

# Executive Cabinet

Agenda and Reports

For consideration on

## Thursday, 24th May 2007

In the Town Hall, Town Hall, Chorley

At 5.00 pm



## **PROCEDURE FOR PUBLIC QUESTIONS/SPEAKING AT EXECUTIVE CABINET MEETINGS**

- Questions should be submitted to the Democratic Services Section by midday, two working days prior to each Executive Cabinet meeting to allow time to prepare appropriate responses and investigate the issue if necessary.
- A maximum period of 3 minutes will be allowed for a question from a member of the public on an item on the agenda. A maximum period of 30 minutes to be allocated for public questions if necessary at each meeting.
- The question to be answered by the Executive Member with responsibility for the service area or whoever is most appropriate.
- On receiving a reply the member of the public will be allowed to ask one supplementary question.
- Members of the public will be able to stay for the rest of the meeting should they so wish but will not be able to speak on any other agenda item upon using their allocated 3 minutes.

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## Chief Executive's Office

Please ask for: Tony Uren  
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Date: 15 May 2007

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**Chief Executive:** Donna Hall

**Chorley**  
Council

Town Hall  
Market Street  
Chorley  
Lancashire  
PR7 1DP

Dear Councillor

## EXECUTIVE CABINET - THURSDAY, 24TH MAY 2007

You are invited to attend a meeting of the Executive Cabinet to be held in the Council Chamber, Town Hall, Chorley on Thursday, 24th May 2007 at 5.00 pm.

### AGENDA

1. **Apologies for absence**
2. **Declarations of any Interests**

Members of the Cabinet are reminded of their responsibility to declare any personal interest in respect of matters contained in this agenda in accordance with the provisions of the Local Government Act 2000, the Council's Constitution and the Members' Code of Conduct. If the personal interest is a prejudicial interest, then the individual Member should not participate in a discussion on the matter and must withdraw from the Council Chamber and not seek to influence a decision on the matter.

3. **Minutes (Pages 1 - 12)**

To confirm as a correct record the minutes of the meeting of the Executive Cabinet held on 29 March 2007 (enclosed).

### MATTERS REFERRED BY THE OVERVIEW AND SCRUTINY COMMITTEE (INTRODUCED BY THE CHAIR OF THE COMMITTEE)

4. **Equality and Diversity Sub-Group - Findings and Recommendations of the Overview and Scrutiny Sub-Group (Pages 13 - 20)**

Report of Director of Policy and Performance (Assistant Chief Executive) (enclosed).

### EXECUTIVE LEADER'S ITEM (INTRODUCED BY THE EXECUTIVE LEADER)

5. **Civic Events Working Group (Pages 21 - 24)**

To receive and consider the minutes and recommendations of the Civic Events Working Group from its meeting held on 12 April 2007 (Minutes enclosed).

Continued....

**CORPORATE POLICY AND PERFORMANCE ITEM (INTRODUCED BY THE EXECUTIVE MEMBER)**

6. **Fourth Quarter Performance Report, 2006/07 - Monitoring Report for 12 months period ending 31 March 2007 (Pages 25 - 74)**

Report of Director of Policy and Performance (Assistant Chief Executive) (enclosed).

**CUSTOMER, DEMOCRATIC AND LEGAL SERVICES ITEM (INTRODUCED BY THE EXECUTIVE MEMBER)**

7. **Contact Centre Efficiencies and Partnership with Lancashire County Council - Scrutiny Inquiry Report (Pages 75 - 100)**

The Executive Cabinet, at its last meeting on 29 March 2007, received and noted the report of the Corporate and Customer Overview and Scrutiny Panel on the outcome of its scrutiny inquiry into Shared Services Contact Centre (Efficiencies and Partnership with Lancashire County Council).

A copy of the report is attached to enable the Executive Cabinet to consider further the report's findings and recommendations.

**ECONOMIC DEVELOPMENT AND REGENERATION ITEMS (INTRODUCED THE EXECUTIVE MEMBER)**

8. **Guiding Principles for Development of the Botany/Great Knowley Site (Pages 101 - 114)**

Report of Director of Development and Regeneration (enclosed).

9. **Variation of Home Repair and Adaptation Grants Schemes in Chorley (Pages 115 - 130)**

Report of Director of Development and Regeneration (enclosed).

**HEALTH, LEISURE AND WELL-BEING ITEM (INTRODUCED BY THE EXECUTIVE MEMBER)**

10. **Astley Park Project - Update (Pages 131 - 134)**

Report of Director of Leisure and Cultural Services (enclosed).

**RESOURCES ITEMS (INTRODUCED BY THE EXECUTIVE MEMBER)**

11. **A Framework for Partnership Working (Pages 135 - 144)**

Report of Director of Finance and Director of Policy and Performance (Assistant Chief Executive) (enclosed).

12. **Achieving Value for Money (Pages 145 - 196)**

Report of Director of Finance (enclosed).

13. **Any other item(s) that the Chair decides is/are urgent**

14. **Exclusion of Press and Public**

To consider the exclusion of the press and public for the following item of business

on the ground that it involves the likely disclosure of exempt information as defined in Paragraph 1 of Part 1 of Schedule 12A to the Local Government Act 1972.

**HEALTH, LEISURE AND WELL-BEING ITEM (INTRODUCED BY THE EXECUTIVE MEMBER)**

15. **Community Managed Community Centres (Pages 197 - 200)**

Report of Director of Leisure and Cultural Services (enclosed).

Yours sincerely



Chief Executive

ENCS

**Distribution**

1. Agenda and reports to all members of the Executive Cabinet, Lead Members and Chief Officers for attendance.

**This information can be made available to you in larger print or on audio tape, or translated into your own language. Please telephone 01257 515118 to access this service.**

આ માહિતીનો અનુવાદ આપની પોતાની ભાષામાં કરી શકાય છે. આ સેવા સરળતાથી મેળવવા માટે કૃપા કરી, આ નંબર પર ફોન કરો: 01257 515822

ان معلومات کا ترجمہ آپ کی اپنی زبان میں بھی کیا جاسکتا ہے۔ یہ خدمت استعمال کرنے کیلئے براہ مہربانی اس نمبر پر ٹیلیفون

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## Executive Cabinet

### Minutes of meeting held on Thursday, 29 March 2007

**Present:** Councillor Mrs Pat Case (Deputy Leader of the Council in the Chair) and Councillors Eric Bell, Alan Cullens, Peter Malpas, Mark Perks and John Walker.

**Also in attendance:**

**Lead Members:** Councillors Peter Baker (Lead Member for Information and Communication Technology), Alan Cain (Lead Member for Human Resources), Mrs Marie Gray (Lead Member for Town Centre), Geoffrey Russell (Lead Member for Finance) and Mrs Iris Smith (Lead Member for Licensing)

**Other Members:** Councillors Kenneth Ball, Dennis Edgerley, Anthony Gee, Daniel Gee, Ralph Snape and Mrs Stella Walsh

#### 07.EC.29 APOLOGIES FOR ABSENCE

An apology for absence was submitted on behalf of the Executive Leader (Councillor P Goldsworthy).

#### 07.EC.30 DECLARATIONS OF ANY INTERESTS

There were no declarations of interest by any of the Executive Members in any of the agenda items.

#### 07.EC.31 MINUTES

The minutes of the meeting of the Executive Cabinet held on 23 February 2007 were confirmed as a correct record for signature by the Chair.

#### 07.EC.32 PUBLIC QUESTIONS

There had been no requests from members of the public to raise at the meeting any questions on the agenda items.

#### 07.EC.33 CONTACT CENTRE EFFICIENCIES AND PARTNERSHIP WITH LANCASHIRE COUNTY COUNCIL - CORPORATE AND CUSTOMER OVERVIEW AND SCRUTINY PANEL INQUIRY

The Executive Cabinet received the final report of the Corporate and Customer Overview and Scrutiny Panel's Inquiry into the Lancashire Shared Services Contact Centre.

The Inquiry had been conducted by two Sub-Groups of the Panel with separate remits to examine (i) the contribution of the Contact Centre to the achievement of the Council's efficiency agenda; and (ii) the effectiveness of the partnership arrangements with the Lancashire County Council and other District Councils in ensuring the delivery of a high quality customer service. While the innovative partnership project had already achieved measurable efficiencies, the Overview and Scrutiny Panel had, after taking account of all the evidence gathered during the Inquiry, made a number of recommendations aimed principally at maximising the efficiencies within the Contact

Centre, particularly through the introduction of the Customer Relationship Management system, and improving both the effectiveness of partnership arrangements and customers' access to services at the Centre.

The Chair of the Overview and Scrutiny Committee (Councillor D Edgerley) reported that the Committee had, at its meeting on 27 March, endorsed the report subject to one minor correction. The Chair of the Corporate and Customer Overview and Scrutiny Panel also commended the report's findings and recommendations for approval and adoption by the Executive Cabinet.

It was accepted that the volume of recorded calls taken on 'General Environmental Issues' warranted an examination of the nature and type of calls, with a view to any identified problems being addressed.

**Decision made:**

That the Corporate and Customer Overview and Scrutiny Panel's report on its scrutiny inquiry into the Shared Services Contact Centre (Efficiencies and Partnership with Lancashire County Council), and the recommendations contained in the report, be noted for further consideration at a future meeting of the Executive Cabinet.

**Reason for decision:**

In order to allow the Executive Cabinet sufficient time to consider the operational and financial implications of the report's findings and recommendations.

**Alternative option(s) considered and rejected:**

The rejection of the report's findings.

**07.EC.34 "GETTING INVOLVED IN SHAPING THE FUTURE OF YOUR NEIGHBOURHOOD" - RESPONSE TO LANCASHIRE COUNTY COUNCIL'S CONSULTATION PAPER**

The Chief Executive submitted a report on a consultation paper issued by the Lancashire County Council entitled "Getting Involved in Shaping the future of your Neighbourhood".

The consultation document set out the County Council's proposals for getting people at a local level involved in the Authority's functions and ways of operation, with the ultimate aim of local residents accepting a degree of ownership and management of local services and facilities.

A draft letter from the Chief Executive in response to the consultation was attached to the report. The proposed response, on behalf of the Borough Council and the Local Strategic Partnership, welcomed the plans as a sound framework for future joint working within neighbourhoods to encourage the engagement of local communities, but highlighted a number of key issues that would require resolution before the neighbourhood approach could be implemented successfully.

**Decision made:**

That the Chief Executive's response to the Lancashire County Council's consultation on engaging communities and neighbourhoods be approved.

**Reason for decision:**



To ensure that the Council's views on the plans to strengthen neighbourhood engagement are made known to the County Council.

**Alternative option(s) considered and rejected**

None.

**07.EC.35 CIVIC EVENTS WORKING GROUP**

The Executive Cabinet received and considered the minutes and recommendations of the recently appointed Civic Events Working Group from its meeting on 12 March 2007.

The Group, set up to co-ordinate the arrangements for certain major civic events, had made a number of recommendations, regarding the arrangements for the visit in 2007 of delegates from Szekesfehervar, the Mayoral Evening on 18 May 2007, the Freedom of the Borough event on 9 June 2007 and the commemoration of the 25<sup>th</sup> anniversary of the Falklands conflict.

**Decision made:**

That, subject to Recommendation (2) of Minute 4 relating to the Mayoral Evening on 18 May 2007 being amended to read as follows, the recommendations of the Civic Events Working Group, be approved and adopted:

'That the evening include buffet refreshments and a maximum of 65 guests be invited, to include Civic dignitaries and members of the Mayor's family at the Mayor's discretion.'

**Reason for decision:**

To ensure that the major civic events in 2007 are organised and regulated in accordance with the Council's policies and budgetary constraints.

**Alternative option(s) considered and rejected:**

None.

**07.EC.36 BEST VALUE RESIDENTS' SURVEY, 2006**

The Executive Cabinet received and considered a report of the Director of Policy and Performance appraising the findings of the triennial Best Value Survey of residents conducted in 2006 on behalf of the Council by MORI IPSOS North in accordance with Audit Commission requirements.

The survey questions had fallen into the following three main categories:

- ***The Council's performance in a number of service areas subject to Best Value performance indicators.***
- The quality of local services which do not make up Best Value performance indicators.
- The perceived quality of life within local communities.

The survey's findings has revealed a reduction in the level of residents' overall general satisfaction with the Council's services since 2003, which accorded with national

trends. The major satisfaction variances had occurred in the areas of waste collection, museums and galleries, and theatres and concert halls, but residents' satisfaction with the Council's complaints handling procedures had increased. The reduction in satisfaction levels was, in fact, anomalous with the statistics that showed residents' acceptance that services had improved over the past three years. This conflict was accredited to the public's aspirations and expectations of the level of public services being raised.

The report also contained a series of recommended actions for the Authority's Directorates to instigate measures to ensure that future services were designed and delivered in a manner that would address the identified concerns and meet residents' expectations.

The Executive Cabinet was also advised that a future report would concentrate on the factors resulting in the demographic and geographical variations evident in the survey's findings and recommend action plans to focus resources on the areas in most need of improvement.

**Decision made:**

That the report be noted and that the series of identified actions be approved for implementation.

**Reason for decision:**

To allow the information contained in the results of the best value survey to be put to effective use in beginning to understand and address the issues raised by the survey and where appropriate using the results to inform service design and delivery and our interactions with residents and customers.

**Alternative option(s) considered and rejected:**

None.

**07.EC.37 TRANSPORT AND SERVICES ACCESSIBILITY PLAN OF CHORLEY BOROUGH**

The Executive Cabinet considered a report of the Director of Development and Regeneration seeking endorsement of the Transport and Accessibility Plan for Chorley, which had been instigated by the Lancashire County Council as a pathfinder project within the Lancashire Local Transport Plan for 2006 – 2010.

The plan focused primarily on public transport provision and its role in enabling the local community to access key services, particularly residents who did not have the use of a car. The Plan concentrated on the non-car modes of transport and the key services that could be accessed by those means.

The Plan recommended a series of improvements to both transport and service provision that could be implemented through a targeted programme of actions.

**Decisions made:**

(1) That the Transport and Services Accessibility Plan for Chorley be approved, subject to the Director of Development and Regeneration being granted delegated authority to make minor textual amendments to the Plan.

(2) That an action plan be produced to guide implementation of the Plan's recommendations.

**Reason for decisions:**

The Plan alone is insufficient to ensure implementation of its recommendations.

**Alternative option(s) considered and rejected:**

None.

**07.EC.38 REVISED LOCAL DEVELOPMENT SCHEME, 2007- 2010**

The Director of Development and Regeneration presented a report seeking approval to the proposed timetable to accompany the revised Local Development Scheme for the Local Development Framework to run from 2007 – 2010 and delegated power to amend the existing Scheme to reflect recent changes.

The Council was required to produce a Local Development Scheme each year, including a timetable of significant dates, or 'milestones', when the relevant documents would be produced. The proposed timetable for the revised Scheme was set out in an appendix to the report.

The timetable had been compiled on the most realistic basis as possible, whilst taking account of the intention to align timetables in the separate strategies of Chorley, South Ribble and Preston and the envisaged delays in the issue of the Regional Spatial Strategy for the North West.

**Decisions made:**

- (1) That, subject to the amendments outlined by the Director of Development and Regeneration, approval be given to the timetable for the draft Local Development Scheme, as now presented.
- (2) That the Director of Development and Regeneration be granted delegated authority to finalise the detailed draft Local Development Scheme.
- (3) That, in the event of the Government Office for the North West or the Planning Inspectorate recommending changes to the draft Scheme, the alterations be effected without further reference to the Executive Cabinet.

**Reason for recommendations:**

The Council must set up a realistic timetable, with adequate time being allowed for the statutory consultations. It is also important to ensure that, if there is a delay by other agencies outside of the Council's control, milestones are not missed.

**Alternative option(s) considered and rejected:**

None.

**07.EC.39 PLANNING AND COMPULSORY PURCHASE ACT 2004: EXTENSION OF "SAVED" POLICIES BEYOND THREE YEARS**

The Director of Development and Regeneration submitted a report requesting delegated authority to extend the role of existing adopted planning policies beyond September 2007. Under the provisions of the Planning and Compulsory Purchase Act 2004, the Council's adopted planning policy documents within the Local Plan would

expire on 27 September 2007, unless the Secretary of State consents to the extension of the policies beyond that date. It had been envisaged that the new planning system would have been operative by that date, but few authorities had so far successfully adopted new planning policies.

It was, therefore, essential to ensure that the Borough was covered by appropriate policies, tailored to the needs of Chorley, beyond September 2007, against which development proposals would be judged. The report suggested a mechanism for the Council to seek the Government's sanction to retain the majority of the policies contained within the Borough Local Plan, as listed in the appendices to the report.

**Decision made:**

That the report be noted and that the Director of Development and Regeneration be granted delegated authority to request the Secretary of State for Communities and Local Government to save the majority of policies contained within the Chorley Borough Local Plan Review, pending the implementation of the new planning system.

**Reason for decision:**

To ensure that there are adequate planning policies available to ensure that development within Chorley contributes positively to the future of the Borough.

**Alternative option(s) considered and rejected:**

The Council could decline to make a submission, in which case the Government Office for the North West could still decide which policies should be saved. However, this risks a number of up to date policies being missed.

**07.EC.40 ACTION PLANS FOR EVERY CHILD MATTERS, CHOOSING HEALTH AND IMPROVING THE QUALITY OF LIFE FOR OLDER PEOPLE**

The Executive Cabinet received and considered a report of the Director of Leisure and Cultural Services recommended approval of Action Plans to progress the Council's work in respect of the Every Child Matters, Choosing Health and Improving the Quality of Life for Older People agendas.

The three work areas had been identified as priority areas within both the Community Strategy and the Council's Corporate Strategy and the action plans produced for each of the three themed areas set out the key projects from 2006/07.

Recent legislation covering the three work areas, along with other initiatives, such as the development of Local Strategic Partnerships and Local Area Agreements, had extended local authorities involvement in the three work areas beyond their traditional role.

The three Action Plans were intended to assist the Council in prioritising requests for further investment and involvement in those work areas and facilitating consultation with the Council's partners to ensure that the targeted resources are used most effectively.

**Decision made:**

That the three Action Plans relating to Every Child Matters, Choosing Health and Improving the Quality of Life for Older People, as shown in Appendices A, B and C to the submitted report, be approved and adopted.

**Reason for decision:**

The Action Plans will allow the Council to co-ordinate better and prioritise its work in the three relevant work areas.

**Alternative option(s) considered and rejected:**

Failure to produce the Action Plans could result in the Council under performing in the three relevant areas and being unable to prioritise resources effectively.

**07.EC.41 ASTLEY PARK UPDATE**

The Executive Cabinet received and considered a report of the Director of Leisure and Cultural Services updating Members on the progress of the works to regenerate and enhance Astley Park.

The Members noted that management responsibility for the delivery of the project had been transferred from the Development and Regeneration Directorate to the Leisure and Cultural Services Directorate, with the consequent transfer of Executive Member portfolio responsibility to the Executive Member for Health, Leisure and Well-being.

A wide ranging review of the capital and revenue implications of the project was currently being undertaken in advance of a future report to the Executive Cabinet.

The Executive Cabinet's instructions were sought on the retention or otherwise, of the Pets Corner facility in the Park, after taking account of the results of the public survey conducted by external consultants which revealed significant support for the inclusion of a pets corner within the project. The Members agreed that, if the facility was retained in the project, further detailed design plans for the pets corner project would need to be presented to the Executive Cabinet.

**Decision made:**

That the report be noted and that the pets corner element of the project be retained and progressed.

**Reason for decision:**

The retention of the pets corner in the project accords with the public's expressed wishes and efficient monitoring of the scheme will ensure its delivery on time and within budget.

**Alternative option(s) considered and rejected:**

None.

**07.EC.42 APPROVAL OF 2007/08 CORE FUNDING AWARDS IN EXCESS OF £5000**

The Executive Cabinet considered a report of the Head of Leisure and Cultural Services seeking the Members' instructions on applications for grant assistance in excess of £5,000 from the Council's Core Fund budget provision in 2007/08. The Executive Member for Health, Leisure and Well-Being would be considering under his delegated powers, the requests for grants less £5,000 to a number of non-profit making organisations.

**Decisions made:**

That approval be given to the making of the following Core Fund grants in excess of £5,000, subject to the Director of Leisure and Cultural Services agreeing and signing off a Core Funding Agreement, with each organisation:

- Chorley and South Ribble Shopmobility – grant of £10,150;
- The Lifestyle Centre, Chorley – grant of £2,385, plus £3,700 towards accommodation costs, via internal transfers
- South Lancashire Arts Partnership – grant of £6,795, subject to the organisation providing an analysis of activity across Chorley, South Ribble and West Lancashire districts and details of the funding from each district.
- Chorley and District Sports Forum – grant of £5,435, subject to the Forum agreeing an appropriate methodology for assessing talented individuals' applications and a fixed budget for the year with the Director of Leisure and Cultural Services, and meeting with the Executive Member for Health, Leisure and Well-Being and the Director of Leisure and Cultural Services to review the remit of the Forum to give priority to the development of the Sport and Physical Activity Alliance.
- Chorley, South Ribble and District Citizens' Advice Bureau – grant of £65,600 (to be paid in two six monthly payments, in advance), plus £17,250 to cover accommodation costs, subject to the Bureau providing the same level of service during 2007/08 as they did in 2006/07 as a minimum, and maintaining the Community Legal Service Quality Mark.

**Reason for decision:**

The grant assistance to key local organisations will enable them to continue with their work, which contributes towards the achievement of the Council's strategic objectives.

**Alternative option(s) considered and rejected:**

Not to award the Core Fund grants in 2007/08.

**07.EC.43 CAPITAL PROGRAMME, 2006/07- MONITORING**

The Executive Director – Corporate and Customer and the Director of Finance presented a joint report monitoring the performance of the 2006/07 Capital Programme and containing recommendations of the Corporate Improvement Board.

The report recommended changes to the 2006/07 Capital Programme Board, the effect of which was to reduce the programme from £13,767,340 to £12,234,570, as a result of the suggested slippage of £1,623,890 to 2007/08 and other changes totalling £181,120.

The recommended slippage of expenditure on a number of schemes to 2007/08 was detailed in Appendix A to the submitted report, with other changes to schemes explained in Appendix B. Appendix C to the report summarised both the capital receipts achieved to date and the anticipated receipts.

**Recommendation made:**

That the Council be recommended:

(1) To approve the revised Capital Programme for 2006/07 in the sum of £12,324,570;

(2) To approve the recommendation of the Corporate Improvement Board to endorse the delivery of the Music Café project by the South Lancashire Arts Partnership at the

Chorley Community Centre, instead of the originally proposed venue of Chorley Interchange.

**Reason for recommendation:**

To effect appropriate revisions to the 2006/07 Capital Programme.

**Alternative option(s) considered and rejected:**

None.

**07.EC.44 IMPLEMENTATION OF SMOKEFREE LEGISLATION**

The Executive Cabinet reconsidered a report of the Director of Streetscene, Neighbourhoods and Environment drawing attention to the likely impact of the Health Act 2006 which introduced the legal framework to make enclosed workplaces and public spaces smoke free from 1 July 2007, and proposing measures to assist the enforcement of the legislation.

It was expected that a significant number of people would wish to stop smoking as a direct result of the new law. The Council would, therefore, need to work in partnership with health professionals to signpost those persons to appropriate counselling services and it was intended that trained volunteer staff would provide a "brief intervention" service within the Council. The report also recommended the temporary appointment of a Smokefree Enforcement Officer to undertake enforcement work within the Council and to help ensure that the public buildings and places affected by the legislation are compliant with the law. The cost of the temporary post would be funded by a £42,000 Government grant towards the Council's initial implementation and enforcement costs in 2007/08.

In response to a Member's enquiry, the Director indicated that the primary legislation allowed exemptions from its prohibitive provisions for only a few defined size and type of premises.

**Decision/recommendation made:**

(1) That approval be given to the creation of a temporary post of Smokefree Enforcement Officer on salary scale SO1, effective up to 31 March 2008.

(2) That the Council be recommended to amend the Council's Constitution by (i) the addition of the implementation of appropriate provisions of the Health Act 2006 to the Council's functions outlined in Appendix 2; and (ii) the extension of the Director of Streetscene, Neighbourhoods and Environment's delegated powers to implement appropriate provisions of the Act, including the appointment of duly authorised Officers to undertake enforcement activity.

**Reason for decision/recommendation:**

To ensure that the Council is properly equipped and effectively resourced to deliver the implementation of the new smoke free legislation.

**Alternative option(s) considered and rejected:**

None.

**07.EC.45 CLEAN NEIGHBOURHOODS AND ENVIRONMENT ACT 2005 - FOULING OF LAND BY DOGS ORDER**

The Director of Streetscene, Neighbourhoods and Environment presented a further report on the adoption of powers created by the Clean Neighbourhoods and Environment Act 2005, following the introduction of regulations to deal with dog fouling, which replaced regulations issued under the Dogs (Fouling of Land) Act 1996.

The report recommended the introduction of a new Order to prohibit the fouling of land by dogs to replace the current Order and the setting of the default fixed penalty notice charge. The proposed Order had been advertised in the local press and an appendix to the submitted report listed the 20 generally supportive responses that had been received.

**Decision/Recommendations made:**

(1) That approval be given to the making of an Order entitled "The Fouling of Land by Dogs (Chorley Council Area) Order 2007" to become effective on 1 May 2007.

(2) That the default fixed penalty notice charge be set at £75.00, with an early payment charge of £50.00 being allowed if payment is received within 10 days of receipt of the fixed penalty notice.

(3) That the Council be recommended to approve the amendment of the Council's Constitution to extend the Director of Streetscene, Neighbourhoods and Environment's delegated powers as linked in Appendix 2 in order to allow the proper authorisation of Officers to undertake enforcement work against persons suspected of committing offences under the terms of the new proposed Order and relevant sections of the Clean Neighbourhoods and Environment Act 2005.

**Reason for decisions/recommendations:**

The proposals will enable the continuation of dog waste control measures and ensure that Officers are appropriately authorised.

**Alternative option(s) considered and rejected:**

None.

**07.EC.46 EXCLUSION OF THE PUBLIC AND PRESS****Decision made:**

That the press and public be excluded from the meeting for the following items of business on the grounds that they involve the likely disclosure of exempt information as defined in Paragraphs 1 and 3 of Part 1 of Schedule 12A to the Local Government Act 1972.

**07.EC.47 STAFFING CHANGES FOLLOWING THE RETIREMENT OF THE EXECUTIVE DIRECTOR - ENVIRONMENT AND COMMUNITY**

The Executive Cabinet considered a report of the Chief Executive recommending a number of staffing changes in her Office and alterations to the Directors reporting procedures as a consequence of the imminent retirement and subsequent disestablishment of the post of Executive Director (Environment and Community).



The staffing proposals had the potential to generate annual savings of £5,000.

**Decisions made:**

(1) That, following the retirement of the Executive Director (Environment and Community), the Directors currently reporting to that post (ie Director of Development and Regeneration, Director of Leisure and Cultural Services and Director of Streetscene, Neighbourhoods and Environment) report directly to the Chief Executive.

(2) That the posts numbered SG/CE/123/0486 in the Chief Executive's Office be disestablished and the following posts be created:

- Office Assistant/Personal Assistant (Scale 6/SO1)
- Support Assistant (Scale 2/3)

(3) That consultations take place with affected staff and Trade Unions and the Executive Leader be granted delegated power to agree the final establishment changes following consideration of consultation feedback.

(4) That the designation of the current Director of Policy and Performance be changed to Director of Policy and Performance (Assistant Chief Executive).

**Reason for decision:**

The changes will ensure that the Council is best placed to deliver the full range of corporate projects set out in the Corporate Strategy.

**Alternative option(s) considered and rejected:**

None

**07.EC.48 WASTE AND RECYCLING COLLECTION CONTRACT**

The Executive Cabinet received a report from the Director of Streetscene, Neighbourhoods and Environment on the action being taken to procure a new waste and recycling collection contract upon the termination of the existing contract with Cleanaway/Veolia on 31 March 2009.

The Director had commenced the tendering process for a new contract that would consolidate the considerable achievements of the current contract and increase customer satisfaction and recycling levels.

A Procurement Group, comprising Members, Officers and waste management and vehicle specialists, had been established, and the Lancashire Waste Partnership had secured Government funding for appointed consultants to produce a procurement model for all partner authorities, with Chorley having been selected as the pilot authority.

The report commented on the several issues that would need to be addressed during the procurement process and included a planned procurement programme that would entail extensive consultations with Members and residents, with particular reference to containers and collection methods.

**Decision made:**

That the report be noted.

**07.EC.49 CUSTOMER, DEMOCRATIC AND LEGAL SERVICES DIRECTORATE -  
RESPONSES TO CONSULTATION ON RESTRUCTURE PROPOSALS**

The Director of Customer, Democratic and Legal Services submitted a report recommending the delegation of authority to two Executive Members to consider the staff responses to the proposals for the restructure of his Directorate agreed for consultation purposes at the last Executive Cabinet meeting, and to determine the final structure. This would enable a decision on the new structure to be made before the next Cabinet meeting in the new Municipal Year following the expiry of the contractual consultation period.

**Decision made:**

That the Executive Leader and the Executive Member for Customer, Democratic and Legal Services be granted delegated authority to respond to the restructure proposals for the Customer, Democratic and Legal Services Directorate, in the light of consultation responses submitted, with the proviso that any material changes to the original proposals will be reported back to the Executive Cabinet.

**Reason for decision:**

To enable contractual requirements to be met and to ensure that a decision on the way forward can be made without undue delay.

**Alternative option(s) considered and rejected:**

None.

Executive Leader



Report of	Meeting	Date
Director of Policy and Performance (Assistant Chief Executive) (Introduced by the Chair of the Overview and Scrutiny Committee)	Executive Cabinet	24 May 2007

## OVERVIEW AND SCRUTINY SUB GROUP EQUALITY AND DIVERSITY FINDINGS AND RECOMMENDATIONS

### PURPOSE OF REPORT

- To provide the executive cabinet with an overview of the work undertaken by the equality and diversity sub- group and to present the committee with suggested recommendations.

### CORPORATE PRIORITIES

- Ensure equality of opportunity and life chances, ensure Chorley Borough Council is a performing organisation.

### 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	

- Failure to continue to properly embed equality and diversity across the authority, may impact upon the reputation of the authority. Equality and diversity is also critical to the revised Comprehensive Performance assessment Framework for District Councils. The recommendations set out in the report will have an operational impact on all Directorates. Equality and diversity outcomes will be key to the result of any future CPA assessment.

### 5. The aims of the Sub Group

- To develop an understanding of how equality and diversity fits with CPA and how equality and diversity can act as a driver to excellence
- To develop the Council's approach to engagement and consultation and the way in which this informs service delivery
- To gain an understanding of the various tools and information systems we could use to drive our progress around equality and diversity



- To explore ways of addressing issues of urban and rural splits within the Borough and the impact this has upon catering for different communities with differing needs
- To understand how we can establish satisfaction and service needs baselines across all of our communities
- To develop mechanisms to ensure that our work around equality and diversity is making a difference for those communities most at disadvantage
- To explore we go about achieving level three of the equality standard, given the capacity issues we face as a district Council
- Establish some real practical ideas which we can take forward to improve outcomes for our communities.
- Change the culture internally
- Develop mechanisms to make service areas accountable for their performance in delivering equitable opportunities and outcomes for all
- To find ways of mainstreaming equality principles into everyday work

## 6. **Summary of the approach**

Members of the sub group met independently of the Overview and scrutiny committee on four occasions. A presentation and general discussion of equality and diversity, the opportunities, current gaps took place at the first meeting, which informed future activity of the sub group.

The manager of the Council's Customer Services met with the group to explore the provisions made at the for meeting the needs of customers with differential needs at the One-Stop Shop and Contact Centre at the Union Street Offices.

The council's GIS officer attended a meeting to discuss the potential use of the Council's GIS software which enables information to be fed into the system to be represented graphically on digital mapping sources.

It was agreed that the system could be developed to provide demographic and deprivation information and identify the localities of particular community groups within the Borough. This information could be useful in determining the specific parts of the Borough to which resources and action should be targeted.

Members of the sub group visited Staffordshire Moorlands District Council to explore their approach to equality and diversity. Staffordshire Moorlands comprises a population of 94,000 within three distinctive market towns, urban fringe settlements and surrounding rural areas. The Council, which employed 309 full time staff, has a current 'good' CPA rating, but was aiming for excellence, and had achieved Level Three of the Equality Standard in March 2006 and so it was felt that we could take some useful lessons from their journey. The visit also involved the examination the operation of one Staffordshire Moorlands 'Rural Kiosks' as part of the visit.

7. **RECOMMENDATIONS FOR ACTION**

Objective	Action	Financial Implications	Timescale	Lead
<b>Leadership and commitment</b>				
Ensure that we have a comprehensive overview of our current position in terms of equality and diversity and the actions required to drive up performance	Conduct an equality audit as a starting point for driving up performance	To be met within existing resources	April 2007	Policy and Performance
Ensure that a strategic overview of equality and diversity is maintained and the equality and diversity implications of decisions are fully explored and understood	Amend the Committee report template so that Equality and Diversity implications have to be outlined in standard reports in the same way as financial and human resources implications. Ensure that all reports are sent to Equality and Diversity lead officer for quality assurance and if necessary ensure that implications templates are completed. Also send reports to communications manager so that a proactive approach to communications around equality and diversity can be taken.	To be met with in existing resources	June 2007	Policy and Performance/ Democratic Services
Clearly articulate to staff, members, and customers our equality and diversity principles.	Establish a set of diversity principles and promote them. Include in the induction pack for new employees and members.	To be met within existing resources	April 2007	Policy and Performance
Inform our understanding of the needs of our Customers and Communities to drive forward our work around equality and diversity.	Undertake our own mini census and or Big Debate to provide additional baseline data so that we are able to understand and meet the needs of our communities	There would be an additional cost associated with this activity.	October 2007	Policy and Performance
Ensure that the needs of our customers and communities in Rural areas of the borough are fully accounted for in service design and delivery.	Include Rural and Urban considerations in Equality Impact Assessments. For example the impact upon rural areas of planning policies which limit building on small areas of land.	To be met within existing resources.	April 2007	Policy and Performance
Ensure that all of our policies and procedures comply with Equality	Undertake an Equality and Diversity Desk top exercise on policies and strategies	To be met within existing	May 2007	Policy and Performance



<p>legislation and our diversity principles. Ensure that we take a partnership approach to addressing the issue raised by demographic change</p>	<p>Undertake partnership review of economic migration and an enquiry into how we collaboratively meet any identified needs.</p>	<p>resources To be met within existing resources</p>	<p>June 2007</p>	<p>Policy and Performance</p>
<p>Ensure that accountability for driving forward the equalities agenda across the authority is clearly established and a strategic approach to delivering equality is embedded across the authority.</p>	<p>Establish an equality and diversity steering group (senior officers) and equality and diversity working group- Equality Champions.</p>	<p>To be met within existing resources</p>	<p>April 2007</p>	<p>Policy and Performance</p>
<p><b>Consultation and Communication</b></p>				
<p>Ensure that we use the proper tools to develop and understanding of the differential needs of our various communities.</p>	<p>Use GIS to map our communities according to a variety of socio-economic and demographic characteristic and use this to inform service provision. Provide all new members and staff with summary information.</p>	<p>To be met within existing resources</p>	<p>May 2007</p>	<p>Policy and Performance/ ICT</p>
<p>Ensure that the good work ongoing around equality and diversity is effectively captured and communicated and all staff, customers and members are aware of the provisions available for customers with specific needs.</p>	<p>Establish a mechanism to centrally collate information about the services provided for hard to reach groups and activity share this information with staff, councillors, customers and the community. Via the Loop?</p>	<p>To be met within existing resources</p>	<p>June 2007</p>	<p>Policy and Performance</p>
<p>Ensure that adjustments made for customers who may experience language barriers when trying to access our services are fit for purpose.</p>	<p>Review the use of translating and interpreting services</p>	<p>To be met within existing resources</p>	<p>June 2007</p>	<p>Policy and Performance</p>
<p>Gain a better understanding of the types of queries hard to reach/ hard to hear groups are approaching the Council with</p>	<p>Conduct a survey of customers attending the Youth and Community Service's surgeries at the One-Stop Shop, together with the nature of the enquiries</p>	<p>To be met within existing resources</p>	<p>June 20007</p>	<p>Customer Services</p>
<p>Ensure that all staff and members are aware of the agencies operating within the borough who can help to progress equality and diversity outcomes for all of our communities</p>	<p>Compile a register of all details of Community Groups and partnerships in Chorley and work with the Chorley Guardian to ensure that these are reflected in their publication.</p>	<p>To be met within existing resources</p>	<p>June 2007</p>	<p>Leisure and Culture</p>
<p>Ensure that we address a gap in consultation forums and mechanisms to address our statutory duty around Gender Equality</p>	<p>Review our approach to consulting on Gender issues</p>	<p>To be met within existing resources</p>	<p>July 2007</p>	<p>Policy and Performance</p>
<p>Ensure that the work of existing groups</p>	<p>Activity publicise the work of the Asian Women's forum</p>	<p>To be met within existing resources</p>	<p>July 2007</p>	<p>Policy and Performance</p>

	and work more effectively in partnership with the form to deliver improvements for target groups.	existing resources		performance
<b>Service provision</b>				
Inform a review of translation and interpreting services.	When people come into the one stop shop and use interpretation services monitor the take up of this service to inform our work around equality and diversity.	To be met within existing resources	April 2007 Onwards	Customer Services
Ensure that customers accessing our services who do not speak English as a first language are made aware of the support services available	Signpost information for non-English speakers about English classes- partnership with Local College?	To be met within existing resources	April 2007 Onwards	Customer Services
Ensure that the licensing service is able to respond to service request from customers who do not speak English as a first language.	Give a copy of the Language Line leaflet to Licensing. The Council's Licensing Section could be encouraged to use the 'Language Line' facility in its dealings with customers	To be met within existing resources	April 2007	Customer Services
Ensure that those who are licensed through the Council are able to fully meet the needs of customers with a disability.	Introduce specifically tailored training in licensing on the needs of customers with disabilities.	To be met within existing resources	July 2007	Customer, Democratic and Legal Services
Ensure that we fully understand the needs of our customers and build a picture of where service delivery failure is disproportionate for particular groups or failing to meet the needs of various diverse groups.	Complaints Monitoring- monitor all complaints in line with the six strands of diversity and use this to inform service provision	To be met within existing resources	April 2007	Policy and performance
Ensure that we offer the highest possible level of support to customers with particular needs with in the one stop shop.	Explore ways of ensuring the Customer Advisors within the one stop shop provide the optimum level of support to customers with particular needs, within resource limitations.	To be met within existing resources	April 2007	Customer Services/ Policy and Performance
Ensure that customers who may be hard to reach or hard to hear are afforded with equitable access to our services, using advocate services as possible/ necessary.	Extend surgeries in One Stop Shop for Hard to Reach Groups- Age Concern/ Job Centre Plus. Explore possibility of working with partners (eg PCT to deliver services from the One Stop Shop).	Additional costs would be associated with this activity.	April 2007 Onwards	Customer Services
Ensure that we fully understand the needs of our customers and build a picture of where service delivery failure is disproportionate for particular groups	Ensure equality monitoring is included in all employee and customer feedback	To be met within existing resources	August 2007	Policy and Performance

or failing to meet the needs of various diverse groups.	Extend remit of Multi Agency Diversity Incidents Panel to address hate incidents relating to all six strands of equality and diversity	To be met within existing resources	April 2007	Policy and Performance
<b>Employment</b>				
Ensure that all staff are aware of and comply with statutory requirements around equality and diversity and are able to meet the needs of all of our customers.	Review our approach to equality and diversity training to ensure that it meets statutory requirements and the needs of our staff, customers and communities.	To be met within existing resources	April 2007	Human Resources
Ensure that the Council as an employer is able to offer equitable employment opportunities and that our policies fully embed an equalities approach.	Review the Council's suite of Human Resources policies amend and introduce new policies to further our equality objectives as an employer- possibly consider introducing a religious observances policy, time off for dependants policy, adoption policy.	To be met within existing resources	April 2007 Ongoing	Human Resources
Ensure that staff have the skills necessary to enable us as a Council to properly engage with different groups within the Borough.	The personal specification for the new Customer Access Officer post with special responsibility for hard to reach groups could include a desirability for applicants to be able to speak one or more languages other than English.	To be met within existing resources	April 2007	Human Resources/ Customer Services
Ensure that people from hard to reach groups are aware of vacancies within the Council as see Chorley as an equal right employer.	Advertise posts in a series of targeted publications – Stonewall, Carers UK, Disabled Go,	Additional costs may be associated with this activity.	April 2007 Ongoing	Human Resources
<b>Member Involvement</b>				
Ensure that members receive equality and diversity training	Provide equality and diversity training for members. (Specifically tailored for chairs of diversity-targeted focus groups).	To be met within existing resources	June 2007	Human Resources/ Policy and Performance
Ensure that members take every opportunity to engage with young people in the Borough	Gain a greater understanding of the ways in which members engage with young people and explore innovative ways of furthering this.	May attract additional costs	April 2007 Ongoing	Democratic Services

There are two outstanding issues which the sub group has not to date been able to fully address,

- **Access to services in Rural Areas**
- **Addressing satisfaction** Further consideration will be given on an ongoing basis to how we tackle these issues as part of our bid to be recognised as an excellent Council.



**8. CONCLUSION**

It is clear that equality and diversity covers a broad ranging agenda, can incorporate Race, Disability, Gender, Age, Sexuality, Religion, elements of Community Cohesion and more- the remit is very comprehensive.

In its purest sense equality and diversity is about delivering equality of access, equality of quality and equality of outcome for all and ensuring that our diverse communities are valued and enabled to prosper. The recommendations outlined above set out the clearest ways in which we as a Council can achieve this using the tools at our disposal and learning from the journey that others have taken in embedding equality and diversity in their organisations. In delivering against equality and diversity objectives and ensuring that all of our customers are afforded equality of outcome and opportunity we will also be meeting many of the requirements of the CPA and embedding best practice across the organisation.

**COMMENTS OF THE DIRECTOR OF HUMAN RESOURCES**

9. The director of Human Resources approves the recommendations in the above report.

**COMMENTS OF THE DIRECTOR OF FINANCE**

10. The report contains no direct financial implications.

**RECOMMENDATION(S)**

11. That all of the recommendations at section seven be approved in principle subject to further costing details.

**REASON FOR RECOMMENDATION**

To ensure that we are able to make progress in meeting the CPA requirements for Equality and Diversity

**ALTERNATIVE OPTIONS CONSIDERED AND REJECTED**

12. That none, or a number of, the recommendations set out above be approved in principle subject to further costing details.

LESLEY-ANN FENTON  
DIRECTOR OF POLICY AND PERFORMANCE

There are no background papers to this report.

Report Author	Ext	Date	Doc ID
Sarah Dobson	5325	9 <sup>th</sup> May 07	ADMINREP/REPORT



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**Civic Events Working Group****Thursday, 12 April 2007**

**Present:** Councillor John Walker (Chair), Councillors Eric Bell and Danny Gee

**Officers Present:** Donna Hall (Chief Executive), Steve Pearce (Assistant Head of Democratic Services), Carol Iddon (Civic Services Manager), Giordan Fong (Senior Legal Assistant) and Dianne Scambler (Trainee Democratic Services Officer)

**Also in attendance:** M Finan (Chorley Royal British Legion), Mr Gaskell (Chorley Royal British Legion)

**07.08 APOLOGIES FOR ABSENCE**

Apologies for absence were received from Gary Hall (Director of Finance) and Louise McCall (Curator of Astley Hall)

**07.09 MINUTES**

**RESOLVED – That the minutes of the meeting of the Civic Events Working Group held on 12 March 2007 be confirmed as a correct record for signing by the Chair, subject to the amendment of minute 07.04 to reflect the correct procedure for inviting guests to the Civic Event.**

**07.10 DECLARATIONS OF ANY INTEREST**

No declarations of interest were declared.

