

## Chief Executive's Office

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Date: 2 September 2005

**Chief Executive:**  
Jeffrey W Davies MA LLM

**Chorley**  
Borough Council

Town Hall  
Market Street  
Chorley  
Lancashire  
PR7 1DP

Dear Councillor

### **EXECUTIVE CABINET - THURSDAY, 8TH SEPTEMBER, 2005**

I am now able to enclose, for consideration at the above meeting of the Executive Cabinet, the following reports that were unavailable when the agenda was printed.

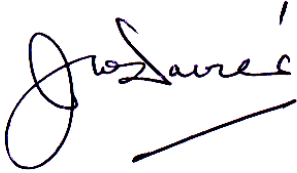
The Capital Monitoring Report (item 5 on the agenda) will be circulated within the next few days prior to the meeting.

Please note that items 8(a) and 8(b) are additional items on the agenda, which was previously circulated to you

#### **Agenda No    Item**

4.    **Revenue Budget 2005/06 - Monitoring (Pages 59 - 80)**  
      Report of Director of Finance (enclosed).
8.    **Customer Access Inspection Report (Pages 81 - 108)**  
      Report of Group Director (enclosed)
- 8a    **Best Value Performance Indicators - Update (Pages 109 - 122)**  
      Report of Head of Corporate and Policy Services (enclosed)
- 8b    **Key Performance Indicators - Update (Pages 123 - 136)**  
      Report of Head of Corporate and Policy Services (enclosed)
10.    **Astley Park - Appointment of Consultants (Pages 137 - 140)**  
      Report of Head of Economic Regeneration (enclosed)

Yours sincerely

A handwritten signature in black ink, appearing to read "Joe Lawrence". The signature is stylized with a large initial "J" and a long horizontal stroke at the end.

Chief Executive

Encs

**Distribution**

1. Agenda and reports to all Members of the Executive Cabinet and Chief Officers for attendance
2. Agenda and reports to Councillor Walker for attendance.
3. Agenda and reports to all remaining Councillors for information.

# Report

Report of	Meeting	Date
Director of Finance (Introduced by the Executive Leader and Executive Member for Capacity and Resources, Cllr J Wilson)	Executive Cabinet	08/09/05

## REVENUE BUDGET MONITORING 2005/06 – REPORT 1 (END OF JULY)

### PURPOSE OF REPORT

1. This paper sets out the current financial position of the Council as compared against the budgets and efficiency savings targets it set itself for 2005/06 for the General Fund and the Housing Revenue Account.

### CORPORATE PRIORITIES

2. This report does not directly relate to the corporate priorities

### RISK ISSUES

3. The issues raised and recommendations made in this report involve risk considerations in the following categories:

Strategy	✓	Information	
Reputation	✓	Regulatory/Legal	
Financial	✓	Operational	✓
People		Other	

4. Actions to manage the budget have the potential to impact on all the above risk categories.

### BACKGROUND

5. The Council's budget for 2005/06 included real cash savings targets of £228,000 from the management of the establishment and a further £100,000 of savings to come from efficiency and Gershon related activities.

### CURRENT FORECAST POSITION

6. The appendix 1 shows the summary forecast position for the Council based upon actual spending in the first four months of the financial year, adjusted for future spending based

Continued....



upon assumptions regarding vacancies and service delivery. Also attached are the individual service unit figures and analysis.

7. The unit cash budgets have been amended for slippage from 2004/05 and for the allocation of 'Earmarked Reserves' for specific initiatives that have already received approval from the appropriate committee. The significant additions to the budget include:
  - £50,000 for slippage relating to recruitment of Chief Executive
  - £45,000 slippage for Contact Centre
  - £54,000 for revenue costs of Job Evaluation in 2005/06
  - £25,000 for Community Centre Management development
8. In addition the £100,000 contingency included within the budget has been partly used to fund ongoing rental for the King Street and Duxbury Park offices. The total cost set against contingency is £59,000.
9. In the period to the end of July we have identified £93,000 of contributions to the corporate savings target of £228,000 for managing the establishment. The savings that have been identified are as a result of savings arising from staff vacancies within the CuDOSS, Economic Regeneration, Finance and property Services Departments. This is an encouraging start to the year, and this position will remain under constant review.
10. Identified savings against the procurement target of £100,000 have not been as positive. To date no definite savings have been identified that can contribute towards the target although a number of initiatives are underway in order to make progress.
11. The Procurement Working Group (PWG) has started an exercise to identify savings that can be achieved through improving the procurement processes and this will generate a series of actions that will result in a contribution to the target. Running concurrently with this project, a Base Budget Review is taking place as part of the estimate setting process, the result of which will also contribute to the Procurement savings target. At present there are no indications as to how much of the £100,000 will be achievable this year.
12. Within the Legal Services department the income received for performing land charge searches is forecast to be £95,000 lower than originally budgeted. This is partially offset by a reduction in search fees of £16,000 leaving a current forecast deficit of £79,000.
13. Although the revenue contribution to the general fund from the land charges income is lower than budgeted it should be noted that it still provides a significant contribution to the fund and as such should continue in it's current form.
14. We believe that the main reasons for the reduced number of searches being processed is a combination of a depressed housing market and the introduction of internet based search facilities that do not require the intervention of the council. Both of these factors are outside our span of control so will continue to impact heavily on financial performance.
15. Due to a higher than anticipated demand for the new refuse containers additional collection service costs are being incurred. The demand is expected to ease by the end of August, after which an assessment of the impact on the budget will be made.
16. It is also likely that some of the additional costs associated with refuse collection may be capital in nature, and that the total costs may be offset in part by savings on performance elements of the contract. These factors will be considered when completeing our assessment.

17. At present the effect of the transitional rules surrounding rent allowances and rebates are unclear. The situation is being monitored closely as it has the potential to impact significantly on the financial outturn.
18. Taking into account the points raised above, the current forecast position is that General Fund balances will be £239,000 lower than anticipated at the end of the year.
19. The service units that have identified the need for a modern apprentice or apprentices from the Young Persons Development Programme have identified funding for the two year programme from existing budgets.

## **HOUSING REVENUE ACCOUNT**

### **BACKGROUND**

20. The forecast for the HRA at the end of 2004/05 was for balances to be at £175k, however the actual outturn position resulted in a higher than expected contribution to balances taking them to £618k.

### **CURRENT POSITION**

21. Some additional cost pressures have arisen on maintenance costs, mainly around gas servicing, and staffing due to additional work requirements associated with stock transfer issues.
22. However, current rental projections based on year to date receipts show a higher than budgeted collection rate as a result of a significant slowdown in the number of council house sales. The effect of this is that the value of bad debt provision has also reduced providing a total additional contribution of £91k.
23. The trading account is running at a small deficit but it is expected that this position will be brought back into line during this financial year.

### **SUMMARY**

24. Reasonable progress has been made towards the Corporate Savings Target of £228,000 for the year. Further savings will be made as the year progresses and more vacancies occur.
25. No progress has been made towards the Efficiency Savings Target of £100,000, but work is in hand to remedy this situation.
26. There are a number of areas that will be monitored closely as the year progresses, these are:
  - Contribution to Corporate Savings and Efficiency Targets
  - Reduced income relating to Land Charges
  - Increased refuse collection costs
  - Transitional rules for rent allowances
27. No remedial action is proposed at this stage in the year even though significant future savings are still required. At the half year stage should the situation not improve then further steps may be necessary.
28. For the HRA, whilst there are some cost pressures causing an increase in expenditure, the reduction in the right to buy sales means additional rental income is being generated for the account, and overall the budget remains on target.

- 29. Given the issues referred to above, it is recommended that no further expenditure is allocated against the remaining contingency fund until we can be sure that Corporate Savings targets have been met.

**RECOMMENDATIONS**

- 30. Executive Cabinet are asked to:
  - a) Note the report.
  - b) Agree to the freezing of additional expenditure financed from the contingency fund.

GARY HALL  
DIRECTOR OF FINANCE

There are no background papers to this report.

Report Author	Ext	Date	Doc ID
Phil Eskdale-Lord	5483		

**Table of Appendices**

1	General Fund Summary
1A	Corporate & Policy Services
1B	Customer, Democratic & Office Support Services
1C	Economic Regeneration
1D	Environmental Services
1E	Finance
1F	Housing (General Fund)
1G	Human Resources
1H	Information & Communication Technology Services
1I	Legal Services
1J	Leisure & Cultural Services
1K	Planning Services
1L	Property Services
1M	Public Spaces Services
2A	Housing Revenue Account Budget Monitoring Statement
2B	Housing Building Maintenance Trading Account

## General Fund Revenue Budget Monitoring 2005/06

Forecast Outturn as at July 2005

	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)
	Original Budget	Agreed Changes	Original Cash Budget	Contribution to Corporate Savings	Current Cash Budget	Forecast Outturn	Variance	Variance
	£	£	£	£	£	£	£	%
Corporate and Policy Services	517,770	-	517,770	-	517,770	517,770	-	0.00%
Customer, Democratic & Office Support Services	2,930,540	160,000	3,090,540	(48,000)	3,042,540	3,042,540	-	0.00%
Economic Regeneration	246,140	-	246,140	(8,000)	238,140	238,140	-	0.00%
Environmental Services	3,090,290	-	3,090,290	-	3,090,290	3,089,290	(1,000)	-0.03%
Finance	1,430,010	50,000	1,480,010	(22,000)	1,458,010	1,447,620	(10,390)	-0.71%
Housing Services (GF)	270,090	7,500	277,590	-	277,590	280,590	3,000	1.08%
Human Resources	621,720	59,688	681,408	-	681,408	681,408	-	0.00%
Information & Communication Technology Svs	905,440	4,000	909,440	-	909,440	909,440	-	0.00%
Legal Services	100,580	-	100,580	-	100,580	179,580	79,000	78.54%
Leisure & Cultural Services	1,042,810	41,550	1,084,360	-	1,084,360	1,076,360	(8,000)	-0.74%
Planning Services	467,950	-	467,950	-	467,950	444,950	(23,000)	-4.92%
Property Services	80,550	-	80,550	(15,000)	65,550	65,550	-	0.00%
Public Space Services	1,331,330	-	1,331,330	-	1,331,330	1,333,330	2,000	0.15%
Budgets Excluded from Finance Unit Monitoring:								
Benefit Payments	(514,440)		(514,440)		(514,440)	(514,440)	-	0.00%
Concessionary Fares	228,980		228,980		228,980	228,980	-	0.00%
Less								
Corporate Savings Targets		(328,050)	(328,050)	93,000	(235,050)	-	235,050	-100.00%
<b>Total Service Expenditure</b>	<b>12,749,760</b>	<b>(5,312)</b>	<b>12,744,448</b>	<b>-</b>	<b>12,744,448</b>	<b>13,021,108</b>	<b>276,660</b>	<b>2.2%</b>
<b>Non Service Expenditure</b>								
Contingency Fund	100,000	(63,000)	37,000		37,000	-	(37,000)	0.0%
Contingency - Corporate Savings	(328,050)	328,050	-		-	-	-	0.0%
Notional Capital Charges	1,168,630		1,168,630		1,168,630	1,168,630	-	0.0%
Revenue Contribution to Capital	-		-		-	-	-	0.0%
Net Financing Transactions	70,350		70,350		70,350	70,350	-	0.0%
Parish Precepts	412,562		412,562		412,562	412,562	-	0.0%
<b>Total Non Service Expenditure</b>	<b>1,423,492</b>	<b>265,050</b>	<b>1,688,542</b>	<b>-</b>	<b>1,688,542</b>	<b>1,651,542</b>	<b>(37,000)</b>	<b>-2.2%</b>
<b>Financed By</b>								
Council Tax	(6,057,272)		(6,057,272)		(6,057,272)	(6,057,272)	-	0.0%
National Non-Domestic Rates	(2,945,840)		(2,945,840)		(2,945,840)	(2,945,840)	-	0.0%
Revenue Support Grant	(3,704,920)		(3,704,920)		(3,704,920)	(3,704,920)	-	0.0%
Collection Fund Surplus	(47,550)		(47,550)		(47,550)	(47,550)	-	0.0%
Use of Earmarked Reserves	(1,167,670)	(259,738)	(1,427,408)		(1,427,408)	(1,427,408)	-	0.0%
Use of General Balances	(250,000)		(250,000)		(250,000)	(250,000)	-	0.0%
<b>Total Financing</b>	<b>(14,173,252)</b>	<b>(259,738)</b>	<b>(14,432,990)</b>	<b>-</b>	<b>(14,432,990)</b>	<b>(14,432,990)</b>	<b>-</b>	<b>0.0%</b>
<b>Net Expenditure</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>239,660</b>	<b>239,660</b>	<b>1.88%</b>

<b>General Balances Summary Position</b>	<b>Budget</b>	<b>Forecast</b>
	<b>£</b>	<b>£</b>
General Fund Balance at 1.4.05	1,000,000	1,000,000
Variations agreed utilising General Fund Balance	(250,000)	(250,000)
Forecast (Over)/Under Spend	-	(239,660)
<b>Forecast General Fund Balance at 31.3.06</b>	<b>750,000</b>	<b>510,340</b>





**SERVICE LEVEL BUDGET MONITORING 2005/2006****CORPORATE & POLICY SERVICES**

JULY 2005

£'000

ORIGINAL CASH BUDGET

518

**Add Adjustments for In year cash movements**

Slippage from 2004/2005

- Use of Earmarked Reserves

Cabinet approved decisions

Delegated Authority decisions

**ADJUSTED CASH BUDGET****518****Less Corporate Savings**

Contribution to Corporate savings targets

**CURRENT CASH BUDGET****518****FORECAST****EXPENDITURE**

No Budget variances identified to date.

