



## **BROMSGROVE DISTRICT COUNCIL**

### **MEETING OF THE PERFORMANCE MANAGEMENT BOARD**

**TUESDAY, 21ST AUGUST 2007, AT 6.00 PM**

**COMMITTEE ROOM, THE COUNCIL HOUSE, BURCOT LANE, BROMSGROVE**

**MEMBERS:** Councillors J. T. Duddy (Chairman), C. B. Taylor (Vice-Chairman), A. N. Blagg, Mrs. M. Bunker, S. R. Colella, Mrs. A. E. Doyle and Mrs. C. M. McDonald

### **AGENDA**

1. To receive apologies for absence
2. Declarations of Interest
3. To confirm the accuracy of the minutes of the meeting of the Board held on 17th July 2007 (Pages 1 - 4)
4. Sustainable Community Strategy - Draft Response (Pages 5 - 14)

(In the interests of economy, Members are requested to bring their copy of the report which was included in the agenda for the last meeting).

5. Use of Resources - Self Assessment (Pages 15 - 48)
6. Business Planning Templates 2008-09 (Pages 49 - 88)
7. Improvement Plan - June 2007 (Pages 89 - 92)
8. Integrated Financial/Performance Report - Quarter 1, 2007-08 (Pages 93 - 132)

**K. DICKS**  
**Chief Executive**

The Council House  
Burcot Lane  
BROMSGROVE  
Worcestershire  
B60 1AA

22nd August 2007

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## BROMSGROVE DISTRICT COUNCIL

### MEETING OF THE PERFORMANCE MANAGEMENT BOARD

TUESDAY, 17TH JULY 2007

PRESENT: Councillors J. T. Duddy (Chairman), C. B. Taylor (Vice-Chairman),  
A. N. Blagg, Mrs. M. Bunker, S. R. Colella and Mrs. C. M. McDonald

Observers: Councillor G.N. Denaro

Officers: Mr. K. Dicks, Mr. H. Bennett, Mr. A. Coel and Mr. A. Jessop

15/07 **APOLOGIES FOR ABSENCE**

An apology for absence was received from Councillor Mrs. A. E. Doyle.

16/07 **MINUTES**

The minutes of the meeting of the Performance Management Board held on 19th June 2007 were submitted.

**RESOLVED** that the minutes be approved as a correct record.

17/07 **STRATEGIC HOUSING INSPECTION ACTION PLAN**

Following the earlier report submitted to the Board in August 2006, which set out the Council's Action Plan which had been developed and approved by Cabinet to address the recommendations made by the Audit Commission in this regard, a further report was submitted giving an update on that Action Plan (as at June 2007) which outlined the progress made, with 86% of the actions having been completed.

**RESOLVED** that the report be noted.

**RECOMMENDED** that the Cabinet (via the appropriate Portfolio holder) explore the possibility of carrying out a "peer review" in October 2007, in support of the aim of achieving a 1-star standard by the time of the next review, to be held in February 2008.

18/07 **IMPROVEMENT PLAN EXCEPTION REPORT - MAY 2007**

Consideration was given to the report on the Improvement Plan for May 2007, together with the corrective action being taken, as set out in the appendix to the report.

**RESOLVED:**

- (a) that the revisions to the Improvement Plan Exception Report, together with the corrective action being taken; and
- (b) that it be noted that, from the 66 actions highlighted for May, 76% of the Plan was on target (green), 2% was one month behind (amber), and 5% was over one month behind (red) – with 18% of actions having been re-scheduled or suspended, with approval.

19/07 **COMPREHENSIVE PERFORMANCE ASSESSMENT AND IMPROVEMENT PLAN 2007-08**

A report setting out the Audit Commission's Comprehensive Performance Assessment, together with the Council's Improvement Plan for the period July 2007 to June 2008, was submitted. It was also reported that the Improvement Director had considered the Improvement Plan and had highlighted twelve additional points which he felt should be added, and these details, having been considered and approved at the last meeting of the Cabinet, were circulated to members.

**RESOLVED** that the Board notes:

- (a) the Audit Commission's Comprehensive Performance Assessment report, and in particular the areas for improvement set out on page 7 thereof,
- (b) the Improvement Plan for 2007-08, and that the Board concur with the view that the Plan addresses the issues raised in the Comprehensive Performance Assessment;
- (c) that the Improvement Plan 2007-08 does cross-reference to the recommendations contained in the Audit Commission's Comprehensive Performance Assessment report and also contains other actions for 2007-08 which are designed to deliver the Council Plan 2007-2010;
- (d) the changes to the Council Plan, as set out in paragraph 3.4 of the report, which were based on the Corporate Management Team's view of the Council's capacity to deliver the Council Plan 2007-2010;
- (e) that further updates to the Improvement Plan 2007-08 may be required, based on discussions between the Improvement Director and the Corporate Management Team: and
- (f) that, in an endeavour to track the progress of all recommendations made by the Board, and to ensure that Cabinet is being held to account, a regular quarterly report be submitted to the Board outlining the progress to date (or otherwise) of any recommendations made during the preceding quarter.

**RECOMMENDED:**

- (a) that, insofar as paragraph 63 of the Corporate Performance Assessment document was concerned (Performance Management of Corporate Projects), the Cabinet be requested to submit a briefing note on how the implementation of the Spatial Project was progressing to date, and that the appropriate Portfolio holder and relevant Head of Service be invited to address the Board at their next meeting in this regard; and

- (b) that, at future meetings, when considering a report on a relevant topic, the appropriate Portfolio holder should be invited to address the Board and be fully briefed by the appropriate officer(s).

20/07 **PERFORMANCE REPORTING - MAY 2007**

A report on the Council's performance as at 31st May 2007 (Period 2) was submitted.

**RESOLVED** that the Board notes

- (a) that 80% of indicators are improving or stable as at the period end, compared to 60% in the previous period;
- (b) that 66% of indicators are achieving their targets at the period end, compared to 63% in the previous period;
- (c) and celebrates the successes as outlined in Section 4.4 of the report;
- (d) the potential areas for concern set out in Section 4.5 together with the action being taken, to improve performance generally; and
- (e) that the Sickness Absence figures be examined in detail at the next meeting of the Board.

21/07 **SUSTAINABLE COMMUNITY STRATEGY**

A report setting out a Sustainable Community Strategy, an overarching strategic document for the future direction of the district, was submitted.

**RESOLVED** that consideration of this document be deferred to the next meeting, and that, in the meantime, the Chairman and Vice-Chairman prepare a draft response to be considered in tandem therewith.

The meeting closed at 7.25 p.m.

Chairman

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## BROMSGROVE DISTRICT COUNCIL

### PERFORMANCE MANAGEMENT BOARD

21 AUGUST 2007

#### RESPONSE TO DRAFT COMMUNITY STRATEGY CONSULTATION

Responsible Portfolio Holder	Roger Hollingworth, Leader of the Council
Responsible Head of Service	Hugh Bennett, Assistant Chief Executive

#### 1. SUMMARY

- 1.1 To agree the Board's response to the draft Sustainable Community Strategy which is currently subject to consultation.

#### 2. RECOMMENDATION

- 2.1. Consider the Chairman's response attached at Appendix 1 (and any further amendments based on discussions at the Board and Councillor Bunker's response – see Appendix 2).

