the Council hit serious budgetary problems in the early 2000s, mostly because of overspends on social services. These financial difficulties coincided with a more rigorous national performance regime introduced as part of the Comprehensive Performance Assessment. Together these pressures persuaded the Council that it needed to re-examine its financial planning and make stronger plans to ensure long-term financial stability, enabling services to develop and improve.

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# Medium Term Financial Strategy

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## Impetus for change

- 6 The result of pressures on the social services' budget meant that at the end of the 2002/03 financial year balances had fallen to just £500,000, against annual expenditure of about £250 million. This threatened the financial stability of the Council and led the council's auditors to warn that balances were dangerously low. In addition, under the new statutory requirement to provide clear and strong professional advice on the acceptable level of balances, the director of finance gave councillors explicit guidance on the need for adequate balances.
- 7 Meanwhile, councillors had concerns that the requirement to fund continuing budget pressures on social services was undermining their, and the electorate's, priorities for improvements to environmental services. In addition, the focus within the CPA regime both on the effective use of resources and continuing improvements to services meant the Council had to develop more effective methods of managing budgetary pressures.
- 8 Members and officers became equally committed to adopting more effective financial and performance management systems.

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## What did the Council do?

- 9 The Council's approach was to adopt a more rigorous Medium Term Financial Strategy (MTFS). Brent had initially established an MTFS in 1998/99, but the pressures encountered in the early 2000s showed the underlying data and assumptions to be unreliable.
- 10 The MTFS had not been sufficient on its own to provide an assurance that outturn would be in line with budget. To be more effective, the MTFS had to be used as a means of driving down revenue expenditure. Officers analysed the reasons for the overspend and concluded the Council had been caught by surprise, in particular, by the cost of elderly people in care. The Council did not have accurate information on how many elderly people were in care, how much they were costing, or how much extra they were likely to cost in subsequent years. Consequently, a much greater focus went onto 'activity monitoring'. Regular activity monitoring reports were produced indicating numerical activity across Council departments, the cost impact of this and related performance against indicators.

## Medium Term Financial Strategy

- 11** The Council also put in place high-level monitoring arrangements to ensure that it took rigorous action to address any pressures that might arise. Pivotal to these arrangements was the 'high level monitoring group', chaired by the chief executive, which oversaw programmes to address service overspends and turn around failing services. Examples of success include:
- transforming a failing benefits service into one of the most improved services in the country;
  - transformation programmes in children's social care that resulted in a reduction in the number of children in care from 427 in June 2006 to under 380 two years later; and
  - cash reductions on spending on placements for children in care of over one million pounds each year.
- 12** These were better outcomes for children and reduced costs to the authority. The auditor has recognised the high level monitoring group as innovative and effective.
- 13** It was clear the reduced balances of just half a million pounds in 2003 were too low and it became a priority for the Council to increase them. Brent built a contribution to balances into its MTFS and restored balances to around £10 million by 2006. As part of its approach to ensuring financial stability, the Council adopted a risk-based approach to determining the necessary level of balances. The Council achieved this by assessing each of the major financial risks it faced and including this as part of the annual budget process. The Council then sets a target range for balances based on this assessment. The financial risks are monitored at a service and corporate level monthly – 'financial hotspots monitoring' - to ensure that they are being managed effectively.

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# Making efficiency savings

- 14** The MTFS, activity monitoring and the risk-based approach to balances were developed alongside the Council's efficiency programme. The MTFS had included a 2 per cent annual efficiency requirement, but it often achieved this by classic 'salami slicing' measures, such as deleting vacant posts, reducing supplies budgets and removing growth put in for priority projects. There was a combination of renewed pressure from government to focus on real efficiencies through the Gershon programme and increased financial pressure on the Council as public finances tightened. This placed the Council on the grant floor (receiving the minimum possible increase in grant, which is below inflation) forcing it to look at more radical measures.
- 15** The Gershon approach, in particular, led the Council to consider making efficiencies that cut across traditional service boundaries, developing shared solutions with other councils and using one-off resources to put in place 'invest to save' programmes. The Council also developed a value for money tool for managers on its intranet site, which included case studies where the Council had made efficiency savings.

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## West London Alliance

- 16** The West London Alliance (WLA) is a partnership between six West London boroughs, with Brent playing a leading role. Chief executives of the WLA member authorities meet to consider how co-operation can bring down costs, such as in procuring adults' and children's social care and in human resources administration. In social care, the priority is to overcome providers' market domination that has enabled them to dictate prices. WLA members share information on prices paid, with the aim of reducing the inflation element of costs. Brent has made savings of some £300,000 annually on adult placement costs by working with neighbouring boroughs to develop a consistent approach to annual increases in care home rates. WLA may also become the means for cross-border shared services in adults' and children's care and in human resources.

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## The Fair Pricing Tool

- 17** The 'Fair Pricing Tool' uses benchmarked prices to help authorities that are procuring care to assess whether prices are fair. It also helps commissioners to reconsider the underlying needs of individuals in care. The tool was devised to help authorities cope with the rising, and highly variable, costs of residential care. Authorities now also use Supporting People programmes. Historically in all of these care activities, it has been difficult for authorities to contest charges that providers have imposed. Analysis in Brent and elsewhere suggested a low correlation between the quality of care and the price paid.