**INCOME****FORECAST CASH OUTTURN 2005/2006****518****Key Assumptions****Key Issues/Variables****Key Actions**

**SERVICE LEVEL BUDGET MONITORING 2005/2006****CUSTOMER, DEMOCRATIC & OFFICE SUPPORT SERVICES****JULY 2005** **£'000****ORIGINAL CASH BUDGET** 2,931**Add Adjustments for In year cash movements**

Slippage from 2004/2005

- Use of Earmarked Reserves 151

Virements (to)/from other Services

- Transfer of Allpay to Finance (50)

Transfer from contingency - additional office costs 59

Other

Cabinet approved decisions

Delegated Authority decisions

- Accomodation Project Costs \*

**ADJUSTED CASH BUDGET** **3,091****Less Corporate Savings**

Contribution to Corporate savings targets

- Salaries savings

**CURRENT CASH BUDGET** **3,091****FORECAST****EXPENDITURE**

Staffing costs - Office Support Services (48)

Software/equipment - Office Support Services 8

Staffing costs - Corporate Procurement (6)

Roses Marketplace Licence 5

Staffing costs - Democratic Services (7)

**INCOME****FORECAST CASH OUTTURN 2005/2006** **3,043****Key Assumptions**

- use of King St Offices to end of September
- use of Duxbury Offices to end of December

**Key Issues/Variables****Key Actions**

**SERVICE LEVEL BUDGET MONITORING 2005/2006****ECONOMIC REGENERATION**

JULY 2005

£'000

**ORIGINAL CASH BUDGET****246****Add Adjustments for In year cash movements**

Slippage from 2004/2005

- Use of Earmarked Reserves

Cabinet approved decisions

Delegated Authority decisions

**ADJUSTED CASH BUDGET****246****Less Corporate Savings**

Contribution to Corporate savings targets

0

**CURRENT CASH BUDGET****246****FORECAST****EXPENDITURE**

Savings on vacant posts

(15)

Agency staff

2

Car allowances

1

Computer software/hardware

5

Grants to Groundwork Trust

(1)

Expenditure under(-) or over (+) current cash budget

(8)

**INCOME**

Income under (+)/ over (-) achieved

0

**FORECAST CASH OUTTURN 2005/2006****238****Key Assumptions**

All vacant posts filled by end of July 2005

Astley Park Project Officer post wholly covered by external funding

**Key Issues/Variables**

Maintaining matched funding for Project officer posts

**Key Actions**

**SERVICE LEVEL BUDGET MONITORING 2005/2006****ENVIRONMENTAL SERVICES**

<b>JULY 2005</b>		<b>£'000</b>
<b>ORIGINAL CASH BUDGET</b>		<b>3,090</b>
<b>Add Adjustments for In year cash movements</b>		
DEFRA Grant income transferred to Capital		18
Matched reduction in supplies and services budget		(18)
<b>ADJUSTED CASH BUDGET</b>		<b>3,090</b>
<b>Less Corporate Savings</b>		
Contribution to Corporate savings targets	_____	0
<b>CURRENT CASH BUDGET</b>		<b>3,090</b>

**FORECAST****EXPENDITURE**

Graffiti removal volume increase	20	
Savings on vacant posts: Neighbourhood Wardens	(16)	
Young Persons Development Programme (1 post)	10	
Agency staff	4	
Abandoned vehicles	(9)	
Recycling banks service	6	
	_____	
Expenditure under(-) or over (+) current cash budget		15
<b>INCOME</b>		
Air Pollution Authorisations volume reduction	5	
Abandoned vehicles	1	
Recycling banks service	(15)	
Litter fixed penalty notices	(2)	
Civic Amenity collection	(5)	
	_____	
Income under (+)/ over (-) achieved		(16)

<b>FORECAST CASH OUTFURN 2005/2006</b>	<b>3,089</b>
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**Key Assumptions**

Young Persons Development Programme to be funded in full from salary savings in Neighbourhood Warden Service in 2005.  
 Activity levels in refuse collection service to return to budgeted levels from September.  
 Potential savings in contract, arising from default notices and performance bonus.

**Key Issues/Variables**

Higher than anticipated demand for refuse containers has generated additional costs in the refuse collection service. This demand is expected to ease by the end of August enabling the effect on the budget to be quantified and reported in the September monitoring statement.

**Key Actions**

Closely monitor activity levels on new refuse collection service and report significant changes

**SERVICE LEVEL BUDGET MONITORING 2005/2006****FINANCE**

<b>JULY 2005</b>		<b>£'000</b>
<b>ORIGINAL CASH BUDGET</b>		<b>1,145</b>
<b>Add Adjustments for In year cash movements</b>		
Slippage from 2004/2005		
- Use of Earmarked Reserves		
Virements (to)/from other Services		
- Transfer of Allpay to Finance		50
<b>ADJUSTED CASH BUDGET</b>		<b>1,195</b>
<b>Less Corporate Savings</b>		
Contribution to Corporate savings targets		
<b>CURRENT CASH BUDGET</b>		<b>1,195</b>
<b>FORECAST</b>		
<b>EXPENDITURE</b>		
Pay in lieu of notice		8
Agency staff:		
	£	
Accountancy	2	
Exchequer	<u>5</u>	7
Saving on maternity / vacant posts:		
	£	
External Funding Officer	(15)	
Corporate Finance	(62)	
Exchequer	<u>(13)</u>	(90)
Project Accountant Post (Jan to March)		10
Consultants fees		13
Audit and Inspection Fee reduction		(13)
IT Software Annual Licences		4
Microfilming		4
Bailiffs Fees		8
Documents Online Service		<u>(3)</u>
Expenditure under(-) or over (+) current cash budget		(52)
<b>INCOME</b>		
Miscellaneous contributions (External Funding Officer)		<u>20</u>
Income under (+)/ over (-) achieved		20
<b>FORECAST CASH OUTTURN 2005/2006</b>		<b>1,163</b>

**Key Assumptions**

Young Persons Apprenticeships to be funded from internally generated savings.  
 Audit and Inspection Fee reduction based on Audit Commission inspection plan  
 Bailiffs fees based on current activity level. No existing budget

**Key Issues/Variables****Key Actions**

**SERVICE LEVEL BUDGET MONITORING 2005/2006**

**HOUSING SERVICES UNIT (GEN FUND)**

JULY 2005

£'000

**ORIGINAL CASH BUDGET**

**270**

**Add Adjustments for In year cash movements**

Slippage

8

Cabinet approved decisions

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**ADJUSTED CASH BUDGET**

**278**

**Less Corporate Savings**

Contribution to Corporate savings targets

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**CURRENT CASH BUDGET**

**278**

**FORECAST**

**EXPENDITURE**

Salaries - Housing Renewal

9

Agency Cover

27

Salaries - Housing Needs

(40)

Help the Homeless Contribution

5

CAB Additional Contribution

2

3

**INCOME**

**FORECAST CASH OUTTURN 2005/2006**

**281**

**Key Assumptions**

Based on Original budget

**Key Issues/Variables**

**Key Actions**

**SERVICE LEVEL BUDGET MONITORING 2005/2006****HUMAN RESOURCES UNIT**

JULY 2005

£'000

**ORIGINAL CASH BUDGET****622****Add Adjustments for In year cash movements**

Virements for other Services

Transfer from contingency      Reward &amp; Retention

5

Cabinet approved decisions      Job evaluation costs 05/06

54

Delegated Authority decisions

**ADJUSTED CASH BUDGET****681****Less Corporate Savings**

Contribution to Corporate savings targets

0

**CURRENT CASH BUDGET****681****FORECAST****EXPENDITURE**

Expenditure under(-) or over (+) current cash budget

**INCOME**

Income under (+)/ over (-) achieved

**FORECAST CASH OUTTURN 2005/2006****681****Key Assumptions**

- temporary staff covering vacant posts & secondment of staff

**Key Issues/Variables****Key Actions**



**SERVICE LEVEL BUDGET MONITORING 2005/2006****INFORMATION & COMMUNICATION TECHNOLOGY SERVICES**

<b>JULY 2005</b>	<b>£'000</b>
<b>ORIGINAL CASH BUDGET</b>	<b>905</b>
<b>Add Adjustment for In Year Cash Movements</b>	
Slippage from 2004/2005	
- Use of Earmarked Reserves	-
Transfer from Contingency	-
Cabinet approved decisions	-
Delegated Authority decisions	-
Correction of Accounting Error	4
<b>ADJUSTED CASH BUDGET</b>	<b>909</b>
<b>Less Corporate Savings</b>	<b>-</b>
Contribution to Corporate savings targets	-
<b>CURRENT CASH BUDGET</b>	<b><u>909</u></b>
<b>FORECAST</b>	
<b>EXPENDITURE</b>	
Salaries (Technician/E-Gov Prog Man/Cust Serv Assist.)	(55)
Young Person's Development Programme	5
Temporary Staff	48
Telephones calls forecast	8
Expenditure under (-) or over (+) current cash budget	<u>6</u>
<b>INCOME</b>	
Telephones (private calls)	(6)
Income under (+)/ over (-) achieved	<u>(6)</u>
<b>FORECAST CASH OUTTURN 2005/2006</b>	<b><u>909</u></b>

**Key Assumptions**

Young Person's Development Programme to be funded from salary saving.  
 Cust Servs Assist post to be kept vacant.  
 E-Gov Programme Manager post vacant until Jan 2006  
 E-Gov Programme Manager cover until September  
 Technician cover continues at current levels

**Key Issues/Variables****Key Actions**

**SERVICE LEVEL BUDGET MONITORING 2005/2006**

**LEGAL SERVICES**

**JULY 2005** **£'000**

**ORIGINAL CASH BUDGET** 101

**Add Adjustments for In year cash movements**

Slippage from 2004/2005  
Virements for other Services  
Transfer from contingency

Cabinet approved decisions  
Delegated Authority decisions

**ADJUSTED CASH BUDGET** 101

**Less Corporate Savings**

Contribution to Corporate savings targets

**CURRENT CASH BUDGET** 101

**FORECAST**

**EXPENDITURE**

Land Charges Search Fees (5)  
Land Charges Network Fees (11)

**INCOME**

Land Charge Searches 95

**FORECAST CASH OUTTURN 2005/06** 180

**Key Assumptions**

**Key Issues/Variables**

- reduced volume of Land Charges

**Key Actions**

**SERVICE LEVEL BUDGET MONITORING 2005/2006****LEISURE & CULTURAL SERVICES****JULY 2005****£'000****ORIGINAL CASH BUDGET****1,043****Add Adjustments for In year cash movements**

Slippage from 2004/2005

Golf course consultancy

16

Midsummer Festival

1

Virements for other Services

Cabinet approved decisions

Trf from Change management Reserve for Community mgmt

25

Delegated Authority decisions

**ADJUSTED CASH BUDGET****1,085**

Less Corporate Savings

Contribution to Corporate savings targets

**CURRENT CASH BUDGET****1,085****FORECAST****EXPENDITURE**

Expenditure under(-) or over (+) current cash budget

Professional and consultancy fees for golf bid and indoor leisu

32

Young Persons Development Programme (2 posts)

20

**INCOME**

Income under (+)/ over (-) achieved

Arts officer funding

(17)

Savings on indoor Leisure contract

(43)

**FORECAST CASH OUTTURN 2005/2006****1,077****Key Assumptions**

Expenditure &amp; income will be in line with budgets

**Key Issues/Variables**

2 posts for Young Persons Development Programme will be funded from this years savings on Indoor Leisure contract.