#### 3. BACKGROUND

- 3.1 The Sustainable Community Strategy is a key document within the Council's performance management framework (see Council Plan 2007/2010). The Council has a statutory duty to work in partnership with other public bodies, the voluntary sector and private sector for the good of the District. The recent co-operation between all the various agencies in responding to the flooding in south Worcestershire provides a very pertinent example of the need to co-operate.
- 3.2 The Sustainable Community Strategy is managed through the Local Strategic Partnership. Members are often concerned about the non-democratic nature of local strategic partnerships. The Performance Management Board has a key role in holding the District's Local Strategic Partnership (Bromsgrove Partnership) to account. The Board will shortly be receiving the Local Strategic Partnership's Annual Report. As per the recent training for Board Members, it is also a legitimate role of the Board to examine and respond to documents that set the strategic direction of the Council and other organisations.
- 3.3 The Board received the draft Sustainable Community Strategy at their July meeting and are requested to bring this report to the August meeting. The Chairman has drafted a response (based on questions from the Assistant

Chief Executive, who is the secretary of the LSP Board) on behalf of the Board, which is attached at **Appendix 1**. Councillor Bunker has also made a response to the Chairman. There was not sufficient time to incorporate this into the Chairman's response, so Councillor Bunker's comments are included separately at **Appendix 2**.

#### **4. FINANCIAL IMPLICATIONS**

- 4.1 There are no immediate financial implications; however, the Strategy's priorities will feed through into the Council's priorities and therefore into the budget round for 2008/09.

#### **5. LEGAL IMPLICATIONS**

- 5.1 None.

#### **6. COUNCIL OBJECTIVES**

- 6.1 The Council is currently reviewing its objectives and priorities in advance of the 2008/09 budget round. The Sustainable Community Strategy will be considered as part of this work.

#### **7. RISK MANAGEMENT**

- 7.1 Partnership working is a key risk within the Council's Corporate Risk Register.

#### **8. CUSTOMER IMPLICATIONS**

- 8.1. The Strategy details an extensive range of actions designed to improve the quality of life for our residents.

#### **9. EQUALITIES AND DIVERSITY IMPLICATIONS**

- 9.1 The draft Strategy will be discussed at the Equalities Forum in August.

#### **10. OTHER IMPLICATIONS**

Procurement Issues: None.
Personnel Implications: None.
Governance/Performance Management: None.
Community Safety including Section 17 of Crime and Disorder Act



1998: None.
Policy: See Council Objectives above.
Environmental: None.

#### 11. **OTHERS CONSULTED ON THE REPORT**

Portfolio Holder	<b>Yes.</b>
Chief Executive	<b>Yes.</b>
Corporate Director (Services)	<b>Yes.</b>
Assistant Chief Executive	<b>Yes.</b>
Head of Service <i>(i.e. your own HoS)</i>	<b>Yes.</b>
Head of Financial Services <i>(must approve Financial Implications before report submitted to Leader's Group)</i>	<b>Yes.</b>
Head of Legal, Equalities & Democratic Services <i>(for approval of any significant Legal Implications)</i>	<b>Yes.</b>
Head of Organisational Development & HR <i>(for approval of any significant HR Implications)</i>	<b>Yes.</b>
Corporate Procurement Team <i>(for approval of any procurement implications)</i>	<b>No</b>

#### 12. **APPENDICES**

- Appendix 1    Chairman's Response.  
Appendix 2    Councillor Bunker's Response.

#### 13. **BACKGROUND PAPERS**

Sustainable Community Strategy, Performance Management Board, 17 July 2007.

**CONTACT OFFICER**

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Tel: (01527) 881430

## APPENDIX 1

### **Chairman of the Board's Draft Response to Community Strategy Consultation**

#### **1. Do you agree with the expanded vision set out from page 229 (7) onwards?**

##### A Thriving Market Town

Agree with broad vision. Perhaps adding that by increasing visitors to the Town could also attract more vandalism and anti-social behaviour therefore any vision must include designing out vandalism and anti-social behaviour particularly when thinking about entertainment such as bars and youth facilities. In addition with an increase of visits there will be an increase in litter. It is extremely important that the streets are kept clean. There has been discussions in the past about using the CCTV to catch people littering and anyone caught could be fined along with naming and shaming on the council website and in the local papers (like Peterborough City Council <http://www.peterborough.gov.uk/page-9191> ).

##### Housing

Agree with broad vision. When thinking about the elderly, strategies must be in place to accommodate those elderly residents that do not want to move in to sheltered accommodation. As long as there is relative good health many elderly would prefer to remain in their own houses surrounded by a familiar environment. Therefore the housing mix must contain appropriate numbers of private bungalows and stop the practice of bungalows being sold and redeveloped into dormer bungalows or two story houses. This could be included for the plans for the Longbridge site.

##### Transport

Parking is a key feature of modern transport. Attracting larger retail stores to the area would provide extra parking. This parking should be made exclusive to shoppers of that store. Consider greater use of underground safe parking.

##### Economy

A mix of business and commercial organisations is essential to attract a mix of jobs including high calibre professions.

##### Environment and climate change

Agree that these are key concerns. The development and adoption of local Biodiversity action plans should be drawn up along with ensuring that new developments adopt the latest code of sustainable housing guidance to minimise waste and reduce energy and water usage in all new developments. Strategic Environmental Assessments are required to identify areas where the natural environment is threatened. Greater commitment to taking action where Air Quality is near or above acceptable levels is required. Greater use of tree planting, landscaping or priority traffic flow management are also essential.

### Crime

We have a valuable source of information collected at the PACT meeting and this information could be collated to find what trends we have in the district which may or may not need action.

### Health

Bringing health to the communities should be encouraged, for example bringing exercise classes to community centres for the elderly or exercise classes for young mums etc. Provision of mental health services for the young and elderly are also an area of concern.

- 2. Do you agree with the priorities set out on page 233(11)? If not, how should they change and why?**

Yes, I would also include community leadership in there along with improving our relationships with our partners (e.g. County).

- 3. Do you agree with the Performance Management arrangements set out on page 234 (12)?**

I would like to see the types of project groups that are set up and whether they adequately target key areas of the plan. The drive delivery and commitment of these project groups are the difference between achieving the objectives of the district or not. I would also like this explained by Hugh at the meeting.

- 4. Do you agree with the Governance arrangements set out on page 235 (13)?**

I am not sure if Community partnerships will work at Parish level. They may do where parishes do not exist but these partnerships should be in the form of parish councils where they do exist. Parish councils are the eyes and ears of the communities and should know what is needed and what the priorities are.

**5. Do you have any comments on the detailed action plans, page 244 onwards?**

Appendix A – Target required ensuring the best use of CCTVs are being achieved.

Appendix B – Target to improve or control air quality levels at key traffic intersections such as Lickey end and Hagley etc. and would like to see recycling of broader range of plastics and corrugated cardboard. I would also like to see pressure applied to businesses in Town centres to reduce waste i.e. giving out plastic bags and reducing packaging and more tree planting and landscaping to help tackle impacts of traffic congestion etc.

Appendix C – Concern over completion dates. Why are they so long? Can these be moved along quicker?

Appendix D – High calibre jobs also required to ensure continued growth and wealth of area. Housing also required a mix of housing including higher valued properties.

Appendix E – Take exercise clubs into the communities targeting vulnerable and dependent groups.

Appendix H – Adopt Parish plans as community strength documents.

Appendix G - If elderly people are going to be a priority then the funding needs to be available.