**07.11 COMMEMORATION OF FALKLANDS 25TH ANNIVERSARY - 22 APRIL 2007**

Mr Finan and Mr Gaskell, representatives of the Chorley Royal British Legion attended the meeting to report on the arrangements for their annual service of remembrance and parade for the Falklands Campaign to be held on 22 April 2007, which would also mark the 25<sup>th</sup> anniversary.

25 Standards would be on parade along with the Deputy Mayor of Chorley, dignitaries from the authority, serving members of the armed forces, local ex-service personnel and the band of the Royal Artillery. The parade would then walk down to the local cenotaph in Astley Park where Reverend Cree would conduct an open-air memorial service.

Details of the event are to be posted on the Royal British Legion's website as Chorley's contribution to commemorating the 25<sup>th</sup> anniversary of the Falklands campaign.

The group thought that there was little point in holding a similar event in June and fully supported the arrangements that had been put into place by the Chorley Branch of the Royal British Legion.

**RESOLVED – 1. That the authority fully supports the arrangements made by the Chorley Branch Royal British Legion for the commemoration of the Falklands 25<sup>th</sup> anniversary on 22 April 2007.**

**2. That the Mayor's Secretary sends a letter to all Members of the Council inviting them to attend the event.**

**07.12 MAYORAL EVENING - 18 MAY 2007**

The Civic Services Manager reported that the arrangements for the Mayoral Event were well under way and that the Mayor's Secretary had just sent out the invitations.

The Curator of Astley Hall had given her assurances that the guests would be able to access the Astley Hall from the rear, but that due to the present building works taking place at Astley Park the guests would have to park on the public car park off Hallgate, Astley Village and walk around to the front of the Hall via the public footpaths. Details of the arrangements regarding access to Astley Hall on the night would be sent out to all the guests.

**RESOLVED – That the report be noted.**

**07.13 FREEDOM OF THE BOROUGH EVENT - 9 JUNE 2007**

The Assistant Head of Democratic Services reported further on the programme and action plan for the freedom event. The Police had agreed to put the necessary arrangements in place to stop traffic from proceeding down St. Thomas's Road for the duration of the presentation of the freedom scroll on St. Thomas's Square and the wording of the scroll would read " the right to march through the streets of Chorley....with drums beating, bands playing and flags flying" in view of the fact that the 5 General Support Medical Regiment was a non combatant unit..

**RESOLVED – That the updated programme and action plan be noted.**

**07.14 SZEKESFEHERVAR****(a) Visit by Delegation 2007**

The Civic Services Manger reported that there was nothing of real significance or importance happening around the borough during September and October that we would be able to include within an itinerary for the visit of the Hungarian delegation during 2007.

It was generally felt that it was worth postponing the delegation until the next scheduled visit in two years time. The visit could then be planned around any special events happening at that time.

The Chorley Divisional Scouts were planning a visit to Szekesfehervar and the winner of the Astley Hall Artist Competition would also be attending the 18<sup>th</sup> Annual International Artist Camp in Agard, so it was felt that the relationship would still be maintained between the two towns.

It was also suggested that a small donation be made to the Scouts to help raise funds for their forthcoming trip.

**RESOLVED – 1. It was agreed by the working group to explore the possibility of there not being a visit this year and to find out the reaction from our twin town.**

**2. That a small donation be made to the Chorley District Scouts Association.**

**(b) Artist Camp**

The Curator reported that the opportunity to go to the 18<sup>th</sup> Annual International Artist Camp being held in Agard, Szekesfehervar from 24 September to 3 October 2007 would be the Visitors Choice Prize in the Astley Hall Open Exhibition. The Exhibition would open on Good Friday and the judging would take place in April. All the artists would be informed that the winner would be a Chorley resident. Details of the winning entry would be reported at a further meeting of this group.

**RESOLVED – That the report be noted.**

**(c) Cookery Project**

Details of the Szekesfehervar Cookery Project Programme had been circulated to all High Schools in the Borough of Chorley and Runshaw College and, a list of all the hotels and restaurants in the Borough had been sent to Councillor Eva Brajer.

**07.15 ST. GEORGE'S DAY - 23 APRIL 2007**

**RESOLVED – That the Civic Services Manager would make the necessary arrangements for the flag of the Borough and the flag of St George to be flown on 23 April 2007.**

Chair

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Report of	Meeting	Date
Director of Policy and Performance (Assistant Chief Executive) (Introduced by the Executive Member for Corporate Policy and Performance)	Executive Cabinet	24th May 2007

## 4<sup>th</sup> Quarter Performance Report 2006/07

### PURPOSE OF REPORT`

1. This monitoring report sets out performance against the Corporate Strategy and the Council's Best Value Performance Indicators for 2006/07.

### CORPORATE PRIORITIES

2. This report impacts on the Corporate Priorities, as the areas of performance covered by the report relate to all four of the Council's priorities. More specifically the report contributes to the strategic objective of ensuring that Chorley Borough Council is a performing organisation.

### RISK ISSUES

3. 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	

4. This report addresses areas of risk in the Council's Performance. If performance is not actively monitored and managed the Council runs the risk of failing to achieve its strategic goals or good operational performance. Performance management is of importance to the standing and reputation of the authority. The report sets out the Council's position at year end and how this will inform performance management into 2007/08.

### 5. EXECUTIVE SUMMARY

- 5.1 The year-end Performance report analyses the performance of key projects and measures designed to deliver and (assess the delivery of) the strategic objectives set out in the Corporate Strategy. The report also looks at our performance against a series of best value performance indicators (BVPIs) and LAA targets as at the end of March 2007. The report also identifies key actions to address underperformance.
- 5.2 Overall the performance of key projects year-end is excellent, with the majority of projects performing as planned. It is clear that good progress has been made within the last quarter, with a number of projects completing and delivering real outcomes, and also



all the remaining projects, which were yet to start at the end of the third quarter are now underway. On a further positive note 73% of those corporate strategy indicators which can be measured at this stage in delivery of the corporate strategy are achieving target. Performance against the long-term outcomes set out in the strategy demonstrates that our programme of delivery is realising some real outcomes.

- 5.3 At year-end 2006/07 54% (54) of indicators have improved when compared to year-end 2005/06 (54 out of 100), this is extremely positive given the level of improvement the Council's performance has shown in previous years.
- 5.4 19% (19) showed consistent performance, of which 5 are achieving the highest possible level of performance and so cannot show any further improvement. Overall 73% (73) indicators showed maintained or improved performance from 2005/06 to 2006/07
- 5.5 At year end 2006/07 32% (22) indicators were in the top quartile, 35% in the second (24) 24% (16) in the third quartile and 9% (6) in the fourth quartile this represents a significant improvement in last year with 26% in the first quartile (16), 28% in the second quartile (17), 23% in the third quartile (14) and 23 in the fourth quartile (14)%. In 2006/07 67% of the total basket of best value performance indicators are in the first and second quartiles compared to only 54% in 2005/06.
- 5.6 Overall the organisation continues to deliver excellent performance in terms of outcomes (performance information) and delivering a programme for change (project and programme management). Performance has continued to improve, building on the already impressive record of achievement over the last three years. As we move into the next municipal year we will focus on target setting and continued effective performance management to ensure that this journey of improvement and excellence continues.

## **6. BACKGROUND**

- 6.1 The Corporate Strategy is the key strategic document for the authority and is focused on delivering the Council's six strategic objectives that underpin the Council's priorities; people, place, prosperity and performance. The Corporate Strategy mirrors, and outlines the Council's contribution to, the Community Strategy, delivery of which is being taken forward by the Chorley Partnership.
- 6.2 The Corporate Strategy identifies a programme of 44 key projects, which contribute to the achievement of our objectives. These key projects will be delivered using the Council's corporate project management toolkit, which has been used successfully to improve performance for other key areas of work such as the Capital Programme.
- 6.3 Taken together the performance of key projects at year-end and the monitoring of key performance indicators sets out our current position in the delivery of the strategic and long term objectives set out in the Corporate Strategy.
- 6.4 Best Value Performance Indicators are National indicators collected in accordance with definitions issued by the Department for Communities and Local Government.
- 6.5 Year End Business Plan monitoring statements have also been produced by directorates separately, and have been sent to the Overview and Scrutiny Committee and panels. Year End Business Plan Monitoring Statements outline the performance of Key Directorate Performance Indicators and the key messages emerging from Directorates at the end of the municipal year.
- 6.6 The Local Area Agreement (LAA) is an agreement between central government and public bodies in Lancashire (with the County Council acting as accountable body) to deliver against a series of outcomes and targets across four cross cutting theme blocks;



- Children and Young People
- Healthier Communities and older people
- Safer, Stronger Communities
- Economic Development and Enterprise

As a district Council we are required to report against a number of LAA indicators at year-end and these can be found in the main body of the report.

## **7. REPORT OVERVIEW**

The report provides analysis and updates covering the following:

- 7.1 Performance regarding delivery of the Corporate Strategy. Incorporating an analysis of the performance of key projects and analysis of the performance of the indicators which measure how far we are delivering against the objectives set out in the strategy.
- 7.2 Exception reports for projects currently not on track, outlining the reasons why and the plans to bring performance back on track.
- 7.3 The overall trend of change for Best Value Performance Indicators compared to 2005/06 municipal year.
- 7.4 The Councils progress in achieving targets as set out in the performance agreement and in particular focusing on driving up the performance of those BVPI's which are more than 5% below the target.
- 7.5 The Councils position in comparison with 2005/06 national quartile data where comparative data is available. Note 2006/07 Quartile data will be made available in December 2007, when comparisons will be made using 2006/07 quartile data.
- 7.6 Identification and commentary (incorporating contextual information and remedial action) for those BVPIs, which have declined when compared with 2005/06.
- 7.7 Performance against the targets contained within the Lancashire LAA which Chorley are currently required to report against along with a general overview of progress in delivery of the LAA.
- 7.8 Action Plans which outline reasons for declining performance, the action to be taken to improve performance in the next municipal year are included for those indicators which are 5% or more below target and/ or declining from 2005/06.
- 7.9 A Focus on those areas where performance has significantly improved or exceeded expectations picking out key messages and lessons which can be shared to drive improvement across the authority.

## **8. KEY PROJECT PERFORMANCE OVERVIEW**

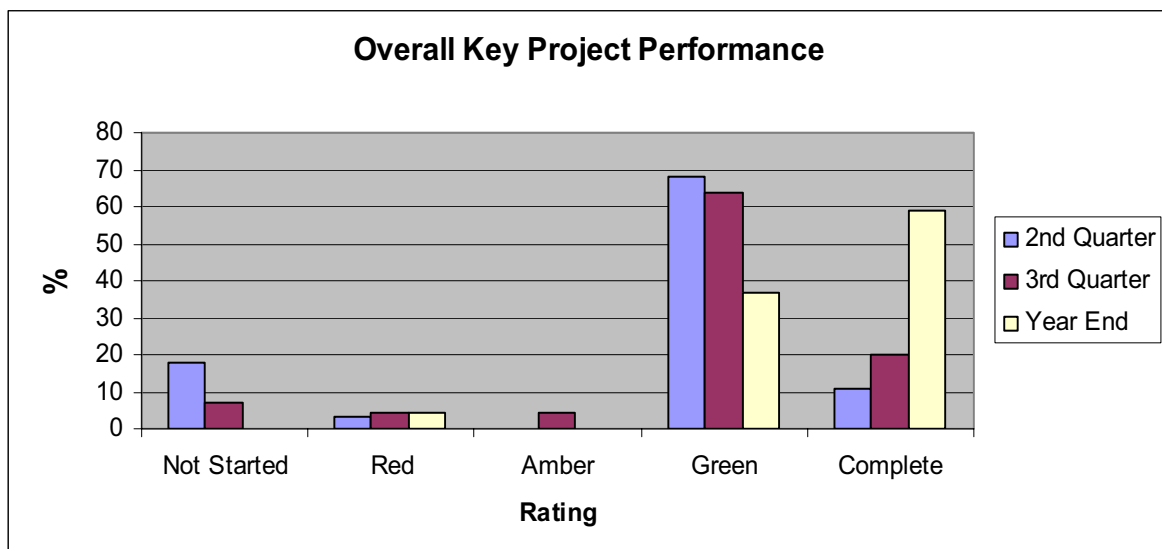
- 8.1 This section looks at the progress made over the last year in delivering the 44 key projects set out in the Corporate Strategy.
- 8.2 2006/07 was the first year that key projects have been highlighted for inclusion in the Corporate Strategy

- 8.3 The use of project management for the key projects has been successful in helping us focus on key areas of work to make sure we are really targeting our priority areas and delivering real outcomes and benefits to our customers, and ultimately achieving our objectives as set out in the Corporate Strategy.
- 8.4 In order to report on progress throughout the year lead officers have been asked to complete a business case, a high level project plan, and quarterly highlight reports.
- 8.5 The highlight reports provide a brief update on the work carried each quarter, what achievements are expected in the next quarter, any current risks and issues affecting the project, and an overall rating of either 'Green', 'Amber' or 'Red'.
- 8.6 If the project is not going as planned, then an exception report is produced instead. This is similar to the action plans used for performance indicators that are below target. They provide a brief analysis of the problem(s), and options for bringing the project back on track.

**9. OVERALL PERFORMANCE**

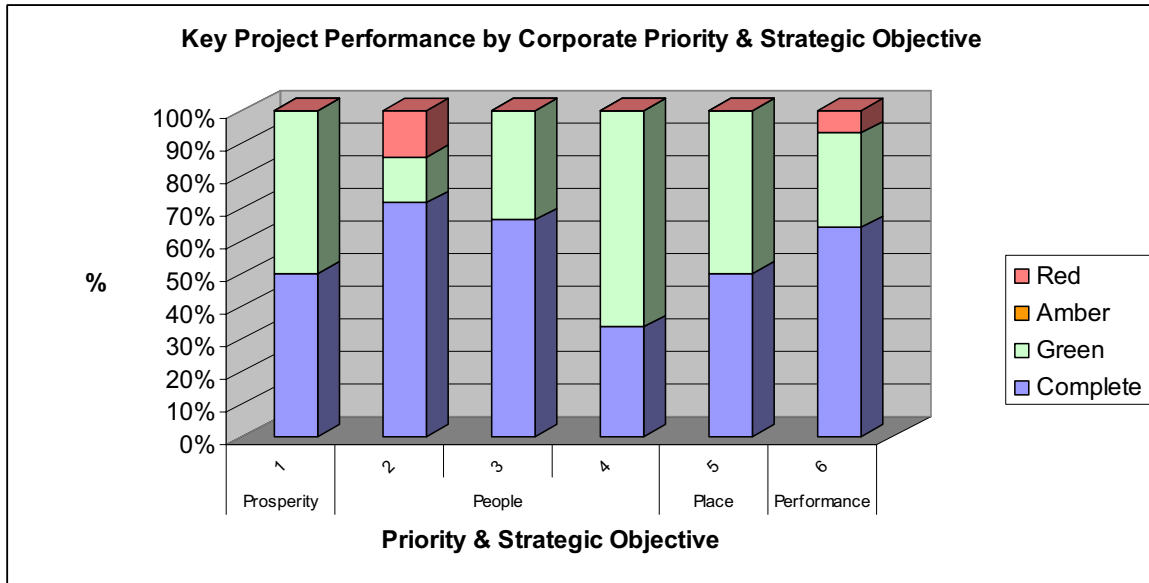
- 9.1 Overall the performance of the key projects is excellent with 95.5% of the projects either completed, progressing ahead of plan or on plan. This is an increase of 10.5% since the end of the third quarter with all projects now either completed or underway.
- 9.2 The table and graph below shows improved performance in comparison with the third quarter. The reduction in the number of projects rated as 'green' is due to them now being complete, and therefore a positive, as is the number of schemes rated 'amber' which has now been reduced from 4.5% to nil.

	2 <sup>nd</sup> Qtr %	3 <sup>rd</sup> Qtr %	Year End %	Variance %
Completed Projects	11	20	59	+39
Projects rated as 'Green'	68	64	36.5	-27.5
Projects rated as 'Amber'	0	4.5	0	-4.5
Projects rated as 'Red'	3	4.5	4.5	0
Project not started	18	7	0	-7



**10. KEY PROJECT PERFORMANCE BY CORPORATE PRIORITY & STRATEGIC OBJECTIVE**

10.1 Strategic objectives 1, 'Put Chorley at the heart of regional economic development in the central Lancashire sub-region', 3, 'Involving People in their Communities', 4, 'Improved access to public services', and 5, 'develop the character and feel of Chorley as a good place to live' are all 100% complete or on track.



As at the end of the third quarter there are two projects, which have been identified as 'behind schedule' and therefore rated as 'red'. These are affecting strategic objective 2, 'improving equality of opportunity and life chance', and 6, 'Ensure Chorley Borough Council is a performing organisation'.

They are different projects to those identified in the last quarter. Explanations and recommended actions to address the issues which are delaying the projects are detailed in exception reports which are included later in the report.

**11. COMPLETED KEY PROJECTS**

11.1 At year-end 26 key projects (59%) had been completed.

11.2 The table below shows the key outcomes from the projects, which have completed in the final quarter between January and March 2007.

Key Project	Key Outcomes
Address the key issue of Town Centre Parking	<p>Amendment of the parking tariff on the flat iron car park has lead to the following outcomes:</p> <ul style="list-style-type: none"> <li>• Increase in the use of the Flat Iron Car park prior to Christmas</li> <li>• Increase in the use of the Flat Iron Car park generally</li> <li>• Increase in the average duration of stay on the Flat Iron Car park</li> <li>• Maintain revenue at or above previous levels</li> <li>• Reduction in the number of Penalty Charge Notices</li> </ul>

	<p>issued for overstaying the period paid for</p> <p>Any further activity to address Town Centre parking will be captured as an integral part of the Town Centre Strategy project.</p>
<p>Prepare Chorley 'Every Child Matters' and 'Youth Matters' action plans</p>	<ul style="list-style-type: none"> <li>• Identification of member and officer champions for issues</li> <li>• Clarity around what key tasks the Council is tackling over the next 3 years</li> <li>• Improved understanding amongst partners as to how the Council contributes to this agenda</li> <li>• The Council is better placed to prioritise and respond to requests for support</li> </ul>
<p>Develop the 'Get up and Go' Programme</p>	<ul style="list-style-type: none"> <li>• An increase in usage of pre-booked activities in 2006/07</li> <li>• Children and young people involved in the shaping of the programme</li> <li>• Finalists in Municipal Journal Awards for our Get Up and Go programme</li> <li>• An action plan showing areas for development over the next 2 years</li> </ul>
<p>Prepare a Chorley 'Older Peoples' action plan</p>	<ul style="list-style-type: none"> <li>• Identification of member and officer champions for issues</li> <li>• Clarity around what key tasks the Council is tackling over the next 3 years</li> <li>• Improved understanding amongst partners as to how the Council contributes to this agenda</li> <li>• The Council is better placed to prioritise and respond to requests for support</li> </ul>
<p>Prepare a 'Choosing Health' action plan</p>	<ul style="list-style-type: none"> <li>• Identification of member and officer champions for issues</li> <li>• Clarity around what key tasks the Council is tackling over the next 3 years</li> <li>• Improved understanding amongst partners as to how the Council contributes to this agenda</li> <li>• The Council is better placed to prioritise and respond to requests for support</li> </ul>
<p>Strengthen links with Parish Council, Faith and Community and Voluntary Agencies</p>	<ul style="list-style-type: none"> <li>• Various local community groups established and supported</li> <li>• Draft Local Funding Compact produced</li> <li>• Creation of Chorley4Funding Network website - "Funding 4 U" to provide more support for CVS and faith groups searching for grants and improved access to funding searches. Pilot Training on use of the website was carried out by External Funding Officer.</li> <li>• 198+ searches performed 'on-line' between June 06 and March 07, which resulted in non-cashable efficiencies of £7,541. Usage by local groups continues to rise.</li> <li>• Increased external funding accessed for groups- Facilitated the achievement of £599,577 (2005/06) and £897,297 (2006/07) of external funding for Chorley community groups and organisations.</li> <li>• Organised Holocaust Event to promote Community Cohesion.</li> <li>• Chorley Council has attained membership of the Interfaith Forum.</li> </ul>

<p>Produce a Transport Accessibility Plan</p>	<ul style="list-style-type: none"> <li>• Establishment of Pilot Parish Council Support Scheme</li> <li>• Full review of how key local services are currently delivered</li> <li>• Assessment of how accessible services are in terms of non-car mode travel</li> <li>• Identification of feasible transport and service provision improvements</li> <li>• Pathfinder learning points</li> <li>• Recommendations for action</li> </ul>
<p>Reconfigure current service delivery arrangements to improve the provision of street scene service</p>	<p>All streetscene services co-located at Bengal St. Depot from October 2006 with strengthening of both management and service improvement functions.</p> <p>All streetscene service requests now supported through the Contact Centre with an enhanced functionality through a developed Authority system access and help screen capability.</p> <p>Improved service request co-ordination through common business support unit at Bengal St.</p> <p>Multi Agency Tasking And Coordination [MATAC] and delivery of streetscene and crime and disorder incidents and service requests introduced.</p> <p>On line tracking systems introduced to record mechanical sweeping effort and aid deployment.</p> <p>Grounds maintenance teams reorganised to direct resource at key sites and improve satisfaction.</p> <p>Potential losses of service capability from Warden Service dissolution mitigated by reconfigured Neighbourhood Officer service.</p> <p>Efficiencies introduced by re-tendering Graffiti removal and Public Toilet Cleansing and Maintenance contracts.</p> <p>Negotiated improvements in Refuse and Recycling contract to improve reliability of recycling service.</p> <p>Biological heritage assessment of SNED estate completed and action plan produced to develop habitat management plans for key sites.</p> <p>Highways residual agreement concluded to mitigate effects of loss of Highways Partnership.</p> <p>Housing disengagement concluded with satisfactory continuation of public space services.</p>
<p>Complete the process of Housing Stock Transfer</p>	<ul style="list-style-type: none"> <li>• CCH established as a registered social landlord.</li> <li>• The Housing Stock Transfer was successfully transferred to Chorley Community Housing (CCH) on the 26/03/07.</li> <li>• The transfer included approximately 2,900 houses, and the transfer of staff to CCH.</li> <li>• CCH will deliver £26 million of major investment in homes and services for tenant over the next 5 years.</li> </ul>

<p>Develop a basket of balanced housing market measures by 01/04/2007</p>	<p>Basket of measured developed from which to measure and improved future performance.</p>
<p>Pilot innovative ways of reassuring our communities</p>	<p>Beneficial agreement concluded to enhance the Police Community Support Officer service in Chorley by 22 PCSOs to improve feelings of safety by citizens.</p> <p>Multi Agency Tasking And Coordination [MATAC] and delivery of streetscene and crime and disorder incidents and service requests introduced.</p> <p>Mainstreaming of Crime and Disorder resources to ensure continuity and retention of skills in the section.</p> <p>Additional support to Parish Councils to free local resources from additional costs of connection to CCTV monitoring service.</p> <p>Offender management unit for Southern Division located to Chorley to better manage persistent and prolific offenders.</p> <p>Alleygate schemes better funded and revised acceptance criteria introduced to remove obstacles to progress.</p>
<p>Develop and implement Use of Resources and VFM action plan</p>	<p>The use of resources Key Lines Of Enquiry (KLOE) scores have improved with each KLOE now scoring 3 (performing well) or 4 (performing strongly):</p> <p>Financial Reporting – Score improved from 2 to 3                  Financial Management – Score remained 3                  Financial Standing – Score remained 3                  Internal control - Score improved from 2 to 3                  Value For Money – Score improved from 3 to 4</p> <p>These improvements will support our CPA reassessment later this year where we aim to achieve 'excellent' status</p>
<p>Develop a strategy to deliver 0% Council Tax increase in 2006/07</p>	<p>A 0% Council Tax increase was achieved.</p>
<p>Implement HR Strategy and achieve IIP and explore other external accreditation</p>	<p>External acknowledgement and national recognition for our people processes in terms of the three elements of 'Plan, Do, Review'. In particular these cover:</p> <ul style="list-style-type: none"> <li>• Clear Strategic Objectives</li> <li>• Effective Individual Performance Management</li> <li>• Good Communication</li> <li>• Staff and Member engagement</li> <li>• Promotion of Equality of opportunity with development opportunities</li> <li>• Effective leadership and management</li> <li>• Recognition of staff performance</li> <li>• Evidence of continual improvement</li> </ul> <p>Implementation of HR Strategy and exploring other external accreditations will continue in the every day work of the HR Directorate.</p>
<p>To embed effective performance and risk management across the</p>	<ul style="list-style-type: none"> <li>• Quarterly Performance Round Tables have been established to challenge performance.</li> <li>• Improved performance monitoring reporting, which now</li> </ul>

<p>organisation</p>	<p>includes more analysis on National and local indicators, the impact on CPA, the progress on delivering the key projects.</p> <ul style="list-style-type: none"> <li>• Performance Agreements have been established. These are agreements from Directors and Portfolio holders to delivering performance improvements.</li> <li>• Improved Data Quality – Data quality strategy produced and training provided to all staff involved in PI collection.</li> <li>• Positive Direction of Travel</li> <li>• Improved Performance</li> <li>• Revised performance management framework</li> </ul>
<p>Rationalise Council Accommodation</p>	<p>The rationalisation of CBC offices into 3 centres (Town Hall, Bengal ST &amp; Union St) and consolidation of Directorates for greater efficiency as follows –</p> <ul style="list-style-type: none"> <li>• Finance Directorate in Town Hall</li> <li>• Development &amp; Regeneration in Union St</li> <li>• Policy &amp; Performance in Town Hall</li> <li>• Gillibrand St &amp; part Bengal St offices let to the newly formed CCH</li> <li>• Gillibrand St Annex let to Liberata in anticipation of property services outsourcing</li> </ul>
<p>Realign the Business Planning Process</p>	<ul style="list-style-type: none"> <li>• Strengthened Business Improvement Planning (BIP) Guidance</li> <li>• Improved consideration and integration of resource implications, risk assessment, efficiency and equality actions.</li> <li>• More detail of key tasks and milestones to enable more accurate performance monitoring, clearer links to our priorities, more of a focus on business improvements rather than day to day delivery.</li> <li>• This will enable directorates to develop more robust BIPS, and support our aim of becoming an excellent Council.</li> <li>• Achievements are recorded, which can be used as evidence in the Direction of Travel self assessment</li> </ul>

**12. KEY PROJECT IDENTIFIED AS ‘RED’**

The following key projects have been identified as ‘red’, meaning that they are not on track. This could be that they are behind schedule, over budget, or there is a serious risk affecting the delivery of the project.

**Develop service level agreements with Lancashire County Council to deliver the LAA and Community Strategy priorities**

The Lancashire LAA for 2006/07 – 2008/09 was negotiated by LCC and respective block leads in the early part of 2006. In order to ensure the targets and outcomes contained within the agreement would be delivered, LCC agreed to draft a Service Level Agreement for partners (i.e. district councils and other public sector agencies) to sign up to.

The first draft SLA was issued to partners for consideration and sign-up in late Autumn 2006. The document was considered by the Chief Executive, Director of Policy and Performance and the Director of Customer, Democratic and Legal Services. In line with other districts, the view at that time was that the document was substantially incomplete

(contained blank pages) with too much emphasis on the role of partners rather than LCC and as a consequence, Chorley refused to sign the document.

In response to the feedback LCC agreed to re-draft the SLA and submit a revised version for consideration by partners. To date the revised SLA has not been issued despite repeated promises that it will be issued shortly. On 30 April LCC was contacted for the latest position and we were informed that the agreement is held up due to the financial element, which is being debated in the funding task and finish group of which Chorley is not a member. The document is now expected at the end of quarter one (July 2007).

The development of the SLA rests with the County Council and until a further draft is received it is impossible to complete this key project in the timescales set.

There is also a further issue in that the Government has announced the introduction of a new framework for LAA's from Summer 2008, 12 months before Lancashire's LAA concludes. Given this change in approach it is a possibility that the SLA when agreed may be superseded by a new agreement. LCC will be asked about this possibility at a future LAA Performance meeting in May.

#### Lead Officers Comments

The issue with this key project is that its progress rests mainly in the hands of the County Council and even when produced, only one agreement will be produced between county and all partners rather than individual ones on a locality or partnership basis.

With this constraint in mind there are two options:

1. Wait until a revised SLA is issued (expected July) and subject to the collective response we may be able to complete the project during this financial year, significantly behind the original schedule.
2. Given the lack of control over this project we should close this project down. If and when the SLA is issued by LCC, Chorley will (depending on the requirements) respond accordingly but this work will sit outside the Corporate Strategy Key Projects.

It should be noted that work is underway as part of the key project to "maximise the opportunities by the White Paper" to develop a Locality Plan for Chorley. This will provide us with the opportunity to identify joint priorities and targets between the Districts and the County including the LAA and agree how we ensure delivery and monitor progress.

Option Two is recommended on the basis that through the Locality Plan we can develop an agreement which will pick up more than the LAA and Community Strategy targets etc and over which we will have more control.

#### Property Outsourcing

The Council has decided to outsource the property services function and has selected Liberata as the preferred contractor following an OJEU notice and issue of Invitation to Tender.

The project envisaged the contract being in place by 01.04.07 but negotiations are continuing with Liberata towards agreement on all contractual issues and contract start.

There will be an impact on the 2007/08 budget position and some operational issues in continuing to deliver the service pending Liberata signing up.

#### Lead Officers Comments



The most realistic option is to bring all parties together for a meeting to agree and document all outstanding issues, which are preventing completion of the contract. This has been arranged for mid May.

If this produces no real prospect of bringing the project to a conclusion other options include re-opening the outsourcing with another bidder or re-establishing an in-house capability.

**13. LIST OF KEY PROJECTS RATED ‘GREEN’**

A ‘green’ rating is where performance is as planned, with progress on target and costs within budget.

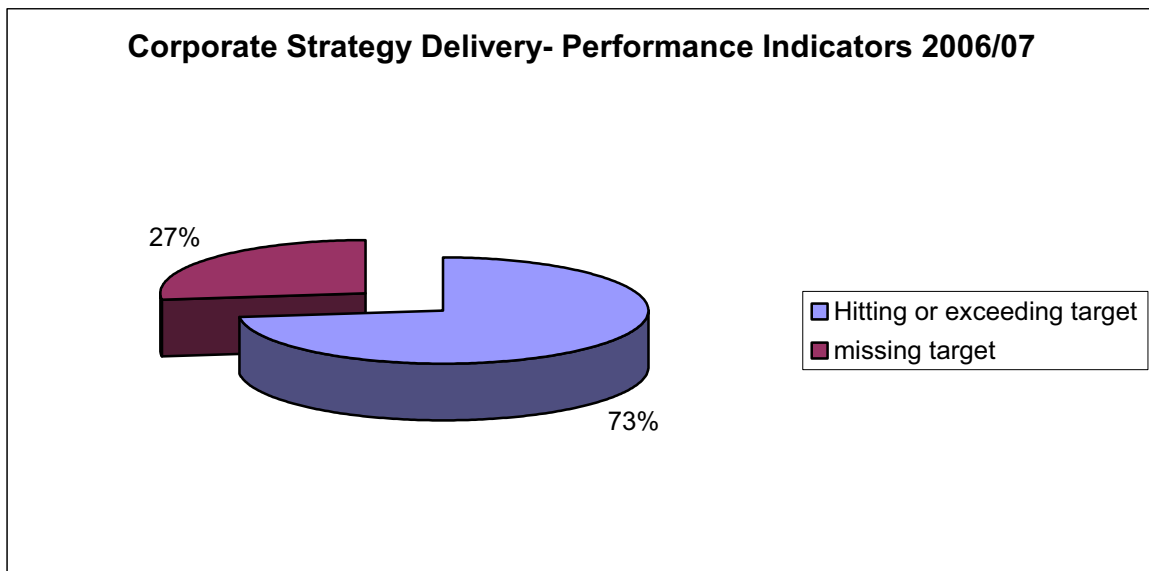
Develop and implement Economic regeneration strategy and priority actions
Complete and implement town centre strategy and priority actions
Pursue opportunities for joint working with neighbouring authorities
Prepare area profiles for our most deprived SOA’s, and prepare action plans
Produce a LSP community cohesion strategy
Prepare a neighbourhood management and engagement strategy
Develop an deliver an action plan for the Customer Focussed access and service design strategy
Deliver Contact Chorley and the Shared Services Partnership
Establish a choice based lettings scheme within the borough in conjunction with Registered Social Landlords (RSL’s) covering 50% of the housing stock by March 2009.
Develop an initial basket of measures and targets for carbon emission reductions for consultation through the LDF process
Deliver the sustainable resources development plan for the Borough to include actions to reduce carbon emissions in line with agreed targets.
Delivery key actions in the community safety strategy
Develop a communications and marketing strategy
Develop and strengthen the LSP
Seek CPA reassessment
Maximise the opportunities given by the white paper.

**14. PERFORMANCE OVERVIEW: CORPORATE STRATEGY PERFORMANCE INDICATORS**

14.1 The Corporate Strategy is focused on year-end 2009 in terms of target setting and delivery. There are a number of indicators against which it is not possible to assess impact before the completion of the Corporate Strategy programme of activity. In these areas reporting at year end continues to focus on delivery of the key projects which will put in place the infrastructure required to deliver against our long term objectives. The number of indicators against which we are reporting at year end is necessarily limited in this municipal year as much of the focus has been on ensuring that the right series of targets and measures are established to check delivery in the longer term. In future years the number of indicators reported against from the Corporate Strategy will increase significantly as agreed baskets of measures and targets are incorporated from 1 April 2007.

14.2 For the majority of indicators for which three-year targets have been set, incremental annual targets have also been agreed to allow us to assess as an organisation where we are building towards delivery of the outcomes set out in the strategy and where we may need to refocus activity or resources to deliver. The chart towards the back of Appendix 1 outlines progress at year-end 2006/07 in delivering against these targets.

14.3 The picture of delivery around those elements of the Corporate Strategy over which we have direct control is good with 73% hitting or exceeding target. The performance of those indicators which seek to gauge residents satisfaction with various elements of service delivery of quality of life in the Borough is less positive. There is ongoing activity focused on understanding the main driver of satisfaction for residents and how we as an authority can tailor our services to meet customer and community requirements. The survey which informed many of the performance measures outlined above (Sept 2006) will be repeated in October 2007 to gauge the impact which this activity has had in improving customer satisfaction levels.



In addition to setting out performance measures and targets and the projects to be delivered to realise the long term objectives set out in the Corporate Strategy in 2006/07, the strategy contained a number of actions to develop baskets of targets and measures (and associated baselines) to facilitate the effective performance management of some of the objectives set out in the strategy. These baskets were:

- Economic regeneration measures from the GVAG baselines and projections in the draft Economic Regeneration Strategy (to measure a vibrant local economy and a robust transport infrastructure).
- Number of neighbourhoods in the worst 20% nationally (develop targets for each are based on are profiles (to measures reduction in number of Super Output Areas in the worst 20% nationally).
- Improved life chances for Children and Young People based around the 'every child matters' and 'youth matters' outcomes of be healthy, stay safe, enjoy and achieve, positive contribution and economic well being'
- Improved quality of life for older people around the older people's outcomes of participation and engagement, healthy lifestyles, integrated services and sustainable communities.
- Life expectancy and premature death from Coronary Heart Disease and cancers,
- Tobacco control obesity and alcohol.
- Baseline for percentage of residents finding it easy to access key local services
- Basket of targets and measures for carbon emission reductions in the Borough

A basket of measures and targets has been established for each of these areas of focus and will be incorporated into the Corporate Strategy in 2007/08 to assess delivery, the first updates regarding performance will be contained in the first quarterly performance monitoring report for 2007/08.

## 15 PERFORMANCE OVERVIEW LOCAL AREA AGREEMENT (LAA)

There are thirteen targets identified within the LAA against which Chorley Borough Council is required to report. Currently we are awaiting information from the County Council about the format and targets against which we are to report for 9 of this total basket of indicators (All Safer and Stronger Communities, Housing element). Representation on behalf of the Council is being made to the County Council to draw this issues to a close but until this is addressed we are only able to report against four indicators for the LAA. Of this small number of indicators the picture is positive with all four achieving their BVPI targets and out performing the County Wide target as set out below.

- BVPI 225, Actions against Domestic Violence. Looks at the number of actions as set out on a checklist which we have implemented. Performance at year-end is good at 63.60% (7/11). This represents a significant improvement on performance last year at 45%, and exceeds the year-end target of 50%.
- The LAA also requires us to report performance against levels of street dirtiness (199a), Graffiti (199b), and Fly Posting (199c). Performance in Chorley is well above the average across the County and has exceeded target for each, the performance of these indicators is set out in more detail in the appendix.

## 16 PERFORMANCE OVERVIEW BEST VALUE PERFORMANCE INDICATORS

This section looks at the BVPI information collected at year-end 2006/07. In contrast to the performance reports submitted quarterly, the full raft of performance indicators (including satisfaction and cost indicators are available at year end). This facilitates the production of a comprehensive position statement, setting out comparisons with last year, performance trends and quartile analysis. It is worth noting at this point that we are still in the process of undertaking an intensive BVPI audit and whilst every effort has been made to ensure the accuracy of performance data (in line with the provision set out in the data quality policy) some year end performance figures may be subject to adjustment after the results of audit are available. The final year-end figures will be published in the annual report on 30 June 2007.

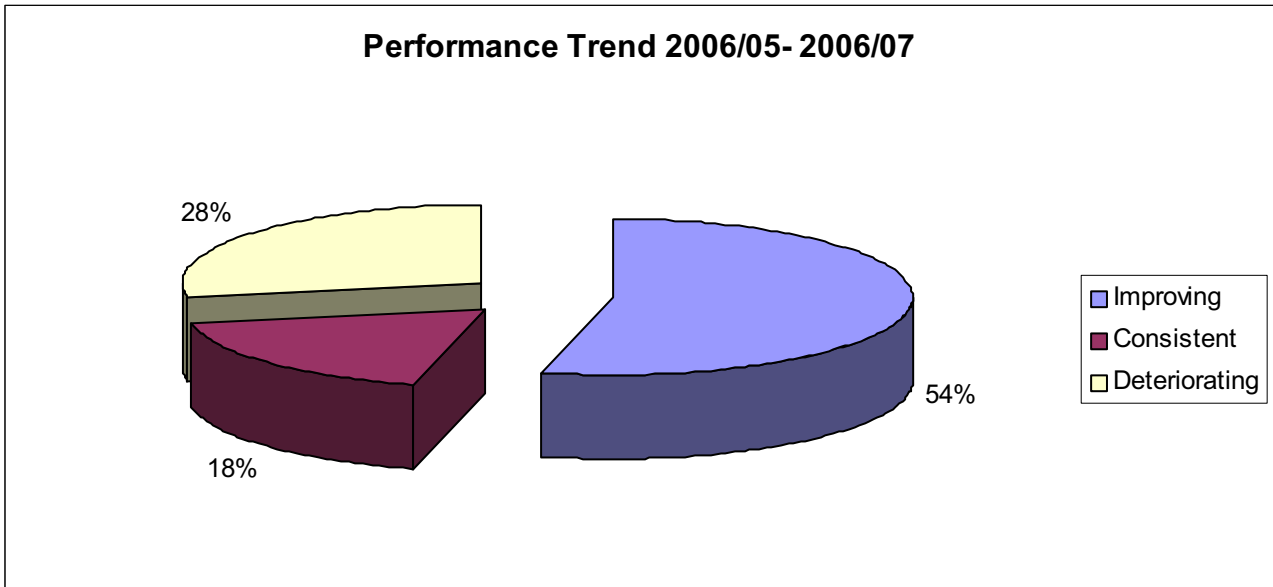
### 16.1 Trend

The performance indicators have been examined to assess whether performance compared to 2005/05 has improved, declined or has stayed the same. For CPA purposes it is critical that we demonstrate that our already excellent levels of service performance are continuing to improve and that we are taking clear actions to address any areas of under performance or deterioration. It is worth noting at this point that the CPA toolkit (which looks at a sub set of the total basket of Best Value Performance Indicators and informs any assessment of our suitability for reassessment) shows a long term journey of improvement with 71% of our indicators having improved between 2003/4 and 2005/6 and 57% having been in the top quartile at the end of 2005/06)

At year-end 2006/07 54% (54) of indicators have improved when compared to year-end 2005/06 (54 out of 100), this is extremely positive given the level of improvement the Council's performance has shown in previous years.

19% (19) showed consistent performance, of which 5 are achieving the highest possible level of performance and so cannot show any further improvement. Overall 73% (73) indicators showed maintained or improved performance from 2005/06 to 2006/07.

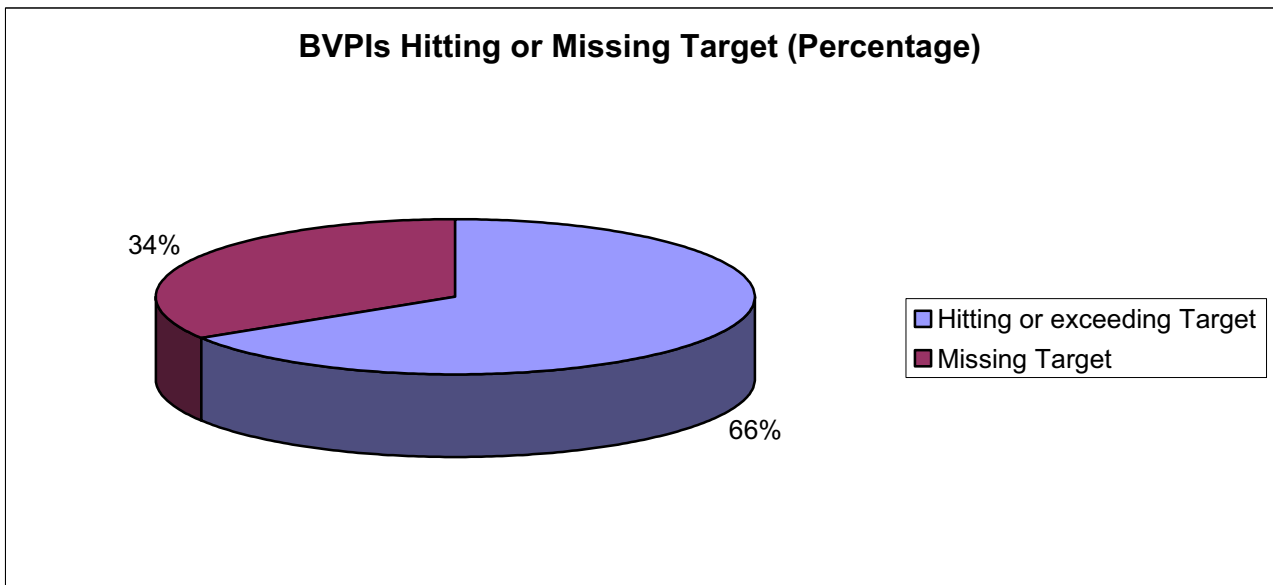
A small percentage 27% (27) showed a decline in performance. For the majority this decline is accounted for by Best Value Survey Indicators and a detailed action plan has been reported under a separate cover. Contextual information and actions to turn around performance in the next financial year for the small number of indicators which have shown a decline and which are not satisfaction indicators are contained later in this report..