**Key Actions**

Negotiations are currently ongoing to review the Indoor Leisure Contract

**SERVICE LEVEL BUDGET MONITORING 2005/2006****PLANNING SERVICES**

JULY 2005

£'000

ORIGINAL CASH BUDGET

468

**Add Adjustments for In year cash movements**

Slippage from 2004/2005

- Use of Earmarked Reserves

Cabinet approved decisions

Delegated Authority decisions

**ADJUSTED CASH BUDGET****468****Less Corporate Savings**

Contribution to Corporate savings targets

**CURRENT CASH BUDGET****468****FORECAST****EXPENDITURE**

PDG Funded Expenditure

123

**INCOME**

Planning Application Fees

(19)

Building Control Fees

(4)

Additional Planning Delivery Grant

(123)

**FORECAST CASH OUTTURN 2005/2006****445****Key Assumptions**

- current income levels are maintained

**Key Issues/Variables**

- level of grant received higher than budgetted

**Key Actions**

**SERVICE LEVEL BUDGET MONITORING 2005/2006**

**PROPERTY SERVICES UNIT**

**JULY 2005** **£'000**

**ORIGINAL CASH BUDGET** **81**

Add Adjustments for In year cash movements

Slippage from 2004/2005

- Use of AMF Reserve

Virements for other Services

Transfer from contingency

Cabinet approved decisions

- Transfers to Corporate & Policy

\_\_\_\_\_ 0

Delegated Authority decisions

**ADJUSTED CASH BUDGET** **81**

Less Corporate Savings

Contribution to Corporate savings targets

**CURRENT CASH BUDGET** 81

**FORECAST**

**EXPENDITURE**

Expenditure under(-) or over (+) current cash budget

Additional agency staff costs not in budget 15

Savings from staff vacancies -30 -15

**INCOME**

- no change to budget

**FORECAST CASH OUTTURN 2005/2006** 66

**Key Assumptions**

**Key Issues/Variables**

**Key Actions**

**SERVICE LEVEL BUDGET MONITORING 2005/2006****PUBLIC SPACE SERVICES**

JULY 2005

£'000

ORIGINAL CASH BUDGET

1,331

**Add Adjustments for In year cash movements****Slippage from 2004/2005**

- Use of Earmarked Reserves

Other

**ADJUSTED CASH BUDGET****1,331****Less Corporate Savings**

Contribution to Corporate savings targets

**CURRENT CASH BUDGET****1,331****FORECAST****EXPENDITURE**

Expenditure under(-) or over (+) current cash budget

DSO Chemical Disposal

2

Purchase of Furniture

5

Street Cleansing client budget

(17)

(10)

**INCOME**

Income under (+)/ over (-) achieved

Car Parking Fees under profile

12

12

**FORECAST CASH OUTTURN 2005/2006****1,333****Key Assumptions**

Young Persons Development Programme to be funded from savings on Street Cleansing client budget.

**Key Issues/Variables**

Salary costs are within budget due to savings on all vacant posts.

Servicegroup vacant posts will be filled ASAP. This will lead to an overspend if the Engineering agency staff costs are not reduced.

**Key Actions**

**SERVICE LEVEL BUDGET MONITORING 2005/2006****HOUSING REVENUE ACCOUNT**

**JULY 2005** **£'000**

**ORIGINAL SURPLUS (-) / DEFICIT (+) FOR YEAR** **(175)**  
**BALANCE AS AT 1.4.05** **(443)**

**Add Adjustments for In year cash movements**

Slippage from 2004/2005

Virements for other Services

Transfer from contingency

Cabinet approved decisions

Delegated Authority decisions

**ADJUSTED HRA BALANCES EXPECTED at 31.3.06** **(618)**

**FORECAST****EXPENDITURE**

Salaries - Housing Services Restructure	32	
Repairs and Maint - Trading account deficit	14	
- additional Gas Servicing	13	
Tenant Profiling - Beacon Research	10	
Bad Debt Provision	(11)	

Expenditure under(-) or over (+) current cash budget 58

**INCOME**

Rents/Charges	(80)	
	(80)	

Income under (+)/ over (-) achieved (80)

**FORECAST BALANCES AS AT 31.3.06** **(640)**

**Key Assumptions**

Rent forecast assumes 1 sale per week to end of year

Assumes full staffing for the year

**Key Issues/Variables**

Repairs and Maint expenditure

Management and Maint Expenditure

**Key Actions**

Control of above

**SERVICE LEVEL BUDGET MONITORING 2005/2006**

**HOUSING TRADING ACCOUNT**

<b>July 2005</b>		<b>£'000</b>
<b>ORIGINAL SURPLUS / DEFICIT</b>		0
<b>Add Adjustments for In year cash movements</b>		
Previously Reported		
Virements for other Services		
Cabinet approved decisions		
<b>ADJUSTED SURPLUS / DEFICIT</b>		<u>0</u>
<b>Less Corporate Savings</b>		
Contribution to Corporate savings targets		
<b>CURRENT SURPLUS / DEFICIT</b>		<u><u>0</u></u>
 <b>FORECAST</b>		
 <b>EXPENDITURE</b>		
Hired Staff	27	
Other Supplies and Services	<u>          </u>	
Expenditure under(-) or over (+) current cash budget		27
 <b>INCOME</b>		
Income under (+)/ over (-) achieved		(13)
 <b>FORECAST SURPLUS(-) / DEFICIT(+) 2005/2006</b>		<u><u>14</u></u>

**Key Assumptions**

Above trading position based on monitoring of the following key risk areas:

- Agency expenditure
- Sub-contractor expenditure
- Materials
- Internal labour

Assumes all other expenditure items are within budget

**Key Issues/Variables**

- Control of sub-contractor budget
- Control of agency budget
- Control of material usage/cost
- Achieving all income targets

**Key Actions**

- to manage above
- to reduce deficit to break-even



Report of	Meeting	Date
Group Director (Introduced by the Executive Member for Customers, Policy and Performance, Councillor D Edgerley)	Executive Cabinet	8/9/2005

## BEST VALUE INSPECTION - CUSTOMER ACCESS AND FOCUS

### PURPOSE OF REPORT

- To inform members of the outcome of a recent Best Value Inspection on the Council's approach to Customer Access and Focus.

### CORPORATE PRIORITIES

- The Best Value Inspection relates directly to the Council's Customer priority area.

### RISK ISSUES

- The report contains no risk issues for consideration by Members.

### BACKGROUND

- The Council's agreed audit and inspection programme 2004/05 included inspection of our approach to customer access and focus. This is designed to test how the Council is:
  - improving access to key services and information
  - using increasing accessibility to improve quality of services
- For a number of reasons this was delayed and the on site inspection took place during week commencing 6 June 2005 involving a significant number of members, staff and partner organisations.
- The results of the inspection are issued in report form and two judgements are made.
  - (a) How good is the approach? (Rating of Poor, \*Fair, \*\*Good or \*\*\*Excellent).
  - (b) What are the prospects for improvement? (Rating of Poor, Uncertain, Promising or Excellent).

### BEST VALUE INSPECTION REPORT

- Chorley's Inspection Report was published in August 2005 (copy appended).
- In scoring the service the report states:

*"The Council is assessed as having a **three-star** approach to customer access and user focus that has **excellent prospects** for improvement".*



- 9. This is the highest possible score on both judgements and recognises the significant progress that the Council has made over recent years. Such a high score is comparatively rare and puts us at the top nationally in the whole of local government in terms of customer access and focus.
- 10. In presenting the draft report to officers of the Council the lead inspector commented:  
  
*“.....It is an unusual score for the Audit Commission and it will attract a lot of attention locally and nationally..... One of the things we were most impressed with here was the way the customer focus was embedded in the culture of the Council..... That culture was present in terms of external customers, internal customers and partnerships with other bodies..... The other real strength is the quality of your plans and documents. Staff, members and customers can clearly see what the Council is trying to do.....”.*
- 11. Despite these comments Best Value is about continuous improvement and there is still an improvement agenda for us to pursue. This includes such things as developing plans to engage with the rural population, implementing our customer focussed access and service design strategy, further raising the profile of customer services within the organisation and embedding our corporate performance management system.

**COMMENTS OF THE HEAD OF HUMAN RESOURCES**

- 12. The outcome of this inspection is an excellent and significant achievement for the authority, and the recognition we have received in terms of our customer focus culture is significant to our future success. Human Resources will continue to help embed this culture further through training and development linked to the competency framework, of which customer focus is a key element, and through Member Development activity. Our Performance Management Process and the newly created Member Development Steering Group will be the mechanisms to drive this forward.

**COMMENTS OF THE DIRECTOR OF FINANCE**

- 13. There are no direct financial implications contained within this report.

**RECOMMENDATION**

- 14. That members note the excellent result from the Best Value Inspection on the Council’s approach to Customer Access and Focus.

**REASONS FOR RECOMMENDATION**

- 15. Members are asked to note that the Council has been formally awarded top marks in the Audit Commission Best Value Inspection on Customer Access and Focus. This is the highest award that the Inspectors can give in an inspection and puts us at the top nationally in the whole of local government for this key priority area.

**ALTERNATIVE OPTIONS CONSIDERED AND REJECTED**

- 16. None.

PAUL MORRIS  
GROUP DIRECTOR

There are no background papers to this report.

Report Author	Ext	Date	Doc ID
Paul Morris	5101	31/8/05	BV INSPECTION - CUSTOMER ACCESS AND FOCUS

Inspection report

August 2005

# Customer Access and Focus

**Chorley Borough Council**

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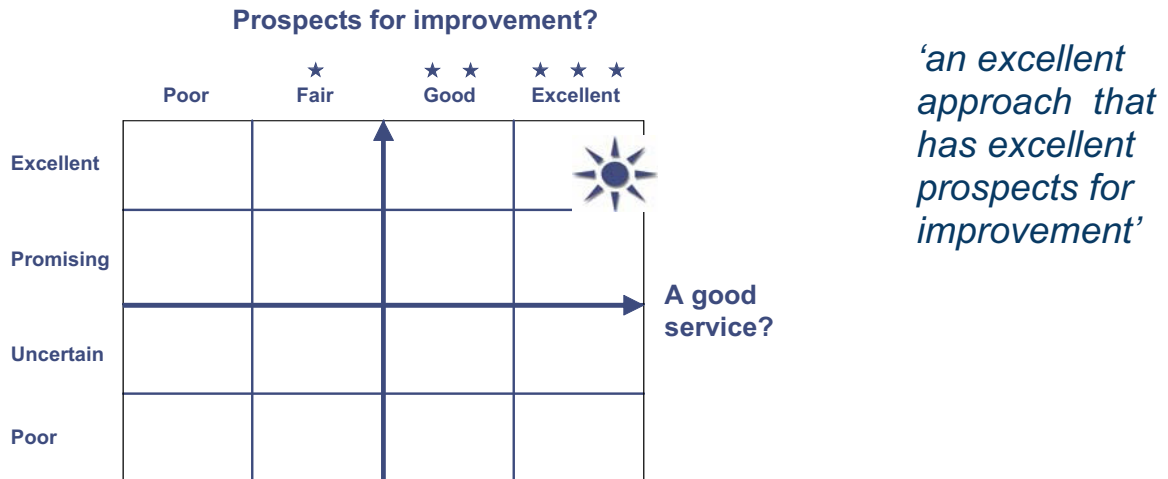
## Summary

- 1      This inspection focuses on the Council's approach to improving services through customer access and focus. The objective of strengthening accessibility and user focus is to refocus services around the needs of citizens and other customers, rather than the problems of those who provide services.
- 2      Situated in the centre of Lancashire the borough of Chorley has excellent transport links to the major cities of the North West. It is an attractive borough with large areas of green space and rural communities to the east. The population is growing. Unemployment in the borough is low and although there are some pockets of deprivation there is also a degree of affluence especially amongst the new residents. New residents typically work outside of the borough and creating cohesive local communities as new developments arise next to more traditional established areas is a real challenge.
- 3      Strong, visionary leadership in customer services is ensuring that the needs of customers and service users are at the heart of planning and service delivery. The Council has a good understanding of the make up of the borough and the diversity of its communities. As a result, it provides a good range of access channels that fit well with local needs. These include well-developed electronic access and a modern, one-stop shop with excellent facilities. Standards are high and there is a strong customer-focused culture across the Council with staff and councillors clearly committed to continuously improving the experience of service users.
- 4      The availability of easily accessed, good quality services is resulting in high levels of customer satisfaction. The Council is building on its success through ambitious plans that shape service provision around the needs and requirements of its customers. Its ambitions are underpinned by reliable corporate systems and reflected in realistic, achievable strategies that target efficiency savings as well as local needs. It is influential in the development of e-government across Lancashire and in the North West region and has a lead role in the delivery of the Lancashire-wide Shared Contact Centre project which aims to deliver wide ranging customer benefits through partnership working.