**Councillor Bunker's Draft Response to Community Strategy Consultation**

- 1) As mentioned at Scrutiny, I feel that the needs of people with mental health problems and disabilities should be included in the strategy. 25% of people have mental health problems at some time in their lives in this country. In the 2001 census the number of people with a limiting life long illness in Bromsgrove was 14,683.
- 2) The performance management monitoring arrangements seems to indicate that BDC will only see performance information on the Community Strategy annually. I feel this need to be more frequent and it should also be presented to PMB quarterly.
- 3) In the section Evidence for selection of priorities, the statistics need to also include their source.
- 4) Some sections of the evidence do not show if the overall picture is getting better or worse over time, for example; there are no statistics for overall crime rate.
- 5) Some sections of evidence also need to compare the statistics with comparable statistics in Worcestershire or the UK.
- 6) I have concerns about the accuracy of some of the statistics, for example the fear of crime statistics are incredibly high.
- 7) The 2006 West Mercia crime and community safety partnership survey states that 27% of residents in Bromsgrove feel that using or dealing drug is a serious problem and 44% in Worcestershire. The community strategy has reversed these statistics.
- 8) Given that the police view would be that some level of fear of crime is a good thing as it encourages basic security conscious behavior e.g. locking doors, is the target to reduce fear of crime the most appropriate? Would it be better to focus on reducing the numbers of those whose life is adversely affected by excessive fear of crime?
- 9) For racial incident reporting the high level action plan suggests a 5% increase in the number of incidents reported however the baseline is zero.
- 10) Output should be delivery and not just reviewing. The output for the Travel Plan is a review and not a target for delivery as is the output for Worcestershire Biodiversity Action Plan.
- 11) The Community Strategy is a public document. I don't think it is helpful to include BVPI's without a definition.

- 12) In relation to the Longbridge action plan is there sufficient confidence in the proposed activity to set a target for a net overall increase in employment for the area?
- 13) The area action plan should also include housing for the elderly and disabled.
- 14) Where is the funding going to come from for the ageing well scheme, otherwise this key deliverable will not be successful?
- 15) How reliable is using the statistic of 24% of the population smoking as it is the national figure? Given that levels of smoking are skewed towards disadvantaged areas and Bromsgrove has above national average levels of affluence.
- 16) In Appendix F, Key Stage and GCSE results can only be monitored annually.
- 17) It is not clear in Appendix F how levels of attainment will be increased.

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## BROMSGROVE DISTRICT COUNCIL

### PERFORMANCE MANAGEMENT BOARD

21 AUGUST 2007

#### USE OF RESOURCES FEEDBACK 2006 AND SELF ASSESSMENT 2007

Responsible Portfolio Holder	Councillor Geoff Denaro Portfolio Holder for Finance
Responsible Head of Service	Jayne Pickering, Head of Financial Services

#### 1. SUMMARY

- 1.1 To advise Members of the feedback from KPMG in relation to the Use of Resources formal judgement for 2006 and to present the updated self assessment submitted to KPMG in July 2007.

#### 2. RECOMMENDATIONS

- 2.1 PMB consider the 2006 Use of Resources feedback and recommendations received from KPMG (Appendix 1).
- 2.2 PMB consider the 2007 Use of Resources self assessment exceptions report i.e. those standards we have self assessed ourselves as not meeting, which has been submitted to KPMG for a formal judgement to be made (Appendix 2).
- 2.3 PMB to consider the whole Use of Resources Self Assessment for Value for Money, given the importance of this key line of enquiry to the Council (Appendix 3).

#### 3. BACKGROUND

- 3.1 Members will be aware that the Council received a formal scoring of 2 out of 4 in relation to the 2006 Use of Resources scoring from the Audit Commission. The Council received a score of 1 out of 4 in demonstrating Value for Money. The scoring represented an improvement over the previous year where an overall of 1 out of 4 was achieved.
- 3.2 The judgement is made up over a number of themes:
- financial reporting – how good the council's financial accounting and reporting arrangements are

- financial management – how well the council plans and manages its finances
- financial standing – how well the council safeguards its financial standing
- internal control – how the council’s internal control environment enables it to manage its significant business risks
- value for money – whether the council currently achieves good value for money and how well it manages and improves value for money

3.2 The table below shows the scoring Bromsgrove received for the individual themes :

**Table 1:**

<b>Theme</b>	<b>Score</b>
Financial reporting	2 out of 4
Financial management	2 out of 4
Financial standing	2 out of 4
Internal control	2 out of 4
Value for Money	1 out of 4
<b>Overall</b>	<b>2 out of 4</b>

3.3 The following table demonstrates the comparison with neighbouring authorities:

**Table 2:**

<b>Authority</b>	<b>Score</b>
<b>Bromsgrove District Council</b>	<b>2 out of 4</b>
Redditch Borough Council	2 out of 4
Wychavon District	4 out of 4
Wyre Forest District Council	2 out of 4
Malvern District Council	2 out of 4
Worcester City District Council	2 out of 4

3.4 The Scoring of 2 reflects that the Council is performing at minimum requirements and is maintaining adequate performance.

#### **4. EXTERNAL AUDIT FEEDBACK**

4.1 Attached at Appendix 1 is the 2006 feedback received from KPMG in relation to the formal assessment. The main areas where the auditors feel the Council should improve are :

- Improvements to working papers
- Consult with stakeholders in production of annual report
- Manage budgets more effectively during the year
- Member to be involved in reviewing management of assets
- Develop cost information to link with performance to understand value for money in the delivery of services

## 5. **SELF ASSESSMENT TO MARCH 2007**

5.1 The detailed self assessment (available on request from the Head of Financial Services) demonstrates the improvements that were evident by March 2007.

5.2 Key improvements from the previous assessment include:

- Liaison with an excellent authority to develop working papers
- Liaison with customers in the presentation of the annual report
- Improved communication of the financial standing of the Authority
- Enhancements to the Risk Management culture within the Council
- Developing action plans with departments to address Value for Money
- Prepared the medium financial plan with enhanced links to corporate priorities

5.3 The assessment does not take into account the developments that the Council has implemented since March 2007. These include:

- Developing action plans with departments to address Value for Money
- Delivered training on risk management and financial management
- Enhanced budget holders responsibility to finance with individual budget packs
- Presented updated integrated financial and performance reports to members
- Approval of asset management plan and development of asset register system

5.4 Appendix 2 details the Use of Resources exceptions i.e. those standards we have self assessed ourselves as not meeting, and proposed actions to meet the standards.

5.5 The entire Value for Money self assessment is detailed at Appendix 3, given the importance of this key line of enquiry to the Council.

## 6. **FINANCIAL IMPLICATIONS**

None as a direct result of this report.

**6. LEGAL IMPLICATIONS**

None.

**7. COUNCIL OBJECTIVES**

7.1 The effective use of resources underpins all the Council's objectives.

**8. RISK MANAGEMENT**

8.1 Risk management is part of the use of resources framework.

**9. CUSTOMER IMPLICATIONS**

9.1 None.

**10. EQUALITIES AND DIVERSITY IMPLICATIONS**

10.1 None.

**11. OTHER IMPLICATIONS**

Procurement Issues	None
Personnel Implications	None
Governance/Performance Management	– subject of the report
Community Safety including Section 17 of Crime and Disorder Act 1998	None
Policy	None
Environmental	None

**12. OTHERS CONSULTED ON THE REPORT**

Please include the following table and indicate 'Yes' or 'No' as appropriate. Delete the words in italics.