**16.2 Targets**

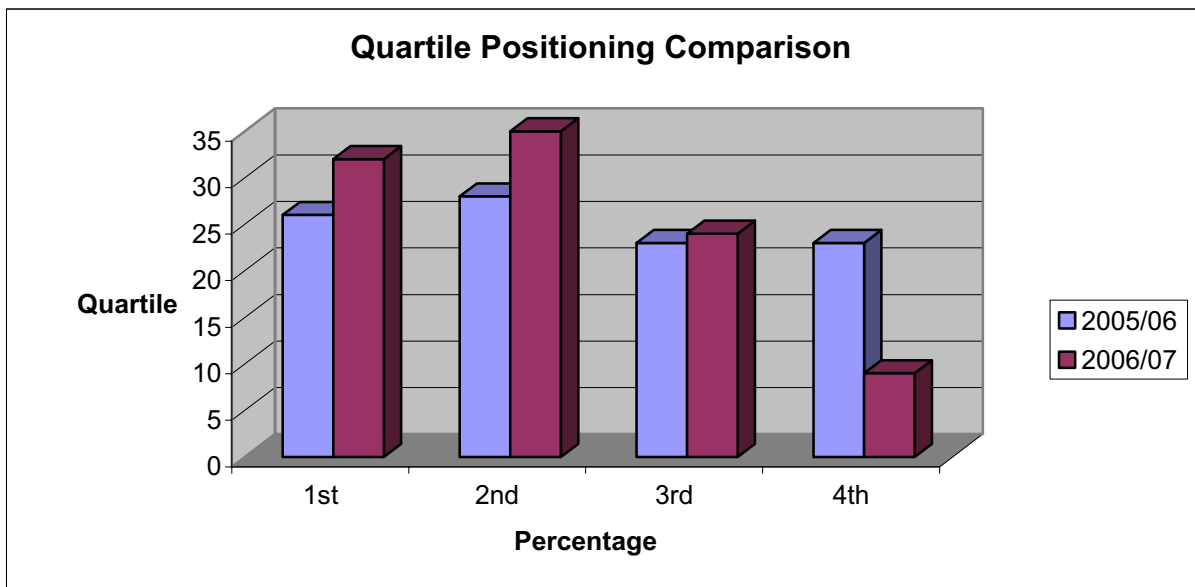
Targets are set at the start of the year, based on 2005/06 performance and available quartile information.

The percentage of indicators achieving target is a useful measure of how well we are performing as targets are a key test of our performance. Targets are set to deliver continuous improvement on previous performance and to move us forward as an authority. With 66% (67 out of 102) of BVPIs achieving target we are doing well, we will need to build on this positive performance to ensure that our level of ambition sets out to deliver continuous improvement. 71% of indicators hit target in 2005/06 and it is clear that the BV survey (which was not reported against in 2005/06) has had an impact in the percentage of indicators hitting target. Given that the percentage of indicators in the top quartile (and second quartile) has improved from last year and the majority of indicators have shown improved performance we will need to carefully explore target setting in 2007/08 to ensure that whilst aiming for continuous improvement and excellence our targets are realistic and achievable, particularly in relation to the BV survey.



**17 Quartile Positions**

- 17.1 The Council’s quartile positioning remains extremely good, and we continue to out perform other District Council’s. The audit commission published an analysis of our relative positioning in comparison to all other District Councils in August 2006. The message emerging from this report was that the Council compares extremely well with others, with 44% of Performance Indicators in the top quartile at year-end 2004/5, this compares with an average of 27 for fair district Council’s (Chorley’s current categorisation) and 36% for excellent District Councils.
- 17.2 Where available, the quartile data is shown for BVPI’s. Not all BVPI’s have quartile data as they are either new indicators or are indicators for which the definitions have changed. All England upper and lower quartiles for March 2006 are the latest available.
- 17.3 At year end 2006/07 32% (22) indicators were in the top quartile, 35% in the second (24) 24% (16) in the third quartile and 9% (6) in the fourth quartile this represents a significant improvement in last year with 26% in the first quartile (16), 28% in the second quartile (17), 23% in the third quartile (14) and 23 in the fourth quartile (14)%. In 2006/07 67% of the total basket of best value performance indicators are in the first and second quartiles compared to only 54% in 2005/06.



**18 Comprehensive Performance Assessment (CPA) Basket**

- 18.1 The CPA basket looks at a smaller sub set of the total BVPI basket and is used as a tool by the audit commission in assessing the Council’s suitability for reassessment in terms of service performance. This is not the only evidence the audit commission would consider when deciding whether or not to reassess the Council and we as an authority are able to request that other performance information is considered when we apply for reassessment.
- 18.2 The Audit Commission methodology states that the basket of CPA measures (as appended) are an accurate reflection of the activity and responsibilities of a District Council, however there are a number of critical areas of activity (Benefits, Corporate Health and Community Safety) which are not reflected in the basket. The picture in terms of performance from our last CPA assessment in 2003/04 has been an extremely positive one with 57% of our CPA indicators in the top quartile in 2005/06 and 71% improving from 2002/03. An analysis of the CPA performance data at year-end 2006/07 suggests that in terms of CPA 75% (9) of our indicators showed improvement or were maintained from

2003/4 to 2006/07 with 25% (3) showing deterioration. It is worth noting that changes to the definitions and way in which indicators have been calculated over the course of four years means that only 12 indicators are directly comparable, meaning that individual indicators have a disproportionate impact on the overall trend of improvement or deterioration.

- 18.3 In terms of quartile positioning, of the total number of CPA indicators for which quartile information is available at year end 2006/07 (26), 39% (10) are in the top quartile, 50% (13) in the second quartile, 8% (2) in the third quartile and 3% (1) in the bottom quartile. This is a slight drop when compared to last year. When looking in more detail at the individual indicators which make up this basket it is clear that satisfaction has had an impact in the overall basket and we are currently working to understand any drops in satisfaction and address these with a detailed report and action plan to cabinet in March 2007 and a programme of 'Citizen's 100' events commencing in July. The trend with regard to CPA indicators does not reflect the strength of improvement across the board and this may be partially a result of the fact that some of our extremely well performing areas of performance are not reflected in the CPA basket. On an extremely positive note 89% (23) of the CPA indicators are in the first and second quartiles which would imply that with focused effort the number of BVPIs in the top quartile could be increased in 2007/08.

## **19 Focus on Success**

- 19.1 The analysis above outlines a general picture of improving performance which places us amongst the best performing Council's nationally detailed below is a selection of the highlights of our story of improvement in terms of best value performance indicators.
- 19.2 Planning services have delivered significant improvements in both processing times and satisfaction levels with the level of service received. The percentage of minor planning applications determined within agreed timescales has improved from 66% in 2005/06 to 77% in 2006/07 moving this service from the fourth to the second quartile nationally. This improvement is also mirrored in the percentage of other applications determined within agreed timescales which has improved from 85% in 2005/06 to 88% in 2006/007, moving the service from the third into the second quartile. Satisfaction with the planning service has also improved greatly from 61% in 2003/04 to 76% in 2006/07.

### **19.3 Abandoned vehicles**

Performance at 96% for the percentage of vehicles investigated within the agreed timescales and 90.67 for the percentage removed performance has greatly improved form 2005/06 to 2006/07 from 56.05 and 51.25 respectively, moving us from the 4th to the 1st quartile nationally for both indicators.

### **19.4 Waste Recycled**

The percentage of waste recycled has increased dramatically from 18.7% in 2005/06 to 43.95% in 2006/07, this moves performance into the top quartile nationally. At 43.95% Chorley Council is currently recycling more than double to average amount of waste recycled by the best performing authorities nationally (20.87).

### **19.5 Housing Satisfaction**

Satisfaction with the Housing Service has generally improved with overall satisfaction moving from 81% in 2005/06 to 86.1%, in 2006/07 (moving the service into the top quartile 84%) and satisfaction with opportunities to participate moving from 69% in 2005/06 to 77% in 2006/07 (again placing the service in the top quartile 69%). This is set in the context of generally improving service performance (the percentage of rent collected has increased and remains in the top quartile).

## 19.6 Benefits Satisfaction

Benefits satisfaction represents another key success for the Council in delivering improving outcomes for customers. Satisfaction has improved and dramatically exceeded the target for six out of seven Benefits satisfaction indicators. Overall satisfaction with the Benefits service has improved greatly from 82% to 87%.

## 19.7 Benefits processing times and calculations correct

The Council's already impressive record of performance around benefits processing has seen further improvement. With the average time taken to process new claims moving from the second into the first quartile (18.72 days) and average time taken to process changes (6.45 days) remaining in the first quartile by some way (top quartile threshold is 9.1 days). The percentage of benefits calculations correct has move from the second into the top quartile (99.4%)

## 20 Delivering Action Plans

20.1 Although performance overall is a picture of excellent and improving performance there remains a need to understand and carefully manage performance where it is not meeting our expectations or has not shown improvement. Below are is a series of action plans for indicators which have triggered a risk criteria for one or more of the reasons listed below

- Performance 5% or more below target
- Performance deteriorating from 2005/06

20.2 It may be that performance is still exceeding target and still in the top quartile but has shown a slight deterioration or that performance has improved but remains below the 5% tolerance of target. Inclusion in this section of the report does not necessarily mean that performance is of particular concern, but rather that we are ensuring that we fully understand the reasons for performance levels and if necessary put measures in place to halt deterioration or to turn around performance.

20.3 Where performance is more than 5% below the target, a red triangle alert will be triggered in performance plus. Action plans which detail why performance has not reached target and what action is being taken to redress this are provided for these indicators. This will ensure that we can effectively manage the performance of the small number of indicators which are not performing as well as we would expect.

20.4 A limited number of indicators have declined when compared to 2005/06 and are missing target by 5 % or more, these indicators are of the most concern in terms of performance and will require focused attention to drive up performance over the next six months.

20.5 Where applicable these indicators will be reported against on a monthly basis until this performance trend has been reversed, and all will be subject to intense scrutiny at the next round of performance round tables to investigate the reasons for poor performance, whether processes around the indicator can be redesigned (business processes reengineering) and to identify whether resources can be redirected to drive up performance.

20.6 Overall, in the context of the total basket of BVPIs (including those reported annually) 102, only 10 indicators fit into this categorisation (as detailed below), of which seven were satisfaction indicators.

**21 Action Plans- Declining Performance, outside of 5% tolerance**

**Days/shifts lost to sickness absence per employee (average)**

2006/07 Performance	Target	Previous performance
10.24	9	10.1

The most recently available quartile data (2005/06) indicates that an outturn of 10.24 would place us in the third quartile nationally and below average (9.60).

The Councils Absence Policy introduced in March 06 has now started to impact on absence management and we have seen an improvement in short term absence levels. There has also been a slight overall reduction in absence despite moving through the winter period that normally shows an increase in figures.

Long-term absence continues to have an affect on overall absence levels and these cases are being managed in line with the policy.

Action to improve performance will include:

- Re title the Absence Policy to Attendance Policy and continue to embed throughout the Council
- Ensure all Managers have received training on the policy and are responsible for managing attendance within their own teams
- Review the monitoring of attendance to identify trends long term/short term
- Review the monitoring of attendance to identify main reasons for absence and target them by pro active health initiatives
- Amend how we record long term and short term absence
- Review the OHU contract and explore opportunities for a more pro active approach i.e. blood pressure monitoring
- Introduce stress awareness briefings for managers/employees
- Review the physiotherapy service and explore alternative methods
- Benchmark against other Local Authorities and adopt best practice from high performing Authorities
- Improve monitoring of statistics by the commissioning of a Management Information System

**Early Retirements**

2006/07 Performance	Target	Previous performance
1.52	0.17	1.06

This performance will place the Council in the bottom quartile nationally and below the national average of 0.57.

A high percentage of early retirements have occurred this financial year due to a number of restructures throughout the Council to realign services and achieve efficiencies. In order to avoid or reduce the number of potential compulsory redundancies employees have taken to opportunity to volunteer for ER/VS. This exercise is unlikely to be repeated as widely in the future.



Actions to improve performance include:

- A workforce plan is being produced that will identify the future workforce needs of the Council in line with the Financial Strategy. Therefore avoiding or reducing the need for any termination of employment including early retirement
- A workforce development plan is being produced linked to the above to re skill employees who may be 'at risk' to enable redeployment to alternative jobs within the Council

### III health retirements

2006/07 Performance	Target	Previous performance
0.22	0.17	0.21

This performance will place us in the 2<sup>nd</sup> Quartile nationally but above the national average of 0.28. Performance is only marginally below that achieved last year and is still relatively good placing Chorley in the second quartile nationally. This indicator will be carefully monitored on a monthly basis through the course of 2007/08 to ensure that there is not further deterioration.

### BVPI Satisfaction Surveys

Indicator	2006/07 Performance	Target	Previous performance
Housing Black and Ethnic Minority Tenants - opportunities to participate	0 Despite using the nationally prescribed methodology, there were only 2 respondents, thus producing an extremely unreliable result	73	67
The way the authority runs things	50	53.66	58
Litter and refuse (Cleanliness)	60	72	62
Refuse Collection	66	92	92
Recycling	77	80	79.2
Museums and galleries	25	65	63
Theatres and concert halls	22	60	58

There are a number of satisfaction BVPIs that are measured on a tri-annual basis. At the meeting in March 2007, the Executive Cabinet received a detailed report on the findings and actions to be taken to understand more fully and where possible address residents issues and expectations.

Currently, national comparative data for District Council's will not be available until June 2007, at which stage, it will be possible to assess Chorley's relative performance and undertake further comparative and best practice sharing activity.

**Local Plan Milestones met- Yes/ No**

2006/07 Performanc	Target	Previous performance
No	Yes	Yes

The milestones were not hit last year because GONW were not content with how we had performed at a particular procedural stage of preparing the documents so we've had to repeat this stage - consequently we missed the milestones.

Each year we are required to submit a new Local Development Scheme which roles forward the 3 year document production programme 1 year. We have adjusted the milestones to ones which we feel we can hit this year in the new 'current' Scheme.

- 22. **Action Plans for those indicators for which performance has deteriorated in comparison with 2005/6 but which still fall within the five % tolerance range of target.**

**Satisfaction with forms (Benefits Service)**

2006/07 Performanc	Target	Previous performance
67	70.5	68

The performance in terms of the forms used to apply for benefit has both fallen and not reached its target. This is despite the 'national standard' benefit claim form being used and having our version crystal marked by the plain English commission. In 2006/07 we invited customers along to a focus group to address this particular issue but no customers were prepared to get involved. Currently in the process of designing a short questionnaire to send with the claims form and letter asking for customers thoughts on what improvements to the forms they would like to see.

**Household Waste Composted %**

2006/07 Performanc	Target	Previous performance
20.16	21	21.62

This performance places us in the 2<sup>nd</sup> quartile nationally, but well above the average nationally at (18.70). This indicator has only seen a very slight down turn in performance which is wholly mitigated by a greater than two fold increase in the levels of waste recycled.

**Household Waste Collection Kgs (Smaller is better)**

2006/07 Performanc	Target	Previous performance
409.96	400	393

This performance places us in the 2<sup>nd</sup> Quartile nationally dropping us out of the top quartile. Performance remains better than average at 438.4.

**Number of Rough Sleepers**

2006/07 Performance	Target	Previous performance
2	0	4

Performance on previous year has improved, however performance has not achieved 2006/07 target. A review of the target will be required as more detailed information is now gathered on rough sleepers to then proactively address individual's circumstances through support services and multi agency working. However, there are currently two cases where by LA does not have a duty to assist and therefore other intervention is required.

**Domestic Burglaries**

2006/07 Performance	Target	Previous performance
7.41 per	8.45	7.25

**Robberies**

2006/07 Performance	Target	Previous performance
0.30	1.57	0.23

Both indicators have seen very small down turns in performance when compared to 2005/06. This is the result of the introduction of new ethical reporting standards introduced by the police (who supply the performance information). However performance remains well above target and in the top quartile.

**22 Action Plans for those indicators missing target by 5% or more but showing no deterioration from 2005/06.**

**Duty to promote Race Equality (Checklist)**

2006/07 Performance	Target	Previous performance
89	100	89

This performance places us in the top quartile nationally and well above the national average at (63%). In order to ensure that we can fully evidence the assertions made in the self assessment checklist efforts have been strengthened to ensure that those elements of the checklist which we are already meeting are robust and delivering what we would expect them to. As the new positive legislative duties around gender and disability have been introduced, work has been ongoing to ensure that those elements of the checklist for Race Equality which we are delivering are broadened to encompass gender and disability as well.

- Actions to deliver against the Race Equality Checklist will be incorporated into the project plan to move the organisation towards achieving level two of the equality standard in the first part of 2007/08.
- The assistance of an equality and diversity consultant has been procured to support delivery around equality and will ensure that we are able to delivery our targets for equality over the next twelve months.

**Satisfaction with Complaint Handling**

2006/07 Performance	Target	Previous performance
40	50	35

Performance has improved significantly and when compared to the single tier and district council’s nationally is in the top 5%. This would suggest that target setting at 50% was unrealistic and will require some scrutiny in 2007/08. This said, work is ongoing to ensure that all complaints are directed to the contact centre in the first instance, and to ensure that all complaints are recorded, response times monitored and complaints are analysed by type, service area and various demographic criteria to ensure that service delivery can be designed to account for the feedback supplied by complaints and to ensure that real action is taken to address the concerns of complainants. The number of complaints received by the Ombudsman relating to Chorley Council has significantly reduced in 2006/7 indicating that customer are more satisfied with our approach to complaints handling and feel less in need of recourse to an independent investigation.

**Black and Ethnic Minority Employees in the top 5% of earners.**

2006/07 Performance	Target	Previous performance
0	0.75	0

This performance will place us in the bottom quartile nationally and below the national average of 3.33%. Chorley has a relatively small workforce so it is sensitive to small changes. We are working with the Ethnic Minority Consultative Committee on barriers to recruitment.

**Percentage of disabled employees**

2006/07 Performance	Target	Previous performance
3.38	3.65	3.12

This performance places us in the second quartile nationally and slightly above the national average of 3.22%. Work is ongoing within Human Resources to review the full suite of policies and the new positive duty around disability equality will be a key driver for this activity.

**Percentage of Council Buildings Accessible to those with a disability**

2006/07 Performanc	Target	Previous performance
83	88	83

Work to Clayton Green Sports Centre to be carried out by Community Leisure Services under the new contract in early 2007/08 will bring the figure up to the 88% target. Access for those with a disability has been a key element of the work to the leisure centres and the fitness suite has been awarded the inclusive fitness accreditation. The implementation of the Equality Scheme introduced in 2006/07, work towards levels two and three of the equality standard and the ongoing development of the Council's consultation with those with disabilities through the disability forum will all improve accessibility for those with a disability above and beyond the definition of this indicator.

Actions to improve performance will include:

- Work to Clayton Green Leisure Centre will start upon completion of the All Seasons refurbishment which is now under way.
- We will need to manage expectations and work closely with the disability forum and other groups, to try to meet needs as far as possible in the interim period. This indicator is a Corporate Strategy indicator contributing to the measurement of Strategic Objective 4 Improved access to public services.

**Pollution control improvements**

2006/07 Performanc	Target	Previous performance
23	100	100

There has been a change of organisation within the directorate responsible for calculating and driving up performance around this indicator, subsequently an audit was undertaken and it was found that there were gaps in performance. Since January 07 there has been a concentrated effort by the new responsible officer to cover the backlog, focussing priority on the area which has the greatest volume of improvements to be made.

Regular periodic review by the line manager to check on progress will take place. The responsible officer has agreed to inform their line manager should there be any deviation from the plan which is to dedicate a certain amount of hours each week to this task as well as implement current improvements.

The time taken so far to begin to remediate the backlog (23%) indicates that a suitable timeframe is available to ensure the end of year (07/08) target will be reached.

**% Change in percentage of families in temporary accommodation**

2006/07 Performanc	Target	Previous performance
-12.66	-2	-19.44

Improved performance in this area against outturn last year and target due to a more robust turnaround of available move on accommodation within our own stock and other RSL partner

stock. Temporary Accommodation demand has increased dramatically over the year, and seems set to continue. This area needs to be reviewed through Prevention of Homelessness Strategy and addressed through the many initiatives including the introduction of new measures to prevent homelessness and by accessing a range of other available permanent or more suitable temporary accommodation and by utilising public, private and voluntary partner housing organisations.

**24 Corporate Strategy Indicators Action Plans- for those not already addressed as BVPI action plans.**

**Percentage of People Satisfied With Opportunities to Participate in Local Decision making**

2006/07 Performanc	Target
27	32.93

To improve the publicity on the following issues:

- Public speaking at Council meetings
- Community Forum meetings
- public involvement in Scrutiny issues
- registration of electors
- availability of postal votes

A draft publicity leaflet has been produced for discussion with the Communications Manager and the content on the Council's website will be reviewed/revised. Details will be circulated at the Community Forum meetings, through community groups etc. Any assistance on this matter would be appreciated.

The Community Forums will have a key role in public involvement in decision-making. The publicity for the next round of meetings in June/July will ask the public to identify the "3 big issues" in their area which need to be addressed. For this round, publicity cards will be circulated through the 6 high schools (6,000 cards).

"You Said we did" schedules will be circulated at the meetings to provide details of the action taken on key issues raised at the first round meetings.

**Vacant Town Centre Floor Space**

2006/07 Performanc	Target
8	7

Performance around vacant Town Centre Floor Space follows a national trend whereby vacancy rates have increased. This level of vacancy is linked to new opportunities for development, ie Market Walk II and the Gillibrand St Development Opportunity. Further more property is sometimes recorded as vacant whilst going through the conveyancing process. Bringing forward development opportunities.

The following activity outlines planned activity to improve the Town Centre which will impact on the performance of this indicator.

- Market Walk Phase II
- Town Centre Audit
- Consider Business Improvement District status

- Car Parking Review
- Consultation with Key Stakeholders
- Prepare and deliver Marketing Strategy
- Communication
- Town Centre Workshop
- Talk of the Town Publication
- Enhancement of Markets
- Develop proposal for Markets
- Appoint Town Centre Manager

**Percentage of Corporate Strategy Projects Achieved**

2006/07 Performanc	Target
79%	90%

2006/07 was the first year that key projects have been identified for inclusion in the corporate strategy, therefore this measure and target was new. This being the case the target was very much an estimate, with the number of key project identified, and the way in which they were defined also new ground for us. One year on we have successfully completed 26 of the 44 key projects. 11 key projects are still ongoing as planned. These were never expected to of completed within the year, and therefore have been discounted from the calculation. This leaves 7 outstanding key projects which were due to be completed within the year.

There are a number of reasons why this has occurred. Firstly it has been recognised that 44 key projects is too many, and as such a number of the projects have been delayed due to resource issues.

There are also lessons that can be learned in the defining of projects. Some projects are more a kin to a programme of work, rather than a project, such as the project to 'complete and implement Town Centre Strategy and priority actions'. While other projects such as 'implement HR Strategy and achieve IIP and explore other external accreditation have three tasks in one, two of which would be better defined as ongoing work, rather than a project'. Finally what is meant by some of the projects is also unclear, which has left them open to interpretation from whoever has been given the responsibility of delivering it.

When the Corporate Strategy is refreshed later in the year, the number of key projects will be reduced by around a half and more time will be spent better defining the projects. A more realistic number of projects, which are clearly defined will help to ensure we are targeting resources where we need them most.

Finally, although we have tried to encourage key projects to use the corporate project management toolkit, this was not introduced until the end of the second quarter when most of the projects were already underway. Since then it has been difficult to monitor and control the projects, which is some cases had no documented business case or project plan. In the next year all key projects should be managed using the toolkit, and a training programme already underway which is compulsory for all those responsible for a key project to attend. Also in the last quarter the Corporate Improvement Board has been established, and part of their remit includes responsibility for delivery of the programme of key projects.

**Number of Affordable Housing Units**

2006/07 Performanc	Target
-	-

8	62.5
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The Borough is not a priority for Housing Corporation funding because other parts of the North West are considered to be in greater need. The opportunities for cross-subsidy from market housing schemes have been limited because of the overall restriction on house building which has only recently been eased. Of those schemes obligated to contribute to providing affordable housing a number of large sites are at an early stage of construction or have not yet started. At Buckshaw Village most of the affordable housing is, for logical scheme layout purposes, being provided just over the Borough boundary in the South Ribble part of the site. The commitment by Adactus Housing Association to provide 40 units per year for 5 years is only just starting with the acquisition of two sites from the Council. The post of Housing Needs and Investment Officer was vacant for most of last year significantly reducing our capacity to liase with housing associations and developers about affordable housing opportunities

Contact is being maintained with the Housing Corporation in case any grant funding windfalls becomes available. Joint working with Preston and South Ribble is being developed in 07/08 to strengthen the case for funding assistance and bids for innovative schemes currently are being pursued. The recent easing of the overall housing restrictions was coupled with an increase in the minimum proportion of affordable housing to be sought from market housing schemes rising from 20% to 30% and should soon bear fruit. Housing land availability and market housing assessments are planned this year with the aim of improving information about available sites and increasing the justification for seeking more affordable housing from market housing schemes. This should put the authority in a good position to respond to the likely further relaxation of house building controls when the Regional Spatial Strategy is finalised early in 2008. The Housing Needs and Investment Officer post will be filled from 8 May 2007.

**Percentage of people who feel that their local community is a place where people from different backgrounds get on well together**

2006/07 Performanc	Target
63	88

The Council launched a community charter at the in partnership with the Interfaith Forum in 2006/07. This will form the basis is work to build a shared sense of tolerance and understanding in the borough. Work is currently underway to develop a Community Cohesion Strategy which will set what Community Cohesion in the borough is thought to be and a comprehensive programme of action set to drive up performance around this indicator. The Council is also involved in a County wide Community Cohesion groups which seeks to address Community Cohesion issues across the County. Work is ongoing with the Ethnic Minorities Consultative Committee and Multi Agency Diversity Incidents Panel to understand the reasons for this performance and what can be done to address these.



**25. CONCLUSION**

- 25.1 Overall the performance of key projects at year-end is excellent, with the majority of projects performing as planned. It's clear that good progress has been made within the last quarter, with a number of projects completing and delivering real outcomes, and also all the remaining projects, which were yet to start at the end of the third quarter now underway.
- 25.2 The audit commission's performance indicator toolkit shows that 71% of BVPIs improved in 2004/05 when compared with 2002/03 (the data used for the last CPA categorisation), with an average of 52% for all District Council's, clearly Chorley is performing extremely well comparatively. It is important that we continue this trend of good and improving performance by focusing on driving up the performance of those indicators bucking this trend.
- 25.3 At year-end 2006/07 54% (54) of indicators have improved when compared to year-end 2005/06 (54 out of 100), this is extremely positive given the level of improvement the Council's performance has shown in previous years. 19% (19) showed consistent performance, of which 5 are achieving the highest possible level of performance and so cannot show any further improvement. Overall 73% (73) indicators showed maintained or improved performance from 2005/06 to 2006/07.
- 25.4 At year end 2006/07 32% (22) indicators were in the top quartile, 35% in the second (24) 24% (16) in the third quartile and 9% (6) in the fourth quartile this represents a significant improvement in last year with 26% in the first quartile (16), 28% in the second quartile (17), 23% in the third quartile (14) and 23 in the fourth quartile (14)%. In 2006/07 67% of the total basket of best value performance indicators are in the first and second quartiles compared to only 54% in 2005/06.
- 25.5 Overall the organisation continues to deliver excellent performance in terms of outcomes (performance information) and delivering a programme for change (project and programme management). Performance has continued to improve, building on the already impressive record of achievement over the last three years. As we move into the next municipal year we will focus on target setting and continued effective performance management to ensure that this journey of improvement and excellence continues.

**COMMENTS OF THE DIRECTOR OF HUMAN RESOURCES**

26. There are no Human Resources Implications associated with this report.

**COMMENTS OF THE DIRECTOR OF FINANCE**

27. There are no financial implications associated with this report.

**RECOMMENDATION(S)**

- That the report be noted.
- 
- Given the lack of control over the key project to 'develop a service level agreement with Lancashire County Council to deliver the LAA and Community Strategy priorities' the project should be closed down. If and when the SLA is issued by LCC, Chorley will (depending on the requirements) respond accordingly but this work will sit outside the Corporate Strategy Key Projects.

LESLEY-ANN FENTON  
DIRECTOR OF POLICY AND PERFORMANCE (ASSISTANT CHIEF EXECUTIVE)

There are no background papers to this report.

Report Author	Ext	Date	Doc ID
Lesley-Ann Fenton	5323	9 <sup>th</sup> May 2007	ADMINREP/REPORT

**APPENDIX 1  
PERFORMANCE DATA TABLES**

**7. 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 at least 5% better than the target set for 2006/07.



= Performance is within the 5% tolerance set for this indicator.



= Performance is significantly worse than the 5% tolerance.

The performance symbols denote year end performance against the target.

Best Value Performance Indicators 2006/07		31/03/2006	31/03/2007
BV002a.02 Equality Standard Level (Level)	Actual	1	1
	Target	1	1
	Comments		
	Perf vs Target		
	Best Q		
	Worst Q		
	All Eng Avge		
BV002b The duty to promote race equality (Percentage)	Actual	89	89
	Target	100	100
	Comments		
	Perf vs Target		
	Best Q	79	79
	Worst Q	53	53
	All Eng Avge	63	63
BV003 % Satisfaction council overall (Percentage)	Actual	53	50
	Target	72	53.66
	Comments		
	Perf vs Target		
	Best Q	60	
	Worst Q	49	
	All Eng Avge	54.63	
	Actual	35	40
	Target	36	50

BV004 % Satisfaction - complaint handling (Percentage)	Comments		
	Perf vs Target		
	Best Q		36
	Worst Q		29
	All Eng Avge		32.73
BV008 % Invoices paid within 30 days (Percentage)	Actual	84.42	91.92
	Target	96	96.5
	Comments		
	Perf vs Target		
	Best Q	96.71	96.71
BV009 % Council Tax collected (Percentage)	Worst Q	89.24	89.24
	All Eng Avge	92.05	92.05
	Actual	98.51	98.74
	Target	98.6	98.6
	Comments		
BV010 % NNDR collected (Percentage)	Perf vs Target		
	Best Q	98.4	98.4
	Worst Q	96.39	96.39
	All Eng Avge	97.15	97.15
	Actual	98.88	99.07
BV011a.02 Women in top 5% earners (Percentage)	Target	98.6	99
	Comments		
	Perf vs Target		
	Best Q	99.26	99.26
	Worst Q	98.1	98.1
BV011b.02 Black/ethnic in top 5% (Percentage)	All Eng Avge	98.57	98.57
	Actual	32	34.78
	Target	23	32
	Comments		
	Perf vs Target		
BV011c.05 Top 5%: with a disability (Percentage)	Best Q	42.58	42.58
	Worst Q	22.22	22.22
	All Eng Avge	31.81	31.81
	Actual	0	0
	Target	0.5	0.75
BV011b.02 Black/ethnic in top 5% (Percentage)	Comments		
	Perf vs Target		
	Best Q	4.33	4.33
	Worst Q	0	0
	All Eng Avge	3.33	3.33
BV011c.05 Top 5%: with a disability (Percentage)	Actual	8	8.7
	Target	6	6
BV011c.05 Top 5%: with a disability (Percentage)	Comments		
	Perf vs Target		

	Perf vs Target		
	Best Q		
	Worst Q		
	All Eng Avge		
	Actual	10.1	10.24
BV012 Days / shifts lost to sickness (Days)	Target	8.9	9
	Comments		
	Perf vs Target		
	Best Q	8.34	8.34
	Worst Q	10.94	10.94
	All Eng Avge	9.6	9.6
	Actual	1.06	1.52
BV014 % Early retirements (Percentage)	Target	0.17	0.17
	Comments		
	Perf vs Target		
	Best Q	0.17	0.17
	Worst Q	0.78	0.78
	All Eng Avge	0.57	0.57
	Actual	0.21	0.22
BV015 % Ill health retirements (Percentage)	Target	0.17	0.17
	Comments		
	Perf vs Target		
	Best Q	0.1	0.1
	Worst Q	0.37	0.37
	All Eng Avge	0.28	0.28
	Actual	3.12	3.38
BV016a % Disabled employees (Percentage)	Target	3.55	3.65
	Comments		
	Perf vs Target		
	Best Q	3.86	3.86
	Worst Q	1.86	1.86
	All Eng Avge	3.22	3.22
	Actual	15.09	15.09
BV016b % Eco. active disabled in area (Percentage)	Target	15.09	15.09
	Comments		
	Perf vs Target		
	Best Q		
	Worst Q		
	All Eng Avge		
	Actual	1.53	1.69
BV017a % Ethnic minorities employees (Percentage)	Target	1.45	1.6
	Comments		
	Perf vs Target		
	Best Q	4.8	4.8

	Worst Q	0.9	0.9
	All Eng Avge	4.9	4.9
	Actual	1.95	1.95
BV017b % Eco. active ethnic in area (Percentage)	Target	1.95	1.95
	Comments		
	Perf vs Target		
	Best Q		
	Worst Q		
	All Eng Avge		
	Actual	71	72.19
BV063 Average SAP rating of LA dwellings (Number)	Target	70	72
	Comments		
	Perf vs Target		
	Best Q	69	69
	Worst Q	63	63
	All Eng Avge	66	66
	Actual	13	13
BV064.02 Priv sec dwellings returned to occupation (Percentage)	Target	17	13
	Comments		
	Perf vs Target		
	Best Q	77	77
	Worst Q	7	7
	All Eng Avge	74	74
	Actual	98.59	96
BV066a.05 % Rent Collected / Rent Owed (Percentage)	Target	98.9	98.9
	Comments		
	Perf vs Target		
	Best Q	98.59	98.59
	Worst Q	97.07	97.07
	All Eng Avge	97.16	97.16
	Actual	1.99	1.74
BV066b.05 % Tenants > 7wks Gross Arrears (Percentage)	Target	1.99	1.9
	Comments		
	Perf vs Target		
	Best Q	4.12	4.12
	Worst Q	8.53	8.53
	All Eng Avge	7.11	7.11
	Actual	57.34	48.98
BV066c.05 % Possession Notices Served (Percentage)	Target	57.34	56.5
	Comments		
	Perf vs Target		
	Best Q	17.06	17.06
	Worst Q	35.28	35.28
	All Eng Avge	28.06	28.06
	Actual	0.45	0.17

BV066d.05 % Tenants Evicted for Arrears (Percentage)	Target	0.45	0.4
	Comments		
	Perf vs Target		
	Best Q		
	Worst Q		
	All Eng Avge		
BV074a Sat'n - tenants overall (Percentage)	Actual	81	86.1
	Target	81	85
	Comments		
	Perf vs Target		
	Best Q	84	84
	Worst Q	74	74
BV074b % Black and ethnic Tenant sat'n (Percentage)	All Eng Avge	78.09	78.09
	Actual	73	100
	Target	73	80
	Comments		
	Perf vs Target		
	Best Q	82	82
BV074c % Non-black and ethnic - Tenant (Percentage)	Worst Q	61	61
	All Eng Avge	70.52	70.52
	Actual	81	86.6
	Target	81	85
	Comments		
	Perf vs Target		
BV075 Satisfaction participation (Percentage)	Best Q	84	84
	Worst Q	74	74
	All Eng Avge	78.08	78.08
	Actual	69	77.8
	Target	69	75
	Comments		
BV075(i) Satn - Participation BEM (Percentage)	Perf vs Target		
	Best Q	69	69
	Worst Q	58	58
	All Eng Avge	62.99	62.99
	Actual	67	0
	Target	67	73
BV075(ii) Satn Participation non-BEM (Percentage)	Comments		
	Perf vs Target		
	Best Q	71	71
	Worst Q	50	50
	All Eng Avge	59.08	59.08
	Actual	69	78

























	Perf vs Target		
	Best Q	70	70
	Worst Q	58	58
	All Eng Avge	63.12	63.12
	Actual	198.2	261.35
BV076a Number of claimants visited (Number per 1000)	Target	200	200
	Comments		
	Perf vs Target		
	Best Q		
	Worst Q		
	All Eng Avge		
	Actual	0.3	0.28
BV076b Number of fraud investigators (Number per 1000)	Target	0.3	0.3
	Comments		
	Perf vs Target		
	Best Q	0.44	
	Worst Q	0.23	
	All Eng Avge	0.35	
	Actual	63.94	56.44
BV076c Number of fraud investigations (Number per 1000)	Target	40	40
	Comments		
	Perf vs Target		
	Best Q	52.61	
	Worst Q	25.14	
	All Eng Avge	43.58	
	Actual	13.5	12.56
BV076d Number prosecutions & sanctions (Number per 1000)	Target	9	9
	Comments		
	Perf vs Target		
	Best Q		
	Worst Q		
	All Eng Avge		
	Actual	27	18.72
BV078a Ave time new claims (Cal days) (Days)	Target	28.5	25
	Comments		
	Perf vs Target		
	Best Q	26.4	26.4
	Worst Q	39.1	39.1
	All Eng Avge	34.5	34.5
	Actual	9	6.45
BV078b Ave time for changes (Cal days) (Days)	Target	14	8
	Comments		
	Perf vs Target		
	Best Q	9.1	9.1

	Worst Q	18.8	18.8
	All Eng Avge	15.2	15.2
	Actual		
BV078c % Renewal claims proc'd on time (Percentage)	Target	92	
	Comments		
	Perf vs Target		
	Best Q		
	Worst Q		
	All Eng Avge		
	Actual	98.8	99.4
BV079a % Benefit calculations correct (Percentage)	Target	98	99
	Comments		
	Perf vs Target		
	Best Q	99	99
	Worst Q	96.6	96.6
	All Eng Avge	97.47	97.47
	Actual		
BV079b % Overpayments recovered (Percentage)	Target	50	
	Comments		
	Perf vs Target		
	Best Q	55.1	
	Worst Q	38.13	
	All Eng Avge	47.74	
	Actual	62	93.21
BV079bi.05 % HB Recovered: Overpayment (Percentage)	Target	62	62.5
	Comments		
	Perf vs Target		
	Best Q	79.39	79.39
	Worst Q	58.98	58.98
	All Eng Avge	69.53	69.53
	Actual	22.6	26.95
BV079bii.05 % HB Recovered: Outstanding (Percentage)	Target	22.6	20
	Comments		
	Perf vs Target		
	Best Q	39.69	39.69
	Worst Q	27.35	27.35
	All Eng Avge	33.66	33.66
	Actual	1.57	1.59
BV079biii.05 % HB O'Pay: Written Off (Percentage)	Target	1.57	1.55
	Comments		
	Perf vs Target		
	Best Q		
	Worst Q		
	All Eng Avge		
	Actual	80	85















BV080a	Benefit	Svc	Target	85	85
Satisfaction: Contact (Percent)			Comments		
			Perf vs Target		
			Best Q	83	
			Worst Q	73	
			All Eng Avge	77.45	
			Actual	83	87
BV080b	Benefit	Svc	Target	78	78
Satisfaction: Office (Percent)			Comments		
			Perf vs Target		
			Best Q	85	
			Worst Q	74	
			All Eng Avge	78.61	
			Actual	74	83
BV080c	Benefit	Svc	Target	77	77
Satisfaction: Tel Svc (Percent)			Comments		
			Perf vs Target		
			Best Q	77	
			Worst Q	66	
			All Eng Avge	67.79	
			Actual	85	89
BV080d	Benefit	Svc	Target	87	87
Satisfaction: Staff (Percent)			Comments		
			Perf vs Target		
			Best Q	85	
			Worst Q	77	
			All Eng Avge	80.41	
			Actual	68	67
BV080e	Benefit	Svc	Target	70.5	70.5
Satisfaction: Forms (Percent)			Comments		
			Perf vs Target		
			Best Q	67	
			Worst Q	60	
			All Eng Avge	63.14	
			Actual	76	83
BV080f	Benefit	Svc	Target	80	80
Satisfaction: Speed (Percent)			Comments		
			Perf vs Target		
			Best Q	76	
			Worst Q	64	
			All Eng Avge	69.44	
			Actual	82	87
BV080g	Benefit	Svc	Target	85	87
Satisfaction: Overall (Percent)			Comments		

	Perf vs Target		
	Best Q	83	
	Worst Q	74	
	All Eng Avge	77.65	
	Actual	18.7	43.95
BV082ai.05 % H'hold Waste Recycled (Percentage)	Target	15	18
	Comments		
	Perf vs Target		
	Best Q	20.87	20.87
	Worst Q	14.22	14.22
	All Eng Avge	17.62	17.62
	Actual	7228	9781.06
BV082aii.05 Tonnes H'hold Waste Recycled (Tonnes)	Target	1890	7560
	Comments		
	Perf vs Target		
	Best Q	15126.1	15126.1
	Worst Q	6086.27	6086.27
	All Eng Avge	16736.77	16736.77
	Actual	21.62	20.16
BV082bi.05 % H'hold Waste Compost (Percentage)	Target	20	21
	Comments		
	Perf vs Target		
	Best Q	13.05	13.05
	Worst Q	3.54	3.54
	All Eng Avge	8.95	8.95
	Actual	7884	8668.4
BV082bii.05 Tonnes H'hold Waste Compost (Tonnes)	Target	7884	7913
	Comments		
	Perf vs Target		
	Best Q	8770.3	8770.3
	Worst Q	1802.6	1802.6
	All Eng Avge	9187.5	9187.5
	Actual	393	409.96
BV084a.05 Household Waste Collection (kgs)	Target	415	400
	Comments		
	Perf vs Target		
	Best Q	393.6	393.6
	Worst Q	478.5	478.5
	All Eng Avge	438.4	438.4
	Actual	-10	3.7
BV084b.05 H'hold Waste % change (Percentage)	Target	-10	6.6
	Comments		
	Perf vs Target		
	Best Q	-3.74	-3.74

	Worst Q	1.31	1.31
	All Eng Avge	-0.99	-0.99
	Actual	47.59	47.59
BV086 Cost of waste collection / house (£s)	Target	42.85	43.5
	Comments		
	Perf vs Target		
	Best Q	39.48	39.48
	Worst Q	52.42	52.42
	All Eng Avge	47.71	47.71
	Actual	62	60
BV089 % Satisfaction - Litter and Refuse (Percentage)	Target	72	72
	Comments		
	Perf vs Target		
	Best Q	66	66
	Worst Q	54	
	All Eng Avge	59.8	59.8
	Actual	92	66
BV090a Satisfaction Refuse (Percentage)	Target	92	92
	Comments		
	Perf vs Target		
	Best Q	89	89
	Worst Q	81	
	All Eng Avge	84.03	
	Actual	79.2	77
BV090b Satisfaction Recycling (Percentage)	Target	80	80
	Comments		
	Perf vs Target		
	Best Q	75	
	Worst Q	63	
	All Eng Avge		
	Actual	96	97
BV091a.05 % res's kerbside recyclables (Percentage)	Target	95	97
	Comments		
	Perf vs Target		
	Best Q	100	100
	Worst Q	93.5	93.5
	All Eng Avge	94.6	94.6
	Actual	96	97
BV091b.05 % res's 2+ k'side recyclables (Percentage)	Target	95	97
	Comments		
	Perf vs Target		
	Best Q	100	100
	Worst Q	90.1	90.1
	All Eng Avge	90.8	90.8
	Actual	46.07	50

BV106 % New homes built on 'brownfield' (Percentage)	Target	50	50
	Comments		
	Perf vs Target		
	Best Q	96.47	96.47
	Worst Q	62.43	62.43
	All Eng Avge	77.01	77.01
	Actual	73	73
BV109a.02 % Planning apps - major (Percentage)	Target	60	60
	Comments		
	Perf vs Target		
	Best Q	74.9	74.9
	Worst Q	57.08	57.08
	All Eng Avge	64.93	64.93
	Actual	66	77
BV109b.02 % Planning apps - minor (Percentage)	Target	65	65
	Comments		
	Perf vs Target		
	Best Q	81.07	81.07
	Worst Q	69	69
	All Eng Avge	74.23	74.23
	Actual	85	88
BV109c.02 % Planning apps - other (Percentage)	Target	80	80
	Comments		
	Perf vs Target		
	Best Q	91.39	91.39
	Worst Q	83.37	83.37
	All Eng Avge	86.49	86.49
	Actual	61	76
BV111 Satisfaction Planning Apps (Percentage)	Target	80	80
	Comments		
	Perf vs Target		
	Best Q	81	
	Worst Q	68.25	
	All Eng Avge	74.32	
	Actual	61	60
BV119a.02 Satisfaction Sport users (Percent)	Target	66	67
	Comments		
	Perf vs Target		
	Best Q		
	Worst Q		
	All Eng Avge		
	Actual		
BV119b.02 Satisfaction Library users (Percent)	Target		
	Comments		