## Scoring the service

- 5 The Council is assessed as having a **three-star** approach to customer access and user focus that has **excellent prospects** for improvement. Our judgements are based on the evidence obtained during the inspection and are outlined below.

### Scoring chart:<sup>1</sup> Council – Customer Access and Focus



- 6 The Council’s approach is **excellent** because:
- ◆ it is easy to contact the Council via a range of channels that meet the expressed needs of local people;
  - ◆ a well-designed and efficient one-stop shop resolves most issues at first point of contact to the satisfaction of customers;
  - ◆ good access to services is complemented by a high quality of experience for service users;
  - ◆ good quality information is provided in a range of languages and formats;
  - ◆ the Council has a good understanding of the diversity of its communities and consultation and feedback are used to shape and improve access and service delivery;
  - ◆ partnership working is delivering a range of added benefits; and
  - ◆ sophisticated technology and e-government initiatives provide high quality access and speedy response and deliver efficiency savings which are passed onto the customer in the form of improvements.
- 7 However, some matters need attention, including:
- ◆ plans for area forums do not clearly build on the good things provided currently by local groups;
  - ◆ plans for fully engaging with the more rural population are not well-developed; and
  - ◆ although the Council provides good support for minority ethnic communities, there is no designated member of staff to provide a consistent contact point.

<sup>1</sup> The scoring chart displays performance in two dimensions. The horizontal axis shows how good the service or function is now, on a scale ranging from no stars for a service that is poor (at the left-hand end) to three stars for an excellent service (right-hand end). The vertical axis shows the improvement prospects of the service, also on a four-point scale.

- 8    The Council's approach has **excellent prospects** for improvement because:
- ◆ it is built on a clear vision and strong leadership;
  - ◆ there is a strong culture across the organisation in which care for the customer and quality service delivery is paramount;
  - ◆ the Council has invested heavily in improved systems to better support its priorities for customer access and customer care;
  - ◆ learning from experience and from others has led to substantial improvements that are recognised and valued by customers, partners and staff;
  - ◆ internal and external challenge, especially from the customer scrutiny panel, is strong and driving improvements;
  - ◆ the Council knows what matters to local people and has sophisticated customer access strategies based on realistic ambitions for the borough;
  - ◆ there is good analysis of take up of services with goals to improve;
  - ◆ sound building blocks for achievement are in place including the Council's leading role in the Lancashire Shared Contact Centre; and
  - ◆ there is a good track record of delivering sustained and important improvements in customer access channels and the quality of service delivery resulting in high levels of customer satisfaction.
- 9    Areas for further development include:
- ◆ the corporate performance management system is not fully embedded although performance management around customer access and customer care is strong;
  - ◆ plans are not all well-integrated and the corporate plan is currently being redrafted to better align with the 2005/25 community strategy; and
  - ◆ strategies to keep up with demographic changes and address longer-term community cohesion issues are not in place.

## Recommendations

- 10 To rise to the challenge of continuous improvement, councils need inspection reports that offer practical pointers for improvement. In this context it is important that the Council, with its partners, recognises that the rapid demographic and social changes expected over the next decade will challenge the interaction and sense of belonging among the borough's communities. By December 2005, the Council should:
- ◆ identify a 'diversity champion' within the Council to act as an advocate and consistent contact point for minority ethnic groups in the borough;
  - ◆ produce an outline of long-term plans to ensure a common vision for communities and equal life opportunities for all residents; and
  - ◆ in order to make sure that its approach to area forums is successful in terms of meeting filling current gaps in community engagement, the Council should:
    - ◆ by December 2005, analyse what approach to area forums would be best for the borough, based on a clear assessment of the effectiveness of current local groups and the best way to integrate them. The analysis should define patterns of need, particularly for the rural population, and set out how they will be met via a strategy for local participation that furthers the aims of the community plan; and
    - ◆ by December 2006, complete pilot projects in the areas of greatest need to test the initial analysis, identify the most effective approach and set a clear borough-wide plan for the future.
- 11 The inspection team thank all the people we met, both inside and the Council, for the enthusiasm and thoughtfulness with which they answered our questions. We are grateful to staff involved in the inspection for the time and effort they put into providing information and setting up meetings.

### Performance Specialists:

**Val Edmonds**

**Penny Aspden**

**Dates of inspection: 6 to 10 June 2005**

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# Report

## Context

- 12 This report has been prepared by the Audit Commission (the Commission) following an inspection under Section 10 of the Local Government Act 1999, and is issued in accordance with its duty under Section 13 of the 1999 Act.
- 13 The Local Government White Paper, *Strong Local Leadership – Quality Public Services*, set out a new framework which commits national government to work in partnership with local government to secure a progressive improvement in authorities' performance. The new framework is underpinned by the statutory provisions in the Local Government Acts 1999 and 2000, and seeks to integrate these with the approach to public expenditure described in the Government's Spending Review and reflected in local and national Public Service Agreements. In particular, the provisions in Part I of the 1999 Act require that services are:
- ◆ responsive to the needs of citizens;
  - ◆ of a high quality and cost-effective; and
  - ◆ fair and accessible to all who need them.<sup>2</sup>

## The locality

- 14 The borough of Chorley is situated in central Lancashire and covers around 80 square miles. Its eastern border lies on sparsely populated upland rising towards the West Pennine Moors; the central spine is more urban, containing the market town of Chorley and settlements close to the M6 and A6 that run north-south through the borough. In the west, the land merges into the Lancashire plain and is dotted with villages and hamlets. The borough is attractive with a large amount of green space. It is well-placed for access to the major cities of the north west of England with good connections to the major motorway and good railway links to Manchester and Preston. Manchester International Airport is easily accessed by motorway and rail. These good links make it an attractive area to live in for people working across the North West, and this is reflected in its population which is steadily expanding. Between 1991 and 2006 it is expected to increase by 5.4 per cent compared to the average increase across Lancashire of 4.6 per cent. House building is keeping pace with the growth in population with a rapid expansion of new developments around the traditional market town of Chorley.
- 15 There are 100,449 people living in 42,250 households. Of these, 20 per cent are aged under 16 years, 61 per cent are aged 16 to 59 years and 19 per cent are aged 60 years or over. The percentage of the population belonging to a black or minority ethnic community increased from 1.1 per cent in 1991 to 2.1 per cent in 2001 and is anticipated to continue to increase. The largest minority ethnic group in the borough is Indian (0.39 per cent, mainly Muslims from Gujarat) closely followed by Pakistani (0.33 per cent) and Chinese (0.31 per cent).

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<sup>2</sup> Circular 03/2003 - Local Government Act 1999: Part 1 Best Value And Performance Improvement.

- 16 The borough overall is relatively prosperous and ranked 172 out of 354 in the index of multiple deprivation. No lower level super output areas (SOAs) within the borough are identified as being in the 10 per cent most deprived nationally although 8 SOAs are in the 20 per cent most deprived nationally. These are in the Clayton-le-Woods North, Chorley North East, Chorley East, Chorley South East and Chorley South West Wards.
- 17 On some individual measures of deprivation the borough does show greater deprivation – in health, for example, there are five SOAs that are among the most deprived 10 per cent nationally. In addition, 18.5 per cent of people describe themselves as having a limiting long-term illness compared to 17.95 per cent nationally and 10.9 per cent provide unpaid healthcare.<sup>3</sup>
- 18 Around half of the adult population works outside of the borough. Within the borough the service sector accounts for 75 per cent of all employment. There are a high proportion of qualified adults and unemployment is comparatively low at 1.1 per cent compared to the Lancashire average of 2.2 per cent.
- 19 Council research shows that 65 per cent of the population have direct access to the internet at home and 40 per cent use the internet at work. There is 100 per cent broadband availability across the borough. This means that electronic access to Council services is popular especially with new residents. However, in the more established communities that were historically-based around manufacturing industry and mining, there is still a preference for more traditional forms of access such as face to face and telephone contact.

## The Council

- 20 There are 47 councillors representing 20 wards – 21 Labour, 20 Conservative, 3 Liberal Democrat, and 3 Independent. The Council is controlled by the Labour party with cabinet support from the Liberal Democrats and the Independents.
- 21 The net revenue budget for 2004/05 was £11.77 million. The Council employs around 500 staff. The customer services champions within the Council are the deputy leader and one of two group directors. Electronic access is a major priority and the leader of the Council is the e-champion. Governance is based on an executive and scrutiny model. An overarching scrutiny committee manages the work programme of three scrutiny panels which focus on the three corporate priorities of customer, community, and environment.
- 22 The Council has a long-term vision of *making Chorley a better place to live, work and visit*. This translates into three corporate objectives: serving our customers better, investing in our capacity to deliver, and investing in a greener, cleaner, safer Chorley. Delivery is underpinned by a set of core principles of social inclusion and equality of opportunity. The Council specifically aims to *'treat our customers fairly and as individuals in accordance with our customer services charter, actively engage with and listen to our communities in designing and improving our services, and continually improve the quality of the priority services we deliver'*<sup>4</sup>.

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<sup>3</sup> 2001 census data.

<sup>4</sup> Chorley Borough Council Corporate Plan 2003/06.

## The inspection

- 23 This inspection assesses the Council's approach and performance in improving customer access and focus for service planning and delivery, based on community involvement, partnership working and the targeting of mainstream resources to local needs. This inspection is part of a programme of reviews of customer access and focus in a number of district councils across Lancashire.
- 24 Customer access and focus is about refocusing public services around the needs of citizens and other users, rather than those who provide services. Focusing more directly on customer needs should drive major changes in the way in which public sector organisations organise their activities, deploy their staff and co-operate in the delivery of services, and the ways in which the general public perceive, access and benefit from the delivery of public services.
- 25 To inform and guide this inspection, Chorley Borough Council completed a self-assessment of its arrangements for customer access and focus in March 2005.

## How good is the approach to improving services through customer access and focus?

- 26 The inspection assesses the Council's approach for improving services through customer access and focus, based on four key lines of enquiry.
- ◆ How easy is it to access services?
  - ◆ Is the Council using e-government to support access to services?
  - ◆ How is the Council using customers' feedback and complaints to improve service quality?
  - ◆ How is the Council improving customer access through partnership working?

## How easy is it to access services?

- 27 Providing a good experience for customers and service users is a high priority for the Council. There is a well-embedded, customer-focused culture across the organisation. Ensuring good accessibility to high quality services is at the core of all service planning and delivery. The Council's 'channels strategy' for customer access is based on extensive consultation to identify preferred methods of contact. It is complemented by a reliable, up-to-date profile of residents, visitors and businesses in the borough and a highly developed understanding of customers and service users. As a result, available access channels closely match the needs of local people. For example, there is high quality internet access via the Council's website, excellent facilities at the Council's one-stop shop and good telephone access via a range of help-lines and service hot lines.
- 28 Customer-focused strategies and plans are supported by a strong commitment from staff and councillors to deliver a high quality response, reinforced by specific training and development. As part of routine performance management, all staff, including senior managers are assessed against a core competence in customer care. Customer service staff are trained to NVQ2 standard in customer care, and have the opportunity to progress beyond this basic level. As a result, there is a strong culture of good customer care across the Council. This culture is evident not only in external interactions but also in working relations between Council departments such as human resources and the legal section, where the 'customer first' ethos is also strongly applied.
- 29 The Council has significantly improved the experience for customers visiting its buildings. The one-stop shop provides a welcoming, good quality environment where customers are dealt with promptly and professionally. It has all the features of a modern, user-friendly reception including good queue management. Facilities are provided for children and good access for people with disabilities. The Council has added clocks and a drinking water dispenser in response to customer feedback. In addition to the open counter, there are three adjacent interview rooms for confidential business.