## Making efficiency savings

- 18** Brent used the fair pricing tool to review 91 existing residential care placements. In 21 cases this led to renegotiations, with savings of up to 37 per cent for each placement, with an average cost reduction of 10 per cent. Brent expects the tool to be a significant factor in achieving a projected £500,000 savings a year in the learning disabilities budget for 2008/09.

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## Learning disability placements

- 19** Expenditure on residential and nursing home care represents nearly half of local authority expenditure on people with learning disabilities. Given both the costs and the desire of service beneficiaries to live in their own homes, it is necessary to review the use of residential care services.
- 20** Brent achieved savings of over £300,000 annually following a review of learning disabilities placements, which halved the number of people with learning disabilities placed in residential care. This has also provided better and more appropriate care arrangements.
- 21** A Return on Investment (ROI) software model jointly developed by Brent and a private sector partner was used to predict the effect of moving people out of residential care. The ROI tool (now known as **mietool**<sup>1</sup>) has been adopted by Capital Ambition, the pan-London centre for improvement and efficiency as the standard approach for assessing the return on investment of improvement and efficiency projects.

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## Looked-after children

- 22** Brent had too many children in council care, leading to higher costs and poorer outcomes for children's life expectations and quality of care. The Council learnt from other councils (Merton, Barnet and Tower Hamlets), which had better outcomes and lower costs - how to improve performance.
- 23** Brent engaged a consultant who was aware of best practice. The focus turned to developing in-house foster care provision, training at-risk families and preventive work and reducing the number of children for whom the Council was required to act as carer. More money went on employing care workers, reducing the need for agency workers and cutting costs. An additional £2 million went on these initiatives, which will be recovered within three years. So far, Brent has reduced the number of looked-after children from 427 to under 380. It has also reduced the amount spent on placements for children in care from just over £15 million in 2006/07 to under £13.7 million in 2007/08.

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<sup>1</sup> The Regional Improvement and Efficiency Partnerships and the Department for Communities and Local Government commissioned **mietool** from RSe Consulting. It is available to all local authorities free of charge, but councils should attend training to use it most effectively. Further information is available on **mietool** on the Centre of Excellence London website – [www.lcpe.gov.uk](http://www.lcpe.gov.uk).

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### Vendor managed service for temporary staff

- 24** The Council spent £12 million a year on temporary staff, with departments using various agencies that fixed their own margins. The Council had no information on how many agency staff the Council used, what jobs they did, how long they were in place, or how much it paid them. The Council was engaged in the costly processing of large numbers of agency invoices.
- 25** Several West London Alliance councils entered into a contract with a vendor managed services (VMS) provider for agency staff. Now the VMS provider co-ordinates procuring all temps working for Brent, using various generalist and specialist recruitment agencies. Margins and additional costs, such as employers' national insurance, are set at standard rates and all contracts with temporary agencies have standard conditions. Agencies that supply agency workers to Brent are audited to ensure compliance with work eligibility, CRB references and other key standards.
- 26** The VMS provider administers the process, including processing approved online time sheets, production of monthly consolidated invoices and payment of all agencies. Management information includes reports on the temps currently working on-site, the monthly charges to the Council, duration of temps in post, equal opportunities, reason for hire, pay increases and management information for service areas.
- 27** The VMS contract started in June 2006. It is saving the Council nearly £500,000 a year on payments to agencies. It made a further £67,000 savings by transferring staff from temporary to permanent status and £100,000 in national insurance. There are significant non-cashable savings from automating the process for procuring agency staff and reducing the number of invoices processed from over 23,000 a year, to just 12 a year.

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### Storage of equipment for people with disabilities

- 28** The Council and PCT jointly commissioned an equipment service for people with disabilities, which was run from a store owned by the Council. It was difficult for the store to meet demand. Significant capital costs were required to make it fit for purpose.
- 29** A consultant was commissioned to consider options for the future of the equipment store. This led to service externalisation in February 2007. The Council let the contract with an annual saving (shared between the Council and PCT) of £423,000 – a cost reduction of nearly 30 per cent. Disposal of the existing building will generate a capital receipt and avoid costs that upgrading the existing building would have incurred. The new contract allows the service to expand to meet legislative requirements and the needs of clients. The requirement to meet targets for delivery of equipment is built into the contract specification, addressing previous underperformance.



## Making efficiency savings

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### Reverse e-auction for IT equipment

- 30** The Council spent about £600,000 annually on PCs and laptops. Until 2005/06, the unit cost of PCs purchased by the Council was among the highest in London. Most PC procurement was centralised, but some units purchased their own PCs - which often did not meet the corporate specification, leading to problems with performance and compatibility.
- 31** By actively managing its PC procurement, the Council reduced the unit price of a standard specification PC from £750 in 2005/06 to £490 in 2006/07 - the second lowest in London. All services are now required to purchase PCs through corporate IT; the Council moved to a regular PC replacement recycle; a standard specification for PCs was agreed. With clearer specifications, the Council improved its procurement practices.
- 32** The Council reduced costs further when it combined its purchasing power with other councils'. The London Centre for Excellence sponsored a consortium of boroughs to conduct a reverse e-auction for PC and laptops. E-auctions are reverse auctions to procure goods or services, conducted online. The e-auction saved £144,000 annually on PC procurement, in addition to £200,000 annually achieved by initial internal procurement improvement.
- 33** The Council's improved PC procurement system enabled it to participate with other councils (and some health bodies) in the e-auction. This accounted for a 30 per cent reduction in the unit price of PCs, while the Council raised its standard specification. The contract also delivered an extended warranty on PCs of five years (compared with three years previously) to match the new replacement cycle.
- 34** The move to a five-year replacement cycle reflected the higher standard specification. This meant that the PCs could cope with changes to applications. In addition, age-related faults are becoming increasingly uncommon and, where they occur, they are covered by the five-year warranty. PCs no longer need to be replaced every three to four years, as in the past. The longer replacement cycle has therefore added to the savings achieved through the e-auction arrangements without compromising either currency or utility.