		Perf vs Target		
		Best Q		
		Worst Q		
		All Eng Avge		
		Actual	60	25
BV119c.02	Satisfaction	Target	64	65
Museum users (Percent)		Comments		
		Perf vs Target		
		Best Q	50	
		Worst Q	31	
		All Eng Avge	42.21	
		Actual	58	22
BV119d.02	Satisfaction	Target	59	60
Theatre users (Percent)		Comments		
		Perf vs Target		
		Best Q	56	
		Worst Q	36	
		All Eng Avge	47.16	
		Actual	76	75
BV119e.02	Satisfaction	Target	77	78
Park/Open Spc (Percent)		Comments		
		Perf vs Target		
		Best Q	77	
		Worst Q	66	
		All Eng Avge	71.6	
		Actual	7.25	7.41
BV126a	Domestic	Target	8.45	8.45
Burglaries/1000	h'holds	Comments		
(Number per 1000)		Perf vs Target		
		Best Q	6.4	6.4
		Worst Q	13.7	13.7
		All Eng Avge	10.8	10.8
		Actual	16.24	15.94
BV127a.05	Violent Crime /	Target	16.54	14.67
1,000 pop. (Number)		Comments		
		Perf vs Target		
		Best Q	12.4	12.4
		Worst Q	22.8	22.8
		All Eng Avge	19.2	19.2
		Actual	0.23	0.3
BV127b.05	Robberies /	Target	0.23	1.57
1,000 pop. (Number)		Comments		
		Perf vs Target		
		Best Q	0.3	0.3

	Worst Q	1.3	1.3
	All Eng Avge	1.4	1.4
	Actual	7.99	6.44
BV128a Vehicle Crimes per 1000 pop (Number per 1000)	Target	9.45	7.14
	Comments		
	Perf vs Target		
	Best Q	7.3	7.3
	Worst Q	14.6	14.6
	All Eng Avge	11.5	11.5
	Actual	83	83
BV156 % LA public buildings - disabled (Percentage)	Target	88	88
	Comments		
	Perf vs Target		
	Best Q	84.7	84.7
	Worst Q	44.66	44.66
	All Eng Avge	63.11	63.11
	Actual	100	100
BV164.02 CRE CoP / GPS (Yes/No)	Target	100	100
	Comments		
	Perf vs Target		
	Best Q		
	Worst Q		
	All Eng Avge	48	
	Actual	100	100
BV166a Checklist - EH (Percentage)	Target	100	100
	Comments		
	Perf vs Target		
	Best Q	100	100
	Worst Q	85	85
	All Eng Avge	89.6	89.6
	Actual	247.1	272.16
BV170a Visits to / usage of museums (Number)	Target	169.1	185
	Comments		
	Perf vs Target		
	Best Q	952	952
	Worst Q	131	131
	All Eng Avge	839	839
	Actual	159.3	161.99
BV170b Visits to museums in person (Number)	Target	149	154
	Comments		
	Perf vs Target		
	Best Q	523	523
	Worst Q	87	87
	All Eng Avge	632	632
	Actual	1272	1489

































BV170c Pupils visiting museums and galle (Number)	Target	2100	1500
	Comments		
	Perf vs Target		
	Best Q	8156	8156
	Worst Q	641	641
	All Eng Avge	7153	7153
	Actual	0.97	8
BV174 Racial incidents per 1000 pop (Number)	Target	18	18
	Comments		
	Perf vs Target		
	Best Q		
	Worst Q		
	All Eng Avge		
	Actual	100	100
BV175 Racial incidents further action (Percentage)	Target	100	100
	Comments		
	Perf vs Target		
	Best Q	100	
	Worst Q	57.14	
	All Eng Avge	75.4	
	Actual	0	2
BV183a Length of stay in B&B accom'n (Weeks)	Target	0	0
	Comments		
	Perf vs Target		
	Best Q	1	1
	Worst Q	4.27	4.27
	All Eng Avge	2.99	2.99
	Actual	13.51	7
BV183b Length of stay in hostel accom'n (Weeks)	Target	5	12
	Comments		
	Perf vs Target		
	Best Q	0	0
	Worst Q	17	17
	All Eng Avge	10.89	10.89
	Actual	5.69	17
BV184a P'pn LA homes which were non-dece (Percentage)	Target	6	17
	Comments		
	Perf vs Target		
	Best Q	16	16
	Worst Q	47	47
	All Eng Avge	32	32
	Actual	-194.7	-194
BV184b % Change non-decent LA homes (Percentage)	Target	50	30
	Comments		

	Perf vs Target		
	Best Q	28.3	28.3
	Worst Q	3.4	3.4
	All Eng Avge	20.9	20.9
	Actual	5.3	7.12
BV199a.05 Street Dirtiness (Percentage)	Target	12	12
	Comments		
	Perf vs Target		
	Best Q	8.8	8.8
	Worst Q	21	21
	All Eng Avge	15.3	15.3
	Actual	1	1.88
BV199b.05 Env. Cleanliness - Graffiti (Percentage)	Target	1	2
	Comments		
	Perf vs Target		
	Best Q	1	1
	Worst Q	6	6
	All Eng Avge	4	4
	Actual	0	0.52
BV199c.05 Env. Cleanliness - Fly-Posting (Percentage)	Target	0	2
	Comments		
	Perf vs Target		
	Best Q	0	0
	Worst Q	2	2
	All Eng Avge	1	1
	Actual		
BV199d.05 Env. Cleanliness - Fly-Tipping (Number)	Target		
	Comments		
	Perf vs Target		
	Best Q		
	Worst Q		
	All Eng Avge		
	Actual	100	100
BV200a.05 Plan making development plan (Yes/No)	Target	100	100
	Comments		
	Perf vs Target		
	Best Q		
	Worst Q		
	All Eng Avge		
	Actual	100	0
BV200b.05 Plan making milestones (Yes/No)	Target	100	100
	Comments		
	Perf vs Target		
	Best Q		



	Worst Q		
	All Eng Avge		
	Actual	100	100
BV200c.05 Plan making monitor report (Yes/No)	Target	100	100
	Comments		
	Perf vs Target		
	Best Q		
	Worst Q		
	All Eng Avge		
	Actual	4	2
BV202 People sleeping rough (Number)	Target	6	0
	Comments		
	Perf vs Target		
	Best Q	0	0
	Worst Q	5	5
	All Eng Avge	4	4
	Actual	-19.44	-12.66
BV203 % Change families in temp accom (Number)	Target	50	2
	Comments		
	Perf vs Target		
	Best Q	-15.84	-15.84
	Worst Q	19.27	19.27
	All Eng Avge	6.71	6.71
	Actual	40.7	31
BV204 % Planning appeals allowed (Percentage)	Target	40	40
	Comments		
	Perf vs Target		
	Best Q		
	Worst Q		
	All Eng Avge		
	Actual	78	94
BV205 Quality of Service checklist (Percentage)	Target	66	94
	Comments		
	Perf vs Target		
	Best Q	94.5	94.5
	Worst Q	83.3	83.3
	All Eng Avge	89.8	89.8
	Actual	50.28	26
BV212.05 Average Time to Re-let (Number)	Target	50.28	35
	Comments		
	Perf vs Target		
	Best Q	29	29
	Worst Q	51	51
	All Eng Avge	44	44
	Actual	4	2

BV213.05 HAS: Preventing Homelessness (Percentage)	Target	4	2
	Comments		
	Perf vs Target		
	Best Q	5	5
	Worst Q	1	1
	All Eng Avge		
	Actual	1.05	0
BV214.05 Repeat homelessness (Percentage)	Target	1.05	1
	Comments		
	Perf vs Target		
	Best Q	0.32	0.32
	Worst Q	4.26	4.26
	All Eng Avge	3.04	3.04
	Actual	688	688
BV216a.05 Identifying contaminated land (Percentage)	Target	688	688
	Comments		
	Perf vs Target		
	Best Q	1428	1428
	Worst Q	325	325
	All Eng Avge	1495	1495
	Actual	1	1
BV216b.05 Info. on contaminated land (Percentage)	Target	1	1
	Comments		
	Perf vs Target		
	Best Q	9	9
	Worst Q	1	1
	All Eng Avge	11	11
	Actual	100	23
BV217.05 Pollution control improvements (Percentage)	Target	100	100
	Comments		
	Perf vs Target		
	Best Q	100	100
	Worst Q	83	83
	All Eng Avge	85	85
	Actual	56.05	96
BV218a.05 Abandoned vehicles-investigate (Percentage)	Target	85	100
	Comments		
	Perf vs Target		
	Best Q	96.64	96.64
	Worst Q	73	73
	All Eng Avge	81.54	81.54
	Actual	51.25	90.67
BV218b.05 Abandoned vehicles-removal (Percentage)	Target	85	85
	Comments		

	Perf vs Target		
	Best Q	95	95
	Worst Q	61.11	61.11
	All Eng Avge	74.39	74.39
	Actual	9	9
BV219a.05 Conservation areas - number (Number)	Target	9	9
	Comments		
	Perf vs Target		
	Best Q		
	Worst Q		
	All Eng Avge		
	Actual	0	0
BV219b.05 Cons. Areas Char. Appr. (Percentage)	Target	0	20
	Comments		
	Perf vs Target		
	Best Q	31.81	31.81
	Worst Q	0	0
	All Eng Avge	23	23
	Actual	0	0
BV219c.05 Cons. Areas Mngmt Plans (Percentage)	Target	0	0
	Comments		
	Perf vs Target		
	Best Q	7.7	7.7
	Worst Q	0	0
	All Eng Avge	9	9
	Actual	45	63.64
BV225.05 Actions against Domestic Violence (Percentage)	Target	45	50
	Comments		
	Perf vs Target		
	Best Q		
	Worst Q		
	All Eng Avge		
	Actual	138278	142331
BV226a.05 Adv. & Guid. Expenditure (£)	Target	138278	142331
	Comments		
	Perf vs Target		
	Best Q		
	Worst Q		
	All Eng Avge		
	Actual	100	100
BV226b.05 Adv. & Guid. CLS Quality Mark (Percentage)	Target	100	100
	Comments		
	Perf vs Target		
	Best Q		

	Worst Q		
	All Eng Avge		



CPA Basket 2006/07		31/03/2003	31/03/2006	31/03/2007
	Actual	32	73	73
BV109a.02 % Planning apps - major (Percentage)	Target	65	60	60
Bigger is better	Comments			
	Perf vs Target			
	Actual	66	66	77
BV109b.02 % Planning apps - minor (Percentage)	Target	60	65	65
Bigger is better	Comments			
	Perf vs Target			
	Actual	83	85	88
BV109c.02 % Planning apps - other (Percentage)	Target	80	80	80
Bigger is better	Comments			
	Perf vs Target			
	Actual		61	76
BV111 Satisfaction - Planning Apps (Percentage)	Target		80	80
Bigger is better	Comments			
	Perf vs Target			
	Actual		5.3	7.12
BV199a.05 Street Dirtiness (Percentage)	Target		12	12
Smaller is better	Comments			
	Perf vs Target			
	Actual		1	1.88
BV199b.05 Env. Cleanliness - Graffiti (Percentage)	Target		1	2
Smaller is better	Comments			
	Perf vs Target			
	Actual		0	0.52
BV199c.05 Env. Cleanliness - Fly-Posting (Percentage)	Target		0	2
Smaller is better	Comments			
	Perf vs Target			
	Actual		96	97
BV091a.05 % res's kerbside recyclables (Percentage)	Target		95	97
Bigger is better	Comments			
	Perf vs Target			
	Actual		92	66
BV090a Satisfaction - Refuse (Percentage)	Target		92	92
	Comments			

Bigger is better	Perf vs Target			
	Actual		79.2	77
	Target	70	80	80
BV090b Satisfaction Recycling (Percentage)	Comments			
Bigger is better	Perf vs Target			
	Actual	85	100	100
	Target	100	100	100
BV166a Checklist - EH (Percentage)	Comments			
Bigger is better	Perf vs Target			
	Actual	62	62	60
	Target	62	72	72
BV089 % Satisfaction - Litter and Refuse (Percentage)	Comments			
Bigger is better	Perf vs Target			
	Actual		18.7	43.95
	Target		15	18
BV082ai.05 % H'hold Waste Recycled (Percentage)	Comments			
Bigger is better	Perf vs Target			
	Actual		21.62	20.16
	Target		20	21
BV082bi.05 % H'hold Waste Compost (Percentage)	Comments			
Bigger is better	Perf vs Target			
	Actual	65	71	72.19
	Target	65	70	72
BV063 Average SAP rating of LA dwellings (Number)	Comments			
Bigger is better	Perf vs Target			
	Actual		393	409.96
	Target		415	400
BV084a.05 Household Waste Collection (kgs)	Comments			
Smaller is better	Perf vs Target			
	Actual		5.69	17
	Target		6	17
BV184a P'pn LA homes which were non-dece (Percentage)	Comments			
Smaller is better	Perf vs Target			
	Actual		98.59	98.59
	Target		98.9	98.9
BV066a.05 % Rent Collected / Rent Owed (Percentage)	Comments			
Bigger is better	Perf vs Target			
	Actual		50.28	26

BV212.05 Average Time to Re-let (Number)	Target		50.28	35
Smaller is better	Comments			
	Perf vs Target			
	Actual	100	100	
BV164 CRE Code - rented housing (Yes/No)	Target	100	100	100
Bigger is better	Comments			
	Perf vs Target			
	Actual	86.43	81	86.1
BV074a Sat'n - tenants overall (Percentage)	Target	88	81	85
Bigger is better	Comments			
	Perf vs Target			
	Actual	62.3	69	77.8
BV075 Satisfaction participation (Percentage)	Target	69	69	75
Bigger is better	Comments			
	Perf vs Target			
	Actual	0	0	2
BV183a Length of stay in B&B accom'n (Weeks)	Target		0	0
Smaller is better	Comments			
	Perf vs Target			
	Actual	5	13.51	7
BV183b Length of stay in hostel accom'n (Weeks)	Target	5	5	12
Smaller is better	Comments			
	Perf vs Target			
	Actual	80	100	100
BV175 Racial incidents further action (Percentage)	Target	100	100	100
Bigger is better	Comments			
	Perf vs Target			
	Actual		61	60
BV119a.02 Satisfaction Sport users (Percent)	Target		66	67
Bigger is better	Comments			
	Perf vs Target			
	Actual		60	25
BV119c.02 Satisfaction Museum users (Percent)	Target		64	65
Bigger is better	Comments			
	Perf vs Target			
	Actual		58	22
BV119d.02 Satisfaction	Target		59	60
	Comments			

Bigger is better	Perf vs Target			
	Actual		76	75
	Target		77	78
BV119e.02 Satisfaction Park/Open Spc (Percent)	Comments			
Bigger is better	Perf vs Target			
	Actual	29	27	18.72
BV078a Ave time new claims (Cal days) (Days)	Target	24.25	28.5	25
Smaller is better	Comments			
	Perf vs Target			

Corporate Strategy Delivery 2006/07		31/03/2007
	Actual	35947
CS1 Economic Development : CS 1.2.1 Town Centre Visits	Target	33142
	Perf vs Target	
	Actual	8
CS1 Economic Development : CS 1.2.3 Vacant town centre floorspace	Target	7
	Perf vs Target	
	Actual	-1.4
CS1 Economic Development : CS 1.4.1 Median workplace earnings in the Borough	Target	3.2
	Perf vs Target	
	Actual	27
CS3 People Involved in their Communities : CS 3.1.1 % of people satisfied with opportunities to participate in decision making	Target	32.93
	Perf vs Target	
	Actual	63
CS3 People Involved in their Communities : CS 3.1.2 % people who feel that their communities are places where people get on well together	Target	88
	Perf vs Target	
	Actual	62
CS3 People Involved in their Communities : CS 3.1.3 % of people who have worked in a voluntary capacity during the last 12 months	Target	62
	Perf vs Target	
	Actual	97.98
CS4 Access to Services : CS 4.1.2 Maintain customer satisfaction with the service recieved in Chorley Contact Centre	Target	95
	Perf vs Target	
	Actual	65
CS4 Access to Services : CS 4.1.5 % 'self-service' services available	Target	50
	Perf vs Target	
	Actual	83
CS4 Access to Services : CS 4.1.7 % Council buildings & services accessible to disabled people	Target	83
	Perf vs Target	
	Actual	84.5
CS4 Access to Services : CS 4.2.1 % of residents who	Target	74

think public transport has got better or stayed the same			
	Perf vs Target		
+	Actual	76	
CS5 Character and Feel : CS 5.1.1 % increase in people satisfied with the Borough as a place to live	Target	75	
	Perf vs Target		
+	Actual	8	
CS5 Character and Feel : CS 5.2.2 Affordable dwellings completed	Target	62.5	
	Perf vs Target		
+	Actual	7.12	
CS5 Character and Feel : CS 5.3.2 % of land assessed as having combined deposits of litter & detrius	Target	12	
	Perf vs Target		
+	Actual	86	
CS5 Character and Feel : CS 5.4.1 Improve feelings of safety during the day	Target	76.46	
	Perf vs Target		
+	Actual	49	
CS5 Character and Feel : CS 5.4.2 Improve feelings of safety during the night	Target	32.55	
	Perf vs Target		
+	Actual	82	
CS6 Performing Organisation : CS 6.1.1 % Corporate Strategy Projects Achieved	Target	90	
	Perf vs Target		
+	Actual	2.5	
CS6 Performing Organisation : CS 6.1.2 Gershon Efficiency Savings	Target	2.5	
	Perf vs Target		
+	Actual	60	
CS6 Performing Organisation : CS 6.2.1 LSP Accreditation Status	Target	60	
	Perf vs Target		
+	Actual	39	
CS6 Performing Organisation : CS 6.3.1 % Priority BVPIs in Upper Quartile	Target	31.66	
	Perf vs Target		
+	Actual	75	
CS6 Performing Organisation : CS 6.3.2 % of Priority BVPIs Improving	Target	58	
	Perf vs Target		
	Actual	Positive	
	Target	Positive	
CS6 Direction of Travel	Perf vs Target		
+	Actual	50	
CS6 Performing Organisation : CS 6.3.3 Satisfaction with the way the Council Runs Things	Target	53.6	
	Perf vs Target		



# Chorley Council

## **Final Report of the Corporate and Customer Overview and Scrutiny Panel into Contact Centre: Efficiencies and Partnership with Lancashire County Council**



**CONTENTS PAGE**

**1. PREFACE..... 3**

**2. EXECUTIVE SUMMARY ..... 4**

**3. INTRODUCTION ..... 5**

**4. METHOD OF INVESTIGATION..... 7**

**5. FINDINGS..... 9**

**6. CONCLUSION..... 21**

**7. APPENDICES..... 22**

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## 1. PREFACE

Part of the 2006/2007 work program of the Corporate and Customer Overview and Scrutiny Panel agreed by the Executive Cabinet in June 2006 was an investigation into the Contact Centre Efficiencies and the Partnership with Lancashire County Council.

The Panel has now completed the Inquiry and the report with our recommendations will be forwarded to the Overview and Scrutiny Committee and finally to the Executive Cabinet.

It was agreed at the start of the Inquiry to create two sub panels: one to concentrate on Efficiencies and the other to focus on the Partnership between the Council and Lancashire County Council. Councillor Mrs Stella Walsh and Councillor Peter Baker chaired these two subs respectively.

I would like to thank the chairs and other members of the Corporate and Customer Overview and Scrutiny Panel for their commitment and enthusiasm in what has been a complex Inquiry.

Also my thanks to all council staff both internal and external for their help in enabling the production of this report.

Councillor Geoffrey Russell  
Chair – Corporate and Customer Overview and Scrutiny Panel

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## 2. EXECUTIVE SUMMARY

The Corporate and Customer Overview and Scrutiny Panel undertook a Scrutiny Inquiry into the Lancashire Shared Services Contact Centre.

This Scrutiny topic was selected because one of the key projects in the Corporate Strategy is to deliver Contact Chorley and the Shared Services Partnership.

The objectives of the Inquiry were split into two sections:

### Efficiencies

1. To assess the contribution of the Lancashire Shared Services Contact Centre to the achievement of the Council's efficiencies agenda.

### Partnership Working

2. To assess the effectiveness of the Partnership arrangements for the Lancashire Shared Services Contact Centre of both officer and Member arrangements.
3. To assess whether the Council is achieving the desired benefits of partnership working, for example, procurement, single point of access to services, efficiencies through extended opening hours and workload sharing.

The investigations have highlighted that the Contact Centre has delivered significant efficiency savings to date, with potential for even more in the future. The Contact Centre fits squarely with Government plans around shared services and is providing a model in our two-tier area that others may follow.

### Contribution of Evidence

The Panel would like to thank all those who have provided evidence and contributed to the Inquiry, including staff at Chorley's Contact Centre, representatives from Lancashire County Council, Ribble Valley Borough Council and Pendle Borough Council.

The Panel would also like to thank Councillor John Walker (Executive Member for Customer, Democratic and Legal) and Councillor Dennis Edgerley (Previous Executive Members for Customers, Policy and Performance) for their contributions to the Inquiry.

### Recommendations

The Corporate and Customer Overview and Scrutiny Panel, after taking account of all the evidence have made recommendations in the following areas: efficiencies generally within the Contact Centre, relating to the Customer Relationship Management system and customer access to services, effectiveness of the Partnership arrangements and the desired benefits of Partnership working.

These recommendations are outlined in the findings table of this report.

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### 3. INTRODUCTION

#### Background

The Overview and Scrutiny Committee referred an Inquiry entitled Contact Centre: Efficiencies and the Partnership with Lancashire County Council to the Corporate and Customer Overview and Scrutiny Panel.

The subject of the Inquiry was considered as part of the Programme of work for the Overview and Scrutiny function at the meeting of the Overview and Scrutiny Committee in June 2006. The topic was selected as the Contact Centre linked to the Corporate Strategy and the Council's priority of "improving access to public services" and "ensuring that Chorley Borough Council is a performing organization".

#### Aims/objectives

The Panel's aims and objectives for the scrutiny Inquiry were identified as follows:

#### Efficiencies

1. To assess the contribution of the Lancashire Shared Services Contact Centre to the achievement of the Council's efficiencies agenda.

#### Partnership Working

2. To assess the effectiveness of the Partnership arrangements for the Lancashire Shared Services Contact Centre of both officer and Member arrangements.
3. To assess whether the Council is achieving the desired benefits of partnership working, for example, procurement, single point of access to services, efficiencies through extended opening hours and workload sharing.

#### Terms of Reference

The terms of reference for the Inquiry were:

1. To conduct an investigation into the Lancashire Shared Services Contact Centre partnership arrangements.
2. To review the efficiency programme relating to the Lancashire Shared Services Contact Centre.
3. To identify possible improvements.
4. To report on the investigations findings and make recommendations to Overview and Scrutiny Committee consistent with the Inquiry's objectives and desired outcomes.

#### Inquiry Project Outline

The Panel completed the "Overview and Scrutiny Inquiry Project Outline" and is attached as Appendix A to this report.

#### Desired Outcome

##### Efficiencies

1. To maximise efficiencies from the Lancashire Shared Services Contact Centre partnership arrangements.

##### Partnership Working

2. To establish that the partnership arrangements are working effectively, and, in situations where this is not the case, to propose actions to remedy the situation.
3. To ensure the partnership is delivering the highest quality customer experience.

Corporate and Customer Overview and Scrutiny Panel Membership

Councillor (Chair) Geoffrey Russell (ES and PS)

Councillor Peter Baker (PS Chair)

Councillor Andrew Birchall (PS)

Councillor Alan Cain (ES)

Councillor Henry Counce

Councillor Magda Cullens

Councillor David Dickinson

Councillor Doreen Dickinson

Councillor Keith Iddon

Councillor Catherine Holye

Councillor Hasina Khan (PS)

Councillor Margaret Lees (ES)

Councillor June Molyneaux (PS)

Councillor Thomas McGowan

Councillor Edward Smith (ES)

Councillor Joyce Snape

Councillor Stella Walsh (ES Chair)

The membership of the Sub-Groups is indicated by (ES) for the Efficiency Sub-Group and (PS) for the Partnership Sub-Group

Officer Support

Lead Officer

Mr. Asim Khan

Assistant Head of Customer Services (Partnership Sub-Group)

Mr. Jim Douglas

Assistant Head of Office Support Services (Efficiency Sub-Group)

Democratic Services

Miss Ruth Hawes

Assistant Democratic Services Officer

General Information

Information on Chorley Borough Council's overview and scrutiny toolkit, policies and procedures can be found on the Council's website: [www.chorley.gov.uk/scrutiny](http://www.chorley.gov.uk/scrutiny)

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## 4. METHOD OF INVESTIGATION

### Documentary Evidence

The Panel received and considered several reports and documents, these included:

### Efficiency Sub-Group

- Annual Efficiency Statement 2005/2006 Backward Looking and 2006/2007 Forward Looking,
- Current and future efficiency plans for Contact Chorley, Partners and examples of best practice,
- Performance Statistics for Contact Chorley,
- A comparison of the cost to the Council of the Partnership versus the cost to implement a solution on it's own.

### Partnership Sub-Group

- Lancashire County Council Overview and Scrutiny report into the Shared Services Contact Centre submitted to the County Council Executive Cabinet on 5 September 2006,
- Chorley Customer Focussed Access and Design Strategy,
- Lancashire County Council Update on Customer Access report to Executive Cabinet on 28 February 2007,

### Witnesses

The Partnership Sub-Group, at it's meeting on 19 January 2007, interviewed the following persons: Councillor Richard Sherras and Mr. Jeff Fenton (Corporate Services Manager) from Ribble Valley Borough Council and Mr. Philip Mousdale (Executive Director for Community Engagement) from Pendle Borough Council.

The Partnership Sub-Group, at its meeting on 26 January 2007, interviewed Councillor Dennis Edgerley (Previous Executive Member for Customers, Policy and Performance) and Councillor John Walker (Executive Member for Customer, Democratic and Legal).

### Research

The Efficiency Sub-Group visited Contact Chorley on 24 November 2006 and the Partnership Sub-Group visited the Red Rose Hub on 8 December 2006. The Sub-Groups considered the views and experiences that were shared on these visits.



Chorley's Contact Centre



Councillor Smith listening in on a call at the Hub.

### Panel Meetings

The agendas, reports and minutes of the Efficiency Sub-Group and Partnership Sub-Group held on can be found on the Councils website: [www.chorley.gov.uk](http://www.chorley.gov.uk)



**5. FINDINGS**

**Objective/Key Issue 1: Efficiencies** - To assess the contribution of the Lancashire Shared Services Contact Centre to the achievement of the Council's efficiencies agenda.

<b>General Findings</b>	<b>Recommendation</b>	<b>Financial Implications</b>
<p>Members discussed the two aspects of efficiency which are cashable savings and non-cashable savings, the non-cashable savings being the provision of value for money services.</p> <p>Evidencing real efficiencies through the Shared Services Contact Centre cannot always be stated in cash terms. The non-cashable element is the improvement in service delivery to the customer.</p> <p>It was unlikely there would be any cashable efficiency savings to claim for 2006/2007, but there should be by 2007/2008.</p>	<p>1, a. When Directorates are sending out information, such as Council Tax letters, to ascertain whether other information could be sent out at the same time to reduce the number of letters sent to customers. This could be raised at monthly meetings between customer services and those Directorates whose services are delivered by Contact Chorley.</p>	<p>The costs will be maintained within the Council's current budget. There may be some efficiency savings resulting from improving mailing.</p>
<p>The four highlighted some of the recommendations made by the Customer Overview and Scrutiny Panel Inquiry into the One Stop Shop in June 2004 that have been implemented. This included semi-automatic doors to the One Stop Shop, monthly meetings between customer services and those Directorates whose services are delivered by Contact Chorley.</p> <p>In addition to this the One Stop Shop has achieved the Chartermark for customer service and now delivers the concessionary travel scheme. Members noted the excellent atmosphere and pleasant, smart staff in the Contact Centre.</p>		

General Findings	Recommendation	Financial Implications
<p>Two of the authorities within the Partnership responded to the request for information on how they recorded efficiencies. One has not identified any efficiency savings from the Contact Centre and have increasing concerns that few, if any ever will be realised. Another are treating any claims that the Contact Centre will produce efficiencies with a wide degree of skepticism and have not included any efficiency savings to date in their Annual Efficiency Statement.</p> <p>The potential for efficiencies is relative to the size of the Council.</p> <p>Tameside Metropolitan Borough Council have indicated that they have not attempted to formally identify efficiency gains from the implementation of their Contact Centre. However, Tameside measure on a monthly basis the 'cost per call' - the budget for staff salaries divided by the number of calls answered.</p> <p>A number of benefits are being realised within the Council's Service Directorates following the transfer of services to the Contact Centre:</p> <ul style="list-style-type: none"> <li>• Monthly departmental meetings with Customer Services to improve service provision through more informed picture of customer demands.</li> <li>• Service Directorates are able to focus on service provision and enhancement</li> <li>• Customer surveys carried out through Customer Services rather than through individual Directorates.</li> <li>• Reduction in number of customer contact numbers in the back-offices.</li> <li>• Call overflow handled by One Stop Shop during peak times rather than service units having to cope and failing to do so.</li> <li>• 80% of Housing Benefits telephone calls are now being dealt with at first point of contact.</li> <li>• Projects that result in large-scale telephone contact can be dealt with through the Contact Centre rather</li> </ul>	<p>1, b. That the Council identify the current cost of dealing with customer contact for the various contact channels i.e. face to face, telephone, and that this be developed to quantify efficiency savings gained when customers email or text.</p> <p>1, c. To identify any future improvements to customer service following the transfer of services into the Contact Centre and to report these in the six monthly update reports to Overview and Scrutiny.</p> <p>1, d. To prioritise areas for investment in integration to back office systems and identify simple transactions not requiring integration and thus reducing software licensing costs.</p>	<p>The costs will be maintained within the Council's current budget and part of the customer profiling project.</p> <p>At this stage there are no additional costs anticipated.</p> <p>The cost of the Customer Relationship Management system and some limited integration is included in the budget for the Lancashire Shared Services Contact Centre Partnership. Other investment will be considered on the basis of a detailed business case which identifies the return on investment. There may be a reduction in costs for simple transactions not requiring integration.</p>

<b>General Findings</b>	<b>Recommendation</b>	<b>Financial Implications</b>
<p>than within individual departments, (i.e. postal voting 30,000 letters out to the public.</p> <ul style="list-style-type: none"> <li>• Extended customer opening hours of 8am – 6pm.</li> <li>• Skilled staff dealing with service queries rather than back office staff. Customer</li> <li>• Services team have the interaction skills to provide high quality customer services</li> <li>• and improved customer experience</li> </ul> <p>The knowledge obtained through transferring services has highlighted where potential service problems are.</p> <p>When services are transferred into the Contact Centre the business process re-engineering and systems integration reduce the back office costs.</p> <p>The Director of Development and Regeneration indicated that half of the cost of providing the first line of enquiry service for the Development Control and Building Control in 2007/8 will be transferred to Customer Services for the provision of the service and half will be included as a efficiency gain in the 2007/8 Forward Looking Efficiency Statement. This is an opportunity to quantify the efficiencies as it coincides with a restructure.</p> <p>This project has highlighted the need to look at business process reengineering on a corporate basis.</p>	<p>1, e. To start the business process reengineering exercise on high volume calls as this will help produce significant efficiencies and to create a task force (similar the to Change Team at Lancashire County Council).</p> <p>1, f. A resource has been transferred to Customer Services to deal with Planning Services calls. To monitor this to establish the cost to Customer Services in providing this service and to ensure that the level of service to the customer has been maintained.</p>	<p>This needs to be investigated further. Other investment will be considered on the basis of a detailed business case which identifies the return on investment.</p> <p>No additional cost.</p>

Customer Relationship Management system Findings	Recommendation	Financial Implications																								
<p>The cost figures below enable us to compare the Partnership against what it would have cost the Council to implement their own solution.</p> <p>The costs are presented over the 7 year term of the agreement.</p> <p><b>GO IT ALONE</b></p> <table border="0"> <tr> <td>CAPITAL</td> <td>217,400 (system)</td> </tr> <tr> <td></td> <td><u>196,800 (see breakdown)</u></td> </tr> <tr> <td></td> <td>414,200</td> </tr> <tr> <td>REVENUE (SOFTWARE)</td> <td></td> </tr> <tr> <td></td> <td>(7 yrs at 35,798 per year)</td> </tr> <tr> <td>REVENUE (EQP, SERVICE MAINT)</td> <td></td> </tr> <tr> <td></td> <td>(7 yrs cost see breakdown)</td> </tr> <tr> <td><b><u>742,206</u></b></td> <td></td> </tr> </table> <p><b>COUNTY PARTNERSHIP</b></p> <table border="0"> <tr> <td>CAPITAL (one off payment)</td> <td></td> </tr> <tr> <td>REVENUE</td> <td></td> </tr> <tr> <td>(7 yrs at 50,000 PER YEAR)</td> <td></td> </tr> <tr> <td><b><u>445,000</u></b></td> <td></td> </tr> </table> <p>Therefore there is a saving of <b>£297,206</b> over the 7 year contract period i.e. £742,206 - £445,000</p> <p>The Customer Relationship Management system is not yet in place, but will be a key part of the project as it records details about the customer, their contact with the Council and additional requirements such as disabilities or a language barrier.</p>	CAPITAL	217,400 (system)		<u>196,800 (see breakdown)</u>		414,200	REVENUE (SOFTWARE)			(7 yrs at 35,798 per year)	REVENUE (EQP, SERVICE MAINT)			(7 yrs cost see breakdown)	<b><u>742,206</u></b>		CAPITAL (one off payment)		REVENUE		(7 yrs at 50,000 PER YEAR)		<b><u>445,000</u></b>		<p>2, a. Working with the Lancashire Shared Services Contact Centre Partnership to set a realistic timetable for the implementation of the Customer Relationship Management system.</p>	<p>The cost of the Customer Relationship Management system is included in the budget for the Lancashire Shared Services Contact Centre Partnership.</p>
CAPITAL	217,400 (system)																									
	<u>196,800 (see breakdown)</u>																									
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<b><u>445,000</u></b>																										
<p>Other services that are delivered from the One Stop Shop on a surgery basis are:</p> <ul style="list-style-type: none"> <li>• Department for Works and Pensions,</li> <li>• Patient Advisory Services,</li> <li>• Citizens Advice Bureau,</li> <li>• Community Services with the Asian Women's Forum.</li> </ul>																										

<b>Customer Relationship Management system Findings</b>	<b>Recommendation</b>	<b>Financial Implications</b>
<p>The information that will be collected about customers on the Customer Relationship Management System will enable Customer Service Advisors to proactively offer services to customers. This potentially includes the provision of non-Council services that already happens in the One Stop Shop.</p>	<p>2, b. To support future developments with the Customer Relationship Management System to prompt the customer service advisor to suggest quicker and easier ways to access the service in the future on line.</p>	<p>The Council launches it's new website on 2 April 2007, which includes a broad range of self-service options for customers. Enhancements to this will be considered on the basis of a detailed business case which identifies the return on investment.</p>
<p>There is potential to use the Customer Relationship Management System, by storing the mobile telephone numbers of customers to text GB for a green bag and the a bag be posted out to the address associated with the mobile telephone number. This would enable resources to focus on providing services to hard to reach and vulnerable customers.</p>	<p>2, c. To promote the use of text messages for service request in future, such as recycling calendars and integrate this into the Customer Relationship Management system and to advertise this facility effectively on items such as green bags.</p>	<p>A further Business Case will be required to look at the wider corporate impact on service delivery for the use of SMS text messaging. The advertising costs will be maintained within the Council's current budget.</p>

<b>Customer Access Findings</b>	<b>Recommendation</b>	<b>Financial Implications</b>																								
<p>There are 4 contact channels for customers at present: by telephone, face to face in the One Stop Shop, self-service on the Council's website and by email. Customer Services staff also manned the reception at the Town Hall. The staff worked in the One Stop Shop and the Call Centre in rotation to gain experience in all areas. Subject to there being sufficient capacity staff in the One Stop Shop would act as an overflow and answer calls when the Call Centre was busy.</p>	<p>3, a. To review and simplify the Chorley Customer Focussed Access and Design Strategy in order to migrate customers onto more efficient channels of service delivery.</p>	<p>The Customer Access officer will be in post shortly. Other investment will be considered on the basis of a detailed business case which identifies the return on investment.</p>																								
<p>Previously it was not possible to gather the number of customer calls received by Service Departments. The telephony system in the Call Centre captures the call abandonment rate, call disruption, variety and type. This information is used to plan the numbers of staff needed to staff the Call Centre. The transfer of calls to the Call Centre releases back office staff to concentrate on complex service issues.</p>	<p>3, b. To examine the reasons why customers contact the Council to determine any root causes that can be resolved and therefore reduce unnecessary contact by customers.</p>	<p>The Customer Relationship Management System will considerably help with this. The cost of the system is included in the budget for the Lancashire Shared Services Contact Centre Partnership.</p>																								
<p>From a total of 135939 calls, between 1 June 2006 and 28 February 2007 9.7% were abandoned. The breakdown of calls offered between Directorates is as follows:</p> <table border="0" data-bbox="971 584 1342 1120"> <tr><td>Switchboard</td><td>69035</td></tr> <tr><td>Recycling</td><td>15639</td></tr> <tr><td>Abandoned Vehicles</td><td>449</td></tr> <tr><td>Waste management</td><td>704</td></tr> <tr><td>Refuse</td><td>2272</td></tr> <tr><td>General Environmental Services</td><td>11463</td></tr> <tr><td>Garden Waste Bins</td><td>13</td></tr> <tr><td>Public Space Services</td><td>2247</td></tr> <tr><td>Benefits</td><td>9509</td></tr> <tr><td>Electoral Registration</td><td>1121</td></tr> <tr><td>Council Tax Billing</td><td>20863</td></tr> <tr><td>Council Tax Recovery</td><td>2624</td></tr> </table>	Switchboard	69035	Recycling	15639	Abandoned Vehicles	449	Waste management	704	Refuse	2272	General Environmental Services	11463	Garden Waste Bins	13	Public Space Services	2247	Benefits	9509	Electoral Registration	1121	Council Tax Billing	20863	Council Tax Recovery	2624	<p>3, c. To look at Interactive Voice Response (IVR) as a means to deal with simple requests and therefore enabling the customer service advisors to deal with more complex service enquiries.</p>	<p>Technical development would be required at estimated cost of £3,000.</p>
Switchboard	69035																									
Recycling	15639																									
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Council Tax Billing	20863																									
Council Tax Recovery	2624																									
<p>In 2006 the Department of Communities and Local Government found in a "take up" campaign of services in</p>																										

<b>Customer Access Findings</b>	<b>Recommendation</b>	<b>Financial Implications</b>
<p>Tameside that:</p> <ul style="list-style-type: none"> <li>• A Face to Face transaction cost £14.65 per visit</li> <li>• A Call Centre transaction cost £1.39 per phone call</li> <li>• A visit to the Council Website cost 25p per transaction</li> </ul>		
<p>The Housing Benefits team undertake home visits and this is found to be more efficient as all paperwork required can be seen at one time.</p>	<p>3, d. To take up the opportunity to deliver more services via home visits, such as the offer of a free bus pass and other service providers, for example, the Fire Service.</p>	<p>This will not be known until the ongoing Housing Benefits home visits project is completed.</p>
<p>The transfer of services has given the Council a much clearer picture of customer requirements and demand in these service areas for example, a high percentage of calls relating to Environmental Services are requests for new recycling calendars and green recycling bags.</p>	<p>3, e. To have a section in the committee report template to highlight if the report affects customers.</p>	<p>No additional cost.</p>

**Objective/Key Issue 2: Partnership Working** - To assess the effectiveness of the Partnership arrangements for the Lancashire Shared Services Contact Centre of both officer and Member arrangements.

Throughout the Inquiry the Members considered reports from Lancashire County Council, where appropriate these have been referenced and quotation marks used.

<b>Findings</b>	<b>Recommendation</b>	<b>Financial Implications</b>
<p>Partners were able to develop their Customer Relationship Management system independently to enable them to utilise the benefits of the Customer Relationship Management system. The second phase was to enable the County and Districts to deliver services for each other.</p> <p>The relationship between Lancashire County and Chorley would be key in achieving this and would realise massive benefits, such as extended opening hours after six in the evening and Saturday mornings.</p> <p>“At the Lancashire Shared Services Partnership Board on the 15 December 2006, it was agreed that the existing vision for the partnership was an aspirational target and there was therefore a need to refine and clarify these objectives into a short term vision statement.</p> <p>“This refined vision is significant in light of the Local Government White Paper and enhanced two-tier working agenda and provides a focus for future partnership working”.</p> <p><i>LLC report</i></p>	<p>4, a. To support the refined long term vision of the Partnership to deliver Lancashire County Council and District partner services and to support the refined vision statement.</p> <p>Please see Appendix B.</p>	<p>No additional cost.</p>
<p>It is acknowledged “The aim of the project to be a completely joined up contact centre with 13 members is unrealistic. It is even more unrealistic given that only 6 of the districts joined the project, as it raises the added complication of relations with the non-members. It is clear that the priorities of the different councils, although linked, are different. All parties have acknowledged that there</p>	<p>4, b. To ensure that the governance arrangements for the Partnership are effective by revisiting the terms of reference for the Joint Committee and to review the vision and project plan every 6 months and monitoring effectively the timescales set down in the project plan.</p>	<p>No additional cost.</p>



<b>Findings</b>	<b>Recommendation</b>	<b>Financial Implications</b>
<p>was a failure to recognise the size of the task at the outset. An appropriately senior and well qualified project manager should have been appointed at the outset of the project, and should have received the necessary authority from the organisation, being answerable to the most senior officers and members.” <i>LLC report</i></p>	<p>4, c. To develop a mechanism for Partner Districts, Lancashire County Council and the contractor for effective communication.</p>	<p>No additional cost.</p>
<p>The role of the Partnership Officer is to liaise with districts and oversee the project. There are regular Project Boards and meetings of the Joint Committee to ensure two-way communication between the partners. As the Partners get to know each other the working relationship becomes stronger and it has taken time for Lancashire County Council (LCC) to get their team of staff in place.</p> <p>Previously Lancashire County Council undertook the management of the contract. Districts need to take a more active role in this.</p>	<p>4, d. To make the Joint Committee meeting effective it is suggested that the quorum is changed to a majority vote system with absent partners given the opportunity to respond electronically to any decision.</p>	<p>No cost to Chorley Council.</p>

**Objective/Key Issue 3: Partnership Working** - To assess whether the Council is achieving the desired benefits of partnership working, for example, procurement, single point of access to services, efficiencies through extended opening hours and workload sharing.

Throughout the Inquiry the Members considered reports from Lancashire County Council, where appropriate these have been referenced and quotation marks used.