- 30 The majority of frontline council services are integrated into the one-stop shop so that staff can deal with a wide range of queries. In addition, the Citizens' Advice Bureau, Department of Work and Pensions and Patients Advice Liaison Service (PALS) operate a regular service at advertised intervals. Customer service officers guide enquirers through a structured conversation presented as a series of dialogue screens. Almost all (97 per cent) queries and service requests are dealt with at the first point of contact and customer satisfaction as measured by regular surveys is consistently high, with 99 per cent of customers describing the service as *good* or *very good*. This has not only substantially improved the service to the public but has also resulted in efficiency savings and improved effectiveness of back office systems. For example, the impact in the benefits section has been a significant improvement in performance with no backlogs in processing. This is allowing the section to focus attention on issues such as driving up take-up of benefits and providing a good level of outreach work. The impact in environmental services has also been to release staff time to focus on areas such as promotion of recycling and enforcement.
- 31 A programme of refurbishments carried out in conjunction with a reference group from the Chorley Disability Forum is resulting in easier access to Council buildings. Currently, 76 per cent of Council buildings are suitable for and accessible to people with disabilities in line with the requirements of the Disability Discrimination Act. Refurbishment of the Victorian town hall is nearing completion and this combined with management plans for Astley Hall and the leisure pool at Brinscall means that the Council is on track to meet the provisions of the act in full by December 2005. The Council does not only focus on achieving compliance with regulations but is committed to a broader role in improving access across the borough. For example, it funded the refurbishment of a car park shared by a pub and community centre, and installed dropped kerbs to ease access to a supermarket site even though it does not own the land or buildings, because of identified need. It acts as an advocate, lobbying on behalf of and with local representatives. For example, encouraging train operators to improve access to local stations and working with Barnados to make community premises more child-friendly.
- 32 The Council publishes clear service standards and customer charters so that the public know what to expect. The comprehensive *Customer Care Policy and Standards* has suitably challenging targets for all channels of access including post. Standards are published in a range of formats including audio tape. Customers and tenants are involved in setting customer care standards for departments (for example, the benefits service), for facilities (such as the one-stop shop, paragraph 29) and for service provision (for example, the tenants' handbook). Standards are high, reflecting best practice in the public and private sectors. Performance against the standards is monitored rigorously with regular reports to managers and councillors who promptly address areas of underperformance.

- 33 Information about the Council and its services is available in a variety of formats including an attractively presented, well-written Council newsletter. The Council consults regularly to make sure that it is using the best means of delivering information to residents and keeping pace with community requirements. For example, working with the ethnic minority consultative committee it determines those publications that need to be provided directly in other languages and those which can be offered to be translated. Where there is a need to inform residents about specific service issues, the Council consults appropriately to ensure that it reaches the maximum number of people and that its messages are clear. For example, the publicity and information campaign for the introduction of a new waste collection and recycling service included a regular newsletter 'Bin Thinking' which is delivered to all households. The 'Bin Thinking' marketing campaign was a 'Green Apple' award winner<sup>5</sup> in 2003. The Council's information and promotion of the new service was highly successful resulting in a much higher than predicted take-up of recycling.
- 34 As well as offering a good range of channels for local people to contact and access services, the Council also goes out into the community to better reach all of its customers. Outreach work is a feature of housing, environment, leisure and benefits services. For example, the benefits team provide a home visiting service which is extended outside of normal hours and it holds a benefits surgery every fortnight at Clayton Brook, in the area where the most benefit claimants live. Local people also raise issues through neighbourhood wardens who provide a good level of local support and information as well as direct environmental services.

### **Is the Council using e-government to support access to services?**

- 35 The Council's sophisticated approach to e-government is delivering significant benefits for local people. It is meeting e-government targets, with 92 per cent of relevant services already e-enabled and the rest on track for December 2005. A clear, accessible website offers good quality, up-to-date information and transactional facilities such as the ability to make payments and submit applications. There are links to other key sites such as the County Council website and the site hosts parish council pages designed and populated by parish clerks. In this year's annual survey of local authority websites, published by the Society of Information Technology Management (SOCITM)<sup>6</sup>, Chorley achieved a 'score' of 34 on a number of tests of accessibility and usability, placing it in equal 11<sup>th</sup> place among English districts. Although SOCITM classes the site as 'content plus' rather than 'transactional', the Council is moving rapidly towards this status.

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<sup>5</sup> Green Apple awards are given annually by the Green Organisation, an environmental charity, to recognise, reward and promote environmental best practice.

<sup>6</sup> Society of IT Management: Better Connected, 2005 – a survey of all local authority websites (February 2005).

- 36 Over the past three years the Council has worked hard to tackle a legacy of poor, incompatible IT systems and low prospects for improving access through e-government. It has invested substantial resources in equipment and systems to bring about rapid improvement in the quality of customer experience. For example, it had no website in 2002 and was amongst the last 12 local authorities to produce one and its initial Implementing e-government strategy was assessed as weak. It now has a highly rated website and is achieving a level of e-enabled services that makes it a top performer nationally.
- 37 The Council takes an innovative approach to using technology. It was selected as an e-voting pilot in 2004 demonstrating the confidence that national government has in its systems. It has implemented mobile working systems in the environment service which increase speed of response to service requests and it uses text messaging to communicate with young service users. Technology is used as an effectively tool to gain information and feedback from customers and users are consulted about new plans. For example, using a web focus group to redesign and upgrade the Council's website.
- 38 Internal ICT systems are robust and support strategic developments. All staff have direct access to the Council's intranet which has recently been redesigned and improved by staff themselves via a range of focus groups and surveys. All councillors have laptops and increasingly good electronic access to many of the documents that they need, reducing the need for paper-based systems. Committee papers will shortly be automatically indexed and uploaded to the website. Councillors' email addresses are well-publicised and linked to the website, and they are accustomed to receiving and responding to complaints and service requests via email. Document Image Processing is being rolled out across the Council following successful trials. Internally, therefore, technology is helping to reduce costs and maximise efficiency and speed of response.
- 39 The Council is also using technology effectively to drive efficiencies externally by encouraging use of the most cost effective channels. For example, it offers a reduction in the cost of land searches if they are conducted through it's online facility. As a result, it has shifted 90 per cent of applications to electronic access.
- 40 Although there is relatively high internet access within the borough,<sup>7</sup> the Council is mindful that a strong focus on delivering services electronically can exclude local people who are not comfortable with technology or who do not have good access to systems. It works with partners to provide free internet access at a range of venues such as libraries and community centres. For example, the Tatton Community Classroom was developed with local people and funded from contributions by partners and local businesses to provide access to technology and e-learning in one of the most deprived areas of the borough. The Council also offers alternative channels. For example, alongside good provision to make card payments 24 hours a day via the website and the telephone it has also significantly extended the facility to make cash payments by creating around 200 pay points in post offices, garages and late shops.

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<sup>7</sup> See paragraph 19.

## How is the Council using customers' feedback and complaints to improve service quality?

- 41 The Council places strong emphasis on consultation and feedback with customers, partners and residents. A wide range of methods is providing a reliable picture of local needs and the diversity of communities and is giving the Council a good understanding of the factors that influence take-up of services. This knowledge is reflected in key strategies such as the draft *Customer Focussed Access and Service Design Strategy*. The Council feeds back to the public and its partners how they have influenced its plans and the ways in which their views have been acted upon. In this way, service users and customers are actively involved in shaping service design and delivery. For example, the disability forum was involved in the design of the one-stop shop and the major refurbishment programme for the town hall. Recognising that there is scope for community groups to get involved even earlier in the design process, the Council is creating opportunities to do so through the work of the scrutiny panels and through specific liaison groups.
- 42 At a corporate level, the Council uses annual surveys, road shows, its citizens panel, and joint consultation with partners to measure customer experience and customer satisfaction across a range of customer groups. At the service level, staff proactively and routinely seek feedback on ease of access and the quality of their response to customers. For example, the benefits section carries out monthly telephone surveys and satisfaction is currently running at 97 per cent (target 88 per cent). A drawback is that this results in a somewhat ad hoc approach that runs the risk of duplication. The Council has recognised this in a revised consultation strategy that better co-ordinates activity across the organisation.
- 43 The Council has a good knowledge of the diversity of its communities and of how they are changing. It has a well-developed understanding of the cultural issues that can create barriers to access. The minority ethnic population although comparatively small, is growing and the Council is building a good level of engagement with minority ethnic groups and their representatives. It supports and acts on the advice of the Asian women's forum which is growing in effectiveness. For example, feedback that the one-stop shop is not a comfortable environment for Asian women is leading to exploration with the forum of acceptable alternatives. It is building links with the growing Chinese population. Representatives of minority ethnic groups greatly appreciate the Council's approach but would welcome the more consistent access provided by a designated liaison officer within the Council with specific responsibilities to build deeper working relationships and deal with issues routinely.
- 44 Consultation and engagement are also targeted to specific groups. For example, the Council is improving its engagement with young people and giving them opportunities to become more actively involved in designing services for themselves. As well as using conventional youth forums and the youth parliament it uses innovative, relevant approaches such as burger bar focus groups, vox pop videos and text messaging.



- 45 When customers are not happy with the response they get, they are encouraged to use the Council's robust complaints and comments system. Clear leaflets and instructions are displayed at all access points and complaints are dealt with promptly and effectively with an overall emphasis on lessons to be learned to avoid similar complaints in the future. Such learning is spread across Council departments. Customers are also encouraged to comment on their experiences. For example, all customers in the one-stop shop are given a short feedback form to complete and leisure centres record and act on all verbal comments made to staff. This provides good quality ongoing information about how well the Council is doing and also early notice when things go wrong.
- 46 Internally, staff and councillors are fully engaged in shaping and improving service design and delivery. There are specific forums which give staff opportunities to put forward ideas and suggest improvements, for example, the *Improve 4 U* group. One-stop shop staff feed back service improvement tips through regular meetings with back office business units. The staff newsletter is popular and attractive and offers a further means of sharing ideas and experiences as well as building team spirit.
- 47 Councillors regularly consult local people informally in their wards and formally through, for example, the *Customer Overview and Scrutiny Panel*. This all-party panel of committed and enthusiastic councillors takes its role seriously and has been instrumental in driving real improvements in customer access and user experience. Its programme of work involves in-depth investigations from a user perspective and it consults and engages with local people in analysing service delivery and identifying improvements. For example, in-depth scrutiny of the housing repairs service led to the instigation of a much improved service available across extended hours and a comprehensive tenants handbook prepared by and with tenants representatives. This has increased tenants' satisfaction with Council services which is high at 81 per cent compared to the national average of 77 per cent.<sup>8</sup> Recent scrutiny of the one-stop shop resulted in clear, costed recommendations including improvements in access for customers with mobility problems and greater availability of planning officers.

## **How is the Council improving customer access through partnership working?**

- 48 The Council is achieving major benefits for customers through partnership working. A significant example of this is its role in the Lancashire Shared Service Contact Centre. The project involves Lancashire County Council and six district councils in developing a shared telephone contact centre to pool information and provide extended services. From the customer's perspective, the collaboration will give access to a wider range of services than those of the local district council, including County Council and other districts' services, via a single telephone call. Chorley Borough Council is the first partner to go live with the project, a testament to its thorough preparation work including a sound technological infrastructure, investment in re-engineering back office systems and well-trained, knowledgeable and confident call handlers. The new contact centre opened in June 2005 offering information on a wide range of services, and a customer relationship management (CRM) system for environmental services. The same CRM system is available in the one-stop shop and will gradually be extended to all services.

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<sup>8</sup> 2004 BVPI score.

- 49 The Council has become a champion of the partnership because:
- ◆ it values the security of knowing that the resources of a larger organisation are available in case of problems; and
  - ◆ it sees the potential for wider benefits for its local communities, visitors and local business, for example, access to the *Lancashire Community Portal*.

Councillors and officers are committed to its success and resources have been shifted to ensure that the Council meets its obligations and the partnership succeeds.

- 50 The Council is leading and influencing others to improve accessibility and bring a strong user focus to services. The Chorley Local Strategic Partnership (LSP) has developed its second community strategy 2005 to 2025 on the back of thorough consultation and feedback from partners, residents and local businesses. This has informed the comprehensive *Chorley Profile* which provides an analysis of the current state of the borough and the challenges and opportunities that can be anticipated over the next 20 years. The Council has played a key role in driving a customer-focused approach and one of five community strategy priorities is *improving access and take-up of public services*. Partners share information and the results of consultation, and there are examples of joint consultation, for example, on health issues, using the Council's citizen's panel. As a result, the Chorley LSP has a strong emphasis on customer engagement and improving customer services across the public sector.

- 51 At a service level there is a strong commitment to working with others to deliver better access and better services. The Council works with local business such as developers to build community facilities. For example, young people had a large say in the design of a new youth and community centre at Adlington built with the assistance of the developer of a neighbouring site. Environmental and community development services work with others such as parish councils to increase a local presence in communities especially in the more deprived areas. For example, neighbourhood wardens not only deliver the Council's aims for improving the environment but also work with the police on joint enforcement operations and joint patrols help to deliver Chorley community safety partnership aims for increasing reassurance and decreasing crime and fear of crime. Wardens have strong customer focus and good local networks. They work to clearly defined procedures but also have a significant degree of discretion enabling them to tailor responses to local needs.

- 52 The Council takes its community leadership role seriously. It has good working relationships with parish councils, supporting their work in tackling local issues, empowering them to deliver local services on its behalf and attending local project groups. It is also an active participant in local police and community together (PACT) meetings. There are a number of established neighbourhood and community groups which it uses to meet the public and seek their views. These include local community groups, tenants' forums and regeneration partnerships such as PAiCE (Positive Action in Chorley East).