Portfolio Holder	Yes
Chief Executive	Yes

Corporate Director (Services)	Yes
Assistant Chief Executive	Yes
Head of Service	Yes
Head of Financial Services	Yes
Head of Legal, Equalities & Democratic Services	Yes
Head of Organisational Development & HR	Yes
Corporate Procurement Team	No

### **APPENDICES**

- Appendix 1 KPMG Use of Resources Feedback 2006
- Appendix 2 Use of Resources Self Assessment – Exception Report
- Appendix 3 Use of Resources Self Assessment – Value for Money

### **BACKGROUND PAPERS**

The full value for money self assessment is available from Jayne Pickering, Head of Financial Services on request.

### **CONTACT OFFICERS**

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INFRASTRUCTURE & GOVERNMENT

**Use of Resources  
Feedback  
2006**

**Bromsgrove District  
Council**

June 2007

AUDIT

The contacts at KPMG LLP in connection with this report are:

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**Executive summary**

2

- 1.1 Scope of this report
- 1.2 Summary of findings
- 1.3 Looking forward
- 1.4 Acknowledgements

**Use of Resources**

3

- 2.1 Summary of our assessment
- 2.2 KLOE 1: Financial Reporting
- 2.3 KLOE 2: Financial Management
- 2.4 KLOE 3: Financial Standing
- 2.5 KLOE 4: Internal Control
- 2.6 KLOE 5: Value for money

**Appendices**

- Appendix A: Summary of recommendations and action plan

This report is addressed to the Authority and has been prepared for the sole use of Bromsgrove DC ("the Authority"). We take no responsibility to any member of staff acting in their individual capacities, or to third parties. *The Audit Commission has issued a document entitled Statement of Responsibilities of Auditors and Audited Bodies.* This summarises where the responsibilities of auditors begin and end and what is expected from the audited body. We draw your attention to this document.

External auditors do not act as a substitute for the audited body's own responsibility for putting in place proper arrangements to ensure that public business is conducted in accordance with the law and proper standards, and that public money is safeguarded and properly accounted for, and used economically, efficiently and effectively.

If you have any concerns or are dissatisfied with any part of KPMG LLP's work, in the first instance you should contact Jon Gorrie, who is the engagement director to the Authority, telephone 0121 232 3694, [jonathan.gorrie@kpmg.co.uk](mailto:jonathan.gorrie@kpmg.co.uk) who will try to resolve your complaint. If you are dissatisfied with your response please contact Trevor Rees on 0161 236 4000, email [trevor.rees@kpmg.co.uk](mailto:trevor.rees@kpmg.co.uk), who is the national contact partner for all of KPMG's work with the Audit Commission. After this, if you are still dissatisfied with how your complaint has been handled you can access the Audit Commission's complaints procedure. Put your complaint in writing to the Complaints Team, Nicholson House, Lime Kiln Close, Stoke Gifford, Bristol, BS34 8SU or by e-mail to: [complaints@audit-commission.gov.uk](mailto:complaints@audit-commission.gov.uk). Their telephone number is 0117 9753131, textphone (minicom) 020 7630 0421.



## Section 1

# Executive summary

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### 1.1 Scope of this report

This report summarises the findings of the 2006 Use of Resources assessment carried out by KPMG LLP ("KPMG") at Bromsgrove District Council ("the Authority").

Our findings are summarised below, with our more detailed findings presented in the next section of this report and recommendations summarised in Appendix A.

### 1.2 Summary of findings

Between December 2006 and February 2007, we completed our second scored judgement on the Authority's use of resources. This assesses the Authority against Key Lines of Enquiry (KLOEs) specified by the Audit Commission, against which the Authority is scored on a scale between 1 (below minimum requirements) and 4 (performing strongly). The scores were reviewed by both KPMG's local and national quality control processes and then the Audit Commission's quality control procedures to ensure consistency in scoring with other auditors and authorities.

The Authority scored an overall level 2 (at minimum requirements – adequate performance). This shows a clear improvement from last year when the overall score was 1 - below minimum requirements. The Authority now has the basic corporate and financial management arrangements in place which allow it to address the Commission's minimum requirements in the areas of Financial Reporting, Financial Management, Financial Standing and Internal Control.

The Authority has also improved its arrangements for delivering value for money. However, this remains a challenge since a number of the Authority's services remain relatively high cost and low performance compared to its peers. As a result, the score on the value for money assessment remained at level 1. The key factor for this was that the Authority was not able to improve its performance and reduce costs for service delivery despite being able to demonstrate adequate arrangements for managing and improving its value for money.

### 1.3 Looking Forward

The key challenge for the Authority looking forward is to use the mechanisms now in place to achieve value for money by delivering cost effective and good quality services to its users. The Authority has demonstrated improvements in its overall use of resources but can make further progress through implementing the recommendations set out in this report. In summary, these are:

- **Financial reporting:** The Authority should consider how it can further develop the quality of the working papers supporting its statement of accounts.
- **Financial planning:** The Authority should use its corporate plan to clearly drive the medium term financial strategy by making both documents clearly link together.
- **Asset Management:** Members should be fully involved in scrutinising the management of the Authority's asset base and that there are kept informed on the progress of the asset management plan.
- **Reserves policy:** We recommend that the Authority's clearly reflects a thorough understanding of the needs and risks in its Medium Term Financial Strategy when setting the level of reserves and balances.
- **Risk Management:** The Authority should aim to embed its risk management processes through training and raising awareness among Members and staff.
- **Value for Money:** The Authority's Members and senior management should routinely challenge and scrutinise the linkage between costs and performance and should make effective use of benchmarking.

### 1.4 Acknowledgements

We would like to take this opportunity to thank Officers and Members for their continuing help and co-operation throughout our audit work.

## Section 3

# Use of Resources

### 2.1 Summary of our assessment

The Use of Resources assessment is based around five KLOEs: Financial Management; Financial Standing; Financial Reporting; Internal Control and Value for Money.

We formulated our judgement against the KLOEs by considering the evidence in the self assessment, holding interviews with the Authority's Officers and Members and through consideration of evidence from our other audit work. Following internal quality control processes by KPMG at both a local and national level, the draft scores were submitted to the Audit Commission for its national review, and have now been approved. The 2006 scores for the five individual KLOEs for Bromsgrove are:

KLOE	2005 score	2006 score
Financial Reporting	1	2
Financial Management	1	2
Financial Standing	2	2
Internal Control	1	2
Value for Money	1	1

### Improvement opportunities

Improvement opportunities within each KLOE assessment area are detailed in the following sections.

### 2.2 KLOE 1: Financial Reporting

1.1: Production of statutory annual accounts	2
1.2: Promoting external accountability	2
<b>Overall score for KLOE 1</b>	<b>2</b>

The overall aim of the financial reporting assessment is to understand how effective the Authority's arrangements are for producing and publicising its annual accounts in accordance with relevant standards and timetables.

The accounts were received on time and the opinion was also issued prior to the statutory accounts publication deadline for the first time since 2003. The accounts were free from significant errors.

The quality of working papers showed an improvement from prior year. However, a number of key working papers were missing at the start of the audit.

Our review found that the Authority was not able to demonstrate that it is considering the views of a range of stakeholders in making its decision whether to publish an annual report.

#### Summary of recommendations on KLOE 1:

**Recommendation 1:** The Authority should ensure that key working papers are provided to auditors at the start of the audit that all key staff are available during the period of the audit visit. The dates of the audit visits with availability of working papers should be agreed with auditors and communicated to all staff.

**Recommendation 2:** The Authority should consider the views of a range of stakeholders in making its decision on whether to publish an annual report and the format that this should take.