<b>Findings</b>	<b>Recommendation</b>	<b>Financial Implications</b>
<p>Lancashire County Council “delivers around 700 different services. It is clearly a massive task to review these, and is a process that will take years, not months.</p> <p>“A “Change Team”, operating from within the Customer Access project to coordinate and work with directorates has been introduced in Spring / Summer 2006.”</p> <p>There are currently four teams on banks of desks who deliver a mix of services, including the switchboard. Each team concentrates on two or three services at a time. There are thirty Full Time Equivalents with eighteen part time staff who cover lunch breaks and peak times. This will increase over time when more services are integrated and in January upstairs will be full. Downstairs is currently the nursery bank but will be live workstations in time.</p> <p>There are currently seven hundred entries on the Corporate Information Database. The aim is to give customers access to all service at one point, for example if a call is in relation to a blue badge the customer will be asked if they would like a fire safety check, or if a customer has just turned 65 they would be asked if they wanted like information about social services. The system transfers any relevant information to the back office meaning that the customer will not have to repeat the information.</p>	<p>5, a. For Lancashire County Council to provide Districts access to their Information systems where necessary to enable delivery of joint services.</p>	<p>No cost to Chorley Council.</p>

Findings	Recommendation	Financial Implications
<p>There are training facilities at the Hub.</p> <p>The Chorley Council and Lancashire County Council customer advisors are highly trained in customer services. "There has been some demand from Directorates for the Customer Service Centre to undertake 24 hour operation. A business case is being prepared and it is considered that it may well be feasible to provide a 24 hour service using a minimal number of staff by mid/late 2007. It is expected that extended opening times of 8am to 8pm will be in place at the Hub by April 2007". <i>LLC report</i></p> <p>Customers want their services and are not concerned who delivers them. The impact of the Partnership has included a change in organizational culture and the Partners have had different levels of success in integrating services into their Contact Centres, due to the size of the Authority, the demographics and corporate commitment.</p> <p>Customer satisfaction is not measured in a consistent way across the partnership.</p> <p>There is not a consistent way of dealing with complaints across the Partnership.</p> <p>Some private companies provide excellent customer service, e.g. tracking on enquiries/deliveries.</p> <p>"The original Customer Relationship Management (CRM) system which provides the interface between the customer and back office systems has not functioned well enough to meet the needs of LCC and the District Partners. Since late summer LCC has been evaluating an alternative CRM also produced by Northgate. This product is a significant improvement over the original CRM. The new proposal has been extensively evaluated by LCC and the District Partners and at their meeting held on 13 February 2007 the Shared Customer Service Joint Committee agreed unanimously to a recommendation of</p>	<p>5, b. To explore opportunities for joint training between Chorley and Lancashire County Council in the future.</p> <p>5, c. To support extended opening hours for Contact Chorley facilitated by the Hub and to publicise emergency contact arrangements in place during out of office hours</p>	<p>No cost to explore the opportunities.</p> <p>A financial model will be developed that is acceptable to Lancashire County Council and Chorley Council.</p>
<p>Customers want their services and are not concerned who delivers them. The impact of the Partnership has included a change in organizational culture and the Partners have had different levels of success in integrating services into their Contact Centres, due to the size of the Authority, the demographics and corporate commitment.</p>		
<p>Customer satisfaction is not measured in a consistent way across the partnership.</p> <p>There is not a consistent way of dealing with complaints across the Partnership.</p> <p>Some private companies provide excellent customer service, e.g. tracking on enquiries/deliveries.</p>	<p>5, d. To explore joint working on the measurement of customer satisfaction via the Customer Relationship Management System and to deal with complaints more effectively across the Partnership.</p> <p>5, e. To look at other areas of excellent contact centre public/private sector initiatives and implement these if appropriate across the Partnership.</p>	<p>No additional cost.</p> <p>No additional cost.</p>
<p>"The original Customer Relationship Management (CRM) system which provides the interface between the customer and back office systems has not functioned well enough to meet the needs of LCC and the District Partners. Since late summer LCC has been evaluating an alternative CRM also produced by Northgate. This product is a significant improvement over the original CRM. The new proposal has been extensively evaluated by LCC and the District Partners and at their meeting held on 13 February 2007 the Shared Customer Service Joint Committee agreed unanimously to a recommendation of</p>		

Findings	Recommendation	Financial Implications
<p>the Partnership Board to accept this alternative proposal.</p> <p>“It is anticipated that the terms of the revised Agreement to be finalised with Northgate will be radically different from those which currently apply in relation to the network, the software and the governance arrangements between Northgate and LCC. The basis of the Agreement will change from it being a fully managed service to one of supply only. It is anticipated that there will be a substantial cost saving to LCC and the current contributions from District Partners will continue at the existing levels. The Project Plan for this implementation and its associated governance is already under development in anticipation of an implementation start in April 2007.” <i>LLC report</i></p> <p>“Three libraries in Accrington, Fleetwood and Rawtenstall were chosen to pilot Face to Face services and became operational in late 2006. An evaluation of these pilot “gateways” will be conducted over the next three months”. <i>LLC report</i></p>	<p>5, f. That any future Lancashire Gateways developments or public service partnerships, such as Housing Associations, for Chorley be based in the One Stop Shop.</p>	<p>A financial model will be developed that is acceptable to Lancashire County Council and Chorley Council.</p>

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## 6. CONCLUSION

### General observations

After taking account of all the documentary and verbal evidence presented and the Corporate and Customer Overview and Scrutiny Panel has identified a number of recommendations which, if implemented, the Members consider will enhance both the efficiencies that can be achieved through the Contact Centre and the Partnership with Lancashire County Council.

### Efficiency Sub-Group

Chorley is as far ahead as other Lancashire Authorities with regards efficiencies and that the potential to achieve efficiencies by utilising technology should not be underestimated.

The Sub-Group's noted the cross over between the two sub-groups, such as the importance of training, info gateways, delivering services for each other

Due to the delays with the Customer Relationship Management system Chorley had to move forward and use a one step at a time approach to transfer each service into the Contact Centre. Lancashire County Council have taken the opposite approach. The Sub-Group feel that Chorley's approach has been more successful.

One of the reasons the Contact Centre has been so successful is the enthusiasm and willingness of the staff to embrace the new approach.

The Customer Relationship Management system is critical in achieving Chorley's aims as it provides a better understanding of customer's needs and contact and therefore information on how to provide a better and more efficient service.

### Partnership Sub-Group

The Partnership was a groundbreaking project with the initial vision for customers to access all services from a single point. This included a virtual network between the County and the six districts.

The Customer Relationship Management system is key to the future of the Partnership and the cost to the Council would be significant to purchase the telephony, hardware and software outside the Partnership. The potential for additional opening hours, in the evenings and at weekend are significant benefits.

If Chorley had not gone with the Partnership we would have faced problems, but different ones.

Other Authorities in the Lancashire Shared Services Contact Centre Partnership will be contacted electronically with the findings and recommendations of the Inquiry.

### Lessons learned for Scrutiny

As there were two definite streams to the Inquiry the Panel appointed two Sub-Groups with five members. The Chair of the Panel sat on both Sub-Groups, with each Sub having a different Chair. This ensured continuity through the Subs and the added benefit of the knowledge and skills of the two Sub-Group Chairs.

The three Chairs have driven forward each step of the Inquiry and, in particular, the writing of the Final Report.

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## **7. APPENDICES**

Appendix A Overview and Scrutiny Project Outline

Appendix B Shared Services Contact Centre Partnership Three Year Vision Statement



**OVERVIEW AND SCRUTINY INQUIRY PROJECT OUTLINE**

<p><b>Review Topic: Contact Centre: Efficiencies and the Partnership with Lancashire County Council.</b></p>	<p><b>Investigation by:</b> Corporate and Customer Overview and Scrutiny Panel</p> <p>Type: <b>Inquiry</b></p>
<p><b>Objectives:</b> <u>Efficiencies</u></p> <ol style="list-style-type: none"> <li>To assess the contribution of the Lancashire Shared Services Contact Centre to the achievement of the Council's efficiencies agenda.</li> </ol> <p><u>Partnership Working</u></p> <ol style="list-style-type: none"> <li>To assess the effectiveness of the Partnership arrangements for the Lancashire Shared Services Contact Centre of both officer and Member arrangements.</li> <li>To assess whether the Council is achieving the desired benefits of partnership working, for example, procurement, single point of access to services, efficiencies through extended opening hours and workload sharing.</li> </ol>	<p><b>Desired Outcomes:</b> <u>Efficiencies</u></p> <ol style="list-style-type: none"> <li>To maximise efficiencies from the Lancashire Shared Services Contact Centre partnership arrangements.</li> </ol> <p><u>Partnership Working</u></p> <ol style="list-style-type: none"> <li>To establish that the partnership arrangements are working effectively, and, in situations were this is not the case, to propose actions to remedy the situation.</li> <li>To ensure the partnership is delivering the highest quality customer experience.</li> </ol>
<p><b>Terms of Reference:</b></p> <ol style="list-style-type: none"> <li>To conduct an investigation into the Lancashire Shared Services Contact Centre partnership arrangements.</li> <li>To review the efficiency programme relating to the Lancashire Shared Services Contact Centre.</li> <li>To identify possible improvements.</li> <li>To report on the investigations findings and make recommendations to Overview and Scrutiny Committee consistent with the Inquiry's objectives and desired outcomes.</li> </ol>	
<p><b>Key Issues:</b> <u>Efficiencies</u></p> <ol style="list-style-type: none"> <li>Migration of resources from back office services into the Contact Centre.</li> <li>Integration to back office systems.</li> <li>Streamlining contact telephone numbers and email points.</li> <li>Managing migration of customers to more efficient methods of access to services.</li> </ol> <p><u>Partnership Working</u></p> <ol style="list-style-type: none"> <li>Review contractual arrangements with Lancashire County Council.</li> <li>Contractor performance and governance.</li> <li>Differing approach of partners.</li> <li>Customer Relationship Management system.</li> </ol>	<p><b>Risks:</b></p> <ol style="list-style-type: none"> <li>Damaging relationships with partnership organisations.</li> <li>Possibility of negative publicity to the partnership.</li> <li>Having desired outcomes beyond the capacity to deliver.</li> </ol>

<p>9. Development of Lancashire County Council Customer Service strategy. 10. Delivery of Customer Focus and Access strategy.</p>	
<p><b>Venue(s):</b> Town Hall, Market Street, Chorley.</p>	<p><b>Timescale:</b> 9 months <b>Start:</b> July 2006 <b>Finish:</b> March 2007</p>

**Information Requirements and Sources:**

**Documents/evidence:** *(what/why?)*

1. Lancashire County Council Customer Service strategy.
2. Partnership Customer Contact strategy.
3. Terms of reference for the officer partnership board and Member joint committee.
4. Chorley Borough Council Customer Focus and Access strategy.
5. Approved Plan and migration dates.
6. Annual Efficiency Statement: 2005/2006 Backward looking and 2006/2007 Forward looking.

**Witnesses:** *(who, why?)*

1. Chair of the Joint Committee.
2. Chair of the Partnership Board.
3. Representative from the contractor (Northgate Information Systems NIS).
4. Representatives from District partners.
5. Councillor D Edgerley (Previous Member of the Partnership Joint Committee).
6. Councillor J Walker (Executive Member for Customer, Democratic and Legal Services and Member of the Partnership Joint Committee).
7. Officers of Chorley Borough Council.

**Consultation/Research:** *(what, why, who?)*

1. Customer satisfaction performance statistics.

**Site Visits:** *(where, why, when?)*

1. Shire District partners.
2. Lancashire County Council.

**Officer Support:**

<b>Lead</b>	<b>Officer:</b>
Asim Khan (Assistant Head of Customer Services).	
<b>Democratic Services</b>	<b>Officer:</b>
Ruth Hawes (Assistant Democratic Services Officer).	
<b>Corporate Policy Officer:</b>	
To be identified as required.	

Likely	Budget	Requirements:
<u>Purpose</u>		£
Site visit costs		200
<b>Total</b>		<u>200</u>

**Target Body<sup>1</sup> for Findings/Recommendations**

(Eg Executive Cabinet, Council, PCT)  
Overview and Scrutiny Committee.



**Appendix B****Shared Services Contact Centre Partnership  
Three Year Vision Statement**

This three-year vision is seen as the foundation to enable the partners to achieve the long term objectives of the Partnership.

Each partner is seeking to provide customers with easy and convenient access to all their services through the development of modern Contact Centres. Each council will work in partnership to achieve significant efficiency gains and service improvements through effective and appropriate sharing of resources and information.

The shared objectives of the Partnership are that:

- Each Council will offer a single point of access for all their services through their Contact Centres
- A two-way signposting service will be available between Lancashire County Council and the District Councils
- Overflow and extended hour opening will be developed as a discretionary service to the partners by Lancashire County Council
- The partners will work towards shared Contact Centres with co-located District and County Council staff
- Lancashire Gateways will be developed in consultation with the partners, within appropriate locations to support the overall aims of the Partnership
- The partners will share common systems and processes including Customer Relationship Management (CRM), telephony and training
- The CRM system will be hosted by Lancashire County Council
- The partners will open up membership of the partnership to other districts
- The partners will further develop joint working into other projects

The partnership will work towards these objectives between 2007 and 2009 and will develop shared programmes for each together with a business plan against which progress will be monitored and reported.

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Report of	Meeting	Date
Director of Development and Regeneration  (Introduced by the Executive Member for Economic Development and Regeneration)	Development Control Committee  Executive Cabinet	22 May 2007  24 May 2007

## **GUIDING PRINCIPLES FOR DEVELOPMENT OF THE BOTANY/ GREAT KNOWLEY SITE**

### **PURPOSE OF REPORT**

1. To advise Members of responses received following consultation of the Guiding Principles Document for the development of the Botany /Great Knowley Site and to approve the document as attached.

### **CORPORATE PRIORITIES**

2. The Guiding Principles Document is connected to the Strategic Objective: to put Chorley at the heart of Regional Economic Development in the Central Lancashire Sub-Region.

### **RISK ISSUES**

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

### **BACKGROUND**

4. The Botany/Great Knowley site was allocated under Policy EM1.4 of the adopted Chorley Borough Local Plan Review (August 2003) for B1 (Business (Offices/Light Industry) and B2 (General Industry) uses. The site is in a number of different ownerships.
5. The guidance note has been prepared by Officers to assist the design process that should be undertaken by those considering the development of the Botany/Great Knowley site. Initial consultations were held with Lancashire County Council, the Highways Agency, and British Waterways prior to the preparation of the draft guidance in January 2007.
6. Following Executive Member approval the document was put out for wider consultation for a four-week period ending on 5 March 2007. All the site landowners have been consulted.
7. Officers had a meeting in April 2007 with planning consultants Erinaceous Planning who represent Patrick Properties who have purchased 8 acres of the site. However, it is apparent from discussions that a considerable amount of work is still required to be completed by these consultants before any planning application can be submitted. Officers have also seen a draft copy of a leaflet prepared by the consultants to inform local residents. It is unclear whether this leaflet has been made public but officers gave feedback that any leaflet should provide additional information and more detail on the access arrangements.

**COMMENTS RECEIVED AND PROPOSED CHANGES**

- 8 Four responses have been received following the consultation period:
- Peter E Gilkes Company. Considers the statement that the Council will not grant planning permission until the adjacent site EM1.9 at Botany Bay (between the M61 motorway and the canal) is under construction will frustrate and severely hinder the development of the site. (Note – this phasing is particularly important in terms of ensuring appropriate access is provided).
  - Lancashire County Council, Environment Directorate – Natural and Historic Environment Service, supports the document but requires more recognition of the requirements identified in Planning Policy Statement 9: Biodiversity and Geological Conservation (PPS9) in the document and that the site's location within an "intermediate" Natural Heritage Zone should be a consideration.
  - Lancashire County Council, Environment Directorate – Strategic Planning and Transport Group welcome the document and state the Borough Council will need to be satisfied that development of this site will not result in an over provision of employment land in Chorley.
  - The Highways Agency has indicated the allocation would generate significant levels of traffic in the morning and afternoon peak flows which could potentially have a material impact on the strategic highways. The Agency need to understand how traffic generated by the site will be distributed onto the local and trunk road network and requests additional matters should be raised within the site masterplan. The likely use of Section 106 financial contributions for public transport purposes should allay some concerns.
- 9 No change is proposed in respect of the phasing of the development, as it is imperative that the road layout through the adjacent site EM1.9 Botany Bay is under construction and the bridge details are finalised prior to site EM1.4 being started.
- 10 Changes are proposed to the document, (shown underlined and in bold) to reflect the requirements in PPS9, recognition of the "intermediate" Natural Heritage Zone (Joint Lancashire Structure Plan (Policy 21) and Landscape and Heritage Supplementary Planning Guidance) and consideration of emerging draft Regional Spatial Strategy policies EM1 (Heritage) and Policy EM3 (Green Infrastructure). Also the ecological survey element is expanded to include the need for additional surveys such as an assessment of habitat linkage/de-fragmentation in the wider landscape.
- 11 Changes are also made to the document to reflect additional requirements specified by the Highways Agency.

**COMMENTS OF THE DIRECTOR OF HUMAN RESOURCES**

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

**COMMENTS OF THE DIRECTOR OF FINANCE**

13. There are no apparent financial implications to this report.

**CONCLUSION**

- 14 Planning Policy Statement 1: Delivering Sustainable Development underlines that good design is indivisible from good planning. The Guiding Principles document includes a range of general and specific requirements identified by your Officers and other stakeholders who have been consulted and which are essential to assist the design process that should be undertaken by those considering the development of the prestigious and visually prominent Botany/Great Knowley Site. The document also

provides a checklist of application requirements that need to accompany any planning application.

**RECOMMENDATION(S)**

- 15 That the Executive Cabinet approves the Guiding Principles document for the development of the Botany /Great Knowley site.

**REASONS FOR RECOMMENDATION(S)  
(If the recommendations are accepted)**

16. The guidance note has been prepared to assist with the design process that should be undertaken by those considering the development of the Botany/Great Knowley site

**ALTERNATIVE OPTIONS CONSIDERED AND REJECTED**

- 17 None

JANE E MEEK  
DIRECTOR OF DEVELOPMENT AND REGENERATION

There are no background papers to this report

<b>Report Author</b>	<b>Ext</b>	<b>Date</b>	<b>Doc ID</b>
Alison Marland	5281	9 May 2007	ADMINREP/REPORT

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# Chorley Council

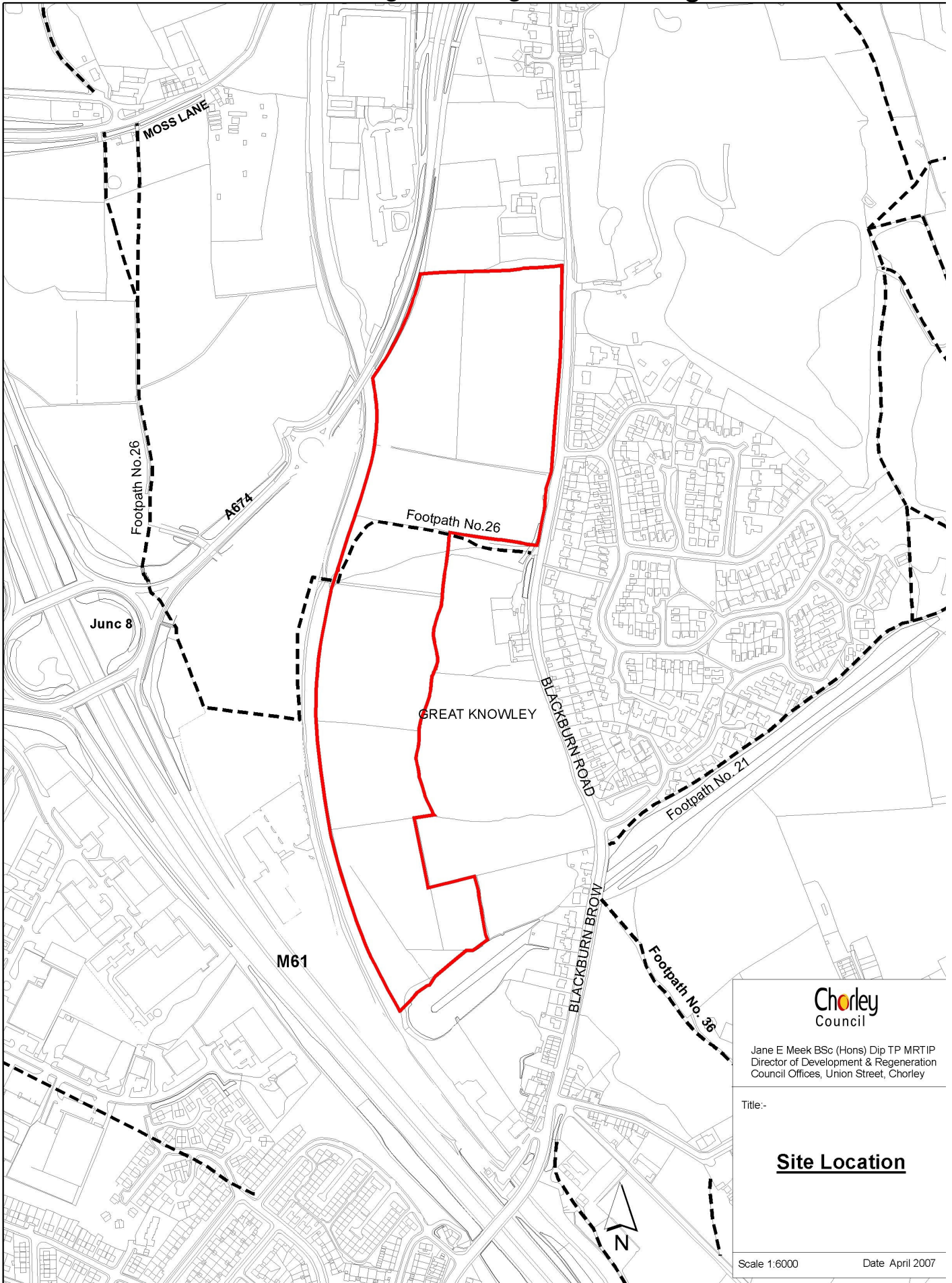
Draft For Consultation

## **GUIDING PRINCIPLES FOR DEVELOPMENT OF THE BOTANY/ GREAT KNOWLEY SITE**

**~~January 2007~~**

**May 2007**







## INTRODUCTION

- 1 Planning Policy Statement 1 (PPS1) underlines that good design is indivisible from good planning. This guidance note is intended to assist the design process that should be undertaken by those considering the development of the Botany/Great Knowley site.

## LOCATION AND SITE DESCRIPTION

(See site location plan)

- 2 The essentials of the site are:
  - Large, prestigious and visually prominent sloping greenfield site of 14.1 hectares
  - Situated off the A674, 2.5km to the north east of Chorley Town, in close proximity to junction 8 of the M61 motorway.
  - The western boundary comprises the Leeds – Liverpool canal.
  - The northern boundary is bounded by the A674 and Green Belt.
  - Blackburn Road forms part of the eastern boundary, together with an area of land allocated in the adopted Local Plan Review as an Area of Safeguarded Land. This same land and a former railway embankment mark the southern end of the site.
  - The site is currently used as grazing land.
  - A public footpath (number 26) runs through the site between Blackburn Road and a crossing over the Leeds and Liverpool canal at Knowley Bridge (Bridge 79)
  - The site contains a large number of trees, which are protected by a Tree Preservation Order (TPO) – see plan at the back of the document.

## REQUIREMENTS

### General

- 3 A comprehensive Master Plan for the whole site will be required as part of any outline planning application.
- 4 Piecemeal development will only be permitted in conformity with the approved Master Plan. Detailed applications for the separate parcels should only be submitted in line with the Master Plan **otherwise such applications are likely to be refused planning permission.**
- 5 The site is allocated under Policy EM1.4 of the adopted Chorley Borough Local Plan Review (August 2003) for B1 (Business (Offices/Light Industry) and B2 (General Industry) uses. Policy EM2 covers development criteria for industrial/business development.
- 6 The site should accommodate **B2 and up to no more than 50% B1 uses with the remainder comprising B2 uses to form a prestigious business park.**
- 7 In terms of office development applicants should apply a sequential test (as set out in Planning Policy Statement 6: Planning for Town Centres) ~~to~~ **and so** conform to the requirements of the Joint Lancashire Structure Plan Policy 17. **Applicants will need to** ~~and~~ prepare a statement to show that there are no more suitable sites in Chorley Town Centre.
- 8 This **The above** requirement stems from the fact that certain policies including Policy EM1 (Employment Land Allocations) of the adopted Chorley Borough Local Plan, August 2003 are not in general conformity with the Replacement Joint

Lancashire Structure Plan 2001-2016 (adopted March 2005). The Joint Lancashire Structure Plan Policy 17 states where office development should be located and that a local authority will need to assess the proportion of the overall land allocation, set out in JLSP Policy 14, which should be allocated to office development (Use Class B1a). Policy EM1 as adopted does not take on board the requirements of JLSP Policy 17 or quantify the amount of land allocated specifically for office development.

### Design

- 9 Any scheme should make a positive contribution to the local environment. To this end, it should respond to the physical features of the site, its topography, boundary treatment, landscape features (including protected trees) and ecology; views into and out of the site; access into/out of and around the site for vehicles and pedestrians; existing services; and neighbouring uses (including the canal). A contextually appropriate and high quality place will be required in terms of the amount of development, its layout, scale (height and massing of buildings), appearance, landscape setting, accessibility, and coherent and clear image. Early discussion with the Council is strongly advised.
- 10 Careful note should be taken of the following:
  - The scheme should ensure that the developed site has its own identity. To this end, careful layout, good looking, innovative building design will be required. Over-elaborate detailing should be avoided and, given local topography, special attention should be paid to roofscapes.
  - Careful attention should also be paid to the creation of high quality public space. An appropriate balance between buildings (footprint and massing) and the spaces around and between them will be of critical importance.
  - The Leeds Liverpool canal is an important heritage and leisure asset and many canal-related structures within the Borough are listed as buildings of historic or architectural importance. The design of buildings fronting the canal and of any new structure crossing the canal should therefore respect the significance of the waterway in these terms. More particularly, any new bridge across the canal will be expected to safeguard and make a positive contribution to the distinctive character of local canal architecture.
- 11 **Scheme D** design should take account of permissions granted for development on the opposite side of the Canal (Site EM1.9), so as to ensure compatibility between the two developments, and, in particular, to maintain the landscape dominated character of this section of the canal. At any one point, only one side of the Leeds and Liverpool Canal should have buildings fronting directly onto the canal and the other side should be heavily landscaped to avoid creating a corridor of development.
- 12 Footpath Number 26 is to be maintained and upgraded in terms of surfacing.
- 13 Design **considerations** ~~should take account of solar orientation to promote energy efficiency and to enable the capture of renewable energy~~ include the integration of renewable energy into the scheme to result in the equivalent of saving 10% of carbon emissions.
- 14 **Scheme D** design should take account of the need to promote safety and security of people, place and buildings.

- 15 Careful attention should be paid to the need to create a high quality landscaped setting for the built development, including boundary treatment. It should be noted that, in order to establish the landscape framework for development, peripheral and structural planting (native species) will be required in the first season after planning permission is granted / development commences and ornamental and/or native planting to soften hard landscaping on completion of the building works.

#### **Ecology and Biodiversity**

- 16 **Careful recognition should be paid to the requirements of Planning Policy Statement 9: Biodiversity and Geological Conservation. The Key Principles of PPS9 ensure that the potential impacts of planning decisions on biodiversity and geological conservation are fully considered. These include that development plan policies and planning decisions:**
- i) **should be based upon up-to-date information;**
  - ii) **should aim to maintain, and enhance, restore or add to biodiversity and geological conservation interests;**
  - iii) **plan policies on the form and location of development should take a strategic approach to the conservation, enhancement and restoration of biodiversity and geology, and recognise the contribution that sites, areas and features, both individually and in combination, make to conserving these resources;**
  - iv) **planning policies should promote opportunities for the incorporation of beneficial biodiversity and geological features within design of developments.**
- 17 **Planning Policy Statement 9 deals with Networks of Natural Habitats which provide a valuable resource, can link sites of biodiversity importance and provide routes or stepping stones for the migration, dispersal and genetic exchange of species in the wider environment. Local authorities should aim to maintain networks by avoiding or repairing the fragmentation and isolation of natural habitats “this may be done as part of a wider strategy for the protection and extension of open spaces and access routes such as canals and rivers, including within urban areas”.**
- 18 **Planning Policy Statement 9 also states “that development proposals provide many opportunities for building-in beneficial biodiversity or geological features as part of good design. When considering proposals, local planning authorities should maximise such opportunities in and around development, using planning obligations where appropriate”.**
- 19 **A site survey and ecological survey is required to inform design. The site’s location within an “intermediate” Natural Heritage Zone is a consideration (Policy 21 of the Joint Lancashire Structure Plan Landscape and Heritage Supplementary Planning Guidance). In addition the emerging Regional Spatial Strategy, Policy EM1 dealing with Heritage and Policy EM3 dealing with Green Infrastructure need to be considered.**

**Contact Details: John Jones (01772) 534171  
john.jones@env.lancscc.gov.uk**

**Access**

- 20 Three potential Development Access points are shown on the Proposals Map of the Local Plan Review. However, now that the A674 roundabout giving access to Botany Bay village is available, an additional access, from either of the other two points shown, is unlikely to be supported by Lancashire County Council as the highway authority.

**Highway Contact Details:**

David Allen (01772) 533855 david.allen@env.lancscc.gov.uk  
 Paul Dunne (01772) 530175 paul.dunne@env.lancscc.gov.uk  
 Simon Bromley (01772) 530173 simon.bromley@env.lancscc.gov.uk

- 21 If development of the site is to be accessed via the existing roundabout on the A674 there needs to be cooperation between the relevant landowners on both sides of the canal to make sure the road proposals can accommodate the necessary link over the canal to access this site. The Borough Council will not grant planning permission for this site until the adjacent site, known as EM1.9 (Botany Bay), is under construction. The Council need to see a commitment that Site EM1.9 will be developed and the access arrangements are in place before this site comes forward for development.

- 22 Any existing or proposed retaining structures supporting the highway or properties, including highway bridges, culverts and footbridges encountered/proposed on or access to the site must be notified and discussed initially with the relevant officer of the Lancashire County Council, Highways and Environment Management, Bridges Division.

**Contact** Alex Fogg, (01772) 53 4624 alex.fogg@env.lancscc.gov.uk

- 23 If access into the site is proposed via a new canal bridge over the Leeds and Liverpool Canal, early discussion is advised with British Waterways and owners of the adjacent site EM1.9 (Botany Bay). Any new bridge will need to revert to private ownership and ideally should be constructed between October 2007 and March 2008 to fit in with existing programmed canal stoppages.

**Contact Details:** Leah Coburn (01942) 405774  
 leah.coburn@britishwaterways.co.uk

- 24 The Highways Agency should also be consulted at the onset because of the proximity of the site to the M61, junction 8 and how development would affect this part of the network; the design stage and the green travel plan.

**Contact Details:** David Wild (0161) 9305768  
 david.wild@highways.gsi.gov.uk

- 25 **The Highway Agency have indicated they require a Transport Assessment to be submitted because as the site is undeveloped at present all trips generated by the site will be new to the network and could generate significant levels of traffic in the AM and PM peaks which could potentially have a material impact on the strategic highway. It is important for the Highway Agency to understand how traffic generated by the site will be distributed onto the local and trunk road network. It is also important to take into account the permissions for development located on the opposite side of the canal at Site EM1.9.**

- 26 **The Highway Agency may wish to see the following matters raised within a site masterplan:**

- **Consideration of the whole plan within the Agency's Influencing Travel Behaviour (ITB) initiative;**

- **Setting maximum parking standards (by use class) for the whole of the site, using the parameters identified within the Joint Lancashire Structure Plan 2001- 2016;**
- **An accessibility mapping exercise for the whole site to determine strategic accessibility (by journey time) by car and public transport beyond its immediate environs;**
- **A full site Travel Plan providing, in outline form, a set of principles that would limit use of the private car, and promote viable, sustainable alternatives to all users. It would form the basis for all subsequent development proposals.**

27 Parking should be in line with the Joint Lancashire Structure Plan 2001 – 2016 (JLSP) Parking Standards, the level being informed by a completed accessibility questionnaire (see Table C of JLSP Parking Standards).

28 A developer contribution will be required (secured through a Section 106 agreement) to address transport and accessibility issues (**including public transport**) pertinent to the development. Lancashire County Council will advise the Borough Council on this aspect. The County Council will calculate contribution figures from those set out in the “Planning Obligations in Lancashire” - Policy Paper (July 2006) and subsequent approvals. The final sum could extend to several hundred thousand pounds.

**Contact Details:**

Neil Whittingham (01772) 533857 Planning Contribution Officer  
neil.whittingham@property.lancscc.gov.uk

**APPLICATION REQUIREMENTS**

29 When a planning application is submitted, the Borough Council will expect it to be accompanied by the following: -

- A Transport Assessment;
- A Green Travel Plan;
- A Sequential Test Statement (for office development);
- An Ecological Survey (Great Crested Newts/Water Voles/Bats etc). **This should also include a Phase 2 survey incorporating mapped NVC Communities, a survey for CRow Act 2000 Section 74 Habitats and Species, an assessment of habitat linkage/de-fragmentation in the wider landscape and the opportunities to deliver biodiversity enhancement. The Ecological Survey should also give an indication of necessary mitigation measures;**

Contact Details: ~~John Jones (01772) 534171 will be able to supply a select list of ecological consultants. john.jones@env.lancscc.gov.uk~~

- A Design and Access Statement;
- A Site Level Survey showing contours and breaks of slope;
- Section Drawings, showing the relative heights of proposed and surrounding buildings;
- Drawings showing accurate views into and out of the site before and after development;
- A Statement showing the location and sizes of any highway structures;
- A Landscape Impact Assessment, including existing trees and their spread in relation to buildings and the purpose and extent of any proposed screening;
- A Record of Community Involvement; (See adopted Chorley Council Statement of Community Involvement (July 2006) Sections 7 & 8);
- A completed accessibility questionnaire (see Table C of JLSP Parking Standards), which should inform the level of parking provision.

**Note**

30 Lancashire County Archaeology Services has checked their records and there are no significant archaeological implications to the proposed development. Lancashire County will therefore not be recommending that any archaeological investigation of the site is necessary.

**PLANNING POLICY INFORMATION**

The site is allocated under Policy EM1.4 of the adopted Chorley Borough Local Plan Review (August 2003) for B1 (Business (Offices/Light Industry) and B2 (General Industry) uses. Policy EM2 of the Local Plan covers development criteria for industrial/business development. The following other local plan policies are particularly relevant.

Policy EP4 covers species protection, Policy EP9 - Trees and Woodland and Policy EP10 - Landscape Assessment.

Policy TR22 covers Development Access Points. Three development access points are shown on the Proposals Map. Policy TR4 covers highway related development control criteria and the requirement on a site of 5.0 hectares or more to support proposals with a Transport Impact Assessment.

Policy TR8 covers the adopted parking standards – although it should be noted that this policy has been superseded by an equivalent policy in the Structure Plan.

Policy TR18 covers provision for pedestrians and cyclists in new developments. Policy RR19 covers the provision of footways, cycleways and bridleways in existing networks and new development.

Policy DC1 covers the Green Belt and Policy DC3 covers the Areas of Safeguarded Land.

The Statement of Community Involvement (July 2006) sets out the Council's proposals for the involvement of the local community in the preparation of the new Local Development Framework and in the determination of Planning Applications. Section 7 covers what are the best ways of informing the Community about planning proposals and Section 8 - the record of Community Involvement.

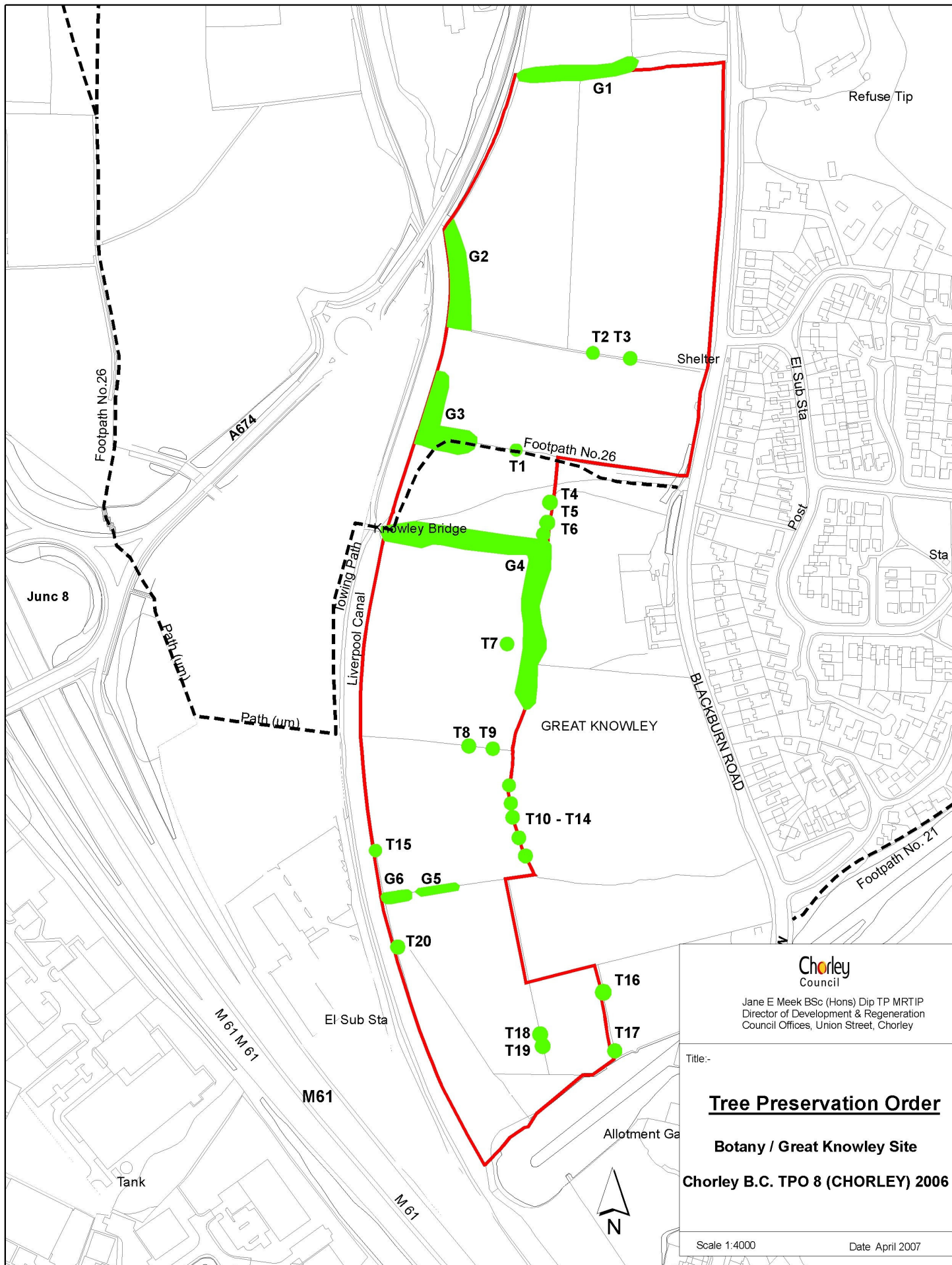
~~Chorley into 2016: Chorley Town Centre Action Area and Retail and Leisure Policies Preferred Options Development Plan Document. Addendum, June 2006.~~

Town Centre Strategy adopted October 2006

Economic Regeneration Strategy adopted March 2006

**COUNCIL CONTACTS**

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**Chorley Council**  
 Jane E Meek BSc (Hons) Dip TP MRTIP  
 Director of Development & Regeneration  
 Council Offices, Union Street, Chorley

Title:-

**Tree Preservation Order**  
**Botany / Great Knowley Site**  
**Chorley B.C. TPO 8 (CHORLEY) 2006**

Scale 1:4000      Date April 2007



Report of	Meeting	Date
Director of Development and Regeneration  (Introduced by the Executive Member for Economic Development & Regeneration)	Executive Cabinet	24 May 2007

## VARIATION OF THE HOME REPAIR AND ADAPTATION GRANTS SCHEMES IN CHORLEY

### 1. PURPOSE OF REPORT

To seek approval for arrangements for the delivery of home repair grants for the next three years.

### 1. CORPORATE PRIORITIES

The proposal fits well with the priorities set out in the Local Area Agreement. In particular it supports the Healthy Communities and older people block and the Enterprise and growth block. It also contributes substantially to reducing the carbon footprint of the borough.

### 2. RISK ISSUES

The report contains no risk issues for consideration by Members.

### 3. BACKGROUND

In mid 2003 government introduced the Regulatory Reform Order, which allowed for local discretion and choice in the allocation and application of grants to assist the private sector in maintaining and improving property. The Council is obliged to publish a policy to set out the grants available. The document attached to this report is intended to replace the current policy and to guide the work of officers for the next three years.

This new policy statement reflects the conclusions of the stock condition survey carried out in 2004; the priorities identified under the Unfitness, Housing Health & Safety Rating System; the Decent Homes criteria; the findings of the government's English House Condition Survey published in September 2006; the establishment of a Home Improvement Agency as a delivery mechanism and experience gained over the last three years

### 4. Proposals.

The prime responsibility for maintaining private sector property rests with the owner, but the Council will wish to ensure that the stock as a whole is maintained and improved to meet modern standards. In particular, elderly or vulnerable households may need assistance in order to keep property at an acceptable standard or to meet special needs. In addition it is vital to improve the energy efficiency of older housing particularly when occupied by less well off households.

4.1 The following schemes are proposed to deal with these issues over the next three years. With immediate effect, there will be four schemes available to residents of Chorley as follows:

1. **Home Repair Assistance (Energy) Grants**. These grants are aimed at households who fail to qualify for the government funded Warm Front grants and give a more basic standard of insulation than is delivered through the Warm Front scheme. Nevertheless, these grants have delivered substantial reductions in carbon usage and made a real difference to the lives of many local people. The grants are delivered through a private sector partner – Quality Services Group – and administered by the Home Improvement Agency.
2. **Home Repair Assistance (Repairs) Grant**. These grants will be available to vulnerable households (defined in the attached policy statement) to assist with the cost of repairs affecting the health and safety of the occupants. The grant is a maximum of £8,000 and the grants are delivered through the Council's Home Improvement Agency – Staying Put South Lancashire.
3. **Disabled Facilities Grant**. These statutorily available grants are for the adaptation and improvement of housing to meet the needs of disabled persons. The terms of the grant are dictated nationally and the work required is specified by Occupational Therapists. The local administration and delivery of the grant is carried out by Staying Put South Lancashire on behalf of the Council.
4. **Handyperson Scheme**. This scheme is administered by Staying Put South Lancashire on behalf of the Council and is available to elderly homeowners for minor repair work. The homeowner makes a small (£10) contribution towards the costs. It is primarily concerned with safety issues and with repairs that, if neglected, may lead to serious disrepair.

4.2 These proposals maintain a wide range of assistance, particularly targeted to the most vulnerable individuals in the community and encourage energy efficiency. They protect the interests of those households who are most at risk and recognise the changed financial climate in which the Council must operate.

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

5. There are no HR implications to these proposals.

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

6. There are no financial implications to these proposals beyond the capital budgets already approved.

#### **RECOMMENDATIONS**

7. That the draft Housing Renewal Grant Policy for 2007 – 2010, which sets out proposals for the next three years in respect of discretionary and mandatory grants to assist vulnerable households to maintain, adapt and improve their homes, be approved for consultation purposes.

**REASONS FOR RECOMMENDATIONS**

8. To ensure that an effective spectrum of House Renovation and Improvement grants is maintained, protecting vulnerable groups, assisting in maintaining the housing stock and promoting energy efficiency.

**JANE MEEK****DIRECTOR OF DEVELOPMENT AND REGENERATION**

There are no background papers to this report.