- 53 The Council rightly focuses its main efforts in community engagement on the five most deprived and disadvantaged areas of the borough, but there are significant rural areas and a risk of rural exclusion. Overall, its strategic plans for rural areas are not well-developed with a range of un-coordinated projects and activities. The Council is planning the introduction of area forums across the borough, partly because it recognises a need to improve participation and engagement in rural areas. A network of forums at neighbourhood level could combine local knowledge with a broader agenda based on community plan priorities in a more systematic way than the present Parish Council and community groups do. However, it is not yet clear how Chorley's area forums will operate or what the added benefits would be. Without a clear strategy based on reliable analysis of need, there is the risk of creating overlapping and potentially conflicting visions for local neighbourhoods. It would also fail to build on the experience and capacity of the kind of groups already in place, some of which have significant experience of raising and managing their own funds as well as enjoying the loyalty and commitment of their communities.

## Summary

- 54 Overall, it is easy to contact the Council via a range of channels that fit well to the profile of the community and meet the expressed needs of local people. This has been achieved through a good understanding of the nature of Chorley residents, visitors to the borough and local business. Good access is complemented by a high quality user experience. Consultation and feedback are used effectively to shape and improve services and partnership working is delivering a range of added benefits.
- 55 Within the Council, there is a strong emphasis on customer care embedded across all departments. Staff routinely demonstrate their commitment to improving the experience of service users and councillors drive a strong customer focus. Technology and e-government initiatives are used effectively to provide high quality access and speedy response and to achieve efficiency savings which are then passed onto the customer in the form of improvements.
- 56 There are areas that require further development, for example, the Council needs to be clear about its plans for area forums and engaging with the more rural population. However, it is evident that the needs of customers and service users are at the heart of Council planning and service delivery. Its approach to improving services through customer access and user focus is therefore judged to be **excellent**.

## What are the prospects for service improvement?

- 57 We have assessed the prospects for service improvement using four key lines of enquiry.
- ◆ **Ownership of problems and willingness to change** – in high performing councils, senior managers and councillors are committed to continuous improvement. They are willing to tackle difficult problems, make difficult decisions and stick to them. They are open about their performance and problems and welcome internal and external challenge.
  - ◆ **Proven capacity** – it is important that senior managers and councillors know what matters to local people and use this information to set clear and consistent priorities. High performing councils focus on achieving impact in priority areas and concentrate effort and resources in proportion to priorities.
  - ◆ **Capacity and systems to deliver performance and improvement** – successful councils need sound performance management, including the flexibility to move money and people and tackle the most important problems. There should be clear lines of accountability for action and the skills to build effective partnerships to help bring about improvements.
  - ◆ **Integration of best value principles into day-to-day management** – continuous improvement should be seen as part of the day job with best value integrated with other Council performance processes.

## Ownership of problems and willingness to change

- 58 The Council's openness to change is impressive. Strong, visionary leadership in customer service drives an ambitious change programme centred on improving access and service delivery. Councillors' staff, partners and customers understand and support the Council's approach. The group director leading the change process has the confidence of staff and has set clear achievable goals that attract the commitment of councillors. Aims are expressed in key strategies including the corporate plan and the pivotal *Customer Focussed Access and Service Design* strategy which is based on the government's nine principles of public service delivery and best practice in the public and private sector. This strategy builds on the current reshaping of services around customer needs and takes forward the re-engineering of back office systems to improve service quality and release efficiency savings. In combination with the eWorkforce programme of 20 core projects and the Council procurement strategy, a total of £1 million of efficiency savings over three years are identified.
- 59 A comprehensive set of strategies support the improvements that the Council is seeking. For example, the *communications strategy* sets out clear benchmarks and targets based on good practice and research; the *corporate equalities plan* incorporates the race equality scheme and is structured around the Council's vision for accessible services for all; and a recently revised *consultation strategy* outlines a better co-ordinated approach to feeding in the views of local people. Strategies are subjected to equalities impact assessment in line with good practice requirements of the Local Authority Equality Standard. They are underpinned by clear action plans to ensure that delivery can be monitored and impact measured. They are not yet fully integrated with the Council's corporate plan which is currently being redrafted to reflect the new community strategy.
- 60 Service plans also reflect a strong customer focus, for example, including local performance targets for user satisfaction and the quality of customer contact. As a result, staff are clear about the corporate approach to customer access and user focus and how they can contribute directly to improvements.

- 61 The Council's approach is informed by learning from others. For example, it has worked with recognised leading councils to significantly improve its performance in relation to e-government. It is also committed to learning from its own experiences, for example, using scrutiny panels to continually review provision, identify gaps and find solutions. Its cross-departmental customer focus group enables staff to exchange ideas and good practice. It is open to external challenge, for example, in response to inspection and consultancy reports it has worked hard to create a more inclusive management style and give staff more opportunities to influence and drive change.
- 62 The Council is investing heavily in its ambitions for customer access. It is self-aware and realistic about the barriers that it needs to overcome. It is prepared to take tough decisions to bring about the changes that it seeks. For example, it has moved resources from back offices to the frontline in order to develop its one-stop shop and contact centre; it has maintained staff motivation by empowering frontline staff to take local decisions. The Council also decided to invest substantial resources in a major refurbishment of the town hall to transform access and facilities in this historic but awkwardly laid out building.

### **Proven capacity**

- 63 Senior managers and councillors have a well-developed understanding about what matters to local people. This has driven a redefinition of priorities and restructuring of political and managerial leadership around priority areas. Resources and efforts are targeted towards these areas and away from low priority areas such as leisure. Analysis of performance indicators shows that this targeted approach is paying off in terms of better quality services for customers in the priority areas. For example, top level performance in processing benefits.
- 64 The Council's priorities make sense to its partners who support and emulate its customer-focused approach to services. Close working arrangements mean that the Council and its partners contribute to achievement of shared aims, for example, voluntary groups help to deliver community development and leisure activities and parish councils deliver local environmental services.
- 65 The Council has good information about the take up levels of its services and is developing strategies to improve take up and attract non-service users. For example, it has a well-researched take up profile for leisure services and strategies in place to increase take up in low use groups. These include charging mechanisms such as concessions and free activities for young people. The leisure trust contract specifically identifies those groups that Council research shows to be low users and contains targets to increase usage which are conditional on finances. In this way, the Council holds the trust to account for providing services to all sectors of the community.
- 66 The Council also has a detailed profile of take up of benefits and although this indicates that overall the extent is as can be predicted, it is still keen to improve. There has been a lack of systematic approach characterised by only periodic campaigns. This is being addressed through the assignment of a designated member of staff to develop a specific project aimed at increasing overall take-up. Staff in the one-stop shop are encouraged to be proactive and advise customers about the range of services that may be available to them that they are not currently accessing. A similar approach has not been taken with telephone customers although it is part of the plans for the new call centre. In this way, the Council is ensuring that services are readily available to all especially those at risk of exclusion.

- 67 The Council's focus on good quality access to good quality services is paying off as shown by high customer satisfaction. In the 2003/04 Mori survey, satisfaction was high at 74 per cent, exceeding the national average in all but two areas – satisfaction with complaint handling was at the national average and satisfaction with planning services was well below the national average. Feedback from council annual surveys and joint consultation undertaken with partners confirms that it is prioritising areas that matter most to local people and improving the quality of life for residents. For example, feedback from the Chorley East community confirms that a combined approach by the Council and its partners to tackle fear of crime through community engagement and information sharing has resulted in greater feelings of reassurance and confidence.

## **Capacity and systems to deliver performance and improvement**

- 68 The Council is improving corporate systems such as performance management and human resources (HR) that were identified as weak in previous inspections including the Comprehensive Performance Assessment (CPA) 2004. Its new performance management framework is becoming established across the organisation, although it is not yet routinely used at every level. Over the past five years the Council has also improved the quality of several of its corporate strategies, from asset management to e-government. Clearer links are emerging between strategies, action plans and what is delivered on the ground. Similarly, it has significantly strengthened HR capacity so that it is based on modern practices which better support delivery of corporate priorities. For example, staff welcome the competency-based personal review system which has an emphasis on customer care because they have a clearer understanding of what the Council is trying to achieve and how their work contributes to priorities. As a result, morale is relatively high; staff have more confidence in the HR team; local managers are more empowered to deal with local issues; and staff have a stronger voice in developing service plans and addressing work force problems.
- 69 Performance monitoring and management of access systems such as the one-stop shop is strong. The one-stop shop monitors customer satisfaction levels by contacting approximately 1 per cent of its customers monthly via a telephone survey. Services are held to account for delivery against their published standards and customer charters. Underperformance is promptly addressed. For example, improving telephone access during peak periods and changing customer approaches to cope with the temporary closure of the town hall for refurbishment. Scrutiny panels are an effective means of evaluating performance, identifying improvements and then monitoring their implementation. A feature of their work is clear, costed action plans with defined targets and assigned accountabilities which are monitored quarterly.
- 70 Money and staff resources are managed efficiently with a willingness to shift efforts to areas needing development. As a result, investments in technology infrastructure, staff and Councillor training and partnership working are delivering much improved access and quality of services. The transition to the one-stop shop was well-managed with minimum impact on customers and service users whilst services migrated across to the new systems and this has also been achieved for the new call centre. For example, the Council managed the selection and training of staff with minimum impact on service delivery ensuring a smooth transition from back office systems to frontline delivery.

- 71 The Council demonstrates good project management, for example, in delivery of major initiatives such as the one-stop shop; shared contact centre; and refurbishment of the town hall. It is building on this by training more staff to use a structured corporate approach to manage simultaneous delivery of integrated projects especially those that support transition of services to the contact centre. It is regarded as reliable, professional and highly competent by its partners.

## **Integration of best value into day-to-day management**

- 72 A major strength of Chorley's approach is the way in which the drive and passion for better customer service evident at a senior level is replicated throughout the organisation. There is a clear commitment throughout departments to continually review and re-assess access channels and service delivery in order to identify gaps and weak areas and address them. Staff are enthusiastic about improving customer experience and the Council has succeeded in building a culture in which care for the customer and focus on quality service delivery is paramount.
- 73 An important aspect of the Council's attitude is its encouragement of innovation. Staff, especially frontline staff, are able to try out new ways of working especially where they have, alongside the customer, identified gaps and areas for improvement. For example, consultation identified that a big source of dissatisfaction for housing tenants was repairers making several visits to finish repair jobs. Housing staff and tenants together redesigned the repairs process so as to eliminate the need for most repeat visits, and the housing service continues to monitor the situation through a local performance indicator measuring the number of repeat visits.
- 74 The nature of society in Chorley is changing rapidly as the borough's population increases. Close-knit communities built round local employment sites such as the former mining village of Coppull are experiencing significant changes in patterns of work. Large areas of new development, such as Gillibrand and Buckshaw Village on the outskirts of the town mean that young parents or single people are isolated, often in a new area where they have few support networks. The Council is actively building good levels of information that enable it to predict changes in demography and adapt services to respond to them. It is continually evaluating its community engagement, identifying new issues and targeting emerging groups that are potentially excluded. It is also using a range of initiatives to help meld adjacent traditional and new communities and to offer new residents opportunities to become engaged in their communities as well as with the Council. However, the changes will begin to strain community cohesion as the contrast between old and young and affluent and less well off become more marked. The Council could do more with its partners to anticipate – for example, using the state of the borough report (paragraph 50) to coordinate information about the issues - and plan for the long-term community integration challenges that it is likely to face.

## **Summary**

- 75 The Council has invested heavily in improved systems to better support its priorities for customer access and customer care. It learns from external challenge, from best practice and from its own experience. This has brought substantial improvements that are recognised and valued by customers.

- 76 There is strong leadership around the approach to customers and a clear strategic direction which has the support and commitment of councillors and staff. The corporate performance management system is not fully embedded but performance management around customer access and customer care is strong. The Council is confidently shaping its services and interfaces around the needs of its customers. Its plans are not fully integrated but it has sophisticated customer access strategies based on realistic ambitions for the borough. It is early days in terms of the potential benefits of the Lancashire Shared Contact Centre but the Council has the necessary building blocks for the future in place and a good track record of delivering sustained and significant improvements. Its approach to improving services through customer access and focus is therefore judged to have **excellent** prospects for improvement.



## Appendices

The purpose of an inspection is to make two judgements. The first is how good is the approach for improving services through customer access and focus. The second is what are the prospects for improvement. We carried out a range of activities to enable us to reach our judgements.

### Documents reviewed

Before going on site and during our visit, we reviewed various documents that the Council provided for us. These included the following.