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# Audit and scrutiny

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## Role of the Audit Commission

- 35** The advent of corporate assessments in 2002 helped stimulate Brent's improvement in financial management and planning. Brent reacted positively to the CPA regime and is one of the fastest improving councils in England, as measured by performance indicators.
- 36** The auditor's assessment of Brent's use of resources has been one of the key drivers to improvement. This helped Brent to plan its use and protection of balances. Brent still has balances below average – less than £10 million – but now has enough to meet contingencies, especially because of its improved financial planning system. Brent's auditor believes that having lower than average balances acts as an important driver in ensuring effective financial management, providing there is stability in the level of balances.

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## Scrutiny

- 37** Brent has a robust system of scrutiny. Its Audit Committee scrutinises the council's internal controls and its Performance and Finance Select Committee examines performance, financial and activity monitoring information and provides challenge to the Council's efficiency programme. The Council set up a Budget Panel in 2006. It has a key role in monitoring the MTFs and commenting on the Executive's proposals on the budget. Brent's Forward Plan Select Committee, chaired by a member of the opposition, can and does call in decisions of the executive. Scrutiny committees review health, children's and other key services.

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# Outcomes and learning

- 38** Brent's use of MTFS has withstood a range of pressures and the MTFS has helped Brent to withstand those pressures. The most obvious example has been in the crisis in relations with the PCT. But Brent has also been under strong demographic pressures, with increased numbers of migrants with diverse needs and an ageing population. The Council is also under severe financial pressure because of being on the 'grant floor'.
- 39** A comprehensive assessment of continuing care responsibilities undertaken by the PCT led to a potentially large call on the Council for the transfer of responsibilities for social care. The Council led a high-profile campaign to ensure the transfer was limited to those cases that were properly the council's responsibility.
- 40** However, significant costs have transferred across without undermining the council's financial stability. Balances remain at almost £10 million. It is indicative of the improvements brought around by development of the MTFS in the early 2000s that the Council has been able to withstand the impact of the transferred responsibilities.
- 41** The financial pressures continue. The Council expects to remain at the 'floor' level of grant increase for some years even if Brent can persuade the Government that its population has increased – which is a matter of disagreement. The floor increase in grant was 2.7 per cent in 2007/08 and 2 per cent in 2008/09, and falls to 1.75 per cent in 2009/10 and 1.5 per cent in 2010/11.
- 42** The combination of a 5 per cent council tax cap, the floor increase in grant and inflation running at over 4 per cent means a real cut in resources. This is when the Council faces budget pressures in adult social care, waste management, concessionary fares and homelessness costs all of which it has to fund from a reduced real resource base.

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## Outcomes

- The Audit Commission scored Brent as a three-star council, which improved well in 2005, 2006, and 2007.
- '(Brent) has a clear focus on achieving value for money and its financial standing is strong';  
'the council's good budgetary discipline has resulted in the restoring of the council's financial standing';  
the Council has 'the level of resilience needed to withstand quite considerable unexpected budget pressures whilst still progressing its objectives'  
(Source: Audit Commission Annual Audit and Inspection Letter, February 2008).
- The council moved from a level 3 to a level 4 in its financial standing assessment in the 2007 Use of Resources judgment.
- Children's social care moved from a level 2 to a level 3 in its most recent Annual Performance Assessment following implementation of its 'invest to save' programme.

- Brent has turned round poor services, such as benefits - which has gone from one star to three stars and won the IRRV award of most improved benefits service 2008.
- The council's performance has continued to improve despite:
  - having the 17th lowest (out of 20) council tax in outer London;
  - being on the 'grant floor'; and
  - having significant budget pressures resulting from population growth, PCT cost transfers and increased cost of waste disposal, concessionary fares and homelessness.

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### Lessons learnt

- It was necessary to concentrate on key priorities, by undertaking a rigorous 'pruning' of plans, which excluded uncosted and unaffordable promises. This meant that even a strongly favoured project – to create parks with 'green flag' for cleanness – had to be scaled back.
- Competing policy objectives had to be reconciled and prioritised. A political objective of offering 'free first' car permits (free for the first car in the household) was in contradiction with the desire to reduce total numbers of vehicles in the borough and cut pollution. Instead, free car permits were made available only to low emitting vehicles.
- Effective financial planning must involve all relevant partners, especially regarding social care.
- Achieving savings through providing shared services and joint offices involves serious practical difficulties, because different public bodies operate different financial management and devolved decision-making systems.

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### Factors in success

- There has been political commitment to the MTFs, along with buy-in from all chief officers.
- There is a clear framework on what to do, who does it and how it links to the policy framework.
- There is an absolute commitment to replenishing balances.
- There is a clear corporate strategy.
- There is near-permanent internal challenge to strategies and budgets.
- There is high quality use of data, seeking always to answer the question, what does expenditure buy us?
- There is a rigorous approach to the efficiency programme.
- There is now government certainty on grant.
- Members' 'star chambers' have been genuinely challenging.

