

Report of	Meeting	Date
Director of Customer, Democratic and Legal Services	Overview and Scrutiny Committee	20/02/07
	Executive Cabinet	22/02/07

## PROVISION OF OVERVIEW AND SCRUTINY TRAINING SESSIONS

### PURPOSE OF REPORT

- To seek approval to the provision of Overview and Training Sessions for Members and Officers by the Improvement and Development Agency (IDeA) in June 2007.

### CORPORATE PRIORITIES

- The proposals in the report will support the Council's corporate priority of "ensuring the 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	

- The failure to deliver the key issues in the Overview and Scrutiny Improvement Plan will potentially affect the Council's Comprehensive Performance Assessment.

### BACKGROUND

- Following the completion of the Centre for Public Scrutiny Self Assessment Framework for Overview and Scrutiny, one of the key actions in the Overview and Scrutiny Improvement Plan is the provision of appropriate Overview and Scrutiny training for both members and officers.
- The provision of Overview and Scrutiny training has been included in the Member Development Programme for 2007/08 following an analysis of the training needs interviews held by the Training Manager with individual Members of the Council.
- The following organisations were invited to submit proposals for the delivery of the training sessions:
  - Improvement and Development Agency and Centre for Public Scrutiny
  - INLOGOV
  - North West Local Authorities Employers Organisation



8. Following consideration of the initial proposals it was considered by officers that the Improvement and Development Agency (IDeA) working in conjunction with the Centre for Public Scrutiny (CfPS) should be invited to provide further details of their proposals.
9. The IDeA recently completed a short piece of work looking at the Council's self-assessment to be completed prior to a possible Comprehensive Performance Assessment in late 2007. IDeA would ensure that the proposals set out in this report and any other work to be carried out with the Council would complement and mutually reinforce each other. Wherever possible, it will deploy the same personnel to ensure maximum consistency.

## **OVERVIEW AND SCRUTINY TRAINING**

10. It is proposed that IDeA provide training sessions for both members and officers covering:
  - General Overview and Scrutiny Issues
  - Chairing Overview and Scrutiny
  - Financial Scrutiny

### **General Overview and Scrutiny Issues**

11. It is proposed that one workshop be held to cover these issues, be delivered in two sessions on **Tuesday 5 June 2007**, with a maximum of 30 participants in each session. One session would be held in the afternoon and one in the evening. The IDeA would involve CfPS in developing the content of the workshop which would be delivered by an IDeA Principal Consultant and a member peer. Workshop participants would include all members, officers from Democratic Services and other officers whose work exposes them to the scrutiny process.
12. Topics to be covered in the workshop would include:
  - Brief general introduction - to overview and scrutiny in general and in Chorley in particular
  - White Paper proposals – a presentation of the implications of the White Paper
  - Ensuring more meaningful community involvement in the overview and scrutiny process - an explanation of why this is an important role for scrutiny, case study examples from elsewhere to show how it can work and provide inspiration, then an exercise presenting a hypothetical scrutiny review and asking groups to explore ways of involving the public.
  - Selection of issues/topics for scrutiny inquiries – presentation of a selection criteria model for filtering scrutiny suggestions, then an exercise of providing a long list of suggestions that participants "put through" the filter to test the development of an effective work programme.
  - How to conduct a scrutiny inquiry – presentation on the issues to be considered prior to and during each inquiry.
  - Formulation of effective questions for witnesses – presentation of guidance on this
  - Formulation of effective recommendations – a presentation on how to do this
  - Review and agreed action.

### **Chairing Overview and Scrutiny**

13. One half day workshop session would be held on **Wednesday 6 June 2007** to cover this topic, which would be delivered by an IDeA Principal Consultant and a member peer. Workshop participants would include Chairs and Vice Chairs of Overview and Scrutiny, officers from Democratic Services, and any other interested members and officers.
14. The workshop would consist of presentations/discussion and practical exercises based on the IDeA standard Local Leadership Academy module, tailored to meet the Council's needs.

Topics to be covered in the workshop would include:

- Chairing, sharing experiences - an exercise to explore how chairing scrutiny is different to chairing a traditional committee, in what ways scrutiny has held the Executive and portfolio holders to account and some of the key learning points from good or bad practice of chairing scrutiny
- Control of meetings and involvement of members – presentation and discussion
- Formulation of effective questions for witnesses – presentation of guidance on this
- Formulation of effective recommendations – presentation of guidance on this
- Project management of scrutiny inquiries as a practical exercise
- Review and agreed action.

## **Financial Scrutiny**

15. It is also proposed that one workshop be held on **Monday 11 June 2007** to cover Financial Scrutiny issues, delivered in two sessions on one day, with a maximum of 30 participants in each session. One session would be held in the afternoon and one in the evening. IDeA would involve CfPS in developing the content of the workshop, particularly relating to examples of good practice, which would be delivered by an IDeA Principal Consultant and a member peer. Workshop participants would include all members, officers from Democratic Services and other officers whose work exposes them to the scrutiny process.
16. The workshop would consist of presentations/discussion and practical exercises. Topics would include:
  - The role of scrutiny in financial management
  - Adding value to the budget setting process
  - Budget and service performance review and monitoring
  - Tips for effective scrutiny

## **FUTURE TRAINING NEEDS**

17. The training material produced by IDeA and CfPS for the workshop sessions referred to above could be utilised to provide training for any new Members elected to the Council in future years. IDeA will also provide details of its training modules covering scrutiny of performance management and on Holding the Executive to Account for consideration in due course.

## **IDeA TEAM**

18. The IDeA team would comprise of an IDeA project sponsor, Helen Platts, who is the Regional Associate for the North West. An IDeA Principal Consultant, Tom Russell, will be the project manager and will deliver the programme, together with a suitably qualified and experienced member peer. The project sponsorship role is that of key client contact with overall responsibility for quality and delivery. The project manager is responsible for day-to-day delivery of the project.

## **COSTS OF PROPOSALS**

19. The total cost of proposals set out in this report will be up to £6,000, which can be financed from the Member Development Budget. The Member Development Steering Group fully supports the proposals as Overview and Scrutiny training as been identified in the Member Development Programme for 2007/08.

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

20. Overview and Scrutiny was identified as a priority development area for the majority of Members who participated in the 2006 Member Training Needs Analysis exercise in 2006

and has already identified as a key action in the 2007 Member Development Programme. In addition, it is important that those Officers who are exposed to the Overview and Scrutiny process are involve with these proposals to ensure a common understanding across Members and Officers in order to maximise the efficiency and effectiveness of the process.

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

21. The report highlights the cost of the training which will be contained within current budgets.

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

22. That approval be given to the provision of Overview and Training Sessions for Members and Officers by the Improvement and Development Agency in June 2007.

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

23. To meet one of the key issues identified in the Overview and Scrutiny Improvement Plan and one of the priorities in the Member Development Programme.

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

24. None.

ANDREW DOCHERTY  
DIRECTOR OF CUSTOMER, DEMOCRATIC AND LEGAL SERVICES

<b>Background Papers</b>			
<b>Document</b>	<b>Date</b>	<b>File</b>	<b>Place of Inspection</b>
Overview and Scrutiny Improvement Plan	December 2006		Democratic Services Section
Member Development Programme 2007/08	January 2007		Human Resources Directorate

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