## Section 3

### Use of Resources

#### 2.3 KLOE 2: Financial Management

2.1: Financial planning and budget setting	2
2.2: Managing performance against budgets	2
2.3: Asset management	2
<b>Overall score for KLOE 2</b>	<b>2</b>

The overall aim of the financial management assessment is to understand how well the Authority plans its finances and delivers on these plans.

The Authority was able to demonstrate a clear improvement in its financial management arrangements compared to the position at the time of our previous assessment. The Authority now has key strategic and financial documents in place with adequate budget monitoring arrangements. The Authority also has an up to date capital strategy in place supported by a comprehensive asset management plan.

Our review noted links between the corporate plan and the medium term financial strategy by reflecting corporate objectives in its financial plans. However the Authority's corporate plan does not clearly drive the medium term financial strategy – for example, through ensuring that the corporate planning process systematically considers the costs of new initiatives and ongoing services, so that financial and strategic objectives are considered together.

At present, the monthly budget reports prepared for senior managers and officers do not incorporate accruals for expenditure which has been incurred but for which invoices have not been received. This means that budget reporting does not incorporate all financial commitments, presenting the risk that budget overspends are not detected and corrected on a timely basis.

We understand that the Authority has recently introduced an electronic ordering system. This facilitate accruals to be included in monthly budget reports in the future. However, while this system is being introduced, it would be desirable for the Authority to ensure that accruals arising from the existing manual ordering system are captured.

We noted that the Authority is facing budget overspends at a department level, based on the position as at December 2006. In order to improve its performance on KLOE 2.2, the Authority needs to ensure that departmental overspends are managed without significant operational or financial impact.

The Authority's recently developed and approved Asset Management Plan has yet to be fully implemented. We also noted that there is scope for Members to be more fully involved in scrutinising the management of the Authority's asset base.

#### *Summary of recommendations on KLOE 2:*

**Recommendation 3:** We recommend that the Authority uses its corporate plan to clearly drive the medium term financial strategy by making both documents clearly link together. The financial strategy should make it clear how the it achieves the corporate objectives of the Authority.

**Recommendation 4:** The Authority should introduce a process to ensure that accruals for income and expenditure are identified on a monthly basis for incorporation into monthly budget reports.

**Recommendation 5:** The Authority should identify the factors which have led to departmental overspends in the past, and should ensure that future years' budgets are realistic and achievable.

**Recommendation 6:** We recommend that Members should be more fully involved in scrutinising the management of the Authority's asset base and should ensure that they are kept informed on the progress of asset management plan.

## Section 3

### Use of Resources

#### 2.4 KLOE 3: Financial Standing

##### 3.1: Managing spending within available resources

2

The overall aim of the financial standing assessment is to evaluate the Authority's arrangements for managing its spending within the available resources, including how the Authority ensures that its finances are sustainable.

The Authority was able to maintain its overall spending within during 2005/06 with variations on most departments' budgets being relatively small.

The revenue balances as at 31 March 2006 stood at £2.3m. After using reserves to fund overspends and the improvement plan during 2006/07, the Authority is projecting the level of reserves to be £1.5m as at 31 March 2007, which would be sufficient to meet the target level of reserves of £850k.

This target reserves level informally incorporates consideration of risk. For example, the fact that the 2005/06 accounts were signed off on time reduced the uncertainty faced in previous years, when the accounts had not been signed off at the time that the next budget was set, which allowed the Authority to reduce the target level for 2007/08. However, there is scope for the Authority to consider more formally how risks should affect its reserves target. It is considered good practice for the potential financial effects of each risk on the corporate risk register to be estimated; this would allow the Authority to incorporate the effect of risks on its target reserves level in a quantitative, rather than just qualitative, way.

*Summary of recommendations on KLOE 3:*

**Recommendation 7:** The Authority should determine its target level of reserves by reference to the estimated financial effect of the risks which it faces and report the findings of the risk assessment to Members.

#### 2.5 KLOE 4: Internal Control

4.1: Risk management	2
4.2: Internal control	2
4.3: Ethics and conduct	2
<b>Overall</b>	<b>2</b>

The overall aim of the internal control assessment is to understand the Authority's control arrangements, encompassing, risk management arrangements and how the Authority ensures a high standard of conduct by Members and officers, in addition to considerations of financial control.

The Authority has an approved and up to date risk management strategy in place. A newly appointed Audit Board reviews and approves the Statement of Internal Control, risk management process and the systems of internal control. The Authority also has a fully resourced internal audit function that operates in accordance with the CIPFA code of practice. System notes and manuals are in place for key systems. The Authority also has an in-house legal department ensuring compliance with relevant laws and regulation.

We understand that the Authority's risk management process is new and is yet to be embedded. The Authority assurance framework in place does not map the Authority's strategic objectives to risks, controls and assurances. The Authority does not proactively monitor compliance with standing orders, financial regulations and its scheme of delegation. Significant partnerships are not integral to the risk management process and the risks associated with them are not considered systematically.

The Authority is not yet able to demonstrate that it is proactive in its role to raise the standards of ethical behaviour amongst Members and staff. For example, there would be scope to develop further the training offered to Members and officers on ethics and conduct issues.

## Section 3

### Use of Resources

#### Summary of Recommendations on KLOE 4:

**Recommendation 8:** The Authority should aim to embed its risk management processes through training and raising awareness among Members and staff. The Authority's risk register should clearly map the Authority's strategic objectives to risks, controls and assurances.

**Recommendation 9:** The Authority should proactively monitor compliance with standing orders, financial regulations and the scheme of delegation through regular internal audit reviews and monitoring of exception reports.

**Recommendation 10:** We recommend that the Authority make significant partnerships integral to the risk management process. Management and Members should regularly review the risks associated with these partnerships.

**Recommendation 11:** The Authority should demonstrate that it is proactive in its role to raise the standards of ethical behaviour amongst Members and staff and should provide ethics training for Members and staff.

#### 2.6 KLOE 5: Value for Money

5.1: Achievement of value for money	1
5.2: Processes to improve value for money	2
<b>Overall</b>	<b>1</b>

The Authority is now able to demonstrate adequate arrangements for managing and improving its value for money (KLOE 5.2). There is now an improved understanding of costs and performance. The Authority has also introduced a new performance management system which helps to produce quarterly performance reports for its Performance Management Board. The Authority has recently established a Procurement Steering Group driven by its Corporate Procurement Strategy and this is driving out inefficiencies and helping to reduce costs.

Despite the improvements in its process to improve value for money, there remain challenges for the Authority in tackling areas of high cost and low performance compared to similar authorities. This should be addressed through the use of benchmarking in a consistent and robust manner.

Our review also noted that the value for money culture is yet to be fully embedded within the Authority with middle managers and front line service providers fully understanding how performance information is currently used and reported.

Value for money considerations are not built into key processes and decision making, including the annual budget setting process, developing a VFM and efficiency culture.

We also noted that the Authority does not carry out robust assessment of service user needs. Delivering a high-quality service is an important part of achieving good value for money, so the Authority should ensure that the views of service users are considered in developing service objectives and budgets.

#### Summary of recommendations on KLOE 5:

**Recommendation 12:** The Authority should develop a mechanism to present cost information alongside performance to help develop further understanding of how costs relate to performance, at the budget/target setting stage, as part of in-year monitoring and for end of year out-turns. Members should then use this information to challenge areas of high cost or weak performance.

**Recommendation 13:** The Authority should carry out a regular assessment of service user needs and the results of the assessments should be considered in decision making.