**Sources**

- Interviews with Duncan McLeod, Director, Finance and Corporate Resources and Peter Stachniewski, Deputy Director, Finance and Corporate Resources.
- Annual Audit and Inspection Letter: Brent London Borough Council, Audit Commission, February 2008.
- Corporate Assessment: Brent London Borough Council, Audit Commission, April 2006.

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# The Audit Commission

The Audit Commission is an independent watchdog, driving economy, efficiency and effectiveness in local public services to deliver better outcomes for everyone.

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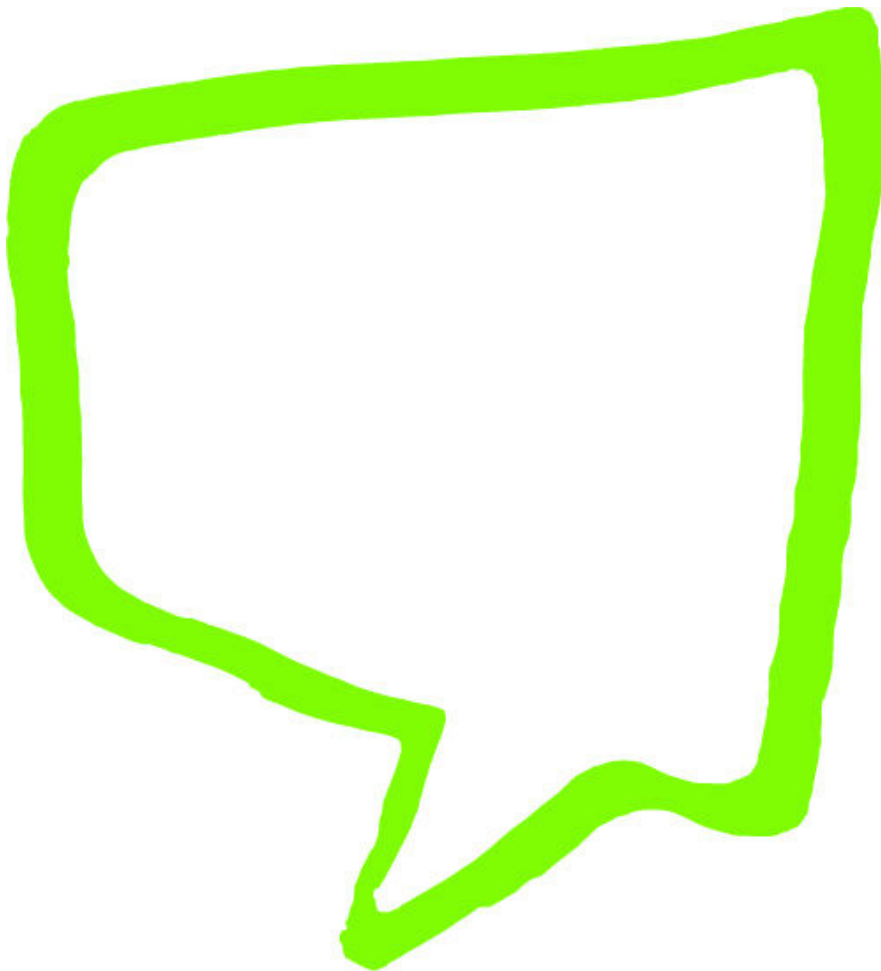
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# Notable Practice

## **Case Study - Medium Term Financial Strategy**

Cambridge City Council

October 2008



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# Executive summary

- 1 Cambridge City Council is a well-managed authority, rated as excellent by the Audit Commission in the 2003 Comprehensive Performance Assessment and with a current assessment of 'well above minimum standards' for use of resources.
- 2 The council initiated a 25-year medium term financial strategy in 1996 as a means to further improve its managerial capacity, when the council was already well managed. The MTFS is a comprehensive document of over 300 pages and is a tool to determine sustainable long-term spending plans, plan efficiency savings, finance invest-to-save projects from reserves, assess risks facing the council, plan its use of assets and rationalise its property portfolio. Members' confidence in the MTFS has been reflected in the setting of agreed target levels for Housing Revenue Account and General Fund reserves. The targets gradually reduce from £12m to about £2m in 2012, accompanied by effective plans to use funding above the target levels to improve services.
- 3 The construction of the MTFS is carried out with the involvement of members as well as officers across the council. The council's 'constitution' gives opposition parties rights to consult with officers and obtain financial information, but requires those parties to table their budget amendments in advance of the final budget-setting council meeting, so as to ensure they are fully costed and sustainable, using modelling based on the MTFS. The council has exceeded the Gershon targets in efficiency savings and has achieved balanced budgets each year since the adoption of the MTFS, through effective use of a cash limit system.

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## Local context

- 4 Cambridge City Council is a large district council, facing major pressures - particularly from population growth, demand for additional homes and pressure on available land for home-building.
- 5 The council strongly promotes environmental and financial sustainability. These policies have enabled the council to succeed in meeting strong demand for new homes on brownfield land. The council has entered into partnership arrangements with the county council and a neighbouring district council to provide further land for building in developments that span the city boundary.