<b>Report Author</b>	<b>Ext</b>	<b>Date</b>	<b>Doc ID</b>
Roger Bailey	5711	08.01.07	ADMINREP/REPORT

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# Chorley

Borough Council

## **DRAFT HOUSING RENEWAL GRANT POLICY 2007 - 2010**



## **DEVELOPMENT & REGENERATION**



# **ASSISTANCE FOR PRIVATE SECTOR HOUSING**

**This document sets out Chorley Council's proposals for the next three years in respect of discretionary and mandatory grants to assist vulnerable households to maintain, adapt and improve their homes. It contains detailed guidance for officers on the delivery of financial assistance in the form of grants for the repair, improvement and adaptation of private sector housing.**

Roger Bailey  
Strategic Housing Manager  
Civic Offices  
Union Street  
Chorley  
PR7 1AL

Date: October 2006

## 1. Executive Summary

- 1.1 The Regulatory Reform Order 2003 removed the previous prescriptive grant system and allows local authorities to replace it with locally set criteria. It is now the Council's responsibility to determine the type and extent of any assistance given; to set the qualifying criteria, conditions, availability and other issues and when necessary adjust policy to reflect changes in housing needs. The only exception to this is the Disabled Facilities Grant, which is still mandatory and controlled by the terms of the provisions contained in the Housing Grants, Construction and Regeneration Act 1996 and subsequent revisions.
- 1.2 The legislation governing the current grant assistance and wider housing renewal policies was withdrawn on the 18 July 2003 and the Council initially implemented an interim grant policy. This policy allowed the Council to continue to process and approve grants whilst continuing its assessment of the feasibility of the introduction of a Home Improvement Agency and for the private sector stock condition survey to be carried out, its results assessed and where appropriate taken into account in the development of this policy.
- 1.3 The interim grant policy came into force on the 18 July 2003 and was subject to a review and amendment on 1 April 2004.
- 1.4 This new policy statement reflects the conclusions of the stock condition survey carried out in 2004; the priorities identified under the Unfitness, Housing Health & Safety Rating System; the Decent Homes criteria; the findings of the government's English House Condition Survey published in September 2006; the establishment of a Home Improvement Agency as a delivery mechanism and experience gained over the last three years.
- 1.5 The Council has the power to provide grants, loans, advice, and materials or if necessary to carry out works directly in order to repair, improve, convert or adapt residential accommodation. In order to facilitate this the Council may set its own grant rates, conditions and other criteria.
- 1.6 In previous policies help was provided through Home Repair Assistance grants for the repair and improvement of properties and to improve energy efficiency; the Handy-Person scheme (run on the Council's behalf by Anchor Staying-Put) for very minor works, and assistance to landlords to bring long-term empty properties back into use. This latter function is now within the Streetscene, Neighbourhoods and Environment directorate.
- 1.7 A Home Improvement Agency (Anchor Staying Put – South Lancashire) has been established jointly with South Ribble Borough Council and the County Council to deliver the Council's private sector housing assistance with effect from May 2006. This approach has widened the scope of assistance available to Chorley residents by increasing the range of advice and services available as well as processing all grant assistance as described in this policy document.
- 1.8 The discretionary assistance that it is proposed to retain for the next three years are:
  - Home Repair Assistance – for essential repairs to properties for owners in vulnerable low-income groups.
  - Home Repair Assistance (Energy) - for energy efficiency improvements to properties for owners in vulnerable low income or at-risk groups.
  - Handy-Person assistance through Anchor Staying Put.
  - The statutorily directed Disabled Facilities Grant will complement the three discretionary grants above, limited to the statutory maximum of £25,000.

Together, these will provide comprehensive support to elderly or disabled residents living in private sector housing within the Borough.

## 2. Policy Context

### Links to the Corporate Strategy, Housing Strategy and other policies

2.1 These detailed policies for grant assistance are an integral part of the Council's overall Housing Strategy and link directly with the corporate vision of making Chorley the place of choice to live, work and invest in the North West.

- We intend to facilitate providing safe, well maintained energy efficient homes, by providing targeted assistance.
- To provide a safety net system of assistance to elderly and vulnerable residents to ensure that the housing stock does not deteriorate.
- To enable disabled and elderly persons to remain living within their homes so as to reduce demand for specialist accommodation, sustain mixed communities and improve the quality of live of residents.

2.2 By investing strategically in the private housing stock we will foster safer communities by,

- Remediating disrepair
- Improving energy efficiency and affordable warmth
- Encouraging home safety
- Promoting private investment in both the privately owned and privately rented tenures
- Creating a culture of environmental sustainability

In achieving these aims the Council believes that it will improve the overall level of prosperity through,

- Joint public and private sector investment in the housing stock
- Providing new employment opportunities within the local construction industry and associated trades.

2.3 These policies for grant assistance are but one link in the chain needed to deliver all of these targets. However, it is anticipated that the Council will achieve a substantial improvement in energy efficiency and a reduction in the current levels of unfitnes within the borough's private housing stock.

2.4 The policies are based on certain fundamental assumptions:

- That limited resources should be directed to assist those least able to carry out essential repairs and improvements themselves
- That priority should be given to households in the vulnerable and 'at risk' groups
- That many home-owners are able to finance works themselves but need access to advice and agency services in order to help implement them
- That maintenance of private sector dwellings is primarily the responsibility of their owners
- That enabling elderly or disabled people to remain in their own homes rather than transferring to specialist accommodation is inherently desirable on both social and economic grounds

## 3. Details of Grants Available



### 3.1 Housing Repairs Grant

It is intended to make this discretionary grant available for at least the next three years. The grant is available to vulnerable owner-occupied (or leasehold) households whose dwelling requires repairs of a substantial nature likely to affect the health and safety of the occupants. Two levels of grant are proposed dependant on the age of the applicant. For those under 60, the maximum grant is £5,000. For those aged over 60, the maximum grant is £8,000. The grant is not available to private tenants because other powers exist to compel landlords to keep properties in a reasonable state of repair.

A vulnerable household is defined as being one where the applicant is EITHER:

- Elderly (aged 60 or over); or
- A parent or legal guardian with a child aged 15 or under; or
- Disabled, as a person:
  - Whose sight, hearing or speech is substantially impaired;
  - Who has a mental disorder or impairment of any kind;
  - Who is physically, substantially disabled; and;
  - Is either registered or could be registered as disabled under either the National Assistance Act 1948 or Children Act 1989.

#### **AND**

Is in receipt of a relevant means tested benefit, which are Income Support, Council Tax Benefit, Housing Benefit, Pension Credit and Income Based Job Seekers Allowance or, on a low fixed income, which results in a contribution level of £0.00 based on the disabled facilities grant means test.

**ALTERNATIVELY** the applicant would qualify as vulnerable if they are 75 years of age or over (irrespective of income level).

The required work is 100% grant assisted up to the maximum grant of £5,000. No conditions are attached and there is no requirement to repay the grant if the property is subsequently sold. No restriction is imposed on the number of applications an owner-occupier may make for assistance on the same property. However the total assistance provided cannot exceed the age related £5,000 or £8,000 maximum limit over any 5-year period.

The grant is administered by the Home Improvement Agency acting on behalf of the Council so that applicants receive the added benefit of welfare advice from the Agency caseworker. The most common types of repair achieved with this grant are repairs to roofs, re-pointing and electrical rewiring.

### 3.2 Housing Energy Grant

It is intended that this grant also will be available for at least the next three years. It is available to any owner-occupier aged over 60 and to disabled persons of any age who does not qualify for the government funded Warm Front grant. For disabled applicants and for persons aged 60 to 69 the grant is a 50% grant. For those aged 70 or over, it is a 100% grant. The maximum eligible expense is £2,500.

The grant covers cavity wall insulation, loft insulation, draught proofing and the provision of a hot water cylinder jacket. Whilst this is less comprehensive than the Warm Front grant, it will make a substantial contribution to reducing carbon emissions as well as substantially improving the quality of life for recipients.

The grant is administered by the Home Improvement Agency and delivered by an approved contractor – Quality Services Group.

**Notes: 1) For the purposes of both grants above, the definition of dwelling will continue to include houseboats and mobile homes used as a person's main residence.**

**2) These grants are available to owner-occupiers and to tenants with a full repairing lease. They are not available to landlords or to tenants whose landlord is the person primarily responsible for repairs.**

### **3.3 Handyperson Scheme**

This scheme provides elderly or disabled owner-occupiers and tenants with the ability to get small repairs done. These might include fixing loose carpets, adjusting a sticking window or door, hanging curtains or similar minor works. A charge of £10 is made to the applicant for the service. The service is delivered by the Home Improvement Agency and is supported by an annual grant from Chorley Council.

### **3.4 Disabled Facilities Grant**

Under current grant legislation these are the only mandatory grant remaining. Qualifying criteria for them is determined nationally under the provisions contained in the Housing Grants, Construction and Regeneration Act 1996 and subsequent revisions. These statutory provisions also include a means test.

These grants are given to adapt the home of a disabled person to meet their needs. The type and extent of work involved is normally determined by an Occupational Therapist appointed by Lancashire County Council's Social Services department. The grant is subject to a means test of the disabled applicant's ability to pay, this determines their level of contribution. The test is set nationally not locally. The grant is the difference between the applicants calculated contribution and the cost of the approved works, subject to the mandatory limit of £25,000.

Although the statutory maximum for this grant is £25,000, it is possible for the Council to give a discretionary element in excess of this figure, although such an element would not attract government subsidy. It has not been past practice of the Council to give such a discretionary increase and no such increase is proposed in this policy statement i.e. the grant will remain at the maximum statutory figure of £25,000.

The applicant must provide a certificate of occupancy with their application but the legislation does not contain any conditions of repayment should the property be sold or the disabled person ceases to occupy it.

Since May of 2006 the Council has used the Home Improvement Agency to deliver these grants on its behalf. A fee is payable to the Agency and this is included in the eligible expense calculation for the grant. The use of the Agency gives a significant extra service to applicants in that they also get access to a caseworker who can address other benefits on their behalf.

These grants are available to owner-occupiers and private tenants. Housing Associations are expected to fund these works themselves on behalf of tenants, but arrangements are in place for these grants to be used where demand exceeds the funds available to the housing associations. Special arrangements have been made within the Transfer Agreement for Chorley Community Housing to fund these grants on ex-council properties.

## **4. Delivery Mechanism**

Chorley Council has worked with South Ribble Borough Council and the Supporting People Unit of Lancashire County Council to jointly tender for a Home Improvement Agency covering both Borough areas. Anchor Staying Put are widely experienced in this type of

work and operate agencies in many parts of the country provides this service. Technical staff have been seconded to work at the agency and the 'client side' is based in the Development and Regeneration Department.

The primary advantage of using an Agency for delivery of these grants is the additional services that they bring to the client group. Part of the process is allocation of a caseworker to each client. The caseworker will tackle all aspects of welfare and benefits to ensure that the client is receiving all of the necessary support from all agencies. They are also skilled in supporting clients through the upset and mess of having building work carried out and can liaise with contractors as necessary to ensure that the work is carried out with the minimum of disturbance.

Regular reports will be made to Members on the performance of the Agency.

**Appendix One****The Regulatory Reform (Housing Assistance) (England and Wales) Order**

The Government introduced legislative changes in 2003 which required the Council as part of its wider Housing strategy to publish a policy for providing assistance to deal with poor conditions in private sector housing, both in terms of the policy tools available and the ability to work in partnership with others. It also provided a major opportunity for the Council to address deficiencies on a local basis within the existing legislation and further develop the strategy for tackling poverty and social exclusion, health inequalities and neighbourhood decline.

The Order:

- Introduced a new general power enabling local housing authorities to provide assistance for housing renewal.
- Replaced some sections within The Housing Grants Construction and Regeneration Act 1996 regarding Renovation grants; Common Parts Grants; Houses in Multiple Occupation Grants; Group Repair and Home Repair Assistance.
- Repealed the provisions in the Housing Act 1985 relating to loans given by local housing authorities for housing renewal (with the exception of local authorities that are not housing authorities).
- Streamlined the provisions governing the declaration and operation of Renewal Areas.
- Made minor changes to the provisions in relation to Disabled Facilities Grants.
- Allowed Councils to provide assistance for repair, improvement and adaptations of housing and also for the demolition of a dwelling and to help with rebuilding costs. Legislation on clearance areas and enforcement of fitness standards remains unchanged.

Further legislation contained in the Housing Act 2004 included alterations to means testing and other criteria relating to disabled adaptations for dependant children. The effect of these changes initially will increase both overall grant levels and also likely demand for adaptations for children. Future amendments to legislation at present still under consultation may reduce the overall financial impact on the Council by transferring the provision of certain types of adaptations (stair lifts and minor works) to Lancashire County Council Social Services however no definitive proposal or timescale has been suggested at the present time.

**Appendix Two****Approved Budgets****A) Disabled Facilities Grants**

Approved capital budget	2005/6 £300,000	2006/7 £350,000	2007/8 £350,000
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**B) Home Repair Grants**

Approved capital budget	2005/6 £145,000	2006/7 £100,000	2007/8 £100,000
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**C) Energy Grants**

Approved capital budget	2005/6 £125,000	2006/7 £100,000	2007/8 £100,000
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**D Handyperson Service**

Approved capital contribution	2005/6 £10,000	2006/7 £10,000	2007/8 £10,000
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<b><u>Totals Over 3 Years</u></b>	£580,000	£560,000	£560,000
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**Appendix Three****English House Condition Survey**

This survey work was carried out in 2003 but not published by government until the summer of 2006. It gives only a regional analysis but this is still helpful in assessing the position in Chorley.

The survey contains the following information:

	<b><u>North West</u></b>	<b><u>England</u></b>
Proportion of private sector dwellings not meeting the Decent Homes standard	34%	31%
Private sector vulnerable households in non-decent homes	40%	37%
Average SAP rating of private sector dwellings	50.3	50
Dwellings with SAP rating less than 30	9.3%	9.8%
Dwellings with SAP rating greater than 70	9.0%	9.1%

**Appendix Four****Chorley Private Sector Condition Survey**

Based on the 2004 Private Sector Stock Condition Survey there are currently 1,698 unfit properties and 2,193 are in need of substantial repair within the borough. In addition a further 1,194 are empty and likely to be in need of improvement. By comparison if the Decent Homes criteria were applied to the borough the results suggest that almost 24% of the private sector stock would fail to meet this standard.

The total expenditure to bring these to an acceptable fitness standard (based on historic average grant levels) has been calculated at £34.2 million and under the Decent Homes standard the figure is £31.6 million. The overall effect of Council intervention on the unfitness level within the borough housing stock is going to be limited, however with the introduction of the Home Improvement Agency, increased options for private improvement works will provide a further boost to dealing with unfitness throughout the borough.

Local government intervention in the private sector housing stock has only contributed to the repair and improvement of a small proportion of the stock. The overall responsibility for maintaining private properties rests with the owner and the Council should only intervene where the private market fails to deliver. The levels of public assistance available are limited therefore it is essential that it be targeted at clearly identified areas.

It is acknowledged that the private sector housing stock is a major public asset. On this basis all assistance should be viewed as a form of investment to protect the stock for longer-term public benefit. Although owners may gain short-term benefits it is not the main reason why assistance is offered.

Excluding Disabled Facilities Grants all other types of assistance are discretionary. They have eligibility criteria but will ultimately be subject to the availability of funding. Budget provision for assistance will never be sufficient to meet more than a fraction of potential demand therefore sustaining future levels of funding are essential to the effectiveness of a renewal policy.

Increases in the capital value of homes in the borough have led to substantial levels of positive equity available to homeowners. Where appropriate, owners must be encouraged to utilise this source of funding to ensure their properties are improved and maintained in a fit condition. However it is recognised that there will be exceptions to this principle and therefore the Council must have a policy that allows for direct intervention and assistance where the market fails to deliver improvements.

The role of advice to householders on maintaining their property will be developed over the next three years through joint working with Anchor and South Ribble Borough Council to produce leaflets and other promotional material.

**Appendix Five****Appeals about decisions and application of policy**

1. The Strategic Housing Manger will treat appeals about refusals of enquiries or applications for assistance relating to this policy on an individual case basis.
2. Appeals must be submitted in writing and include the specific grounds on which the appeal is based. They must be sent to the:  
Strategic Housing Manager, Chorley Council, Civic Offices, Union Street, Chorley PR7 1AL
3. Appeals will only be considered on the following grounds:
  - That the Council's policy has not been applied correctly in the specific case, or
  - That the case is an exception and merits consideration under the councils exceptional cases procedure.
4. Appeals will not be considered on the grounds that the appellant disagrees with the policy. However the Strategic Housing Manager will consider any written comments and complaints about the published policy.
5. A written response will be issued in answer to all appeals submitted. If a case merits further consideration it will be submitted to the Director of Development & Regeneration along with recommendations and options where appropriate. The Director of Development & Regeneration, in consultation with an Executive Member, may then authorise assistance as an exception to the general policy.



Report of	Meeting	Date
Director of Leisure and Cultural Services (Introduced by the Executive Member for Health, Leisure and Well-Being)	Executive Cabinet	24/05/07

## ASTLEY PARK PROJECT - UPDATE

### PURPOSE OF REPORT

- The purpose of this report is to update Members on progress with the Astley Park Project and to agree the way forward with the Coach House element of the project.

### CORPORATE PRIORITIES

- The project contributes to all of the Council's strategic objectives in some way. But, particularly the strategic objectives to improve equality of opportunity and life chances, improve access to public services and develop the character and feel of Chorley as a good place to live.

### RISK ISSUES

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

Strategy		Information	
Reputation	4	Regulatory/Legal	
Financial	4	Operational	4
People		Other	

- The key risk areas associated with this project relate to reputation, financial and operational matters. As you will read, the project has been split into a number of discreet elements and risks are assessed and mitigated at each stage. Further in this report Members will note specific actions that are being undertaken to address these risk issues further.

### BACKGROUND

- Following notification of the successful Heritage Lottery Fund (HLF) award in 2005, work began on site in February 2006. The Astley Park Project is a high profile project which has a valuable role to play in maintaining and enhancing the quality of life of local people. The regeneration of the park along with a proactive management regime has the potential to offer a hugely enhanced asset to the people of Chorley and visitors.
- The project has been implemented to a number of individual contracts and the purpose of this report is to update Members on the various aspects of these contracts and the overall project.



**WOODLAND AND TREE CLEARANCE CONTRACT**

7. This contract has been completed and all outstanding snagging issues have been resolved.

**LAKE CONTRACT**

8. The de-silting works have been completed and the dam wall made good. It was hoped that the first grade of the silt would take place by the end of April followed a few weeks later by final spreading and seeding. However the silt is not drying out as quickly as was hoped and therefore we are looking into the possibility of spreading the wet silt to assist the drying out process prior to final grading and seeding.

**DEMOLITION CONTRACT**

9. The demolition work has been completed along with the health and safety plan.

**LANDSCAPE CONTRACT**

10. Good progress is being made with the landscape contract, the contractors have made the most of the recent good weather. The renovation of the Ha-ha is complete, work to the front lawns including drainage is also complete. The driveway to the Hall frontage has been tarmaced ready for the resin bound gravel wearing course which will be laid later in the contract. The flags have been removed from the lake side and again the tarmac base course has been laid ready for the resin bound gravel wearing course. These flags are to be reused in the surfacing of the proposed courtyard to the rear of the coach house. The bound gravel path following the western boundary through the woodland north of the lake is complete. Work is ongoing in the walled garden, a new wall is being constructed to the east to enclose the garden on 3 sides and renovation to the existing walls is taking place. The next element of the work to start will be path works within the woodland along the river corridor.
11. The planning application for lighting along Chorley approach has been submitted. Further information has been sought relating to the impact the lighting would have on the bat activity within the area and a design and access statement has been provided. The application is likely to go to the June planning committee.

**BUILDING CONTRACT**

12. The building work tenders were returned at the end of January and all tenders were in excess of the available budget. A tender report has been provided by the project Quantity Surveyor and in addition a value engineering exercise was undertaken to generate a list of proposed tender economies for the scheme. The coach house is a Grade II listed building of national importance and as such its historic fabric and context must be respected, it is therefore important that the work carried out to the building is of an appropriate quality and standard in fitting with the historic value of the property and also for its intended use.
13. £687,000 has been allocated for the building contract. The lowest tender figure is £292,000 over budget. An exhaustive list of potential savings has been drawn up by Simon Fenton Partnership (the project quantity surveyors). The total list of savings they have identified amount to £218,000, still leaving a shortfall of £74,000 (plus 15% fees). However, many of the potential savings are considered inappropriate as they would result in (a) the coach house simply being made wind and water tight and not ready for operation; and (b) poorer quality materials being used which would impact on future maintenance costs. The quantity surveyors were instructed to review the savings and revise them to address these concerns. Their provisional calculations have identified £144,000 of acceptable savings, resulting in a shortfall of £170,200 (£148,000 plus 15%

fees). It should be noted that these figures are still subject to negotiation with the building contractor.

14. Other HLF projects that have experience similar problems have submitted further bids to HLF and been successful, most notably Cuerden Valley Country Park. HLF could fund up to a maximum of 78% of the £170,200 leaving the Council to fund the remaining £37,444.
15. If we were to make an application for further funding it would be prudent to bid also for furniture within the park and to build a wall between Astley Hall and its boiler house which would enhance the walled garden and improve security. Both of these items were not included in the original bid. The cost of these works amounts to £100,812. If HLF provided funding at 78%, or £78,632, this would mean that the Council would need to provide match funding of £22,180 for this element.
16. In summary, the total costs amount to:

	<b>Total</b>	<b>HLF</b>	<b>CBC</b>
Building Contract	£170,200	£132,756	£37,444
Furniture	£80,265	£62,606	£17,659
Additional wall	£20,547	£16,026	£4,521
<b>Total</b>	<b>£271,012</b>	<b>£211,388</b>	<b>£59,624</b>

17. It is recommended that officers be instructed to submit a request for additional HLF funding, as outlined above.

#### **PETS CORNER**

18. Following the decision to maintain the inclusion of pets corner within the project our consultants are now currently working on detailed designs for the pets corner and play area.
19. Once the details have been agreed a planning application for the proposals will be submitted. The remains of pets corner will be removed and the area reinstated as part of the landscape contract.

#### **PLAY AREA AND KIOSK**

20. Now the decision has been made to retain pets corner as part of the project and HLF have given formal approval to the proposed adjustments of the layout of the facility, detailed designs are now being drawn up.

#### **MANAGEMENT AND MAINTENANCE PLAN**

21. Work is underway on the Management and Maintenance Plan and an initial scoping document has been produced and forwarded to HLF for comment. The production of this document is a condition of the Heritage Lottery Fund grant. Further details of the plan, and any areas requiring Member decisions, will be brought for approval in due course.

#### **PUBLICITY**

22. Update posters have been installed on temporary notice boards at the 3 main entrances into the park and are regularly updated on a monthly basis. Permanent notice boards will replace these in due course. A small exhibition has been set up in Astley Hall.

**FUTURE REPORTS**

23. Much of the content of this report is very similar to previous reports. In addition, project management and reporting arrangements have been reviewed. Following consultation with the Executive Member, we have agreed only to bring reports to Executive Cabinet that require a decision.

**COMMENTS OF THE DIRECTOR OF HUMAN RESOURCES**

24. There are no Human Resource issues arising from this update report.

**COMMENTS OF THE DIRECTOR OF FINANCE**

25. As the tenders for the building contract were considerably above the sum provided for in the scheme budget, it is necessary to consider the consequences. The proposal by the Director of Leisure and Cultural Services is that the scheme budget be increased, provided that the Heritage Lottery Fund will contribute funding for 78% of the additional requirement. The Council's own increased contribution of around £60,000 would probably be financed by external borrowing, with annual revenue consequences of approximately £5,000 per year. Members may consider this revenue cost to be justified if it helps to ensure the completion of the project to a high standard and if it helps to attract another £211,000 worth of lottery grant.

**RECOMMENDATION(S)**

26. Members are asked to note progress with the project and approve the recommendation to approach HLF for additional funds for the building contract, site furniture and the construction of an additional wall to the rear of the Hall.

**REASONS FOR RECOMMENDATION(S)  
(If the recommendations are accepted)**

27. To increase the budget to enable the execution of the building contract without jeopardising the design and quality of the renovation giving due respect to the historic importance of the building and providing facilities fit for purpose.
28. To enable the inclusion of site furniture and an additional wall to the rear of the Hall within the project which was not included within the original bid.

**ALTERNATIVE OPTIONS CONSIDERED AND REJECTED**

29. None.

JAMIE CARSON  
DIRECTOR OF LEISURE AND CULTURAL SERVICES

There are no background papers to this report.

Report Author	Ext	Date	Doc ID
Suzanne Cox	5262	8 May 2007	LCSREP/94113LMA



Report of	Meeting	Date
Director of Finance and Director of Policy and Performance (Assistant Chief Executive) (Introduced by the Executive Member for Resources)	Executive Cabinet	24 <sup>th</sup> May 2007

## A FRAMEWORK FOR PARTNERSHIP WORKING

### PURPOSE OF REPORT

- To seek members' approval of the attached Framework for Partnership Working, which conforms with current best practice in the way that partnerships involving the Council should be governed and managed.

### CORPORATE PRIORITIES

- Partnership working is now central to the Government's improvement and inspection agendas. It is therefore essential that we ensure that Chorley's partnership arrangements help meet our corporate priority of being a performing organisation.

### RISK ISSUES

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

Strategy	3	Information	
Reputation	3	Regulatory/Legal	
Financial	3	Operational	3
People	3	Other	

- Effective governance and management arrangements for partnership working underpin the achievement of all the Council's strategic objectives. Should any key partnership fail this would have a significant financial impact, affecting its staff and ultimately the Council's reputation.

### BACKGROUND

- Working in partnership with other organisations to deliver jointly agreed objectives is now considered essential to the delivery of effective public services and local authorities in particular, are expected to initiate, lead and engage in partnership working.
- The Local Government White Paper contains a clear expectancy that greater collaborative working will be central to transforming local services. Collaborative arrangements may not always result in a partnership, however it is important that wherever this might happen, effective partnership controls and procedures are in place to protect the Council's interests.

7. At the highest level, the Council is expected to play a leading role in the Local Strategic Partnership (LSP) by working in collaboration with other public, private, voluntary and community organisations to deliver better outcomes for local people.
8. Partnership arrangements also represent a key service delivery option available to the Council and they may also provide a potentially important source of funding (for example PFI, PPP's etc.).
9. As a result, effective partnership working now underpins the improvement and inspection agenda, including the new district CPA regime, Use of Resources assessment and CIPFA SOLACE Corporate Governance Framework.
10. In their recent Use of Resources report, the Audit Commission made several recommendations regarding the Council's partnership management arrangements, including the need to:
  - Adopt a formal assurance policy framework to manage partnership risks
  - Identify the Council's significant partnerships and ensure that there are appropriate governance arrangements in place for each of them
11. A review of the Council's partnership working arrangements has recently been completed by Internal Audit, who as part of their review produced a revised "Framework for Partnership Working" (attached) to encompass best practice and in so doing address the above Audit Commission recommendations.
12. The revised Framework has now been reviewed / endorsed by Strategy Group and the remaining paragraphs summarise and explain the main provisions:

#### **REVISED FRAMEWORK PROVISIONS**

13. The Director of Finance has now assumed corporate responsibility for the oversight of partnership working, including the production / maintenance of procedural guidance. This responsibility will be added to the corporate procurement role under their corporate contract management remit. Close liaison with the Director of Policy and Performance to ensure that corporate standards are also applied to the Local Strategic Partnership (LSP) will be necessary.
14. The Audit Commission's definition of partnerships has been adopted, which states that a partnership is " an agreement between two or more independent bodies to work collectively to achieve an objective".
15. Officers wishing to involve the Council in a key partnership arrangement are required to report this to the Executive Cabinet and seek formal approval of the proposed arrangement. A key requirement will be to demonstrate clear linkage with the Council's strategic objectives. Indeed the Council should consider the benefits of continuing in any arrangement, which does not contribute significantly in that regard.
16. It is proposed that an annual report be submitted to the Executive Cabinet by the Director of Finance setting out how each of the key partnership's objectives and targets have been achieved. Additionally this report will contain an assessment of the financial well-being of each of the key partners and will highlight any other issues that need to be brought to members' attention.
17. The new framework states the importance of establishing what the Council's key partnerships are and the more substantive governance and risk management arrangements that these should be subject to. The following governance disciplines should however, be applied to every partnership, irrespective of its remit or status:

- Clear commonality of interests
- Sound business case based on an Impact assessment
- Clear outcomes aligned to the Council's strategic objectives
- Certainty over responsibilities & clear reporting lines
- Clear payment structure (where appropriate)
- Certainty over the ownership of insurable risks
- Internal Audit access arrangements
- Clear exit strategy

18. Officers are also required to follow HM Treasury / OGC guidance on the management of partnership risk. This includes the establishment of joint risk registers for all the Council's key partnerships.

**COMMENTS OF THE DIRECTOR OF HUMAN RESOURCES**

19. Not applicable to this report

**RECOMMENDATIONS**

20. That the report is noted and the revised Framework for Partnership working is formally approved.

21. That all key partnership initiatives are presented to Executive Cabinet, prior to any agreement being put in place.

22. That an annual report on all key partnerships' performance and where appropriate, financial well-being be submitted to Executive Cabinet by the Director of Finance.

**REASON FOR RECOMMENDATION**

23. To ensure that the Council continues to encompass best practice in partnership working and in so doing addresses the specific recommendations made by the Audit Commission in their recent Use of Resources report.

**ALTERNATIVE OPTIONS CONSIDERED AND REJECTED**

24. None.

**GARY HALL  
DIRECTOR OF FINANCE**

<b>Background Papers</b>			
<b>Document</b>	<b>Date</b>	<b>File</b>	<b>Place of Inspection</b>
"A Framework for Partnership Working"	2002	FINANCE DIRECTORATE	Union Street Offices
"Managing Risks with Delivery Partners" (HM Treasury / OGC)	2004		
CIPFA SOLACE Corporate Governance Framework	2006		

<b>Report Author</b>	<b>Ext</b>	<b>Date</b>	<b>Doc ID</b>
Garry Barclay/ James Douglas	5468	23 <sup>rd</sup> April 2007	Partnership Working Report

# Chorley Council

## **Framework For Partnership Working**





# CONTENTS

- 1 BACKGROUND
- 2 WHAT IS A PARTNERSHIP?
- 3 ESTABLISHING NEW PARTNERSHIPS
- 4 THE COUNCILS KEY PARTNERSHIPS
- 5 GOVERNANCE
- 6 RISK MANAGEMENT
- 7 CORPORATE OVERSIGHT OF PARTNERSHIP WORKING

## 1. BACKGROUND

Continued...

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1.1 This policy framework meets the prevailing standards and recommended best practice as at December 2006 and in so doing addresses the issues raised by the Audit Commission following their original review of the Council's partnership management arrangements in 2002 and more recently in their 2006 Use of Resources report.

1.2 In particular it sets out the control procedures and processes that members and officers need to be aware of and apply whenever they are involved in partnership working.

1.3 It also supplements the guidance on partnership working that already exists within the Council, for example that contained in the Council Constitution and the Corporate Procurement Strategy.

## 2. WHAT IS A PARTNERSHIP?

2.1 A plethora of definitions exist to describe what actually constitutes a partnership. The Council has adopted the Audit Commission's general definition contained in "Governing Partnerships - Bridging the Accountability Gap" (2005):

*"An agreement between two or more independent bodies to work collectively to achieve an objective".*

2.2 The following are considered to be partnerships and therefore subject to this Policy Framework. This list is not exhaustive but covers the main areas of partnership working.

- **Local Strategic Partnership (LSP)**

Councils have been directed to enter into a LSP with all other local public sector service providers, together with the private and voluntary sectors, in order to improve outcomes for local people by working together on a multi-agency basis.

- **Joint Committees**

Under Section 101 of the Local Government Act 1972, where 2 or more local authorities wish to undertake joint activities, they have power to set up a joint committee. An example of this would be the setting up of a joint committee for purchasing across more than one Council area.

- **Charities and Trusts**

Increasingly, local authorities have been setting up bodies with charitable status to provide services that had previously been provided directly by the local authority, in areas such as housing, leisure and social services. This Council has for example set up a trust to operate some of its leisure facilities.

- **Companies**

Sometimes it is advantageous for councils to be involved in setting up companies for specific purposes. They can have various structures (for example limited liability by shares or by guarantee) and Chorley has previously used this vehicle in some circumstances.

- **Contractual Arrangements with the Private Sector**

Examples of such arrangements include the development agreements for the Town Centre and the Gillibrand development.

- **Partnerships under legislation**

An example of this is the Community Safety Partnership.

- **Private Finance Initiative**

Should the Council obtain approval to such a project, this would involve private sector finance for construction work with the private sector then operating the services in the completed building.

- **Informal Arrangements**

This covers situations cases where Chorley wishes to work with other Councils, organisations or individuals to deal with specific problems or issues. As between Councils, these arrangements can be formalised into joint committees under Section 101 of the Local Government Act 1972.

For the purposes of this framework, the issuing of grants or the carrying out of collaborative procurements shall not in themselves constitute the formation of a partnership, although they may lead to a partnership in any resulting arrangement.

## 3. ESTABLISHING NEW KEY PARTNERSHIPS

3.1 The Council's strategic objectives and long-term outcomes are set out in the Corporate Strategy. Before entering into any new form of partnership working it is essential to be able to demonstrate clear linkage with strategic objectives. This is to ensure that resources are not unnecessarily diverted away from delivering on key priorities and targets by becoming involved in peripheral activities that do not tangibly contribute to the delivery of the Corporate Strategy.

3.2 Similarly it is essential to decide on an appropriate structure for any proposed partnership (e.g. company, charity, contract, etc) or indeed whether a formal structure is needed at all. The Director concerned must consult with the Director of Customer, Democratic & Legal Services regarding the structure for all key partnership arrangements.

3.3 Any proposal to enter into a new key partnering arrangement should be formally reported to and approved by the Executive Cabinet. Such reports must demonstrate:

- The consultation processes that have been followed (internally and with potential partners)
- The partnership's impact on strategic objectives
- Consideration of the Council's exposure to risk and the potential liabilities that could be imposed on the Council
- The intended structure and why
- Resource implications
- Arrangements for governance, risk management and control
- Member / officer accountabilities and terms of reference

## 4. THE COUNCILS EXISTING KEY PARTNERSHIPS

4.1 Clearly some partnerships are more important than others, in terms of:

- Their impact on the delivery of the Council's strategic objectives
- The extent of the Council's reliance on its partners to deliver core services
- Their financial value
- The scale of human and other resources involved
- Where long term commitments exist
- Where there is a significant degree of innovation / risk

4.2 Taking these factors into account, the following are considered to be the Council's key partnerships (as at December 2006):

- The Chorley Partnership (LSP)
- Community Leisure Services
- Cleanaway
- Glendale
- Chorley Community Housing
- Property Services
- South Lancashire Arts Partnership
- Lancashire Waste Partnership
- Shared Services Contact Centre Partnership
- Bolton MBC Health & Safety Partnership

4.3 It is important to differentiate between these and other partnerships as the degree of governance and risk management discipline that needs to be applied should be scaled accordingly. This list needs to be kept under review and amended to reflect any change in status or to accommodate important new partnerships.

4.4 Managers should contact the Corporate Procurement and Partnerships Manager for guidance and advice on any new partnership arrangements.

## 5. GOVERNANCE

5.1 The success of any partnership depends largely on having an effective system of governance and control in place. With regard to the Council's key partnerships, the following control measures are considered essential:

### Pre-Agreement Controls

Before entering into any arrangement, there needs to be a **clear cultural synergy** and **commonality of interest** between the Council and its prospective partner(s) in addition to a **sound business case** for the relationship. The Council needs to "do its homework" by carrying out **due diligence checks**, including a **financial vet** and an evaluation of a prospective partner's **system of corporate governance**. Finally there needs to be **an assessment of the impact** on the Council of entering into such an arrangement.

### Agreement Controls

The basis for any significant partnership should be set out in a **formal agreement / contract** which should be endorsed by the Director of Customer, Democratic & Legal Services. Such an agreement should contain **clear, agreed objectives & outcomes** and be **clearly aligned with the Council's strategic objectives**. It should also cover how the Council's and the prospective partner's **Standing Orders and Financial / Contract Procedure Rules** apply.

### Partnership Management Controls

There needs to be **certainty over the respective responsibilities** of the Council and its partner which should be supported by **clear reporting lines** and a **decision making framework / scheme of delegation**. Strong financial management and budgetary control disciplines also need to be applied.

### Performance Management & Reporting

The Council needs to be **publicly accountable** for all its key partnership arrangements by regularly reporting on progress to members. **Formal reports** should be submitted to the **Executive Cabinet** at least annually setting out how its **objectives and targets** have been achieved and any issues which need to be brought to members' attention.

### Dispute Prevention & Resolution Controls

There is a risk that a partnership may be over reliant on key people, to the extent that if they are absent or actually leave the partnership itself becomes under threat. An **inclusive approach to managing the relationship** and **sound communication channels** including **regular meetings** are key to mitigating this risk. Where the arrangement involves making payments between partners this should be set out in a **clear payment structure**. The formal agreement should also contain **agreement variation** and **dispute resolution** mechanisms so that if problems arise they are resolved quickly and amicably. This should be supported by clarity over the **ownership of insurable risks**. The right of each partner's **Internal Audit** function to access their respective records should also be formally agreed.

### Exit Strategies

There is the potential for any partnership to fail. The Council should protect itself from this eventuality by developing a **clear exit strategy** for all of its key partnerships in order to mitigate the **financial, reputational** and **other risks** which could materialise.

### Non-Key Partnerships

Although the above control measures are relevant to all of the Council's partnership arrangements, they need to be scaled down or applied on an "as needs" basis to non-key partnerships. The main difference is that there is no expectation that the performance of non-key partnerships should be regularly reported to members. The following are however considered to be the minimum control measures that should be applied to all partnership arrangements irrespective of their status:

- Commonality of interests
- Sound business case
- Impact assessment
- Clear objectives & outcomes aligned to Chorley's strategic objectives
- Certainty over responsibilities & clear reporting lines
- Regular meetings
- Clear payment structure (where appropriate)
- Ownership of insurable risks
- Internal Audit access
- Exit strategy

## 6. RISK MANAGEMENT

6.1 The Council has been guided by the HM Treasury / OGC guidance on managing partnership risks as contained in their publication "Managing Risks with Delivery Partners" which has been endorsed by the Audit Commission as representing best practice. The key provisions of this guidance are listed below together with instructions on how it should be applied to the Council's key partnerships:

#### **Identify the Council's key partnership / partnering arrangements**

These have now been identified and are listed in section 4 above. This list needs to be kept under review and amended to reflect any change in status or to accommodate important new partnerships.

#### **Review the key partnerships for alignment of objectives and to assess inherent risks.**

This was undertaken by Internal Audit in November 2006 and the results reported to chief officers and members. Section 5 of this policy framework document contains provisions which should be applied to any new key partnership arrangements.

#### **Establish joint risk registers for every key partnership**

The Directors responsible for each of the Council's key partnerships need to arrange for the completion of joint risk registers with partners using the template and approach contained in the corporate project management guidelines which are held on the Loop under My Briefcase / Projects.

When completing the risk registers, Directors should consider the risks listed in Section 5 of this policy document that apply specifically to partnerships.

The Audit & Risk Manager should be contacted for further information or advice in completing risk registers.

#### **Evaluate our key partners' risk management arrangements**

In addition to completing joint risk registers, Directors should also satisfy themselves that the partner's internal risk management arrangements are sound. Again the Audit & Risk Manager should be contacted for assistance with this. The aim should be to obtain an annual disclosure on governance and / or Statement On Internal Control (SIC) and this should be included in the partnership agreement / contract.

#### **Non-Key Partnerships**

The above risk management disciplines are mandatory for the Council's key partnerships and optional for the remainder.

## **7. CORPORATE OVERSIGHT OF PARTNERSHIP WORKING**

7.1 The Director of Finance is the corporate lead on partnership working. The Corporate Procurement and Partnerships Manager in the Finance Directorate will continuously review and update this Policy Framework and maintain a database of all partnership arrangements involving the Council and publish it on the Council web site.



Report of	Meeting	Date
Director of Finance (Introduced by the Executive Member for Resources)	Executive Cabinet	24 May 2007

## ACHIEVING VALUE FOR MONEY

### PURPOSE OF REPORT`

- To update Executive Cabinet on progress with our drive to managing and improving value for money within the organisation

### CORPORATE PRIORITIES

- Value for Money is central to our corporate priority of being a performing organisation

### 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	

- Achieving, managing and improving Value for Money form a key part of how we are assessed and scored in our annual Use of Resources assessment. A poor score would impact adversely on the organisation’s strategic aspirations, and on its reputation. Additionally non-achievement of Value for Money would potentially have detrimental financial implications for the Council.

### BACKGROUND

- Executive Cabinet approved a strategic framework for delivering our aspirations on Value for Money in December last year.
- This required the formulation of a programme of Value for Money reviews of services across the organisation to be developed and implemented.

### PROGRESS

- Following submission of our annual Use of Resources self-assessment on Value for Money for 2006, we were recently informed that the highest score of 4 was to be awarded against that theme. This score denotes that we are operating at well above the minimum standards and performing strongly in this category and clearly is excellent news for the council.



8. The judgement did however confirm the need to develop an implement a programme of VFM reviews.
9. The following programme has now been formulated by Strategy Group
  - Year 1 2007/8 - Streetscene, Neighbourhoods and Environment
  - Year 2 2008/9 - Revenues and Benefits  
- Planning
  - Year 3 2009/10 - Support Services  
(ICT, Finance, Property, HR, Customer and Legal)  
- Leisure and Cultural Services
10. This programme will be led by my Business Improvement Team but clearly will involve significant impact from the Service Directorate being reviewed and by key staff in other support service areas such as Accountancy, Policy and Performance and ICT. Additionally I have highlighted the likely need for external support during the Review programme.
11. My report to Strategy Group which sets out the rationale behind determining the review programme in more detail is attached at Appendix A for member's information.

#### **COMMENTS OF THE DIRECTOR OF HUMAN RESOURCES**

12. Not applicable to this report

#### **RECOMMENDATION (S)**

13. That the progress on establishing VFM within the organisation and the 3year programme of reviews be noted
14. That Executive Cabinet and Overview and Scrutiny Committee receive the Outcome reports on each of the reviews carried out.
15. That the appropriate Executive Cabinet portfolio holder sits on the project board for each of the VFM reviews

#### **REASONS FOR RECOMMENDATIONS**

16. To ensure that the Council continues making progress on embedding VFM within the organisational culture and to ensure that the specific recommendations made by the Audit Commission in the 2006 Use of Resources report are effectively addressed.

#### **ALTERNATIVE OPTIONS CONSIDERED AND REJECTED**

17. None

GARY HALL  
DIRECTOR OF FINANCE

There are no background papers to this report.

<b>Report Author</b>	<b>Ext</b>	<b>Date</b>	<b>Doc ID</b>
Jim Douglas	5203	2/5/07	FINREP/0305LM2



<b>Report of</b>	<b>Meeting</b>	<b>Date</b>
Director of Finance	Strategy Group	17/04/07

## **ACHIEVING VALUE FOR MONEY**

### **PURPOSE OF REPORT`**

- To consolidate our strategic approach to VFM into a clear way forward.  
  
To present a draft 3-year Value for Money Review Programme, which puts delivery of VFM at the core of the Transformation Agenda.  
  
To suggest a Review Methodology and process for undertaking VFM reviews.

### **OUR VALUE FOR MONEY VISION**

- To provide consistently high quality services at the optimum price to meet and fulfil the needs of our customers.
- To be an exemplar Council exercising internal processes in the most cost effective manner.  
  
To have a Value for Money culture firmly embedded at all levels of the organisation.

### **NATIONAL BACKGROUND**

- At national level the Local Government White Paper demands the delivery of transformed services and value for money that Communities want, through challenging traditional methods of service delivery.
- Ambitious efficiency gains of 3% cashable savings per annum will be required for the period covered by the CSRO7 spending review (2008-2011) and this demand in itself provides a very strong driver for innovation in service delivery.
- Additionally the Varney report identifies major opportunities to strengthen public service delivery to make it more accessible, convenient and efficient to meet changing citizen and business expectations, including the development of a change of circumstances service and reducing operating costs in Contact Centres by 25% by 2010. Our strategy on Customer Access will be the key driver for this area of transformation and it is suggested this needs to be refreshed to address these issues.