## Appendices

### Appendix A: Summary of recommendations and action plan

No.	Recommendation	Priority	Management response	Timescale
1	The Authority should ensure that key working papers are provided to auditors at the start of the audit that all key staff are available during the period of the audit visit. The dates of the audit visits with availability of working papers should be agreed with auditors and communicated to all staff.	High	Accountancy staff have met with KPMG to review the PBC list to enable correct interpretation of requirements. Team have also visited Wychavon for advice and support on working papers. Audit have been given dates of when staff are available and managers are all aware of dates of audit via the final accounts timetable.	July/August 2007
2	The Authority should consider the views of a range of stakeholders in making its decision on whether to publish an annual report and the format that this should take.	Medium	The Authority has consulted a sample of the public via a SNAP survey in relation to the Council results and annual report. The feedback will be taken into account in preparing the 06/07 report.	Implemented
3	We recommend that the Authority uses its corporate plan to clearly drive the medium term financial strategy by making both documents clearly link together. The financial strategy should make it clear how the it achieves the corporate objectives of the Authority.	High	The Council links via the Revenue and Capital bid request forms the funds to priority and uses this during the budget approval process. The Council will identify more clearly those that are non priority as part of the 2008/09 financial planning period.	March 2008
4	The Authority should introduce a process to ensure that accruals for income and expenditure are identified on a monthly basis for incorporation into monthly budget reports.	Medium	The implementation of the Commitment Accounting System will introduce commitments for expenditure based on original orders. The Council will review the impact of income accruals and the added value to the financial information if actioned.	
5	The Authority should identify the factors which have led to departmental overspends in the past, and should ensure that future years' budgets are realistic and achievable.	High	The review of the medium term financial plan for 2007/08 included a review of the budgets required to delivery the services provided by the Council with a focus on those that were overspent or had shortfalls in income received. Following identification of the reasons for the variations and the impact on the priorities the 2007/08 budgets were approved at the realistic level.	Implemented
6	We recommend that Members should be more fully involved in scrutinising the management of the Authority's asset base and should ensure that they are kept informed on the progress of asset management plan.	High	The Asset Management Plan was approved in early 2007 and this details the Councils strategy for managing assets. This will be reviewed through the Council Plan and managed together with the Capital Programme.	Implemented
7	The Authority should determine its target level of reserves by reference to the estimated financial effect of the risks which it faces and report the findings of the risk assessment to Members.	High	The appropriate level of reserves was reported as part of the medium term financial plan for 2007/08 following a review of the risk to the Authority of the financial position.	Implemented

## Appendices

### Appendix A: Summary of recommendations and action plan

No.	Recommendation	Priority	Management response	Timescale
8.	The Authority should aim to embed its risk management processes through training and raising awareness among Members and staff. The Authority's risk register should clearly map the Authority's strategic objectives to risks, controls and assurances.	High	<p>Risk management training has been arranged for staff during May, September, November and February. Training for members has been identified as part of the modern councilor programme.</p> <p>The new risk management process links service and corporate objectives to the Council's objectives. The new risk registers also detail high impact risk areas, current controls and an improvement action plan.</p> <p>The Audit Board will receive quarterly exception reports on the departmental and corporate risk registers to ensure members are aware of how risks are managed in the Authority.</p>	Implemented
9	The Authority should proactively monitor compliance with standing orders, financial regulations and the scheme of delegation through regular internal audit reviews and monitoring of exception reports.	High	Internal Audit monitors compliance with Financial Regulations, Standing Orders and the Scheme of Delegation as necessary during individual audit reviews and reports issues as, required. Internal Audit has not completed a separate review on Financial Regulations, Standing Orders and the Scheme of Delegation, although a review of these areas is risk assessed annually as part of the audit planning process.	Implemented
10	We recommend that the Authority make significant partnerships integral to the risk management process. Management and Members should regularly review the risks associated with these partnerships.	High	<p>There is a key objective on the Corporate Risk Register entitled "Effective partnership working". This objective will be reviewed by officers and Members in line with the new Risk Management Framework.</p> <p>Risk management partnership working is currently being explored with other Councils in the area.</p>	
11	The Authority should demonstrate that it is proactive in its role to raise the standards of ethical behaviour amongst Members and staff and should provide ethics training for Members and staff.	Medium	The Council has undertaken an ethical governance review which has identified areas of weakness and member development. Accordingly the Council has developed an action plan to address these points and these are being monitored through corporate management team and the member development steering group.	Implemented
12	The Authority should develop a mechanism to present cost information alongside performance to help develop further understanding of how costs relate to performance, at the budget/target setting stage, as part of in-year monitoring and for end of year out-turns. Members should then use this information to challenge areas of high cost or weak performance.	High	The integrated finance and performance monitoring report is presented to Performance Management Board and Cabinet on a quarterly basis to show the relationship between cost and performance and includes action plans to address area of concern. VFM Action plans are in place to address benchmarking of services to allow comparison of service delivery against customer satisfaction.	Implemented

## Appendices

### Appendix A: Summary of recommendations and action plan

No.	Recommendation	Priority	Management response	Timescale
13	The Authority should carry out a regular assessment of service user needs and the results of the assessments should be considered in decision making.	High	The Business Plans for 2007/08 include the use of surveys and customer questionnaires to establish service user needs and satisfaction levels. These will be used to develop the services delivered to our customers. In addition there will be various advertising campaigns during 07/08 to identify customer need and satisfaction of council delivered services.	Implemented



## Use of Resources – Self Assessment Exception Report

Key Line of Enquiry	Financial Management
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Level 2	Key Line of Enquiry Descriptor	Pass/Fail	Comments	Action Plan
2	2.3.5 The Council's arrangements for reporting to Members are sufficient to ensure that they fulfil their responsibility in relation to the council's land and buildings portfolio at both a strategic and service level	Fail	Not at present.	Assets Management Group established – new system to be implemented as part of the spatial project Reporting to members to be initiated by new group in 2007/08
2	2.3.6 The Council has an annual programme of planned maintenance based on a rolling programme of property surveys	Fail	Not at present	Assets Management Group established – will address issue of planned maintenance
2	2.3.7 The council has assessed the level of backlog maintenance	Fail	Not at present	Assets Management Group established – will address issue of maintenance

Level 3	Key Line of Enquiry Descriptor	Pass/Fail	Comments	Action Plan
3	2.3.10 There is a plan in place to reduce the level of backlog maintenance and this has been approved by members	Fail		Assets Management Group established – will address issue of planned maintenance
3	2.3.11 The council has developed a set of local performance measures in relation to assets that link asset use to corporate objectives	Fail		Assets Management Group established – will address issue of performance measures
3	2.3.12 The council makes investment and disposal decisions based on thorough option appraisal and whole life costing	Fail	Yes for investment, but poor on disposal.	Assets Management Group established – will address issue of disposals

Level 4	Key Line of Enquiry Descriptor	Pass/Fail	Comments	Action Plan
4	2.3.13 Performance measures and benchmarking are being used to describe and	Fail		Will be addressed through asset management group

	evaluate how the council's asset base contributes to the achievement of corporate and service objectives, including improvement priorities			
4	2.3.14 The results of performance measurement and benchmarking are communicated to stakeholders where relevant	Fail		Will be addressed through asset management group
4	2.3.15 The council has developed an approach for the co-ordination of asset management information and its integration with relevant organisational financial information	Fail		Will be addressed through asset management group