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# Medium Term Financial Strategy

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## Background

- 6 Cambridge City Council is a well-managed authority, which has avoided crises. It has developed a strong and effective medium term financial strategy through evolution and good proactive management, not as a response to difficulties.
- 7 The germination of the council's MTFS (termed by the authority a Medium Term Strategy, or MTS, to reflect its wider role and content) preceded the adoption of a similar strategy by most other authorities and, indeed, prior to the recommendation by CIPFA of an MTFS, or the drawing-up of a template for an MTFS.

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## Strengthening financial management

- 8 On his appointment in 1996, the director of finance, David Horspool, evaluated the council's existing financial management practices and considered how to strengthen these. He concluded that a MTFS would assist the council in making longer-term and more sustainable decisions, as well as better integrating service and financial planning. Objectives for the MTFS included integrating all aspects of the council's planning into a single document.
- 9 Horspool's proposal to establish the MTFS was greeted favourably by the chief executive, other senior officers and members, because all could see the benefits offered by it. The MTFS produced information that was useful to them and which they could see enhanced their ability to fulfil their roles.
- 10 Horspool says that his previous work experience - he was previously deputy treasurer at another district council - suggested that a comprehensive MTFS was necessary for any authority to have effective and sustainable medium term financial planning and management. It was clear to him that this was what he terms 'a sensible approach'.
- 11 The first MTFS was produced for the financial year 1997/98, taking a co-ordinated view of the council's finances. It brought together information on the General Fund, the Housing Revenue Account (HRA), capital and revenue expenditure plans and forward projections on predicted and required revenue, capital receipts, service costs and potential savings from service efficiencies.
- 12 Initially, the MTFS was a relatively short document of a few dozen pages. Subsequently, the MTFS grew as new information sources and analysis were added and now contains over 300 pages, including an executive summary, itself of about 30 pages. As the council - its members and officers - increasingly demanded the ability to forward plan effectively, so the MTFS has become more comprehensive.
- 13 By bringing together service plans and council priorities, the MTFS enables members to allocate resources in accordance with policy priorities. It also links with a risk database and an analysis of the uncertainties affecting the council, so that potential liabilities and other threats to financial projections are taken into consideration when

## Medium Term Financial Strategy

service and financial decisions are taken. The risk database considers corporate, service and project risks. A summary of the highest rated risks is incorporated in the MTFS as context for financial decisions, in particular setting target levels for reserves. The MTFS itself is also fully risk-assessed.

- 14 Despite its length, the MTFS remains a 'high level' document, containing minimal detail. It is supplied to all members and has proved useful to councillors, as well as officers, for planning and reference purposes.
- 15 Prior to the adoption of an MTFS, Cambridge had a financial planning system that was typical for a district council - each service department reported to committee and a summary of the agreed resource allocations to departments was brought together as a budget document for consideration in the council's annual budget-making meeting. Forward projections were limited to the following two years. Through the MTFS, the council brought together all of its core financial and service management information into one document, "making sense of the inter-relationships," as Horspool puts it.
- 16 Alongside the MTFS, the council introduced cash limits for each service, to provide assurance on delivery of the overall control totals. This has worked exceptionally well, delivering balanced budgets in every year since the system was adopted. It has assisted the council to implement efficiency savings which have exceeded - and in many cases pre-dated - the Gershon savings targets.

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### The council constitution

- 17 Financial sustainability is reinforced by Cambridge City Council's constitution. A detailed budget-setting programme has been agreed with the majority and opposition groups (there were formerly two opposition groups that endorsed the programme, though there is now only one opposition group on the council). This gives an opposition party full access to officers in drawing-up alternative budget proposals. In return, the proposals must be set against the context of the council's existing financial plans. All budget proposals must be formally submitted to committee in advance of the annual budget-making full council meeting. This prevents uncosted and unrealistic budget proposals being tabled at the last minute and ensures that opposition budget proposals are themselves financially sustainable.
- 18 The MTFS provides officers with the capacity to demonstrate to members why capital receipts need to be spent in a planned way, showing how today's receipts may be necessary to meet known demands in future years that would otherwise be unaffordable. This approach underpins the council's policy of financial sustainability.

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# Asset management

- 19 In recent years, the remit of the MTFS has gradually been extended effectively, including using it to improve asset management. All major assets are now reviewed through the council's Property Portfolio Review, which operates in conjunction with the MTFS. The review uses objective data to consider the value and contribution of existing assets. Methods to assess the value of commercial property include the return on capital employed, which has led to the identification of under-performing assets and their subsequent disposal. Assets that are not used for commercial purposes are assessed on the basis of alternative uses, and how their existing use assists the council to meet broader policy objectives.
- 20 Possible disposals are considered in the first instance by the Asset Management Group - an officer group, which provides a corporate overview. Recommendations of the Asset Management Group go to the Corporate Management Team and, if endorsed, on to the relevant service committees for final decision.
- 21 Options for disposal are evaluated, ranging from maximising capital receipts to making land available for social purposes – in return for lower capital receipts - for example, for developments that include affordable housing or have a reduced carbon footprint. The council's systematic review of its property portfolio has assisted with its objective of ensuring that a high proportion of new home building is on brownfield land and as a result it has actually exceeded its own target - an achievement commended by the Audit Commission.
- 22 In some instances, there is a conflict between the commercial and policy objectives. For example, car parks produce a high rate of capital return, but contravene the policy objectives of the city and county councils of reducing traffic congestion and city centre car use. In these circumstances, the availability of comprehensive information allows a balanced strategy to be adopted; in this instance through the local traffic management plan.
- 23 To create a co-ordinated approach to resource management, responsibility for the property portfolio was transferred to the finance department in 2007. The identification of under-performing assets, and taking action to improve their use, is a priority objective for the council. This has led to millions of pounds of capital receipts being made available for re-investment, and a reduction in asset maintenance costs.