### **STRATEGIC APPROACH AND OBJECTIVES**

- In December last year the Executive Cabinet approved a Strategic Framework for delivering our aspirations on Value for Money( Appendix 1 )

8. Achieving our objectives on VFM was considered critical to the following strategic objectives being achieved:
  - Service Provision in the upper quartiles
  - Improving our Use of Resources scores in 2006
  - Recategorisation of our CPA rating from fair to excellent
9. Section 5 of our Strategic Framework for VFM sets out our objectives for managing and improving VFM, how we plan to achieve these objectives and how they will be monitored and measured. The relevant extract from the framework is set out below

***Improving Value for Money***

How we Plan to Get There	How do we Measure Success?
Implement the use of Resources VFM – key lines of Enquiry Action Plan.	Use of Resources Assessment.
Undertaking VFM studies on specific areas of activity identified as worthy of review.	An active programme of VFM studies is ongoing. Achieving annual efficiency targets.
Establish guidance documentation and a VFM measurement template to enable comprehensive VFM review to be undertaken.	VFM being carried out in accordance with corporate guidance and standards.
Implement a robust benchmarking framework.	Thorough comparison of performance against other similar Councils.
Raise the profile of Value for Money across the Council.	Through surveys of staff members and other stakeholders.
Reward ideas for change through development of an appropriate staff incentive scheme.	Evidence of change through staff suggestion scheme.
Establish a VFM corporate support function within the Finance Directorate.	Formal approval of new structure for the Finance Directorate.
Establish a corporate framework for partnership working in accordance with best practice.	External assessment of partnership arrangements by the Audit Commission.

**PROGRESS TO DATE**

10. Chorley began its quest for Value for Money in earnest at the beginning of 2004 following production of an e-Readiness Audit of internal processes and services.
11. Although fully focused on e-enablement of internal processes and work practices, this Audit provided the catalyst and platform to a new way of thinking, about how we operated at our organisation.

12. Over the following 2 years through the e-workforce programme we were able to reduce the administrative support establishment through e-enablement, the introduction of new electronic processing of systems, and the eradication of processes that were not adding value. The following is an extract from the conclusion of the consultant's report, which identifies the various process areas and the estimated number of staff time in weeks, which could be saved.

Absence Management	5.8	weeks
Annual Leave	5.74	weeks
Car Mileage	17	weeks
Committee Administration	40	weeks
Flexitime Administration	34.2	weeks
Mail Handling	81	weeks
Parking Permits	3	weeks
Planning Administration	47	weeks
Purchase Orders and Invoices	112.5	weeks
Reception (Gillibrand)	<u>64.35</u>	<u>weeks</u>
	410.59	weeks
Bengal Street Purchase Admin	128.2	weeks
DTP under utilisation	<u>225</u>	<u>weeks</u>
	763.79	weeks ÷ 44 = 17.35 FTE's

13. This equates to approximately 17.35 FTE and although our actual reduction in the establishment achieved through the e-workforce programme did not mirror the savings estimated in these process areas exactly, we were able to reduce the administrative support staff establishment by 17.5 FTE's over the financial years 2004/5 and 2005/6.
14. Through investment in new technology, re-engineering of back office processes and a more strategic approach to procurement, we have therefore been able to substantially reduce costs enabling us to report efficiency gains which will be considerably in excess of our target of £1.29 million for the 3 year period covered by SR04 ending, 2007/8. I currently estimate that we will achieve savings in excess of £2 million over the review period and attach our 2007/8 Forward Looking Statement. ( appendix 2)
15. This ambitious change programme implemented across the Council over the past 3 years has given us an excellent platform to take the organisation forward through the next phase of transformation Our position has also been significantly strengthened corporately through the recent review of our Business Planning Process which is now more clearly aligned with our Financial and Performance management cycle.
16. At the heart of this change process will be the delivery of Value for Money. We have already made significant progress in the delivery of VFM, a fact recognised in the recent excellent status awarded to the VFM theme in our Use of Resources Assessment 2006. The UOR report however states that we need to develop and implement a programme of review. This will of course be crucial to us maintaining the 'excellent' status in years to come and will carry significant weight in the CPA judgement. It will also help us ensure that we target areas where it appears we are either providing an expensive service or one that is not performing to the high quality standards we, and our customers expect and demand.

**3 YEAR REVIEW PROGRAMME**

17. It is proposed that we develop and implement a programme of service reviews over the next 3 years. We envisage 2 reviews per year being undertaken, with each service following a clearly defined methodology for completing the review.
18. Clearly there are a number of options available to us for undertaking the Service Reviews. The pros and cons of the various approach alternatives are considered later in this report.

**HOW HAVE WE SELECTED SERVICES FOR REVIEW?**

- 19. As part of our preparation for this report and we have undertaken an analysis of the expenditure and performance of the Authority using the Audit Commission VFM profile tool and our spend profile over a 3 year period.(Appendix 3) This information has been provided us with a useful starting point for the development of a 3-year programme and it should also assist Directors in the formulation of their Business Improvement Plans.
- 20. Data for benchmarking services within the Authority is limited, however we have now developed a Benchmarking Strategy, which should enable improved data to be generated in the future.
- 21. This will involve considering use of established benchmarking clubs such as CIPFA however, I also feel there is an opportunity to establish a Benchmarking Club with our Audit Commission Northwest Neighbour authorities with Chorley taking the lead. The Business Improvement Team will be looking into this possibility in the coming months.
- 22. Directors have been have been offered the opportunity to discuss their VFM aspirations or concerns with my Business Improvement Manager. They have also been informed that a 3-year programme of reviews is being presented to Strategy Group on which they will be consulted following Strategy Group deliberation.

**SERVICES SUGGESTED FOR REVIEW**

- 23. The VFM/Financial Analysis we have carried out relates to expenditure and performance data for 2005/6 and will be no doubt open to question or dispute by Chief Officers and their managers. It is however the recognised national method of comparison and in the absence of more up to date benchmarking data it is the best we can do with the information available. In prioritising the programme we have also taken into consideration the fact that the corporate focus on delivering efficiency savings so far has been through back office services. It is felt important therefore that the initial part of the 3-year programme is focused on front line services.
- 24. The draft plan has been prepared as a result of this analysis although it may become subject to change over the 3-year period as the process develops, priorities change and more information about services becomes available.
- 25. The services selected for inclusion in the draft 3-year programme are as follows. The percentage figures shown are calculated against a total revenue budget in 2005/6 of £15,136,633 and over the 3-year programme amount to around 80% of the total revenue spend.

		% of revenue budget
Year 1 2007/8	- Streetscene, Neighbourhoods and Environment	22.7
Year 2 2008/9	- Revenues and Benefits	5.5
	- Planning	5.4
Year 3 2009/10	- Support Services (ICT, Finance, Property, HR, Customer and Legal)	36.4
	- Leisure and Cultural Services	9.9

**WHAT WILL BE THE SERVICE REVIEW METHODOLOGY?**

26. Clearly this is a new area for us, however a methodology has been developed which we consider will serve our purpose.
27. Our suggested approach follows a self-assessment method with against a pre-defined set of 'Key Lines of Enquiry'.
28. The Self-Assessment Structure is as follows:
- **Section 1: Context and Aims of the Service** – the aims and objectives of the service, priorities and relation to the Council as a whole
  - **Section 2: Quality of the Service** – achievements, specific outcomes and impact, particularly from a user-focus perspective
  - **Section 3: Demonstrated Improvements** – improvements in the last year, in relation to Council priorities. Where future changes are planned, outline them here.
  - **Section 4: Strategic Capacity to Improve** – how is the service equipped to improve in the future

An example showing a proposal for the content, length and layout of the Self Assessment can be found in Appendix 4.

29. If we followed this approach the Self-Assessment would need to be supported with evidence from within the service, and the assertions made within it supported not only by this evidence, but by the availability of staff and managers for interviews. The Self-Assessment, evidence and interviews should be structured to support the Key Lines of Enquiry.
30. The list of proposed Key Lines of Enquiry is based on the revised CPA Corporate Assessment procedure to be used by the Audit Commission 2005-8.

**Proposed Key Lines of Enquiry around which to review Self Assessment:**

- **Context and Aims of the Service**
  - Are there clear and challenging aims for the service?
  - Are these aims shared with the wider aims of the Council and its partners?
  - Does the service have robust and clear priorities for improvement?
  - Is there a strategy and action plan in place to realise these priorities?
- **Quality of the Service**
  - What specific outcomes has the service achieved in the last year?
  - What has the service achieved in increasing its customer-focus in the last year?
  - Does the service have a rigorous approach to performance management to enable performance improvement?
  - What is the performance of the service like in relation to similar services at other Authorities?
- **Demonstrated Improvements**
  - Has the service made any improvements to the efficient delivery of services in the last year?
  - Has the service made any improvements to the Value for Money obtained in its service delivery in the past year?
  - Are there any plans for service improvements in the future, and how will these impact on the way that services are delivered?
- **Strategic Capacity to Improve**
  - Is there clear accountability to enable effective decision making?
  - Is capacity used effectively to deliver ambitions and priorities?

31. The service would be reviewed based on these Key Lines of Enquiry, with scores attributed to the services based on their level of competence in each. This would allow for ease of comparison and reference between services, as well as providing an easy way of showing service managers where strengths and weaknesses are within their service. These scores could be based on best practice, which the service being reviewed would be measured and scored against. The scoring mechanism would of course also have to take account of local needs.

A proposed scoring system for the Quality Section of the Self Assessment is shown at Appendix 5.

#### **HOW WILL THE REVIEWS BE CARRIED OUT?**

32. There are various approaches that can be taken and it is useful to consider the 4 apparent alternative and their respective advantages and disadvantages.

a) Internal Review led by appropriate Directorate

Advantages

- Less expensive than external review
- Greater service knowledge and how the Council operates
- Opportunity to share good practice

Disadvantages

- Lack of external input means that we may miss out on good practice elsewhere
- Resources may be diverted to the day job
- Perhaps too close to divert easily from existing practice
- Who would score the service?

b) External review led by Business Improvement Team

Advantages

- Less expensive than external
- Team leader has knowledge of how the Council operates
- Provides challenge from outside the service area
- Provides corporate learning which can be used on other reviews

Disadvantages

- Lack of external input may mean we miss out on good practice
- Lack of experience of conducting VFM reviews
- May not be well received by the Service Directorates
- Potentially transfers 'ownership' away from Directorates
- Who would score the service?

c) External Reviews

Advantages

- A fresh perspective
- Free from prejudice
- Bring good practice
- Potential greater awareness of Government trends and Central Government requirements
- Likely to be given more respect than internal review staff from Business Improvement
- Increased validity in eyes of others

Disadvantages

- More expensive

- Availability of suitable reviewer may be an issue
  - Possible confidentiality issues
- d) Mixed approach involving Internal and External
- Advantages
- Internal knowledge
  - Knowledge of service and how it operates within the Council
  - Provides internal challenge from outside service area if led by Business Improvement Team
  - Provides corporate learning
  - A fresh perspective
  - Free from prejudice
  - Bring good practice
  - Increased validity in eyes of others than purely internal
- Disadvantages
- More expensive than purely internal
  - Availability of suitable reviewers may be an issue
  - Possible confidentiality issues
33. My preferred option is d) which allows for potential knowledge transfer through the build-up of skills through the internal players whilst also providing the rigour and robustness of an external inspection.
34. One further key decision if Strategy Group were similarly persuaded on this 'mixed' approach would be who would lead on the individual review. Clearly this could be assigned to an external consultant, or led internally within either the Service Unit involved or from the Business Improvement Team. My preference is for the review to be internally driven by The Business Improvement Team with a critical involvement and commitment within the Service Unit and from Corporate Support staff, where necessary, within Finance, ICT, Policy & Performance and HR. I believe this will enable us to challenge the service internally from outside the Service Directorate and also have the advantage of bringing in an external resource to contribute and challenge on the Inspection and scoring part of the review. I would envisage someone from IdEA or the Regional Centre of Excellence being able to assist us with this.
35. If my suggested 'mixed approach' were preferred led by The Business Improvement Team, there would be 2 key periods within the review.
36. Firstly a self-assessment would need to be completed but this would involve considerable preparation and gathering of evidence from within the Business Improvement Team and the service being reviewed.
37. If we were then to have an external inspection and scoring of the evidence, I would envisage an intense 3 day period where staff involved would be subject to interviews, and the external assessor would allocate scores against the key lines of enquiry. The likely cost of bringing in an external resource on each review would be £3-5k.

#### **TIMETABLE**

38. It is suggested in the programme that the reviews are carried out over an initial 3-year programme.
39. It is important that the first review is completed prior to our CPA submission date in October this year.

- 40. It is therefore recommended that the Streetscene, Neighbourhood and Environment Service be the first service reviewed and that this is completed during 2007.
- 41. It is planned that the first review will be undertaken during Year 1 with 2 reviews per year being undertaken during the remainder of the programme.
- 42. It is difficult to assess the likely resource implications and this will of course be influenced on the decisions Strategy Group on the method of conducting the review.

**OUTCOMES**

- 43. Clearly we want to see a robust series of reviews, which challenges service provision, forms an opinion of whether VFM is being delivered and has a recommended Improvement Plan.
- 44. From this an Action Plan would need to be established for the service to address any weaknesses identified and to improve areas of strength whenever possible.
- 45. A corporate monitoring and review of progress system would have to be established to ensure that the Action Plans are implemented and it is suggested that progress on Action Plans be reported to Strategy Group 6 months after publication.

**OTHER VFM ACTIVITY**

- 46. Procurement

Since establishment of the Corporate Team back in 2004, major VFM gains and Efficiency savings have been achieved through improved procurement practice and a more strategic approach.

Following a study undertaken by an external consultant in 2005, a number of major spend areas were identified for investigation. Many of these have or are currently being looked at and major improvements have been achieved in the procurement of Agency staff, Mobile Phones, Property Services, advertising and printing. Major procurement exercises are currently ongoing for ICT and Telecommunication services from which we are confident major savings will be delivered.

However as part of our VFM financial analysis a number of other expenditure areas have been identified where it is felt further investigation is necessary to ensure we are getting the best value for money. These are set out below showing budget spend and I have added ICT and Telecommunications expenditure budgets to present a full picture.

	Annual spend £
Postages	105,890
Publications	38,890
Computer Software Maintenance	132,440
Gas and Electricity	111,750
Subscriptions	73,790
Thin Client	150,000
Telephony	160,000

- 47. The total revenue budget for these expenditure areas amounts to £772,760, which equates to approximately 18% of the Supplies and Services budget. I suggest that these areas of expenditure be examined as part of the VFM programme and a report produced on the findings.

- 48. Strategic Asset Management

Improving management of our assets is vital to achieving efficiency gains and ensuring VFM. As part of the Property Services Contract the contractor is required to produce a



strategic review of our assets within 3 months of the contract commencement date and this will help inform decisions about how they can be used more effectively.

49. Income Maximisation

Internal Audit are undertaking an exercise to investigate the potential for maximising current income streams and areas where opportunities to generate additional income might exist.

50. Collaboration

Chorley is involved in a number of partnership and collaborative ventures and has a strong record of delivery in this area. Improving collaboration and sharing back office services form a key strand of the LG White Paper Efficiency section and the Transforming Local Government in Lancashire sets out a development programme on a menu of back office processes. Additionally, work continues on the Shared Financial Services project with South Ribble Borough Council and other collaborative ventures achieving Efficiency and Procurement savings can be found in most of the Council's directorates

51. Business Improvement and Customer Focus

Clearly this is an area that presents opportunity for the Council to improve service delivery through ensuring we are making the best use of finite resources and becoming more responsive to the needs and preferences of service users.

Although an integral part of delivering VFM, Business Improvement essentially looks at the whole approach of how we can improve our business. This involves improving end to end service delivery chains and the associated processes, activities and jobs of which they are comprised, accurately costing service delivery, meeting customer needs and providing enhanced service access channels and identifying opportunities for collaboration and sharing services.

The National Process Improvement Project BPA project on which the Council has been leading Council has been leading should provide a strategic lead on a Change Programme for Chorley incorporating business improvement. However the Director of Customer, Democratic and Legal Services has a separate report on this meeting agenda which looks at this issue in more detail, particularly in respect of key services transferring to the telephone contact centre and the specific need to tackle the business processes attached to these service areas as part of the CRM implementation programme. Whilst agreeing this is an important piece of work, I feel it is important that this is not dealt with in isolation and forms part of a corporate, longer term approach to delivering VFM through business process improvement

## **RECOMMENDATIONS**

52. That the VFM review approach and methodology programme set out in the report be approved by Strategy Group.

53. That the VFM Action Plan shown as Appendix 6 be approved.

54. That the outcome report from each review be presented in draft form to the Corporate Improvement Board.

GARY HALL  
DIRECTOR OF FINANCE

There are no background papers to this report.

<b>Report Author</b>	<b>Ext</b>	<b>Date</b>	<b>Doc ID</b>
Jim Douglas	5203	11 April 2007	FINREP/1104LM4

# **Value For Money Framework 2006 - 2009**

## **Finance Directorate**





**CONTENTS**

	<b>PAGE</b>
1. Background	2-3
2. Defining value for money	3-5
3. Creating and maintaining a value for money culture	5
4. Key principles of the VFM Strategy	5-6
5. Strategic objectives and approach	6-10
6. Roles and responsibilities	10

# 1. INTRODUCTION

- 1.1 The Council’s vision is to make Chorley the place of choice to live, work and invest in the North -West.
- 1.2 Our priorities are set out in the Corporate Strategy as follows:

PRIORITY	PROSPERITY		PEOPLE		PLACE	PERFORMANCE
STRATEGIC OBJECTIVE	1. Put Chorley at the heart of regional economic development in the central Lancashire Sub-Region	2. Reduce pockets of inequality.	3. Get people involved in their communities	4. Improved access to public services.	5. Develop the character and feel of Chorley as a good place to live.	6. Ensure Chorley Borough Council is a performing organisation.

- 1.3 Achieving value for money is a core requirement of the strategic objective of ensuring Chorley Borough Council is a performing organisation, and successful achievement of VFM will be a major contributor to CPA and use of resource assessments.
- 1.4 In recent years the Council has taken the following significant steps to ensure that value for money is obtained in the provision of its services.

- Audit Commission Analysis** → Analysis of service performance indicators undertaken in August 2006, showed that the proportion of PI’s where the Council is performing in the best quartile is 44%. This equates to that being obtained by CPA rated ‘excellent’ Councils.
- Best Value Reviews** → Highest scores in Lancashire as at 15/09/05.
- Improvement Planning** → The Corporate Improvement Plan addresses the issues raised following our 2004 CPA inspection and is subject to regular review.
- Internal Audit** → Conduct VFM reviews of specific business areas.
- Overview and Scrutiny** → Strengthened roles in ensuring VFM.
- Performance Management** → Performance Plus used to assess performance across the organisation against pre-set targets.
- Business Planning Process** → Reviewed process strengthens the link between business and financial planning.
- Efficiency Agenda** → Substantial efficiency gains and cost savings already achieved. Corporate programme of business process transformation has also commenced.

**Project Management Methodology** → System developed in-house and now embedded within organisation and advocated for use across the North West by the Regional Centre of Excellence. Formal business case for projects must be approved before project can commence.

**Procurement** → Significant savings achieved through more effective procurement processes and good practice and a real focus on a more strategic approach. As at June 2006 85% achievement of National Procurement Strategy milestones confirmed through external assessment by ID<sup>o</sup>A/RCE.

1.5 The Council's use of resources assessment recognised that the Council was providing good value for money in the provision of services in comparison with other similar District Council's and we received a score of three out of four. However, they found an absence of a clear structure for assessing the wider VFM issues of policy decisions for the whole community, an inconsistent use of benchmarking as a means of challenging costs, performance and VFM and no clear definition of what VFM means at Chorley and how this will be assessed and monitored.

1.6 It is therefore against this background that an integrated and coherent VFM Strategy, focusing on achieving good value for money and managing and improving value for money, is essential if we are to continue the good progress already made.

1.7 If we are to be successful in our pursuit of VFM we believe this will make a significant contribution to the following strategic targets being met:-

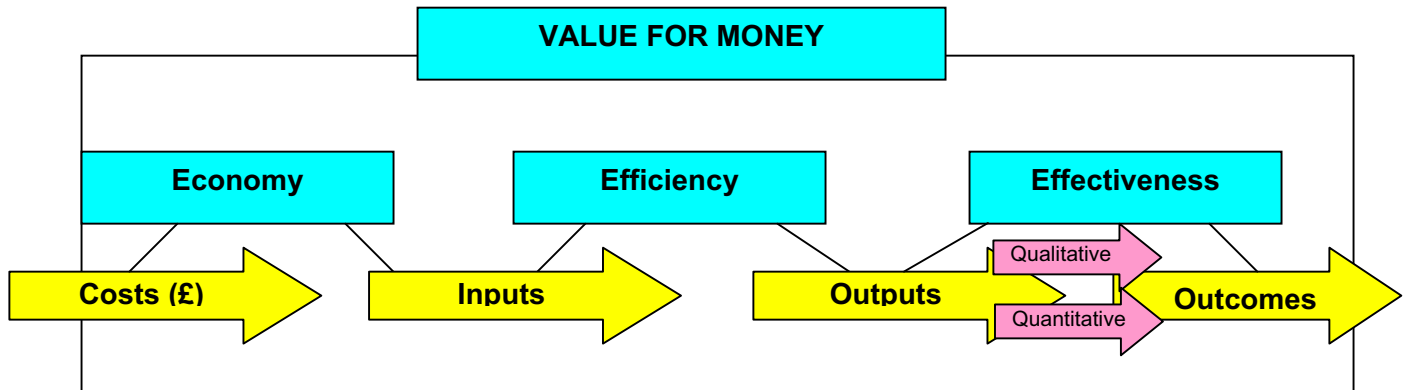
- Service provision in the upper quartile.
- Achievement of score of                    in Use of Resources Assessment consistent with achieving excellence on CPA.
- Recategorisation of our CPA rating from Fair to Excellent.

## 2. DEFINING VALUE FOR MONEY

2.1 Value for Money (VFM) is a concept that has been around in local government for over 20 years. VFM has long been defined as the relationship between economy, efficiency and effectiveness, sometimes known as the 'value chain'.

2.2 VFM is a term used to assess whether or not an organisation has obtained the maximum benefit from the goods and services it both acquires and provides, within the resources available to it. It or only measures the cost of goods and services, but also takes account of the mix of quality, cost, resource use, fitness for purpose, timelines, and convenience to judge whether or not, together, they constitute good value.

2.3 VFM is illustrated by the following diagram:



**Economy** is the price paid for what goes into providing a service, for example, the annual cost of a Neighbourhood Warden, the rent per square metre of accommodation. Economy is about minimising the cost of resources for an activity ('doing things at a low price').

**Efficiency** is a measure of productivity – how much you get out in relation to what is put in. For example, the number of benefit claims processed per week by a Claims Officer; kilometres of road maintained per £1,000 spent. Efficiency is primarily associated with the process and delivery ie performing tasks with reasonable effort ('doing things the right way').

**Effectiveness** is a measure of the impact achieved and can be quantitative or qualitative. For example, how many people chose the postal vote option rather than the traditional ballot box method (quantitative); satisfaction levels among different sections of the refuse collection service (qualitative), and so on. Outcomes should be equitable across communities, so effectiveness measures should include aspects of equity. Effectiveness is primarily associated with the outcomes for customers ie the extent to which objectives are met ('doing the right things').

**VFM** is high when there is an optimum balance between all three – relatively low costs, high productivity and successful outcomes. The Improvement and Development Agency (IDeA) in its procurement guidance defines best value for money as the 'optimum combination of whole-life costs and benefits to meet the customer's requirement'.

2.4 The Council has a statutory duty to deliver Best Value in the provision of its services. Best Value means continual improvement in terms of the economy, efficiency and effectiveness of service delivery.

2.5 Under Best Value we need to demonstrate that our services:

- meet the needs of local people;
- are being provided to the level and quality desired by the community;
- are at a price local people are willing to pay;
- are competitive with other potential suppliers;
- are capable of securing continuous improvement over time.



2.6 Chorley Borough Council continually looks for ways to improve economy, efficiency and effectiveness in the delivery of its services. Not least this process is driven by:

- constraints on available funding to meet budget pressures;
- savings targets declared as part of the budget process;
- the Gershon regime and additional efficiency targets set by the Members.

### **3. CREATING AND MAINTAINING A VALUE FOR MONEY CULTURE**

3.1 If we are to be successful in achieving our strategic aspirations and targets for VFM, establishing and maintaining the right culture within the organisation is of paramount importance. To do this we must:

- Stress the need for the Council to continually strive to do more at the appropriate quality, for less money.
- Effectively communicate this message to staff at all levels within the organisation.
- Clearly define the organisation's aims, strategies and policies.
- Ensure members/staff are clear about their responsibilities in relation to best value through appropriate training and development.
- Embrace good practice and ensure success is communicated across the whole organisation.
- Ensuring an effective infrastructure is in place to corporately manage value for money.

### **4. KEY PRINCIPLES OF THE VFM STRATEGY**

- We will be clear about the objectives of services/activities provided.
- We will demonstrate that the service/activity fits with the Corporate Strategy and where appropriate adopts a community wide perspective.
- Focus is not on costs alone – local context and quality need to be accounted for.
- The VFM process will be open, transparent and measurable.

- Judgement will address current performance in achieving VFM, how well VFM is managed and improved over time and the extent to which a long-term approach is taken.
- Judgement should rely primarily on evidence showing the outcomes achieved.

## 5. STRATEGIC OBJECTIVES AND APPROACH

It is essential that we link our strategic objectives to the VFM criteria set out by The Audit Commission in their Annual Governance report. This approach will clearly demonstrate how we plan to tackle each of the criteria and how we will monitor and measure outcomes.

**Audit Commission Criteria**

***Strategic and Operational Objectives***

The body has put in place arrangements for setting, reviewing and implementing its strategic and operational objectives.

How we Plan to Get There	How do we Measure Success?
Produce a cohesive corporate strategy supported by effective programme and project management.	Delivery of key projects, performance targets and long term outcomes.

**Audit Commission Criteria**

***Communication***

The body has put in place channels of communication with service users and other stakeholders including partners, and there are monitoring arrangements to ensure that key messages about services are taken into account.

How we Plan to Get There	How do we Measure Success?
Implementation of the Communications Strategy.	Achievement of the Level 1, Level 2 and Level 3 benchmarks as set out in the strategy.

**Audit Commission Criteria**

***Performance Management***

The body has put in place arrangements for monitoring and scrutiny of performance, to identify potential variances against strategic objectives, standards and targets, for taking action where necessary, and reporting to members.

How we Plan to Get There	How do we Measure Success?
Implementation of an effective Business Planning Framework	Production and monitoring of Directorate plans in accordance with revised business planning requirements.
Maintaining an effective staff performance approval system.	Achievement of 100% staff performance review.
Through a robust and effective Overview and Scrutiny process.	Achievement of the Overview and Scrutiny Forward Plan.
Through a robust and effective Audit Committee process.	Full compliance with new CIPFA guidance on Audit Committees.

**Audit Commission Criteria**

***Data Quality***

The body has put in place arrangements to monitor the quality of its published performance information, and to report the results to members.

How we Plan to Get There	How do we Measure Success?
Production of an effective quality assurance system for the collection and publication of performance information.	Positive feedback within the Audit Commission’s annual Data Quality Report.

**Audit Commission Criteria**

***Internal Control***

The body has put in place arrangements to maintain a sound system of internal control.

How we Plan to Get There	How do we Measure Success?
Conduct an annual review of the system of internal control and the publication of a statement of internal control alongside the Annual Accounts.	Publication of a CIPFA compliant statement of internal control and subsequent “sign-off” by the Audit Commission.

**Audit Commission Criteria**

***Risk Management***

The body has put in place arrangements to manage its significant business risks.

How we Plan to Get There	How do we Measure Success?
Production of a cohesive strategy for the management of strategic and operational business risk.	Production and ongoing review of strategic and operational risk registers
Production and maintenance of effective emergency and business continuity plans.	Regular testing to ensure plans are effective.
To ensure appropriate and cost effective insurance cover is in place.	Cover effectively meets claims experience.
To ensure appropriate health and safety policies and procedures are in place.	Monitoring compliance level through health and safety audit process.

**Audit Commission Criteria**

***Improving Value for Money***

The body has put in place arrangements to manage and improve value for money.

How we Plan to Get There	How do we Measure Success?
Implement the use of Resources VFM – key lines of Enquiry Action Plan.	Use of Resources Assessment.
Undertaking VFM studies on specific areas of activity identified as worthy of review.	An active programme of VFM studies is ongoing. Achieving annual efficiency targets.
Establish guidance documentation and a VFM measurement template to enable comprehensive VFM review to be undertaken.	VFM being carried out in accordance with corporate guidance and standards.
Implement a robust benchmarking framework.	Thorough comparison of performance against other similar Councils.
Raise the profile of Value for Money across the Council.	Through surveys of staff members and other stakeholders.
Reward ideas for change through development of an appropriate staff incentive scheme.	Evidence of change through staff suggestion scheme.
Establish a VFM corporate support function within the Finance Directorate.	Formal approval of new structure for the Finance Directorate.
Establish a corporate framework for partnership working in accordance with best practice.	External assessment of partnership arrangements by the Audit Commission.

**Audit Commission Criteria**

***Probity***

The body has put in place arrangements that are designed to promote and ensure probity and propriety in the conduct of its business.

How we Plan to Get There	How do we Measure Success?
Production and maintenance of Codes of Conduct for Members and officers.	Monitoring the number of Standards Board referrals and disciplinary incidents.
Maintenance of Register of Incentives, Gifts and Hospitality.	Evidence of ongoing upkeep of these records.
Maintenance of whistle-blowing, anti-fraud and complaints procedures.	Monitoring of awareness and usage of those procedures

**Audit Commission Criteria**

***Financial Strategy***

The body has put in place a medium-term financial strategy, budgets and a capital programme that are soundly based and designed to deliver its strategic priorities.

How we Plan to Get There	How do we Measure Success?
Ensuring that a medium-term financial strategy, budget control measures and a successful capital programme are achieved.	Use of Resources Assessment, Annual Efficiency Statement, Capital Programme Board monitoring.

**Audit Commission Criteria**

***Financial Standing***

The body has put in place arrangements to ensure that its spending matches its available resources.

How we Plan to Get There	How do we Measure Success?
Setting a balanced budget in accordance with the Financial Strategy.	Avoidance of overspending.

**Audit Commission Criteria**

***Financial Management***

The body has put in place arrangements for managing performance against budgets.

How we Plan to Get There	How do we Measure Success?
Ensuring that clear, documented processes are in place to achieve effective budgetary management.	Through budget monitoring, analysis of service performance indicators, both internal and external.

**Audit Commission Criteria**

**Asset Management**

The body has put in place arrangements for the management of its asset base.

How we Plan to Get There	How do we Measure Success?
Maintenance and implementation of the Asset Management Plan.	Achievement of the key deliverables within the Asset Management Plan. Monitoring contractor performance through Property Services Outsourcing Contract.

**6. ROLES AND RESPONSIBILITIES**

- 6.1 Responsibility for VFM lies with all elected members and all employees of Chorley Borough Council. It is not restricted to those with resource or financial responsibilities. The Council is required to satisfy itself that VFM is being sought and achieved from all areas of the Council.
- 6.2 The Council in conjunction with the Strategy Group/Director’s Team and the Capital and Efficiency Board have responsibility for ensuring that satisfactory arrangements are in place to ensure VFM is being delivered.
- 6.3 Managers have the operational responsibility to maintain an awareness of good practices in their own area of work and to ensure these are consistently followed. Managers need to satisfy themselves that VFM is being secured within the budgets they manage.
- 6.4 The Council’s Overview and Scrutiny and Audit Committees will satisfy themselves that appropriate arrangement are in place to promote and achieve economy, efficiency and effectiveness.
- 6.5 The Capital and Efficiency Programme Board will ensure that all new Project Business Cases properly evaluate and measure VFM as part of the Business Plan preparation process.
- 6.6 The Finance Business Improvement Team will assist with carrying out VFM studies and the evaluation, measuring and monitoring of VFM within Service Units.

# Annual efficiency statement - forward look

## Details

Local authority Chorley Borough Council  
Contact name James Douglas  
Job title Business Improvement Manager  
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## Statement

### **Strategy for making and monitoring efficiency gains**

#### **Strategy for Period to 2008/09**

##### **General Strategy**

Our focus on achieving efficiency gains continues unabated into 2007/08. During 2006, a change in political leadership delivered a challenge to achieve a zero based Council Tax increase in 2007/8 for the services delivered by Chorley. This has been achieved largely through a major restructure across the Authority however the process, system and technological changes we have made over the past 3 years have also played a significant part in providing the platform to enable the changes in structure to be made.

The Council is also also playing a major role at national and regional level on a number of change

programmes. On the National Process Improvement Programme, Chorley is leading on a project aiming to establish a Business Process Architecture blueprint for District Councils to restructure to deliver services. We intend to use this learning and project outcomes to implement a 3 year organisational change programme at Chorley

Partnership continues to play a major role in how we procure and deliver services. The new Property Services outsourced contract will be operational from April 2007 and this will deliver over £100,000 in savings during the financial year.

Chorley is also leading the way regionally in developing shared services. A Regional Centre of Excellence funded project investigating the feasibility of service collaboration between Chorley and

~~South Ribble Borough Councils on Financial, Asset Management, Internal Audit, Procurement and Efficiency is nearing completion. We are confident there will be significant benefits delivered through increased capacity, economies of scale and sharing of expertise, skills and experience.~~

We are also involved nationally in a project involving 15 local authorities aiming to develop a framework for the development of a common approach to local customer profiling to improve the efficiency of services to our citizens and to improve the way we interact with them.

We are also now well resourced to maintain the momentum with the formation of a Corporate Business Improvement Team, which brings together staff involved in the Procurement and Efficiency agendas. At Corporate level the newly established Corporate Improvement Board led by the Deputy Chief Executive provides a strong, single point governance forum to manage the efficiency programme, ensuring targets are met and the change process is effectively maintained.

A critical part of our strategy will be the continuing hard focus on performance management to ensure that reductions in costs through restructure do not adversely impact on performance. This is done as part of the Business Planning process through quarterly reports to Overview and Scrutiny Committee and this enables us to take corrective action quickly if this is ever shown to be necessary.

It was also pleasing to close out 2006/07 with an improved Use of Resources score for 2006 and we think in particular our score of 4 on Value For Money confirms and properly reflects the efforts and achievements made by the Council in recent years.

## **Key actions in 2007/08**

### Key Actions in 2007/08

We are well on course to exceed our efficiency targets by the end of 2007/08, and a sub-group of the Corporate Improvement Board focusing on developing a 3 year plan for Efficiency and Transformation has now been established. This will be closely aligned to the LG White Paper Implementation Plan and the Business Improvement package recently published by the Government.

Our Key Actions for 2007/8 include:



- ~~Review our Procurement Strategy to re-prioritise our focus in the light of National Guidance.~~
- Implementing our strategic approach to VFM, including carrying out 2 VFM service reviews during 2007/8 as part of a 3 year programme and implementing our Benchmarking Strategy.
- Implement a Corporate Contract Management system and ensure delivery of £100k anticipated savings through the outsourced Property Services Contract.
- Continuing transfer of key services to the Telephone Contact Centre and implementation of an integrated CRM system.
- Providing training and awareness to all levels of the organisation on the efficiency agenda as part of a drive to embed a VFM culture at the Council.
- Implementation of the outcomes from the Shared Services collaboration project with South Ribble Borough Council and the RCE on financial and related services.
- Ensure the revamped Business Improvement Planning process is effectively integrated to the Council's overall financial and performance management cycle.
- Implementation of the change programme resulting from the Business Process Architecture project being undertaken on behalf of the CLG.
- Engaging in joint procurements/collaboration to deliver savings ie IT through e-action; telephony through partnership with neighbouring Council.
- Real focus on migration of customers to cheaper access channels following the new website 'go live ' in April 2007

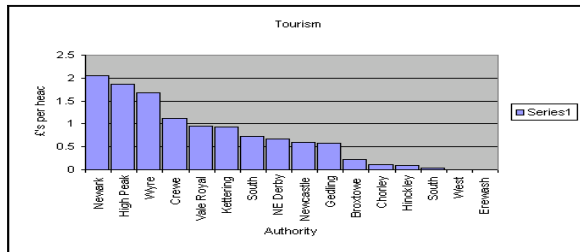
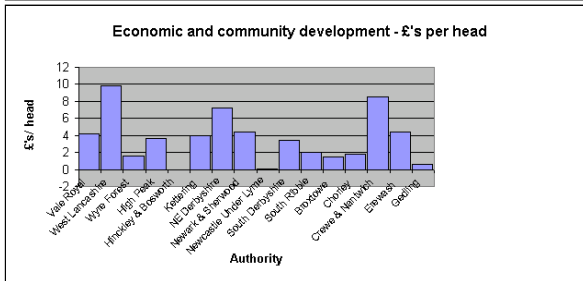
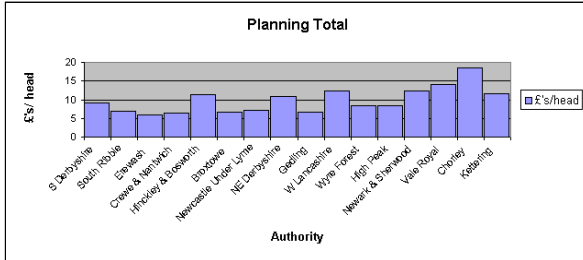
	Expected annual efficiency gains (£)	...of which cashable (£)	Related links
Adult social services			<ul style="list-style-type: none"> <li>• <a href="#">Documents</a></li> <li>• <a href="#">People</a></li> <li>• <a href="#">Projects</a></li> </ul>
	Strategy:		
	Key actions:		
			<ul style="list-style-type: none"> <li>• <a href="#">Documents</a></li> <li>• <a href="#">People</a></li> </ul>

Children's services			<ul style="list-style-type: none"> <li>• <a href="#">Projects</a></li> </ul>
Strategy:			
Key actions:			
Culture and sport	32,100	32,100	<ul style="list-style-type: none"> <li>• <a href="#">Documents</a></li> <li>• <a href="#">People</a></li> <li>• <a href="#">Projects</a></li> </ul>
Strategy: Our strategy for delivering major leisure services through partnership continues to deliver savings on our Golf and Leisure Services contracts. Additionally a strategic programme for transferring management of local community centres to Community groups is being implemented			
Key actions: continuing to effectively manage the major leisure and golf course contracts and implement the programme of transferring management of the council's community centres to community groups			
Environmental services			<ul style="list-style-type: none"> <li>• <a href="#">Documents</a></li> <li>• <a href="#">People</a></li> <li>• <a href="#">Projects</a></li> </ul>
Strategy:			
Key actions:			
Local transport (highways)			<ul style="list-style-type: none"> <li>• <a href="#">Documents</a></li> <li>• <a href="#">People</a></li> <li>• <a href="#">Projects</a></li> </ul>
Strategy:			
Key actions:			
Local transport (non-highways)			<ul style="list-style-type: none"> <li>• <a href="#">Documents</a></li> <li>• <a href="#">People</a></li> <li>• <a href="#">Projects</a></li> </ul>
Strategy:			
Key actions:			
LA social housing (capex)			<ul style="list-style-type: none"> <li>• <a href="#">Documents</a></li> <li>• <a href="#">People</a></li> <li>• <a href="#">Projects</a></li> </ul>
Strategy:			
Key actions:			
LA social housing (other)			<ul style="list-style-type: none"> <li>• <a href="#">Documents</a></li> <li>• <a href="#">People</a></li> <li>• <a href="#">Projects</a></li> </ul>
Strategy:			
Key actions:			
Non-school educational services			<ul style="list-style-type: none"> <li>• <a href="#">Documents</a></li> <li>• <a href="#">People</a></li> <li>• <a href="#">Projects</a></li> </ul>
Strategy:			
Key actions:			
			<ul style="list-style-type: none"> <li>• <a href="#">Documents</a></li> <li>• <a href="#">People</a></li> </ul>

Supporting people			<ul style="list-style-type: none"> <li>• <a href="#">Projects</a></li> </ul>
Strategy:			
Key actions:			
Homelessness			<ul style="list-style-type: none"> <li>• <a href="#">Documents</a></li> <li>• <a href="#">People</a></li> <li>• <a href="#">Projects</a></li> </ul>
Strategy:			
Key actions:			
Other cross-cutting efficiencies not covered above			
Corporate services	478,890	475,890	<ul style="list-style-type: none"> <li>• <a href="#">Documents</a></li> <li>• <a href="#">People</a></li> <li>• <a href="#">Projects</a></li> </ul>
Strategy: Monitoring the major organisational structural changes which have been made to the Council during 2006/7 to ensure we continue to meet customer demands and achieve high levels of performance			
Key actions: Implementation of shared services project outcomes in financial and related service areas Carrying out VFM reviews in line with a strategic programme Implementation of HR Management Information system			
Procurement - goods and services	195,090	195,090	<ul style="list-style-type: none"> <li>• <a href="#">Documents</a></li> <li>• <a href="#">People</a></li> <li>• <a href="#">Projects</a></li> </ul>
Strategy: review corporate strategy focus on key areas of the national Strategy still to be effectively implemented and embedded in our procurement culture			
Key actions: embed effective contract management process to ensure delivery of major contracts Carry out major procurements in IT and Telephony services geared to deliver major savings from 2008/9 Commence procurement preparation for Waste Management Contract due for renewal in 2009			
Procurement - construction			<ul style="list-style-type: none"> <li>• <a href="#">Documents</a></li> <li>• <a href="#">People</a></li> <li>• <a href="#">Projects</a></li> </ul>
Strategy:			
Key actions:			
Productive time	1,700		<ul style="list-style-type: none"> <li>• <a href="#">Documents</a></li> <li>• <a href="#">People</a></li> <li>• <a href="#">Projects</a></li> </ul>
Strategy: continue to identify opportunities for improving productivity through Value for			

	Money and Efficiency reviews and the HR Strategy		
	Key actions: Implementation of HR e-enabled training system		
Transactions	40,670	12,830	<ul style="list-style-type: none"> <li>• <a href="#">Documents</a></li> <li>• <a href="#">People</a></li> <li>• <a href="#">Projects</a></li> </ul>
	Strategy: strategic focus on customer profiling as a move to migrate customers onto cheaper access channels		
	Key actions: appointment of customer access officer  implementation of customer profiling project  improve transactional capability of our new website		
Miscellaneous efficiencies			<ul style="list-style-type: none"> <li>• <a href="#">Documents</a></li> <li>• <a href="#">People</a></li> <li>• <a href="#">Projects</a></li> </ul>
	Strategy:		
	Key actions:		
Total	748,450	715,910	

Development and Regeneration	Audit Commission data using 2005/06 expenditure figures		Rank
	Chorley	Nearest Neighbour Avg	
	£'s per head	£'s per head	
Planning Total	18.46	9.81	Most expensive
Economic and Community Development	1.83	3.58	11th out of 16
Tourism	0.12	0.73	12th out of 16