Key Line of Enquiry	Financial Reporting

Level 4	Key Line of Enquiry Descriptor	Pass/Fail	Comments	Action Plan
4	1.2.8 The council publishes an annual report or similar document which includes summary accounts and an explanation of key financial information and technical terms designed to be understandable by members of the public	Fail	Not published for 2005/06 Annual report to include performance and summary accounts published separately in 2006/07 for public and on website	Annual report and summary accounts to be merged into one document for 2007/08

Key Line of Enquiry	Financial Standing
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Level 2	Key Line of Enquiry Descriptor	Pass/Fail	Comments	Action Plan
2	3.1.8 The council sets and monitors targets for income collection and recovery of arrears, based on age profile of debt	Fail	During 2005/06 HOS were sent monthly updates of debts outstanding for action within the department. A target of 15% of debt over 35 days was set for 2006/07 as part of the financial services business plan – this is monitored on a monthly basis	To continue to monitor monthly

Level 3	Key Line of Enquiry Descriptor	Pass/Fail	Comments	Action Plan
3	3.1.9 The council consistently maintains its spending within its overall budget and without significant unexpected overspends or under-spends	Fail	The councils budget overall for 2005/06 was significant and did not meet the expectation of the budget setting for the financial year. The variations for 2006/07 had been expected and actions	Regular financial monitoring will improve the variations to spend

			had been put in place to manage the overspends to budget.	
3	3.1.10 The council has identified target levels for reserves and balances that are based on a thorough understanding of its needs and risks, including its treasury management strategy and is meeting these targets	Fail	The levels of balances and reserves are not in line with reviews of treasury strategy, but do include an assessment of financial risk associated with the councils finances	Further work needed
3	3.1.11 Monitoring information is available that evaluates the effectiveness of recovery actions, associated costs, and the cost of not recovering debt promptly	Fail	Not produced by the Council	Further work needed

Level 4	Key Line of Enquiry Descriptor	Pass/Fail	Comments	Action Plan
4	3.1.12 Members monitor key financial health indicators and set challenging targets, e.g. income collection, levels of variances from budget, prudential framework indicators, capital programme management	Fail	Integrated financial and performance reports are presented to members on a quarterly basis however there is a little challenge and discussion on these reports.	Further work needed to include member training on financial awareness
4	3.1.13 The council monitors the opportunity costs of maintaining its levels of reserves and balances and compares these to the benefits it accrues	Fail	Not performed by the council	Further work needed

Key Line of Enquiry	Internal Control
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Level 3	Key Line of Enquiry Descriptor	Pass/Fail	Comments	Action Plan
3	4.2.16 The procedure notes/manuals for those systems identified by the council as being business-critical are reviewed and updated at least annually	Fail	Procedure rules for business-critical systems have been written, but require annual review	
3	4.2.17 The standing orders, standing financial instructions and scheme of delegation are reviewed at least annually	Fail	Financial Regulations and Contract Procedure Rules have been adopted. A Scheme of Delegation is in place. All documents require annual review	
3	4.2.18 Compliance with standing orders, standing financial instructions and the scheme of delegation is monitored by management, and any breaches identified and appropriate action taken	Fail	Financial Regulations, Contract Procedure Rules and the Scheme of Delegation require embedding and monitoring	



Key Line of Enquiry	Value for Money
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Please see Appendix 3.

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### Value for Money Update on Sept 06 assessment

#### Performance Management Board

The Performance Management Board and Executive Cabinet receives an integrated financial and performance report on a quarterly basis to inform members on the overall position of the Council.

The integrated financial and performance report provides information across a wide range of performance indicators relating to corporate priorities and the interrelationship between the Authority's financial position and operational performance in key areas. There are action plans in place that demonstrate where areas of concern are focused to ensure the Council meets its financial and operational objectives.

The PMB evaluates these reports and critically assesses the financial and performance service data provided. The PMB also scrutinises the Council's Improvement Plan that monitors the actions required to deliver better service's and corporate practices throughout the Council.

#### Performance Monitoring

**Performance Monitoring:** Service Business Plans, containing the Council Plan and Improvement Plan actions, are monitored and managed through a three tier approach:

1. The Government Monitoring Board receives update reports against the Improvement Plan at its monthly meetings.
2. Councillors receive regular performance monitoring information at the monthly Performance Management Board and Cabinet. This information includes updates on the Improvement Plan, quarterly performance figures on public facing services and specific indicators.
3. All the above information goes to the Council's Corporate Management Team for detailed review and challenge.

## Value for Money Strategy and Action Plans

- 10.1 The Council is committed to work to establish Value for Money principles in the way in which its services. The key processes through which these principles will be delivered are contained within the Value for Money Strategy which was approved in January 2007. Some of these principles are embedded to a lesser or greater degree within the organisation; others will need to be established.
- 10.2 Departments must develop a vision of what services they will deliver and what the services will look like. This is already included as a key part of the Service Business Planning process. Once the vision has been established and translated into practical activities, **all** resources must be directed into achieving that vision. If any activity is only partly aimed at achieving the overall vision, the resources must be redirected to other activities. The responsibility for developing and implementing this vision must be that of the Head of Department.
- 10.3 In order to develop and establish a Value for Money culture within the Council;
- Departments must take care to investigate and understand customers' expectations and priorities and reallocate resources to satisfy them. This is key to making sure that resources are allocated according to the Council's overall priorities.
  - Departments must act commercially in delivering services. Public sector managers act commercially when they use and procure resources (such as staff, equipment, available funds) efficiently and those resources are solely used for achieving the overall vision of the service.
  - As well as establishing Value for Money principles within their service on a day-to-day basis, Departments must look to develop specific VFM projects aimed at generating efficiency gains and/or service improvements. The criteria for selecting these projects will focus on areas of above average cost and/or below average performance.
  - The Business Service Plans must include VFM targets and be linked to the achievement of efficiency gains to be included in the budget. At the same time they have to deliver longer-term efficiency gains to be included in the Medium Term Financial Plan. For some services VFM targets will be relatively easy to quantify and measure. For others (e.g. planning) the achievement of a set of performance goals may constitute the achievement of Value for Money.

- Where service Departments are proposing efficiencies, they must consult with central Departments that possess the expertise to deal with particular issues that may arise, for example in the fields of legal services, finance, ICT and Human Resources. For example, most efficiency proposals will have some HR implications for staff and the Council and may require consultation with the trade unions.
- Departments need to monitor on a regular basis how well they are achieving the cost and performance targets. This will require the ability to access data on demand and immediately rather than at the end of a quarter or a month. Managers must hold regular meetings which concentrate on up-to-date assessments of performance and plan action to be implemented as soon as possible to improve performance.
- The large ICT projects such as the Spatial Project have the capability of delivering significant efficiencies but these efficiencies can only be maximised if the user departments plan at an early stage how they are going to use the new technological capabilities to provide measurably better customer services and/or deliver cost savings. The Departments also need to consider ( and include in their service plans ) how the new technologies will enable them to transform the way in which they do business and enable them to reallocate resources from traditional activities to new ways of working.
- The Corporate Management Team (CMT) needs to consider on a regular basis examples of where Authority wide projects (i.e. those affecting more than one or indeed all Departments) need to be implemented in order to deliver efficiency gains. This might include initiatives to improve sickness absence rates across the Authority or procurements affecting one or more Departments. The CMT also needs to consider whether it can demonstrate that Value for Money is being delivered. This might involve considering the outsourcing of particular services such as leisure and refuse collection.
- Managers must draw up an action plan to deliver Value for Money as part of the way in which they deliver their services. This action plan needs to set out practical ways in which officers can improve Value for Money in the next year and in the medium term (1 to 5 years). The action plan must aim to improve the key performance indicators for the service as well as unit costs
- The Authority will continue to use partnerships with the public, private and voluntary sector to generate efficiencies. This is already being done through initiatives such as the Worcestershire Revenues and Benefits initiative and the Worcestershire Hub.