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## Managing reserves and investments

- 24 The MTFS is used to actively manage the level of reserves for both the HRA and General Fund. This is demonstrated in the current plans to reduce the level of General Fund reserves from £12m to the target level of £5m by 2015. Reserves are drawn on to provide temporary initial financing for invest-to-save schemes, with members given assurance on the reliability of savings and the sustainability of reserves by the long-term forward financial projections.

**Asset management**

- 25 By having extensive forward projections - the MTFs covers a 25-year period - members can see that savings from investments can be justified by taking a long-term perspective. This is particularly important for the council given its use of reserves to finance invest-to-save projects. The longer-term perspective gives members the assurance they need that they can authorise the medium term reduction in reserve levels as they can see that these are projected to rise again subsequently. This has been demonstrated in the case of the current investment in customer access improvements.
- 26 The 25-year financial model underpins Cambridge's version of the MTFs, and includes its projection of council tax rises in years going forward. By demonstrating that the budget balances over a forward period, members can see that their financial proposals are sustainable. Moreover, councillors are effectively prevented, by the forward-modelling, from putting forward short-term and electorally attractive lower council tax increases that are financially unsustainable when projected forward. The current MTFs assumes an annual council tax increase of 4.5 per cent for the next four years.

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# Service planning

- 27 One of the principles of the MTFS is that it is decisions on service priorities that must determine finance, rather than the other way round. Accordingly, the service plans are brought together within the MTFS in the annual planning and decision-making cycle. These service plans can produce resource amendments - bids for growth, or planned reductions in expenditure, reflecting efficiency gains or other savings.
- 28 As part of the annual budget-making process there is an annual review of current service plans each November, which identifies any potential resource amendments. The reviews take into account local and national performance indicators and benchmarking against comparable authorities, where available.
- 29 However, the Audit Commission had previously commented that while Cambridge's MTFS process is excellent, its performance management is comparatively weak. The authority accepts that while performance management has been strengthened in recent years, it still needs further improvement.
- 30 All major contracts are listed within the MTFS, including the renewal date, to provide indication of the timings of potential step-changes in related costs.

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## A 25-year strategy

- 31 The Government specifies a 30-year model for the Housing Revenue Account. If this is appropriate for the HRA, the council believes it makes sense for a similar timeframe to be used for the general fund and capital spending. Further, if there is to be effective integration of all the council's finances, then there needs to be a similar timeframe for all the budgets.
- 32 The council believes that a 25-year period is a timeframe that demonstrates genuine sustainability. A shorter period would lose some of the benefits that can be achieved by forward financial planning: for example, a five-year perspective would not justify the use of reserves to fund many invest-to-save projects. An example is with the financing of mercury abatement works required at the crematorium.
- 33 The use of the MTFs has helped plan efficiency savings over a sustained period - it has not been necessary to generate more savings to meet the government's 3 per cent efficiency savings targets. The Audit Commission has commended the council for its success in generating Gershon savings - it met the Gershon three-year targets within two years.
- 34 A longer-term strategy is particularly important for the council because of the projected growth in dwellings and population. While there is some short-term growth, the major impacts will be from 2011 - so it is important for the council to have assurance that it has the resources and policies that are appropriate for the challenges associated with that growth.
- 35 The strategy also helps inform the council in undertaking its section 106 negotiations, so that, in particular, the council is aware of the medium and longer-term implications on the revenue budget of any additional capital assets that are provided under section 106 arrangements.
- 36 The 25-year strategy also helps to provide the context for the council's policy on asset disposals. By having that longer-term outlook, the council can decide on disposals while considering its longer-term need for land and buildings in delivering effective services.

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# How has the strategy been tested?

- 37 The MTFS has helped improve the management of the council's reserves. Members have confidence in the 25-year strategy, which has enabled them to approve the use of reserves to finance invest-to-save schemes.
- 38 The director of finance's section 25 reporting has been made easier by the comprehensive character of the MTFS. One of the benefits of the detail of the MTFS is that it provides detailed and comprehensive assurance in relation to:
- the robustness of the estimates used for calculating the budget; and
  - the adequacy of the proposed financial reserves.
- 39 A higher than predicted pay settlement agreed by local government employers provided a last minute challenge for the council in its September 2007 MTFS. This caused the council to increase its requirement for efficiency savings to maintain its financial strategy.
- 40 The MTFS proved important in assisting the council in delivering a well-managed transfer of political leadership, when the council moved from a long period of Labour control, to outright Liberal Democrat control in May 2000. The change in political leadership led to major changes in spending priorities – resulting in over £300,000 of revenue changes and £345,000 in capital spending (as well as £400,000 per annum for the next three years) - but the process was conducted in an efficient and effective manner.
- 41 Initial adoption of the MTFS was so long ago that there is no clear recollection of the challenges involved in implementation - which probably means that there were no significant challenges.