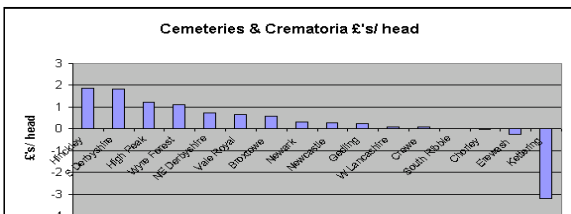
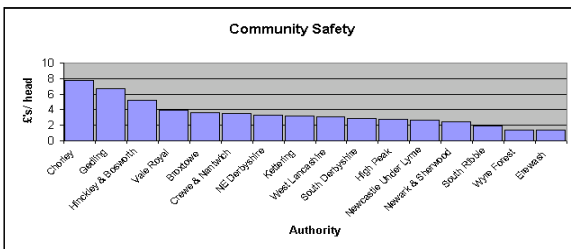
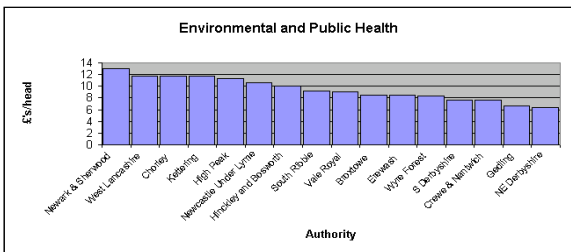
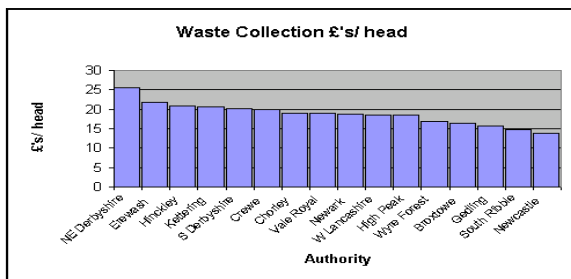
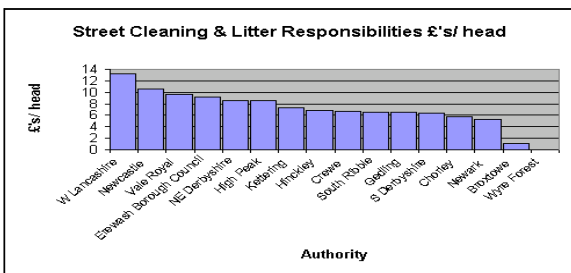
Performance Indicator	Performance		Change	Rankings		Performance 2006	Ranking 2006	
	2004	2005		2004	2005			
Planning applications - Number of applications decided	1150	1207		57 9th	10th	1309	1325	
Planning applications - Percentage of applications decided in target time (BV109)	73%	85%	12%	10th	4th	See breakdown below		
<b>BV109a - Percentage of major planning applications within 13 weeks</b>	48%	74%	26%	9th	6th	73%	6th	
<b>BV109b - Percentage of minor planning applications within 8 weeks</b>	51%	71%	20%	13th	10th	66%	15th	
<b>BV109c - Percentage of other planning applications within 8 weeks</b>	80%	88%	8%	10th	5th	85%	16th	
Appeal decisions in year - Percentage allowed (BV204)	60%	30%	-30%	16th	7th	40.70%	4th	
BV205- Quality of Planning Service Checklist	n/a	n/a	New Indicator benchmarking data not available			78%	13th	
<b>BV111- Satisfaction with the planning service</b>	60%	60%	n/a				71%	Not available- still awaiting compa

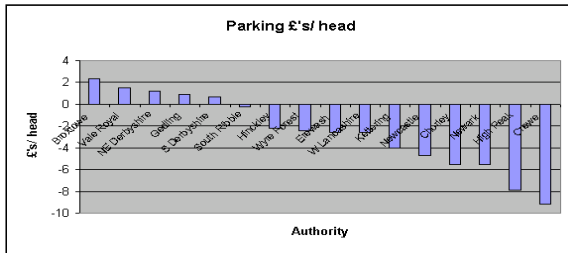
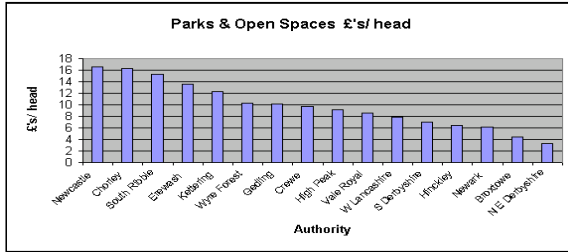
	BV109a	BV109b	BV109c	BV204
Vale Royal Borough Council	93.10	88.88	94.63	42.00
Gedling Borough Council	90.00	88.00	94.00	25.00
Kettering Borough Council	89.58	83.06	90.50	43.80
Broxtowe Borough Council	86.36	75.25	88.04	40.00
Newark and Sherwood District Council	84.00	83.00	93.00	33.00
<b>Chorley Borough Council</b>	<b>73.00</b>	<b>66.00</b>	<b>85.00</b>	<b>40.70</b>
North East Derbyshire District Council	69.05	81.52	90.85	25.00
Erewash Borough Council	69.00	84.00	94.00	33.00
High Peak Borough Council	66.67	91.06	95.42	33.30
South Ribble Borough Council	64.29	69.11	91.60	42.90
Hinckley and Bosworth Borough Council	64.00	79.00	88.00	29.00
Crewe and Nantwich	59.65	68.78	90.20	40.50
West Lancashire District Council	59.10	67.50	90.21	29.50
South Derbyshire District Council	56.25	69.92	86.65	19.00
Newcastle Under Lyme Borough Council	35.90	54.15	86.28	18.50
Wyre Forest District Council	34.62	70.97	86.24	36.00

Audit Commission data using 2005/06 expenditure figures  
 Chorley NN Average Rank  
 £'s per head £'s per head

**Streetscene, Neighbourhoods and Environment**

Street cleaning and litter responsibilities	5.77	7.01	13th out of 16
Waste collection	19.07	18.77	7th out of 16
Environmental and Public Health Services	11.76	9.48	3rd out of 16
Community Safety	7.79	3.49	Most expensive
Cemeteries and Crematoria	-0.03	0.35	14th out of 16
Parks and Open spaces	16.33	9.81	2nd out of 16
Parking	-5.5	-2.52	13th out of 16





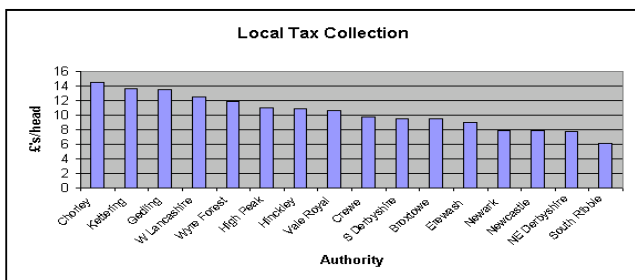
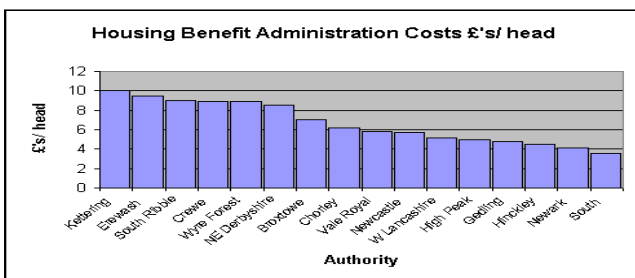
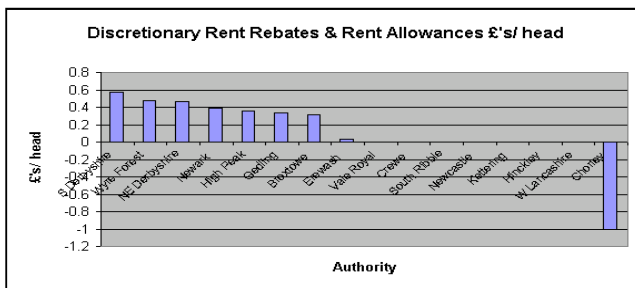
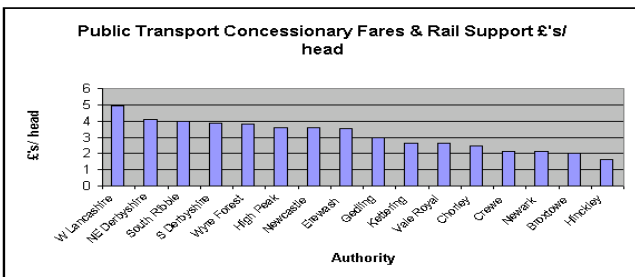
Performance Indicator	Performance 2004	Performance 2005	Change	Rankings 2004	Rankings 2005	Performance 2006	Ranking 2006
BV199 - Street and environmental cleanliness	14%	14%		0 5th	7th	See breakdown below	
<b>BV199a - Street and environmental cleanliness (Street Dirtiness)</b>						5.30%	1st
<b>BV199b - Street and environmental cleanliness (Graffiti)</b>						1%	3rd(=)
<b>BV199c - Street and environmental cleanliness (Fly-posting)</b>						0%	1st(=)
<b>BV89 The % of people satisfied with the cleanliness standard</b>		62%			7th	60%	Benchmarking data not currently a
<b>BV90a The % of people satisfied with household waste collection</b>		86.50%			3rd	66%	Benchmarking data not currently a
<b>BV90b The % of people satisfied with waste recycling</b>		79%			1st	77%	Benchmarking data not currently a
BV 82a & b - Household waste	16.20%	23.70%	7.50%	2nd	1st	See breakdown below	
<b>BV 82a(i) - Household waste recycled</b>						18.70%	6th
<b>BV 82b(i) - Household waste compost</b>						21.62%	3rd
<b>BV119d Satisfaction with parks/ opens spaces.</b>	63.1	76	12.9	9th	4th	75%	Benchmarking data not currently a
BV 126a Domestic Burglaries per 1000 Households	11.68	7.68				7.25	4th
BV 127a Violent crime per 1000 of population			Change in definition benchmarking data not available			16.24	9th
BV 127b Robberies per 1000 of population			Change in definition benchmarking data not available			0.23	3rd
BV 128 Vehicles crimes per 1000 of the population	8.36	9.46				7.99	4th
BV 225 Domestic Violence Checklist	n/a	n/a	New indicator			45%	Not

	BV199a	BV199b	BV199c	BV82a(i)	BV82b(i)
<b>Chorley Borough Council</b>	<b>5.3</b>	<b>1</b>	<b>0</b>	<b>18.7</b>	<b>21.62</b>
Kettering Borough Council	5.7	5	0	14.11	14.76
South Ribble Borough Council	6	0	0	15.45	18.74
Newark and Sherwood District Council	7	1	1	26	0
High Peak Borough Council	8	5	4	11.86	0.47
North East Derbyshire District Council	8	0	0	12.72	7.74
Erewash Borough Council	11	5	0	21.11	17.15
Gedling Borough Council	12	2	0	24.63	3.25
Crewe and Nantwich	12.4	6	1	14.72	10.18
Broxtowe Borough Council	15	9	4	25.39	10.05
West Lancashire District Council	15.5	1	1	12.93	18.19
South Derbyshire District Council	15.7	2	0	13.19	12.4
Newcastle Under Lyme Borough Council	16.6	3	0	12.7	3.93
Wyre Forest District Council	17	2	1	24.98	0
Vale Royal Borough Council	19	3	0	18.3	23.6
Hinckley and Bosworth Borough Council	21.7	1	1	17.62	22.7

Audit Commission data using 2005/06 expenditure figures  
 Chorley NN Average Rank  
 £'s per head £'s per head (most expensive)

Finance

Public Transport, Concessionary Fares & Rail Support	2.49	3.13	12th out of 16
Discretionary Rent Rebates and Rent Allowances	-1	0.12	16th out of 16
Housing Benefit Administration Costs	6.17	6.67	8th out of 16
Local Tax Collection	14.48	10.36	Most Expensive



Performance Indicator	Performance		Change	Rankings		Performance		Ranking	
	2004	2005		2004	2005	2006	2006		
BV10 Percentage of non-domestic rates collected	98.4	98.4	0	11th	9th	98.88	7th		
<b>BV78a Speed of processing new claim to HB/CTB</b>	35	25	-10	5th	4th fastest	27	6th fastest		
BV78b Speed of processing changes of circumstances to HB/CTB	9	6.5	-2.5	6th	3rd fastest	8	4th fastest		
BV79a Accuracy of HB/CTB claims	98.8	98.4	-0.4	8th	6th	98.5	8th		
BV9 Percentage of Council Tax collected	97.9	98.4	0.05	9th	2nd	98.51	3rd		

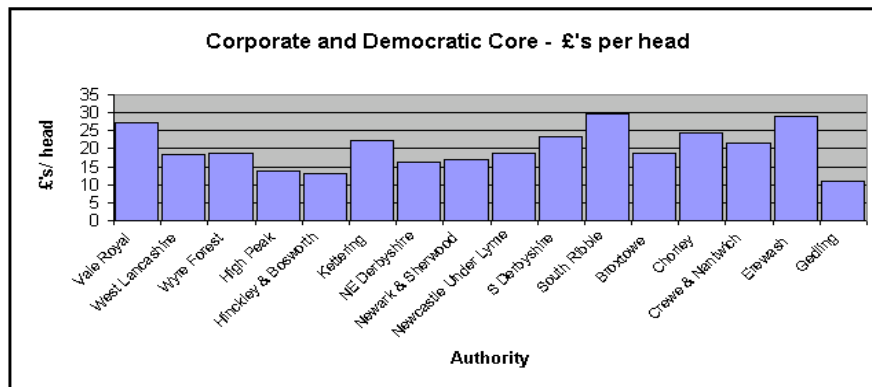
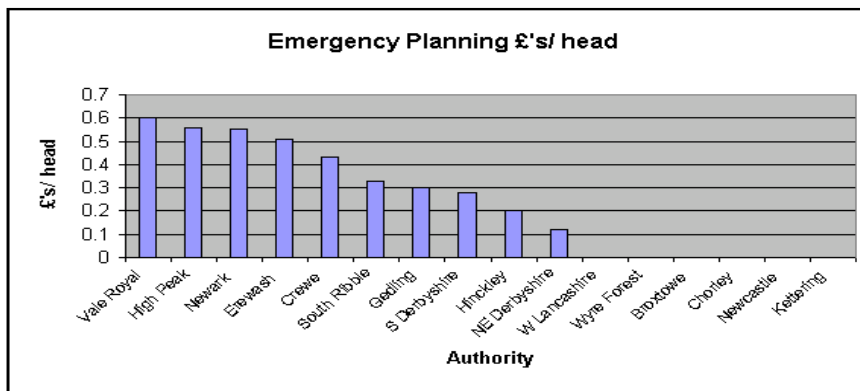
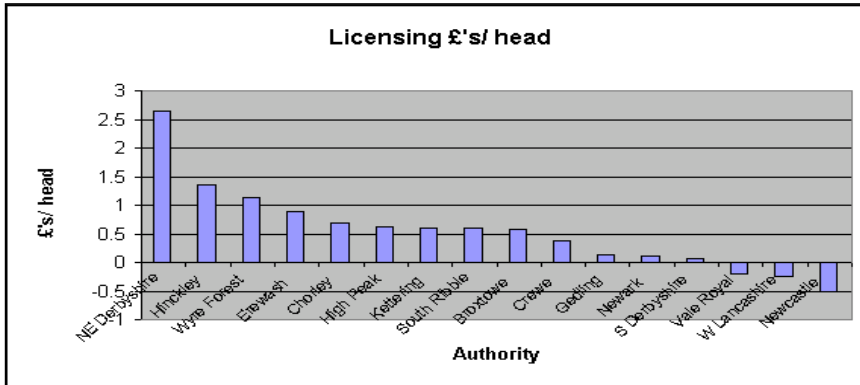


	82	82 n/a				Benchmark ing data not currently available
	BV10	BV78b	BV78a	BV79a	BV9	
South Derbyshire District Council	99.46	24.5	6.2	97.4	98.82	
High Peak Borough Council	99.37	17.2	23	99.6	98.53	
Wyre Forest District Council	99.2	25	13.6	95.8	98.4	
Crewe and Nantwich	99.1	30.1	16	98	97.49	
Hinckley and Bosworth Borough Council	99.06	51.1	5.4	95.8	98.45	
Vale Royal Borough Council	99	29.1	9	98.6	98.09	
<b>Chorley Borough Council</b>	<b>98.88</b>	<b>27</b>	<b>8</b>	<b>98.5</b>	<b>98.51</b>	
Erewash Borough Council	98.79	40.1	10.2	99.2	97.1	
West Lancashire District Council	98.7	25.1	14.2	96.4	98.2	
Broxtowe Borough Council	98.4	49.6	10.2	98	97.5	
Newark and Sherwood District Council	97.7	43.7	11.3	99.6	97.4	
South Ribble Borough Council	97.6	21.4	2.6	98.95	97.8	
Newcastle Under Lyme Borough Council	97.5	56.3	8.6	99.6	96.46	
North East Derbyshire District Council	97.26	37.4	28.4	97.2	97.72	
Gedling Borough Council	96.1	41.6	12.8	96.2	97.5	
Kettering Borough Council	94.44	39.1	19.5	99.2	97.39	

Audit Commission data using 2005/06 expenditure figures  
**Chorley**                      **NN Average**                      **Rank**  
**£'s per head**                      **£'s per head**                      **(most expensive)**

**Customer, Democratic and Legal Services**

Licensing	0.69	0.55	5th out of 16
Emergency Planning	0	0.24	n/a
Corporate and Democratic	24.32	20.24	4th out of 16

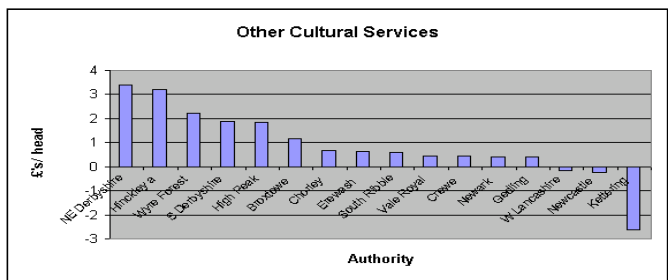
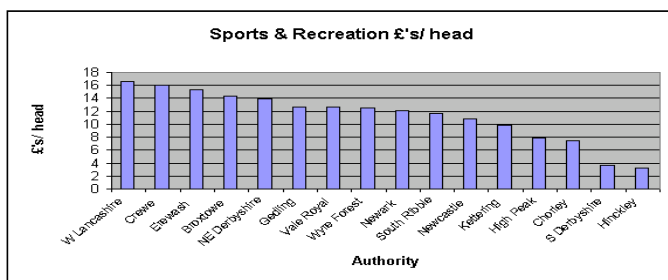
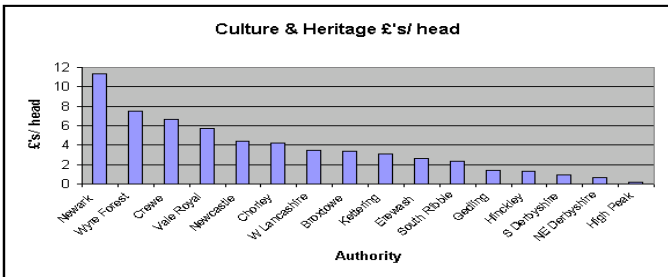


Audit Commission data using 2005/06 expenditure figures

Chorley NN Average Rank  
£'s per head £'s per head (most expensive)

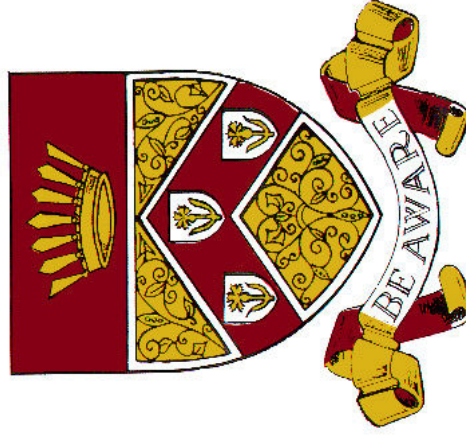
Leisure and Cultural Services

Culture and Heritage	4.22	3.7 6th out of 16
Sports and recreation	7.48	11.29 14th out of 16
Other cultural services	0.66	0.9 7th out of 16



Performance Indicator	Performance		Change	Rankings		Performance	Ranking
	2004	2005		2004	2005		
<b>BV119a Satisfaction with sport and leisure facilities.</b>	52.5	65	12.5 9th	1st		60	Benchmarking data is not currently
<b>BV119c Satisfaction with museums and Galleries (out of 14)</b>	52.5	63	10.5 1st	1st		24	Benchmarking data is not currently
<b>BV119d Satisfaction with theatres / Concert halls. (out of 14)</b>	52.5	58	5.5 4th	2nd		22	Benchmarking data is not currently
170a Visits to Astley Hall per 1000 of the population	230	268	38	-	-	247	6th out of 13
170b Visits to Astley Hall in person per 1000 of the population	123	247	124	-	-	159	7th out of 13
170c Pupils visiting Astley Hall	1223	2311	1088	-	-	1272	6th out of 13

## SERVICE REVIEW SELF ASSESSMENT



NAME OF SERVICE:

SERVICE REVIEW DATE:

**1. CONTEXT AND AIMS OF THE SERVICE**

**Please describe the aims and objectives of the service, priorities and relation to the Council as a whole.  
(Max 2 sides of A4)**

- Are there clear and challenging aims for the service?
- Are these aims shared with the wider aims of the Council and its partners?
- Does the service have robust and clear priorities for improvement?
- Is there a strategy and action plan in place to realise these priorities?

**2. QUALITY OF THE SERVICE**

**Please describe your service's achievements in the last year, giving particular attention to specific outcomes and impact, particularly from a user-focus perspective.  
(Max 4 sides of A4)**

- What specific outcomes has the service achieved in the last year?
- What has the service achieved in increasing its user-focus in the last year?
- Does the service have a rigorous approach to performance management to enable performance improvement?
- What is the performance of the service in comparison to similar services at other Authorities?

**3. DEMONSTRATED IMPROVEMENTS**

**Please describe your service's improvements in the last year, in relation to Council priorities. What future changes are planned, outline them here.**

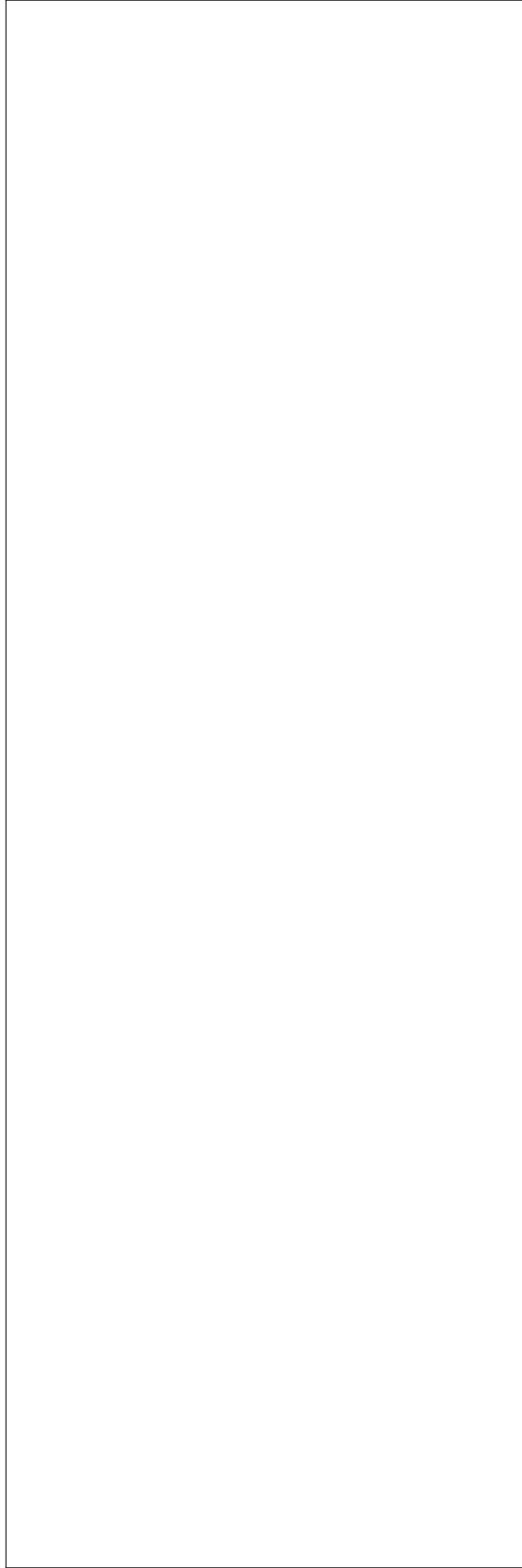
**(Max 2 sides of A4)**

- Has the service made any improvements to the efficient delivery of services in the last year?
- Are there any plans for service improvements in the future, and how will these impact on the way that services are delivered?
- Has the service made any improvements to the Value for Money obtained in its service delivery in the past year?

**4. STRATEGIC CAPACITY TO IMPROVE**

**Please indicate how your service has considered its strategic capacity to improve in the future.  
(Max 4 sides of A4)**

- Is there clear accountability to enable effective decision-making?
- Is capacity used effectively to deliver ambitions and priorities?





**APPENDIX 5**

**GUIDE TO POTENTIAL SCORING SYSTEM WITHIN SELF ASSESSMENT**

It is proposed that services be scored as part of their review, to allow them to compare their performance with other services, set a benchmark score for improvement, and communicate findings easier across their service.

It is proposed that the scoring methodology be based on the acquisition of points out of 4 dependent on how close the service performs to an “ideal” service. This same methodology has been used in previous Audit Commission inspections. In addition, it is proposed that services be awarded a score for their level of improvement. This is an approach similar to the Authority as a whole, which now has two scores side by side for its CPA grade.

**The Service Performance Score:**

Each of the elements of the Self Assessment would be given a score out of 4, based on achievement of certain levels of performance in the KLOE’s.

Using this approach, the “Quality of the Service” element of the Self Assessment could be scored as follows:

- The quality of the service is excellent
  - Many positive outcomes in the last year
  - Attention paid to user focus with demonstrable service improvements as a result
  - A rigorous and embedded performance management structure within the service, leading to continual improvement

= 4
  
- The quality of the service is good
  - Some positive outcomes in the last year
  - Some attention given to user focus, not always acted upon and often not top priority
  - Performance Management is not always embedded in service planning, leading to a lack of quality performance management information and some conflicting service aims

= 3
  
- The quality of the service is fair
  - Few positive outcomes in the last year
  - Scant attention paid to user focus, with little or no reference to users in service planning
  - Performance Management is patchy, with a haphazard and non-embedded approach to continual improvement

= 2

- The quality of service is poor
  - Virtually no positive outcomes in the last year
  - Users are not consulted regularly, and their views do not form part of service planning
  - There is little evidence of performance management having a positive effect on service delivery

= 1

This would allow for a score out of 4 for each of the elements of the Self Assessment. Once these scores are collated, an average score can be worked out to produce an overall service performance score out of 4.

**The Direction of Travel Score:**

In addition to the service performance score, it is proposed that the service as a whole be given a Direction of Travel score out of 4, where performance improvement across the service as a whole is judged. This judgement can be made looking at evidence provided mainly in the “improvement” KLOE of the “Quality of Service” element, but can also be judged in the round using all the evidence provided for the inspection.

It is proposed that the Direction of Travel judgement labels mirror those for CPA:

“**Improving Strongly**” – **The service shows strong and demonstrable improvement.** It has made significant improvements to outcomes over the last year. It also has the potential to continue to significantly improve the way it works and the services it provides to local people.

“**Improvement Well**” – **The service is moving forward and improving well.** It has made some improvements to outcomes over the last year. It has the potential to continue to improve services it provides to local people. It has made some improvements to outcomes over the last year. However, it needs to improve the way it works in order to continue to improve services to local people in the future.

“**Improving Adequately**”. The service has little or no improvement, but no decline. It has maintained its overall outcomes at the level we saw last year. The service identified priorities but has made little progress over the last year on improving them. However, the service is improving the way it works, providing some confidence that better outcomes will occur in the future. It has maintained its outcomes at the level were seen last year.

“**Not improving**”. The service shows no improvement and perhaps a negative direction of travel. Performance has not improved this year, and may have deteriorated over the last year. Several priority areas for improvement have got worse. Unless the service improves the way it works, the likelihood of it achieving improvement is limited.

**Overall score:**

The services would be given two scores side by side, for instance “2, Improving Well”.

**ACHIEVING VALUE FOR MONEY – CORPORATE ACTION PLAN**

REFERENCE DOCUMENT	TARGET	ACTION PLANNED	BY WHEN	BY WHOM	HOW DO WE MEASURE SUCCESS	PROGRESS AT.....
<p><b>AUDIT COMMISSION CRITERIA STRATEGIC OPERATIONAL OBJECTIVES</b></p> <ul style="list-style-type: none"> <li>Value for Money Framework 2006 – 2009 Section 5</li> </ul>	<p>Produce a cohesive Corporate Strategy supported by an effective programme of project management.</p>	<p>Monitoring of existing Corporate Strategy and review in line with Business Planning cycle.</p>	<p>September 2007</p>	<p>Director of Policy &amp; Performance</p>	<p>Delivery of key projects, performance targets and long term outcomes.</p>	
<p><b>AUDIT COMMISSION CRITERIA COMMUNICATIONS</b></p> <ul style="list-style-type: none"> <li>Value for Money Framework 2006 – 2009</li> <li>Communication Strategy</li> </ul>	<p>Implementation of The Communication Strategy.</p>	<p>Achievement of the Level 1, Level 2 and Level 3 benchmarks as set out in The Strategy.</p>		<p>Director of Policy &amp; Performance</p>	<p>Achievement of the Level 1, 2 and 3 benchmarks as set out in the Strategy.</p>	
<p><b>AUDIT COMMISSION CRITERIA PERFORMANCE MANAGEMENT</b></p> <ul style="list-style-type: none"> <li>Communication Strategy</li> <li>Business Improvement Planning – A Managers Guide</li> </ul>	<p>Review and Implementation of an effective Business Planning Framework</p>	<p>Preparation of revised Manager Guidance documentation and revised Framework</p>	<p>April 2007</p>	<p>Director of Policy &amp; Performance Director of Finance</p>	<p>Production of Business Improvement Plans to deadline. Monitoring of Plans in line with the revised Business Planning cycle and timetable.</p>	
<ul style="list-style-type: none"> <li>VFM Framework</li> <li>Human Resources Strategy</li> </ul>	<p>Maintaining an effective staff performance appraisal system</p>	<p>Clearly linking Performance Management to the Business Planning Cycle.</p>	<p>April 2007</p>	<p>Director of Policy &amp; Performance Director of</p>	<p>Achievement of 100% staff performance review to deadlines set.</p>	

REFERENCE DOCUMENT	TARGET	ACTION PLANNED	BY WHEN	BY WHOM	HOW DO WE MEASURE SUCCESS	PROGRESS AT.....	
<ul style="list-style-type: none"> <li>Business Improvement Planning – A Managers Guide</li> </ul>				Finance			
<ul style="list-style-type: none"> <li>VFM Framework Overview &amp; Scrutiny Improvement Plan</li> </ul>	Effective challenge and scrutiny of service performance	Implementation of the Overview and Scrutiny Forward Plans 2007/8.	To timetable set out in plans	Director of Customer, Democratic and Legal Services	Outcomes from reviews undertaken		
<ul style="list-style-type: none"> <li>VFM Framework Performance Monitoring Reports</li> <li>Business Improvement Plans</li> </ul>	To achieve Corporate Performance Targets	Monitoring of targets set through key local and national performance indicators	Quarterly	Corporately by Director of Policy & Performance At Directorate Level by all Directors	Proven high quarterly performance		
<ul style="list-style-type: none"> <li>VFM Framework. Role &amp; Membership of Audit Committee Report to Executive Cabinet 3/3/6</li> <li>Audit Committee Draft Programme 2007/8</li> </ul>	Improving the current Audit Committee arrangements to comply fully with CIPFA Guidance on Audit Committees.	Implementation of Action Plan contained in report to Executive Cabinet 30/3/6. Implementation of Audit Committee programme.	By March 2008	Director of Finance	Conduct a follow-up review of The Action Plan/Programme in March 2008.		
<table border="1"> <tr> <td data-bbox="1078 1707 1159 1969"><b>AUDIT COMMISSION CRITERIA DATA QUALITY</b></td> </tr> </table>	<b>AUDIT COMMISSION CRITERIA DATA QUALITY</b>						
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<ul style="list-style-type: none"> <li>VFM Framework Date Quality Strategy &amp; Action Plan</li> <li>Data Quality Audit</li> </ul>	Production of an effective quality assurance system for the collection and publication of performance information.	Implementation of Data Quality Action Plan	By March 2008	Director of Policy & Performance	Monitoring and follow-up by Internal Audit/Audit Commission		

REFERENCE DOCUMENT	TARGET	ACTION PLANNED	BY WHEN	BY WHOM	HOW DO WE MEASURE SUCCESS	PROGRESS AT.....
<p><b>AUDIT COMMISSION CRITERIA INTERNAL CONTROL</b></p> <ul style="list-style-type: none"> <li>• VFM Framework</li> <li>• Annual Governance Statement 2006/7</li> </ul>	<p>Establishing a sound system of internal control.</p>	<p>Production of our Annual Governance Statement for 2006/7 and addressing the significant governance issues.</p>	<p>Sept 2007</p>	<p>Director of Finance Director of Customer, Democratic &amp; Legal Services</p>	<p>Annual 'sign-off' by Audit Commission</p>	
<p><b>AUDIT COMMISSION CRITERIA RISK MANAGEMENT</b></p> <ul style="list-style-type: none"> <li>• VFM Framework</li> <li>• Strategic Risk Register</li> <li>• Key Project Risk Registers</li> </ul>	<p>Effective management of strategic and operational risk</p>	<p>Review and update of Strategic Risk Register. Implementation of Action Plan.</p>	<p>Mar 2007</p>	<p>Director of Finance Director of Policy &amp; Performance</p>	<p>Annual Review of Strategic Risk Register. Operational risk on Key Projects monitored through the Corporate Improvement Board.</p>	
<ul style="list-style-type: none"> <li>• VFM Framework</li> <li>• Review of Business Continuity Management</li> <li>• VFM Framework</li> </ul>	<p>To have effective proven Emergency and Business Continuity Plans in place. To ensure that appropriate and cost effective insurance cover is in place.</p>	<p>Implement Action Plans deriving from the Audit Commission review of Emergency Planning and the Internal Audit Review of Business Continuity. Full review of insurance cover undertaken in 2006 to reflect organisational changes. Claims experience will be monitored carefully. Careful monitoring of new contract with Bolton. Formal review will be undertaken March 2008.</p>		<p>Director of Customer, Democratic &amp; Legal Services Director of Finance</p>	<p>Monitoring and review by Audit Commission and Internal Audit. Cover effectively meets claims experience.</p>	
<ul style="list-style-type: none"> <li>• VFM Framework</li> <li>• SLA with Bolton Council</li> </ul>	<p>To ensure that appropriate health and safety policies and procedures are in place.</p>		<p>Mar 2008</p>	<p>Director of Finance</p>	<p>Reduced service cost against satisfactory contract performance</p>	

REFERENCE DOCUMENT	TARGET	ACTION PLANNED	BY WHEN	BY WHOM	HOW DO WE MEASURE SUCCESS	PROGRESS AT.....
<p><b>AUDIT COMMISSION CRITERIA VALUE FOR MONEY</b></p>						
<ul style="list-style-type: none"> <li>• VFM Framework</li> <li>• VFM reports to Strategy Group 17.4.07</li> <li>• Executive Cabinet 24.5.07</li> </ul>	<p>To achieve score of 4 for VFM Theme in use of Resources Assessment</p>	<p>Implementation of VOR-VFM Keylines of Enquiry Action Plan. Submit self-assessment to Audit Commission.</p>	<p>Dec 2006</p>	<p>Director of Finance</p>	<p>Score of 4 awarded.</p>	
<ul style="list-style-type: none"> <li>• VFM Framework</li> <li>• VFM reports to Strategy Group 17.4.07</li> <li>• Executive Cabinet 24.5.07</li> </ul>	<p>Carry out a 3 year programme of VFM Service Reviews.</p>	<p>Programme submission to and approved by Strategy Group.</p>	<p>April 2007</p>	<p>Director of Finance</p>	<p>Successful VFM Reviews being undertaken</p>	
<ul style="list-style-type: none"> <li>• VFM Framework</li> <li>• VFM reports to Strategy Group 17.4.07</li> <li>• Executive Cabinet 24.5.07</li> </ul>	<p>Establish guidance documentation and a VFM template to enable comprehensive VFM review to be undertaken.</p>	<p>Use of methodology to undertake reviews.</p>	<p>From June 2007</p>	<p>Director of Finance</p>	<p>Successful VFM Reviews being undertaken.</p>	
<ul style="list-style-type: none"> <li>• VFM Framework</li> <li>• VFM reports to Strategy Group 17.4.07</li> <li>• Executive Cabinet 24.5.07</li> </ul>	<p>Implement benchmarking strategy</p>	<p>Investigation of benchmarking clubs appropriate to use. Contact nearest neighbours to discuss forming club.</p>	<p>July 2007</p>	<p>Director of Finance</p>	<p>Robust corporate benchmarking system in place delivering quality data.</p>	
<ul style="list-style-type: none"> <li>• VFM Framework</li> </ul>	<p>Improved profile for VFM across the Council. VFM embedded in culture.</p>	<p>Carry out a services of roadshows/presentations to staff. Work on feature for staff newsletter. Publicise VFM review outcomes corporately.</p>	<p>August 2007</p>	<p>Director of Finance</p>	<p>VOR assessment efficiency gains VFM review outcomes</p>	

REFERENCE DOCUMENT	TARGET	ACTION PLANNED	BY WHEN	BY WHOM	HOW DO WE MEASURE SUCCESS	PROGRESS AT.....
<ul style="list-style-type: none"> <li>VFM Framework</li> </ul>	Establish a staff incentive scheme.	Design scheme for consideration by Strategy Group.	August 2007	Director of Finance	Evidence of change through staff incentive scheme.	
<ul style="list-style-type: none"> <li>VFM Framework</li> </ul>	Establish a VFM corporate support function with Finance Directorate.	Structure established.	Actioned Jan 2007	Director of Finance	Key priorities of Team actioned successfully.	
<ul style="list-style-type: none"> <li>VFM Framework</li> <li>Report to Executive Cabinet – 24.5.07</li> <li>CIPFA SOLACE Corporate Governance Framework</li> </ul>	Establish a Corporate Framework for Partnership Working in accordance with best practice.	Framework prepared and approved by Strategy Group. Formal approval by Executive Cabinet May 2007.	May 2007	Director of Finance	All new key partnerships following framework guidance. All new key partnerships reported to CC for approval. Annual review and report to Executive Cabinet on key partnership performance.	
<div style="border: 1px solid black; padding: 2px;"> <b>AUDIT COMMISSION CRITERIA PROBITY</b> </div>						
<ul style="list-style-type: none"> <li>VFM Framework</li> </ul>	Production and maintenance of Codes of Conduct for Members.	Audit Review of Codes of Conduct undertaken by Internal Audit. Revised Codes of Conduct to be prepared and approved by Executive Cabinet.	Aug 2007	Director of Customer, Democratic & Legal Services  Director of Human Resources	Monitoring the number of Standards Board referrals and disciplinary incidents.	
<ul style="list-style-type: none"> <li>VFM Framework.</li> </ul>	Satisfactory systems in place to register incentives, gifts and hospitality received by staff.	Comprehensive review of systems undertaken in 2006. Electronic registration facility for staff now in place. Members system to be facilitated through modern.gov.		Director of Customer, Democratic and Legal Services	Evidence of systems being properly used.	

REFERENCE DOCUMENT	TARGET	ACTION PLANNED	BY WHEN	BY WHOM	HOW DO WE MEASURE SUCCESS	PROGRESS AT.....							
<ul style="list-style-type: none"> <li>• VFM Framework</li> <li>• Whistle-Blowing Policy</li> <li>• Corporate Complaints Procedure</li> </ul>	Satisfactory whistle-blowing, Anti-Fraud and Complaints Procedures in place.	New whistle-blowing policy new approved and in place.  Internal Audit to work with Directors to compile an anti-fraud risk register.  Establishing Corporate Complaints Procedure electronically.	Actioned  During 2007/8 as part of Internal Audit plan  June 2007	DHR  Director of Finance  DPP	Monitoring of awareness and usage of policy  Minimisation of risk of fraud  Monitoring of quality of data and response to complaints.								
<table border="1"> <tr> <td data-bbox="643 1449 1019 1967"> <b>AUDIT COMMISSION CRITERIA FINANCIAL STRATEGY</b>   <ul style="list-style-type: none"> <li>• VFM Framework</li> <li>• Medium Term Financial Strategy</li> </ul> </td> <td data-bbox="643 1050 1019 1449">                     Ensuring that a medium-term Financial Strategy, budget control measures and a successful capital programme are achieved.                 </td> <td data-bbox="643 630 1019 1050">                     Preparation and approval of Medium-Term Financial Strategy.                 </td> <td data-bbox="643 420 1019 630">                     July 2007                 </td> <td data-bbox="643 210 1019 420">                     Director of Finance                 </td> <td data-bbox="643 100 1019 210">                     Successful outcomes from Use of Resources Awareness, Annual Efficiency Statements and Corporate Improvement Board Monitoring.                 </td> <td data-bbox="643 100 1019 367"></td> </tr> </table>							<b>AUDIT COMMISSION CRITERIA FINANCIAL STRATEGY</b>  <ul style="list-style-type: none"> <li>• VFM Framework</li> <li>• Medium Term Financial Strategy</li> </ul>	Ensuring that a medium-term Financial Strategy, budget control measures and a successful capital programme are achieved.	Preparation and approval of Medium-Term Financial Strategy.	July 2007	Director of Finance	Successful outcomes from Use of Resources Awareness, Annual Efficiency Statements and Corporate Improvement Board Monitoring.	
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<p><b>AUDIT COMMISSION CRITERIA FINANCIAL MANAGEMENT</b></p> <ul style="list-style-type: none"> <li>VFM Framework</li> </ul>	<p>To have clear documented processes in place to achieve effective budget management.</p>	<p>Budget and performance monitoring on a quarterly basis.</p>	<p>Ongoing to financial timescales</p>	<p>Director of Finance</p>	<p>Budget and performance outputs and outcomes. Use of Resources Assessment.</p>	
<p><b>AUDIT COMMISSION CRITERIA ASSET MANAGEMENT</b></p> <ul style="list-style-type: none"> <li>VFM Framework</li> <li>Property Services</li> <li>Contract Management Plan</li> </ul>	<p>To ensure we are maximising use and value of our Asset Base.</p>	<p>Strategic review of the Council's Asset Base to be undertaken by Liberata within 3 months following contract start date.</p>	<p>By July 2007</p>	<p>Liberata</p>	<p>Outcomes from review</p>	
<ul style="list-style-type: none"> <li>VFM Framework</li> </ul>	<p>Achieving efficiency gain targets set by Government</p>	<p>Continuing Corporate approach to ensuring efficiency gains are maximised, costed and evaluated in accordance with Government guidance.</p>	<p>Ongoing to efficiency statement submission timetables</p>	<p>Director of Finance</p>	<p>Achieving efficiency targets.</p>	
<ul style="list-style-type: none"> <li>Achieving Value for Money Report to Strategy Group 17.4.07</li> </ul>	<p>To ensure that corporate expenditure areas are identified in the report are providing Value for Money.</p>	<p>Corporate Procurement to undertake a detailed review of the expenditure areas and report to Strategy Group on outcomes.</p>	<p>By Aug 2007</p>	<p>Director of Finance</p>	<p>Outcomes from review.</p>	

REFERENCE DOCUMENT	TARGET	ACTION PLANNED	BY WHEN	BY WHOM	HOW DO WE MEASURE SUCCESS	PROGRESS AT.....
<ul style="list-style-type: none"> <li>Achieving Value for Money Report to Strategy Group 17.4.07</li> </ul>	<p>To ensure that income streams to the Council are being maximised.</p>	<p>Internal Audit to undertake a detailed review of income streams.</p>	<p>By July 2007.</p>	<p>Director of Finance</p>	<p>Outcomes from review.</p>	
<ul style="list-style-type: none"> <li>Achieving Value for Money Report to Strategy Group 17.4.07</li> </ul>	<p>To improve Business processes relating to services being transferred to Telephone Contact Centre</p>	<p>Prepare a detailed business plan on how this might be achieved.</p>	<p>July 2007</p>	<p>Director of Customer, Democratic &amp; Legal Services</p>	<p>Proven Business Case being delivered</p>	
<ul style="list-style-type: none"> <li>Achieving Value for Money Report to Strategy Group 17.4.07</li> <li>Shared Services in Financial Business Case</li> </ul>	<p>To achieve improved delivery of Financial Services across the 2 partner authorities.</p>	<p>Consider recommendations in Consults report.</p>	<p>June 2007</p>	<p>Director of Finance</p>	<p>Implementation of a successful partnership.</p>	

By virtue of paragraph(s) 1 of Part 1 of Schedule 12A  
of the Local Government Act 1972.

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