- ◆ Council self-assessment.
- ◆ Customer Focussed Access and Service Design Strategy 2005.
- ◆ Consultation Strategy.
- ◆ Chorley Community Safety Partnership Audit and Strategy 2005/08.
- ◆ Community Plan 2002 to 2005.
- ◆ Chorley Borough Community Strategy 2005 to 2025 (draft).
- ◆ Chorley Profile – a State of the Borough Report (June 2004).
- ◆ Corporate Plan 2003/04 to 2005/06.
- ◆ Corporate Improvement Plan 2004/07.
- ◆ E-government Strategy.
- ◆ IEG 1 to 4.
- ◆ Strategy for an Accessible Public Service One-Stop Shop Contact Centre.
- ◆ ICT Strategy 2005/08.
- ◆ Lancashire Partnership: Shared Service Contact Centre – The Way Forward (July 2004).
- ◆ Web Strategy.
- ◆ Consultation Strategy.
- ◆ Customer Charter; Customer Care Policy and Standards.
- ◆ Equality impact assessment guidance.
- ◆ Corporate Communications Strategy 2004 to 2007.
- ◆ Human Resources Strategy 2004 to 2007.
- ◆ Competency Framework.
- ◆ Performance Management Framework.
- ◆ Overview and Scrutiny Committee Reports.
- ◆ Executive and Scrutiny panel minutes.
- ◆ Minutes of *Improve 4U* group.
- ◆ Internal Audit Report – Review of Benefits.
- ◆ Sample Business Plans.
- ◆ *News and Views, Bin Thinking, Borough News and Have Your Say* .

- ◆ Tatton Community Group – Annual Report 2004/05.
- ◆ Tenants Handbook.
- ◆ Working Together – Chorley and South Ribble Compact (undated).
- ◆ Contact Centre Project Plans.

## List of people interviewed

The inspection team observed the operation of the Council's one-stop shop and the work of the customer scrutiny panel. The team visited the All Seasons leisure centre, Tatton community centre, and Buckshaw Village. The team also spoke to a range of people involved with the Council.

Paul Morris	Group Director
Judy Daniels	Chorley Disability Forum
Hasina Khan	Asian Women's Forum
Steve Lomas	Head of Housing Service
Dave Price	Revenues and Benefits Manager
Darren Cranshaw	Parish Council representative on Chorley LSP
John Lechmere	Head of Environmental Services
Susan Edwards	Coppull Parish Clerk
Roger Handscombe	Head of Property Services/DDA Lead Officer
Max Allam	Chorley Muslim Welfare Society
Tim Rignall	Head of Corporate and Policy Services
Keith Allen	Head of Public Space Services
Eileen Bee	Co-ordinator – Disability Forum
Asim Khan	Assistant Head Customer Services
Helen Sutton	Customer Services Manager
Jamie Carson	Head of Leisure and Cultural Services
Mark Snaylam	Contracts Manager, Contract Manager, Leisure
Tim Murphy	Head of IT
Jim Douglas	Assistant Head of Office Support Services
Steve Pearce	Assistant Head of Democratic Services

Andy Roden	Consultant, Northgate – one-stop shop technology
Shelley Riston	Communications Officer
Stella Walsh	Borough and Parish Councillor; Chair of Scrutiny Panel
Cllr Edgerley	Executive Member, Customers Policy and Performance
Paul Hepburn	Lancashire County SCC project
Susan Edwards	Parish Council clerk
Tom Watson and Liz Morey	Tatton Community Centre
Jane Meek	Head of Regeneration
Derek Leech	Chair Tenants Forum
Jane Stafford and Sam Winckley	Customer Services
Barbara Charnock	ICT Services – Business Analyst
Andy Brown	Greenspace Co-ordinator
Dave Bradley and Carol Rosco	Environmental Services
Sarah Dobson and Lindsay Parr	Corporate and policy services
Denise Fletcher	HR
Cindy Lowthian	Lancashire CC Senior District Partnership Officer
Leah Pearce	Benefits officer
Charlie Vosen	Housing services
Lincoln Shields	Chorley LSP
Claire Forum	Chorley LSP
Jan Stanley	Chorley LSP
Steve Ashley	Chorley LSP
John Cree	Chorley LSP

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**QUARTERLY  
BEST VALUE PERFORMANCE INDICATORS  
2005/06  
MONITORING REPORT TO EXECUTIVE  
CABINET  
As at End June 2005**



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**INTRODUCTION**

This monitoring report sets out performance against the ODPM Best Value Performance Indicators (BVPI's) for the year ending 31 March 06. This report shows performance for the first quarter, 1 April to 30 June 05.




This is one of two quarterly monitoring reports to be received by Executive Cabinet. This report monitors BVPI's, the other monitors Corporate KPI's.

Bi-monthly Business Plan monitoring statements will also be produced by Units separately. The first will be available shortly.



**INTERPRETATION**

**Performance Symbols**

Symbols are used in the monitoring tables to provide a quick guide to how the Council is performing against a particular indicator:

-  = Performance is hitting or better than the target set for 2005/06.
-  = Performance is within tolerance. It is better than last year but below target.
-  = Performance is significantly worse than planned; it is worse than last year.

The performance symbols denote year to date performance against the target. The targets have been profiled across the year to give a reasonable comparison to use in assessing performance.

Some indicators are new so have no targets. To avoid the  the target has been estimated from the actual performance. They will always display the  symbol. This position will regularly be reviewed to establish better targets as soon as is practical.

**Notes of Clarification**

Section	Indicator	Comments
Corporate Health	BV009 Council Tax Collected	The figure reported is the % of the total debit that has been collected at the end of each month. The targets will change monthly.
	BV010 NNDR Collected	The figure reported is the % of the total debit that has been collected at the end of each month. The targets will change monthly.
	BV011 – BV017 HR Indicators	These figures are a year to date figure.

**PERFORMANCE DATA TABLES**

**Corporate Health** – See page 5

**Community Safety**– See page 6

**Leisure and Culture** – See page 7

**Planning and Land Charges** – See page 8

**Environment** – See page 9







**Housing and Council Tax Benefits** – See page 10





**Housing** – See page 11






Some indicators are new so have no targets. To avoid the  the target has been estimated from the actual performance for the period. They will always display the  symbol. This position will regularly be reviewed to establish better targets as soon as is practical.





Corporate Health			
	Perf to Date	Perf vs Target	Year End Target
BV008 % Invoices paid within 30 days	81.35		96.00
BV009 % Council Tax collected	30.15		98.60
BV010 % NNDR collected	30.78		98.60
BV011a.02 Women in top 5% earners	20.83		23.00
BV011b.02 Black/ethnic in top 5%	0.00		0.50
BV011c.05 Top 5%: with a disability	8.33		8.71
BV012 Days / shifts lost to sickness	2.40		8.90
BV014 % Early retirements	0.21		0.17
BV015 % Ill health retirements	0.00		0.17
BV016a % Disabled employees	3.44		3.55
BV017a % Ethnic minorities employees	1.53		1.45
BV156 % LA public buildings - disabled	78.00		88.00
BV157 % e-government	92.40		100.00





Housing & Council Tax Benefits			
	Perf to Date	Perf vs Target	Year End Target
BV078a Ave time new claims (Cal days)	28.90		28.50
BV078b Ave time for changes (Cal days)	9.90		8.50
BV079a % Benefit calculations correct	99.20		98.00
BV076a Number of claimants visited	205.00		200.00
BV076c Number of fraud investigations	56.00		40.00
BV076d Number prosecutions & sanctions	14.24		9.00



Housing			
	Perf to Date	Perf vs Target	Year End Target
BV066a.05 % Rent Collected / Rent Owed	96.96		98.90
BV212.05 Average Time to Re-let	58.96		30.00
Homelessness			
	Perf to Date	Perf vs Target	Year End Target
BV183a Length of stay in B&B accom'n	0.00		0.00
BV183b Length of stay in hostel accom'n	3.82		12.00

Planning			
	Perf to Date	Perf vs Target	Year End Target
PL BV106 % New homes on brownfield sites	39.60		50.00
BV109a.02 % Planning apps - major	80.00		60.00
BV109b.02 % Planning apps - minor	78.00		65.00
BV109c.02 % Planning apps - other	90.00		80.00
Land Charges			
	Perf to Date	Perf vs Target	Year End Target
BV179 % standard searches in 10 days	93.09		100.00

Waste & Cleanliness			
	Perf to Date	Perf vs Target	Year End Target
BV082ai.05 % H'hold Waste Recycled	13.53		15.00
BV082bi.05 % H'hold Waste Compost	26.61		20.00

Culture - Visits to Astley Hall			
	Perf to Date	Perf vs Target	Year End Target
BV170a Visits to / usage of museums	77.50	★	169.10
BV170b Visits to museums in person	53.43	★	149.00
BV170c Pupils visiting museums and galleries	435.00	●	2100.00

Community Safety			
	Perf to Date	Perf vs Target	End of Year Target
BV126a Domestic Burglaries/1000 h'holds	1.75		8.45
BV128a Vehicle Crimes per 1000 pop	1.99		9.45
BV174 Racial incidents per 1000 pop	3.00		18.00
BV175 Racial incidents - further action	100.00		100.00

New Community Safety Indicators		
	Perf to Date	Perf vs Target
BV127a.05 Violent Crime / 1,000 pop.	4.29	
BV127b.05 Robberies / 1,000 pop.	0.05	

## **COMMENTS ON POOR PERFORMANCE**

### **Corporate Health**

#### **BV008 % invoices processed within 30 days**

The introduction of the new finance system had resulted in a temporary downturn in performance, particularly in April 05, as individuals become used to the new working arrangements. Performance is improving month on month with July's figures showing a further improvement. The Director of Finance expects this trend to continue over the coming months.

#### **BV11a Women in top 5%**

There will be turnover in Senior Management Group, and it is anticipated that there is the potential to achieve the target by year end.

#### **BV16a % Disabled employees**

There will be turnover of staff, and it is anticipated that there is the potential to achieve the target by year end.

### **Housing**

#### **BV066a % rent collected/rent owed**

The year to date figure is 1.94% below target. This is due to people paying at outlying sites e.g. the post office. Payments are only credited to their rent accounts 3 or 4 days later, which shows as a temporary arrears at month end. Also, May was a five week month, which affects the monthly figures adversely.

#### **BV212 Average time to relet homes**

The time taken to bring homes up to the Lettable Standard is greater due to more stringent standards of presentation than has been the case in the past. Initiatives are being introduced to improve the position and in-month figures show that the average time is reducing.

### **Planning and Land Charges**

#### **BV179 % standard searches in 10 days**

Delays in Planning in completing their part of the searches have contributed to this figure. This is currently being rectified.



## **COMMENTS ON SPECIFIC INDICATORS**

### **New Indicators**

It is very difficult to set a target for an indicator which has never been monitored before. As a temporary arrangement, the actual performance is also entered as the target, to show performance as on track. As a result, there is no year end target.

#### **BV127a Violent Crime per 1,000 population and 127b Robberies per 1,000 population**

This indicator is new for 2005/06. The first year will be used to establish a baseline figure against which future performance will be measured. The target is to reduce the 2005/06 level of violent crime by 10% over the following three years.

#### **BV211a,b Repairs and maintenance expenditure.**

This indicator is new for 2005. Systems will be in place to collect the information for the next and remaining quarters of the year.

#### **BV218a,b Abandoned vehicles**

This is a new indicator for 2005/6, and ODPM has only recently decided that Districts should collect this indicator. At present, current systems make this indicator time consuming to collect. Systems are being investigated to try to find a less time consuming collation method. Due to the work pressures of introducing the alternate weekly collections, calculation of this indicator has been deferred. A figure will be produced next quarter.

### **Further Information**

For further information, please contact:  
Lindsay Parr Ext 5341, Jenny Rowlands Ext 5248, Sarah Dobson Ext 5325.

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**QUARTERLY  
KEY PERFORMANCE INDICATORS  
2005/06  
MONITORING REPORT TO EXECUTIVE  
CABINET**

**As at End June 2005**



**CONTENTS**

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## INTRODUCTION

This monitoring report sets out performance against the Council's Key Performance Indicators (KPI's) for the year ending 31 March 06. This report shows performance for the first quarter, 1 April to 30 June 05.

This is one of two quarterly monitoring reports to be received by Executive Cabinet. This report monitors Corporate KPI's, the other monitors BVPI's.

Bi-monthly Business Plan monitoring statements will also be produced by Units separately. The first will be available shortly.

KPI's fall into three main types:

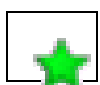
1. CORPORATE KPI's – Performance indicators which are used to monitor the Corporate Plan. These may be BVPI's or locally defined indicators.
2. BEST VALUE KPI's – National indicators collected in accordance with definitions issued by the Office of the Deputy Prime Minister. These are prefixed by BV in the monitoring tables that follow.
3. LOCAL KPI's – Locally defined performance indicators which are used to monitor performance within a Unit. These have a two character prefix denoting the service unit to which they relate. Indicators prefixed with CBC monitor corporate performance and are not attributable to one particular Unit.