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# Learning and outcomes

42 The external auditors through most of this period were PricewaterhouseCoopers. Both PwC and the Audit Commission were fully informed throughout of the MTFS and its evolution and were fully supportive, though they did not play an active role in its adoption.

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## Lessons learnt

- Cambridge would not advise another authority to merely copy its approach - rather a council should adopt systems that best suit its own circumstances. It should do what works for it.
- The objective should not necessarily be a 300 page MTFS, but an MTFS that meets a council's needs. A comprehensive MTFS will often best be achieved by evolution, not instantly. An attempt to produce a comprehensive document very quickly is likely to create an unbearable burden on many authorities - especially district councils with limited staffing resources.
- It is hard to obtain sufficient resources at a district council to support the move to an MTFS all in one go. Outcomes need to be balanced against the resources needed to achieve them.
- Achievability must be over a number of years, with each stage manageable. It is not sensible or effective to move too quickly to an over-ambitious or comprehensive MTFS.
- There needs to be a realistic timetable during the year for the stages which come together for an MTFS. It is important to make it easy for service heads to contribute to the MTFS and not to make last minute demands for information from them, particularly at times of the year when they have other onerous obligations.
- It is best to ask service heads for information at a time of the year when their other demands are lower and to only seek information that they would need to provide anyway. In this way, the MTFS can assist service heads' work management, rather than be an additional demand on them.
- Only collect the information that is necessary.
- Get the close involvement and 'ownership' of the corporate management team for the MTFS process.
- Involve members from both the ruling and opposition groups. Get cross-party support for the strategy. Work closely with the opposition as well as the ruling group. This can ensure that the approach will survive any change in political control.
- The MTFS can co-ordinate the council's service management and policy prioritisation process. This can demonstrate to staff why activities are important: for example, why risk assessment is important and justifies the time necessary to make it reliable.

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## Outcomes

- The Audit Commission has assessed Cambridge as an 'excellent' authority in its CPA and CA reports.
- Cambridge has been assessed as 'excellent' in its use of resources, enabling it to balance its budget in a challenging environment, says the Audit Commission.
- Every year in which it has used the MTFs, the council has achieved balanced budgets without the need to identify additional savings during the financial year.
- The council has been effective in identifying and achieving efficiency savings, a process begun before the Gershon targets were set and exceeding the Gershon targets.
- Cash limits have worked.
- The use of the council's Policy Priority Fund, creating 'policy space' to enable effective redirection of resources, has been effective in enabling the council to respond to policy changes.
- Capital receipts from asset disposals have been worth several million pounds and assisted the council to meet broader policy objectives. The MTFs has helped the council to identify assets that are disproportionately costly to maintain or make insufficient contribution to policy aims, encouraging them to dispose of these and reduce asset maintenance costs.
- The asset disposal policy has helped the council to exceed its targets in building new homes on brownfield land.

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## Sources:

- Meeting with David Horspool, director of finance, Cambridge City Council
- Cambridge City Council's Medium Term Strategy
- Audit Commission, Corporate Assessment
- Audit Commission, Comprehensive Performance Assessment
- Audit Commission, Annual Audit Letter

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# The Audit Commission

The Audit Commission is an independent watchdog, driving economy, efficiency and effectiveness in local public services to deliver better outcomes for everyone.

Our work across local government, health, housing, community safety and fire and rescue services means that we have a unique perspective. We promote value for money for taxpayers, covering the £180 billion spent by 11,000 local public bodies.

As a force for improvement, we work in partnership to assess local public services and make practical recommendations for promoting a better quality of life for local people.

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## South Gloucestershire Council - Medium term financial planning

**Released 17 December 2009**

South Gloucestershire Council has strong medium term financial planning arrangements, including a ten year medium term financial plan. The Council has increased confidence that its plans are sustainable and deliverable, and financial management remains strong. Impact of possible events on finances and therefore on services are anticipated where possible. The recent Corporate Assessment concluded that the Council's 'financial management and control is strong'. It also commended the ten year projected corporate revenue budget.

Despite the difficult economic climate, a long term sustainable budget has been set which reflects the council's priorities.

The Medium Term Financial Plan (MTFP) includes a projected corporate budget over a ten year period and, in a number of areas, includes best and worst options. Specific scenarios considered include:

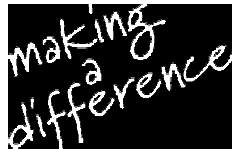
- possible RSG settlements
- growth in tax base
- possible impacts of pension fund contribution rates

Risks and other major factors are considered and the Council has set out their impact on savings requirements and council tax increases.

Changes were made to the MTFP during 2008/09 to reflect lower council tax increase targets in the short to medium term. These will accelerate the planned reductions set out in the ten year plan. Savings will be achieved primarily from the three year transformational change programme. This focuses on back office and support services and is now being implemented. This programme will ensure the planned lower council tax increase targets are met and deliver £13 million of efficiency savings over three years. This will also mean that:

- reserves and balances are maintained at acceptable levels
- Value for Money is improved
- frontline services do not suffer
- the customer interface is improved





# Overview and Scrutiny Committee

No Direct Ward Relevance

28th April 2010

## WORK PROGRAMME

(Report of the Chief Executive)

