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POTENTIAL SCRUTINY ACTIVITY 2004/5 – DISCUSSION NOTE

INTRODUCTION

This note is to inform a discussion at the first meeting of the panel to enable the annual work programme to be agreed. It complements the work chairs and vice chairs undertook at a recent scrutiny workshop, at which it was suggested that each panel select only two or three key topics for the whole year, and scrutinise them in detail, with a clear purpose on outcomes. This focus on what the panels are aiming to achieve by the end of the scrutiny year, will support scrutiny's greater influence on policy development and reshaping the work of the council.

OVERALL CONTEXT

This panel has two main remits – finance and performance. To enable our activity this year to be very focussed and generate more tangible outcomes, we could embark upon and deliver two major scrutiny projects – one in each of these two main areas. These could complement other specific activities and provide space for: our routine reviews of performance, the budget, call-ins, and for new work arising during the year.

ACTIVITY

The way in which we could work on these two projects would vary according to the particular task, but is likely to be a combination of working groups, research, comparison, site visits, informal meetings, officer support, and events involving the whole panel.

SUGGESTED OUTLINE PROJECTS

Two suggested project themes are:

1. Path to excellence and
2. Financial strategy

Possible content is outlined below:

PROJECT 1 - PATH TO EXCELLENCE

The council has publicly stated its aim of being an "excellent" CPA council by 2008. The council will also need to be considered excellent in visible, practical terms by residents and other stakeholders. Our performance management framework will be vital in ensuring the council achieves its aim, and this panel has a role to play in ensuring our arrangements are sound and help to improve performance across the board.

Possible outcomes

- Improved CPA inspection results and BVPI performance.
- Delivery of the corporate assessment CPA improvement plan.
- A revised "Beacon Index" which helps drive up performance.
- Changes to the performance management arrangements of the council.
- Delivery of several successful best value reviews.
- Improvements to the overview and scrutiny function as a whole.
- Ensuring customers' views are used effectively to shape service delivery.
- Improved presentation and use of performance data by members and managers.

Possible activities

- Briefings to understand the CPA model, CPA improvement plans, performance management framework, best value review approach, successful scrutiny.
- Going to a council where scrutiny works better and using their ideas here.
- Experimenting with alternative methods of presenting performance information.
- Examining and identifying the drivers and barriers to performance improvement.
- Identifying those PIs that make most difference to excellence in all respects and including them in the Beacon Index, perhaps removing others to make room.
- Ensuring that improvement plans are implemented on time/to the required standard.
- Participating in best value reviews and ensuring action plans are implemented.
- Appraisal and selection of the performance management ICT package.

PROJECT 2 - FINANCIAL STRATEGY

The council has now secured financial stability and has been recognised for having sound arrangements and a number of good practice approaches. This provides us with an opportunity to change our scrutiny focus away from checking financial monitoring reports, to policy review and development, shaping the medium term financial strategy. We could help to make the budget process more inclusive, with members and council tax payers having more input to the budget process making it more understandable to us all.

Possible outcomes

- A revised, expanded and/or reformatted financial strategy.
- A budget more closely aligned with the council's vision.
- Rationalisation of paperwork and streamlined budget processes.
- A new financial training programme, with mentoring &/or coaching for members.
- Revised format of reporting on financial information/budget to members.
- Enhanced budget consultation methods and greater input to the budget setting process.
- A clearer understanding of the council's medium term future financial position.
- Recommendations on the use of the prudential code and treasury management for key capital projects.
- Recommending which spending pressures to fund, and the action needed now to address future spending pressures.

Possible activities

- Workshops, training and coaching from council officers
- Working group on various or specific aspects.
- Comparing current documents against others and making changes
- Decision conferencing.
- Speaking with members of the public/other councillors to ask how they would like to be involved in the budget process, conducting surveys, internet quizzes, school visits etc.
- Speaking with other councillors to determine how they want to be trained in financial issues and developing a training programme.
- Reviewing information from the internet and other councils to inform our work.
- Looking ahead over the next 3 to 5 years to identify if we have any potential funding shortfalls and recommending action to address them.

- Examining comparative council tax and funding levels to see where we fit and identify where we would like to fit.
- Looking at options for remodelling our debt and using gains for investment
- Identifying and examining options for investing in council services using the prudential code.

POSSIBLE CROSS - CUTTING THEME

The two above projects/themes come together as part of the council's integrated planning framework and there may be opportunities for members of the panel to work together on a third project – with activity that contributes to making our integrated planning document and the processes behind it "live and breathe", by linking together financial planning, performance information and service planning.

Cllr Barry Sanders

Chair of the Resources and Performance Scrutiny & Performance Panel