CD CuDOSS  
 CP Corporate and Policy Services  
 LC Leisure and Cultural Services  
 ER Economic Regeneration  
 EN Environmental Services  
 FN Finance  
 HS Housing Services  
 HR Human Resources  
 IT Information Technology  
 LG Legal Services  
 PL Planning Services  
 PR Property Services  
 PS Public Space Services  
 CBC Corporate

## INTERPRETATION

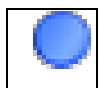
### Performance Symbols

Symbols are used in the monitoring tables to provide a quick guide to how the Council is performing against a particular indicator:



=

Performance is hitting or better than the target set for 2005/06.



=



Performance is within tolerance. It is better than last year but below target.



=

Performance is significantly worse than planned and is worse than last year.

The performance symbols denote year to date performance against the target. The targets have been profiled across the year to give a reasonable comparison to use in assessing performance.

Some indicators are new so have no targets. To avoid the  symbol, the target has been estimated from the actual performance. They will always display the  symbol. This position will regularly be reviewed to establish better targets as soon as is practical.

**Comparative Data**

Where available, the quartile data is shown for BVPI's. All England Best and Worst quartiles for March 2004 are the latest available.

PI's prefixed CBC or with Unit initials do not have any quartile information, as quartile information is only available for national indicators. Within the data tables, the indicators without quartile data have been separated. If none of the indicators on a page have quartile data, the quartile columns have been removed.

**Notes of Clarification**

Section	Indicator	Comments
Corporate Health	BV009 Council Tax Collected	The figure reported is the % of the total debit that has been collected at the end of each month. The targets will change monthly.
	BV011 – BV017 HR Indicators	These figures are a year to date figure.

**Preferred Direction of Travel**

The preferred direction of travel for some measures is unclear.

Section	Indicator	Preferred Direction of Travel
Capacity	CBC005 % Budget spent at year end (forecast)	Target is best
Greener	BV106 % New homes built on brownfield sites	Bigger is better
	BV 63 Average SAP rating of LA dwellings	Bigger is better
Corporate Health	BV014 Early retirements	Smaller is better
	BV015 Ill Health retirements	Smaller is better

**PERFORMANCE DATA TABLES**

**Customer** – See page 6

**Capacity** – See page 7



**Greener** – See page 8



**Cleaner** – See page 9

**Safer** – See page 10

**Corporate Health** – See page 11

The KPI's which follow were agreed at SMG for the year April 05 – March 06. Any annual KPI's have not been included.

Some indicators are new so have no targets. To avoid the  the target has been estimated from the actual performance for the period. They will always display the  symbol. This position will regularly be reviewed to establish better targets as soon as is practical.




CBC Customer - Cumulative						
Quarterly Perf	April	May	June	Target 05/06	Best Q 03/04	Worst Q 03/04
 BV008 % Invoices paid within 30 days	69.69	76.06	81.35	96.00	95.90	88.00
 BV156 % LA public buildings - disabled	78.00	78.00	78.00	88.00	64.83	21.01



CBC Capacity - Cumulative							
Quarterly Perf	April	May	June	Year End Target	Best Q 03/04	Worst Q 03/04	
BV009 % Council Tax collected	11.14	20.60	30.15	99.00	98.29	97.90	
BV012 Days / shifts lost to sickness	0.83	1.62	2.40	8.00	8.90	13.45	
CBC Capacity - Twice Yearly							
1st Period Perf	June	Year End Target					
HR001 % Staff with Completed Performance Reviews	80.00	80.00					

CBC Greener - Cumulative				
Quarterly Perf	April	May	June	Year End Target
PL BV106 % New homes on brownfield sites	43.30	45.60	39.60	50.00
CBC008.05 % waste recycled/composted	36.83	38.21	40.14	35.00
CBC Greener - Quarterly				
Quarterly Perf	1st Qtr	Year End Target		
PR008a: Energy Consumption: Gas	52.00	50.00		
PR008b: Energy Consumption- Electricity	91.40	91.00		

CBC Cleaner - 'in month'						
Quarterly Perf	April	May	June	Year End Target		
CBC011 CALC % graffiti removed 28WD	83.00	100.00	100.00	90.00		
CBC012.05 Racist/offensive graffiti 2WD	100.00	100.00	86.00	100.00		
CBC Cleaner - Cumulative						
Quarterly Perf	April	May	June	Year End Target		
EN001.05 % Fly tipping removed 2 WD	83.00	82.00	86.00	75.00		

CBC Safer - 'in month'					
Quarterly Perf	April	May	June	Year End Target	
 BV126a Domestic Burglaries/1000 h'holds	0.52	0.52	0.71	8.45	
 BV128a Vehicle Crimes per 1000 pop	0.63	0.58	0.78	9.45	
New Community Safety Indicator					
Quarterly Perf	April	May	June		
 BV127a.05 Violent Crime / 1,000 pop.	1.40	1.45	1.44		

CBC Corporate Health - 'in-month'							
Quarterly Perf	Apr	May	June	Year End Target	Best Q 03/04	Worst Q 03/04	
	BV008 % Invoices paid within 30 days	69.69	76.06	81.35	96.00	95.90	88.00
	BV011a.02 Women in top 5% earners	21.74	20.83	20.83	23.00	39.05	17.45
	BV011b.02 Black/ethnic in top 5%	0.00	0.00	0.00	0.50	3.70	0.00
	BV014 % Early retirements	0.00	0.00	0.21	0.17	0.17	0.83
	BV015 % Ill health retirements	0.00	0.00	0.00	0.17	0.17	0.54
	BV156 % LA public buildings - disabled	78.00	78.00	78.00	88.00	64.83	21.01
	BV157 % e-government	92.37	92.37	92.40	100.00	74.00	52.30
CBC Corporate Health - 'in-month' (no quartile data)							
Quarterly Perf	Apr	May	June	Year End Target			
	BV011c.05 Top 5%: with a disability	8.70	8.33	8.33	8.71		
	BV016a % Disabled employees	3.50	3.47	3.44	3.55		
	BV017a % Ethnic minorities employees	1.55	1.54	1.53	1.45		
CBC Corporate Health - Cumulative							
Quarterly Perf	Apr	May	June	Year End Target	Best Q 03/04	Worst Q 03/04	
	BV009 % Council Tax collected	11.14	20.60	30.15	98.60	98.29	96.00
	BV010 % NNDR collected	13.78	21.72	30.78	98.60	99.10	97.82
	BV012 Days / shifts lost to sickness	0.83	1.62	2.40	8.90	8.90	11.67

## **COMMENTS ON POOR PERFORMANCE**

### **Customer**

#### **BV008 % invoices processed within 30 days**

The introduction of the new finance system had resulted in a temporary downturn in performance, particularly in April 05, as individuals become used to the new working arrangements. Performance is improving month on month with July's figures showing a further improvement. The Director of Finance expects this trend to continue over the coming months.

### **Corporate Health**

#### **BV11a Women in top 5%**

There will be turnover in Senior Management Group, and it is anticipated that there is the potential to achieve the target by year end.

#### **BV16a % Disabled employees**

There will be turnover of staff, and it is anticipated that there is the potential to achieve the target by year end.

## **COMMENTS ON SPECIFIC INDICATORS**

### **Customer**

#### **CD001 Satisfaction with the Contact Centre**

As the Contact Centre only went live in June, there is no information for the first quarter. There will be a figure for the second quarter.

### **Capacity**

#### **CBC 005 % Budget spent – year end forecast**

Figures will not be available until July as the first three months of the year are spent closing the previous year's accounts.

### **Safer**

#### **BV127a Violent Crime per 1,000 population**

This indicator is new for 2005/06. The first year will be used to establish a baseline figure against which future performance will be measured. The target is to reduce the 2005/06 level of violent crime by 10% over the following three years.

As a temporary arrangement, the actual performance is also entered as the target, to show performance as on track. As a result, there is no year end target.

**Further Information**

For further information, please contact:

Lindsay Parr Ext 5341, Jenny Rowlands Ext 5248, Sarah Dobson Ext 5325.

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Report of	Meeting	Date
Head of Economic Regeneration (Introduced by the Executive Member for Life and Leisure)	Executive Cabinet	08/09/05

## ASTLEY PARK – APPOINTMENT OF PROFESSIONAL TEAM

### PURPOSE OF REPORT

- To seek approval to re-appoint Chris Burnett Associates and Allen Todd Architects as lead consultants on the Astley Park Restoration Project.

### CORPORATE PRIORITIES

- This report relates to the corporate priorities of cleaner, greener, safer.

### RISK ISSUES

- The issue raised and recommendations made in this report involve risk considerations in the following categories:

Strategy		Information	
Reputation	✓	Regulatory/Legal	
Financial	✓	Operational	✓
People		Other	

- The issue for Members is whether the Council will achieve best value if the consultants who have been working on the project for the last five years are re-appointed or whether this can now only be achieved by going through the tender process.

### BACKGROUND

- Over the last few years the Council have used Chris Burnett Associates – Landscape Consultants as the lead consultants and Allen Todd Architects as the Architectural advisors at Stage 1 and Stage 2 of the bid process. They were appointed in 2000 following interviews and tender selection process to put together the Stage 1 bid. This included Surveys, Master plan and Outline Business Plan. They were re-appointed in May 2004 to put together the Stage 2 application which was approved in March this year.
- Following the Stage 2 approval your officers have been in discussion with the Heritage Lottery Fund (HLF) and their project management consultants on the best way to implement the project. The main concern is that we achieve best value.
- The options are to go out to tender, interview and appoint new consultants or re-appoint Chris Burnett Associates and his team to lead the project.
- The first option would enable the Council to test the market and see if the costs of the project could be reduced. However, the project would be delayed for approximately 4 to 6 months in order to carry out the tender, interview and appointment of the consultants. If



new consultants were appointed the project would be further delayed as they come up to speed on the project.

9. The HLF scrutinised the figures at Stage 2 of the bid which were also capped at Stage 1. Consequently I doubt whether significant savings would be found.
10. The appointment of Chris Burnett Associates and his team would reduce the time needed before development commenced on site as they have detailed knowledge of the park and the buildings and the issues which relate to them.
11. The HLF and their consultants have no objection to the re-appointment of the consultants but have asked that in order to help ensure best value that we compare the fee scales for similar commissions. Although it is difficult to compare different projects we have compared the percentage fees being charged by our consultants and other consultants on other projects.

<b>Project</b>	<b>Consultants Fees</b>
Astley Park	9.95%
Georgian Theatre	10.0%
<u>Landscape</u>	
Astley Park	15%
Cuerden Valley Park	16%

12. Although this is a snapshot, the fees being charged are generally in line if not slightly cheaper.

#### **COMMENTS OF THE DIRECTOR OF LEGAL SERVICES**

13. I do not consider it would be an efficient use of the procurement process to have to re-tender for consultants at this stage of the project. Rule 17 of the current Contract Procedure Rules already provides in respect of the appointment of consultants, that in circumstances requiring flexibility or where there are specialised needs, the relevant service head may agree alternative arrangements with the Director of Finance.

#### **COMMENTS OF THE HEAD OF HUMAN RESOURCES**

14. There are no apparent HR implications to this report.

#### **COMMENTS OF THE DIRECTOR OF FINANCE**

15. The level of fees for the consultants is consistent with those included in the HLF grant application. By delaying the project for between 4 and 6 months for the appointment of new consultants we would not be operating in the most efficient manner, and would run the risk of over-running on the project as a whole. Any costs associated with an over-run would be the responsibility of the Council.

#### **CONCLUSION**

16. In view of the knowledge and expertise which Chris Burnett Associates and his team bring to the project, combined with the fact that the cost of the project is capped and the fact that the fees are in line with those charged elsewhere, I feel that it would be appropriate to appoint Chris Burnett Associates and Allen Todd Architects as lead consultants on the restoration of the park.

### RECOMMENDATION

17. That Chris Burnett Associates and Allen Todd Architects should be appointed as lead consultants on the restoration of Astley Park.
18. That the Council enter into a contract with the professional team to deliver the project as set out in the Heritage Lottery Fund grant.

JANE MEEK  
HEAD OF ECONOMIC REGENERATION

<b>Background Papers</b>			
<b>Document</b>	<b>Date</b>	<b>File</b>	<b>Place of Inspection</b>
Astley Park Stage II Implementation	March 2005	Astley Park Stage II	Gillibrand St Offices

<b>Report Author</b>	<b>Ext</b>	<b>Date</b>	<b>Doc ID</b>
Jane Meek	5285		REGENREP/90074JM2

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