Date of Meeting	Subject Matter	Officer(s) Responsible for report
<b>ALL MEETINGS</b>	<b>REGULAR ITEMS</b>	<b>(CHIEF EXECUTIVE)</b>
	Minutes of previous meeting	Chief Executive
	Consideration of the Forward Plan	Chief Executive
	Consideration of Executive Committee key decisions	Chief Executive
	Call-ins (if any)	Chief Executive
	Pre-scrutiny (if any)	Chief Executive
	Consideration of Overview and Scrutiny Actions List	Chief Executive
	Referrals from Council or Executive Committee, etc. (if any)	Chief Executive
	Task & Finish Groups - feedback	Chief Executive
	Committee Work Programme	Chief Executive
	<b>REGULAR ITEMS</b>	
	Quarterly Performance Report	Chief Executive
	Quarterly Budget Monitoring Report	Chief Executive
	Review of Service Plans 2010 / 13	Relevant Lead Heads of Service
	Annual Update on the Implementation of the Civil Parking Enforcement Scheme	Relevant Lead Heads of Service

# Overview and Scrutiny

Committee

28th April 2010

	<p><b>REGULAR ITEMS</b></p> <p>Update on fly tipping and progress with the Worth It campaign</p> <p>Update on the work of the Crime and Disorder Scrutiny Panel.</p>	<p>Relevant Lead Heads of Service</p> <p>Relevant Lead Heads of Service</p>
	<p><b>REGULAR ITEMS</b></p> <p>Oral updates on the progress of:</p> <ol style="list-style-type: none"> <li>1. the Dial-A-Ride Task and Finish Group;</li> <li>2. the Local Strategic Partnership Task and Finish Group;</li> <li>3. Joint Worcestershire Hub Scrutiny; and</li> <li>4. Bus Pass Scheme County Provision.</li> </ol>	
<b>OTHER ITEMS - DATE FIXED</b>		
<b>28th April 2010</b>	Gender Equalities – Update Report	Relevant Lead Head of Service
<b>28th April 2010</b>	Medium Term Financial Plan – consideration of best practice	Relevant Lead Head of Service
<b>28th April 2010</b>	Overview and Scrutiny End of Year Report	Relevant Lead Head of Service



# Overview and Scrutiny

Committee

28th April 2010

<b>28th April 2010</b>	Youth Employment at Redditch Borough Council - Report	Relevant Lead Head of Service
<b>2nd June 2010</b>	Business Centre Review – Pre-Scrutiny	Relevant Lead Head(s) of Service
<b>2nd June 2010</b>	Consideration of items for inclusion on the agenda of the Work Programme Planning Event	Relevant Lead Head(s) of Service
<b>10th June 2010</b>	Training – Introduction to Scrutiny	Relevant Lead Head(s) of Service
<b>17th June 2010</b>	Crime and Disorder Scrutiny Training – all Members	Relevant Lead Head(s) of Service
<b>23rd June 2010</b>	Fees and Charges Task and Finish Group – Update on Implementation of the Charging Policy	Relevant Lead Head of Service
<b>23rd June 2010</b>	Performance Outturn Report	Relevant Lead Head of Service
<b>14th July 2010</b>	Disabled Facilities Grants and the Lifetime Grant – scrutiny of the Countywide Scheme	Relevant Lead Head of Service
<b>19th August 2010</b>	Neighbourhood Groups Task and Finish Group – Monitoring Report	Relevant Lead Head of Service
<b>19th August 2010</b>	Review of Ditches – Update Report	Relevant Lead Head of Service

# Overview and Scrutiny

Committee

28th April 2010

<b>15th September 2010</b>	Quarterly Performance Monitoring Report – First Quarter	Relevant Lead Head of Service
<b>17th November 2010</b>	Update on fly tipping and progress with the Worth It campaign	Relevant Lead Head of Service
<b>8th December 2010</b>	Quarterly Performance Monitoring Report – Second Quarter	Relevant Lead Head of Service
<b>19th January 2011</b>	National Angling Museum Task and Finish Group – Update on Actions	Relevant Lead Head of Service
<b>19th January 2011</b>	Local Strategic Partnership – Final Report	Relevant Lead Head of Service
<b>9th February 2011</b>	Civil Parking Enforcement - Annual Monitoring Report	Relevant Lead Head of Service
<b>2nd March 2011</b>	Council Flat Communal Cleaning Task and Finish Group – Update on Implementation of Recommendations Stage Two.	Relevant Lead Head of Service
<b>13th April 2011</b>	Update on fly tipping and progress with the Worth It campaign	Relevant Lead Head of Service
<b>June 2011</b>	Third Sector Task and Finish Group – Stage Two Update on Responses to the Group's Recommendations	Relevant Lead Head of Service
<b>OTHER ITEMS – DATE NOT FIXED</b>		

# Overview and Scrutiny

Committee

28th April 2010

	Church Green Improvements Report – Pre-Scrutiny	Relevant Lead Head of Service
	Dial-a-Ride Task and Finish Review – Final Report	Relevant Lead Head of Service
	Local Area Agreement Review – Consideration of Scoping Document.	Relevant Lead Head of Service
	Overview and Scrutiny Member Training on Pre-Scrutiny.	Relevant Lead Head of Service
	Private Sector Home Support Service – Pre-Scrutiny	Relevant Lead Head of Service
	Sub Regional Choice Based Lettings – Pre-Scrutiny	Relevant Lead Head of Service
	Work Programme Planning Event 2010/11	Relevant Lead Head of Service