- The Authority needs to monitor Value for Money proposals to ensure they are fully implemented and the benefits realised. The Authority can use its project management framework for this and the Finance team can record efficiency gains made in the Annual Efficiency Statement.
- Members can play an important and proactive role in encouraging for Value for Money throughout the Authority. The portfolio holder for Financial Services will support the awareness and ownership of VFM at the member level

Since April 2007 the Heads of Service have developed action plans to support the delivery of Value for Money within the Council (extract of Financial Services plan below). Geoff Denaro ( portfolio holder for finance) is the lead member who is involved in the discussions on how to move VFM forward.

Challenge meetings are underway with the Improvement Director, member champion and Head of Financial Services to identify the key areas of focus for departments and to plan a timeline for the improvements to be made.

Procurement activity continues at a pace with the support of the procurement manager with various projects being undertaken to support the delivery of Value for Money and improved procurement practices in the Council. These include:

- Renegotiation of utility contracts.
- Negotiation of sponsorship deals in the district.
- Procurement of digital printers within the Council.
- Implementation of Government Procurement Cards.
- Market tender of stationery contract with other districts in Worcestershire.
- Reviewed supplier listing with the aim to secure framework contracts for services provided and therefore reduce number of suppliers.
- Negotiated diesel contract using OGCB's contract and reducing costs

There are a number of other issues that are being investigated by the procurement manager.

The attached table is an extract from the current Council Plan which identifies how the Council aims to improve VFM over the next 3 years.

Priority	Key Deliverable	Outcome Measure	How Do We Know We Are Getting There?	Project/Action	Completion Date	Resource	Lead Member
Value for Money (FP1)	Delivery of Agreed Savings	Cashable Savings as per Medium Term Financial Strategy	Quarterly Updates on VFM Action Plans	VFM Strategy	31 March 2010	Procurement Manager  Additional Resource Maybe Required	Portfolio Holder for Finance
	Corporate Restructure	Fit for Purpose Management Structure	Savings/New Arrangements Reflected in Financial Strategy	Complete Review and Develop Action Plan	31 March 2009 (new structure in place)	CMT and HR&OD Department	Portfolio Holder for Human Resources, Legal and Democratic Services
	Alternative Methods of Service Delivery *	Cashable Savings and Improved Services	Completion of Project Plans	Development of Project Plans Based on VFM Assessments by Departments	31 March 2010	Procurement Manager  Additional Resource Maybe Required	Portfolio Holder for Finance
	VFM Ratings	75% of Services Scoring 2 or Above	Quarterly Updates on VFM Action Plans	VFM Strategy	31 March 2010	Procurement Manager Additional Resource Maybe Required	Portfolio Holder for Finance

## **Extract from Financial Services Business Plan in relation to VFM**

9.2 The accountancy, procurement and Internal Audit teams will support and advise the services within the Council in the exploration of any alternative methods of front line service delivery. This will include the provisions of financial option appraisals, advising on the compliance with procurement regulations and ensuring risk is addressed when considering alternative provision. However there are certain actions that specifically will be undertaken by Financial Services to improve VFM at Bromsgrove. These are :

- 9.3
- # Financial Services to undertake a customer survey in October 07 to analyse the view of the customer of the services provided.
  - # Benefits to undertake a customer survey using SNAP to find out how the Council can improve the service to the customer. November 2007.
  - # The Purchase Order processing commitment system to be fully implemented across the Council by September 07. This will improve the financial information presented to officers and members and the budget management.
  - # Pursue alternative methods of service delivery / providing services for other councils – in particular the extension of the procurement partnership and the recovery within revenues and benefits. By June 07 to have a plan in place with another district to realise efficiencies of joint working.
  - # Continued development of the partnership with the County and pensions service in the third age project with the Councils welfare officer. To be fully committed to joint working in the delivery of home visits by September 07.
  - # To widen the implementation of Government Procurement Cards with the aim to identify a further 50 suppliers to utilise the service.
  - # Benchmarking work to be undertaken to see what the targets are for Accountancy and Internal Audit Services in excellent councils which will enable the council identify the true value of the internal service provision. To be undertaken in July 07.
  - # The section will work hard to improve budget monitoring information to support the financial management and control of service departments. To demonstrate improvements by June 07.



- ✚ To work with the facilities team to reduce cost of utilities across the Council. By October 2007.
- ✚ To implement the home working project as supported by the DWP to realise efficiencies in space and time for staff who are supported in this scheme.

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**BROMSGROVE DISTRICT COUNCIL**  
**PERFORMANCE MANAGEMENT BOARD**

**21ST AUGUST 2007**

**BUSINESS PLANNING TEMPLATES 2008/09**

Responsible Portfolio Holder	Roger Hollingworth, Leader of the Council
Responsible Head of Service	Hugh Bennett, Assistant Chief Executive

**1. SUMMARY**

- 1.1 To seek approval from Cabinet for the approach to business planning 2008/09.

**2. RECOMMENDATION**

- 2.1 It is recommended that the Board:-

- consider the departmental service business plan template set out in Appendix 1;
- consider the VFM scoring matrix set out in Appendix 2;
- consider the annual planning and performance cycle set out in Appendix 3; and the timetable for reviewing the medium term financial plan (Appendix 4);
- note that the first draft service business plans (including budget bids and savings) will need to be completed by 30 September and that Portfolio Holders will meet with their Heads of Service in early September to provide a policy steer and again at the end of September to review the first drafts; and
- make recommendations to Cabinet on any identified improvements to the service business planning process.

**3. BACKGROUND**

- 3.1 The Council's approach to performance management has improved over the last 2 years. Service business plans form a key element of the Council's performance management framework (see Council Plan 2007/2010). The production of the 2007/08 service business plans was somewhat muddled, due to a number of changes being made to the Cabinet approved template

mid process. These included changes by the Improvement Director, Lead Official and changes to reflect equalities and value for money. These changes have improved the template and 2008/09 should be about consolidating these changes, not making further changes. Heads of Service were asked to provide feedback on the 2007/08 process. Given the number of changes, the feedback was surprisingly positive and includes (the area under each bullet is the suggested response):-

- a desire to keep and build on team plans;

The report submitted to Corporate Management Team did include recommendations on improving team plans, but these have been rejected. The Assistant Chief Executive will need to discuss this issue further with Corporate Management Team and bring forward an alternative approach.

- linking team plans to PDRs;

See previous comment..

- a clearer timetable for production and publication of business plans;

See paragraph 3.2 below and Appendix 3

- maintain and build on the VFM templates;

Culture and Communities amended the original corporate template and this was identified as best practice by the Improvement Director. The approach of a VFM action plan, VFM scores and targets and self assessment has been built into the corporate template.

- maintain and build on the links to the medium term financial strategy;

The Council Plan Part 1 (September Full Council) report will have a financial aspect this year, including savings targets for each department. Appendix 6 of the template builds in the simple templates that were used last year after the project management methodology approach was found to be too much for small bids. Full business cases will now only be requested by the Head of Financial Services after initial consideration of Appendix 6.

- ensuring there is a 3 year as well as one year focus;

The Service Strategy section addresses this concern as does the three year departmental budget section.

- no new sections;

One new section has been introduced. Heads of Service are asked to complete a Cabinet Forward Plan for their service business plan. This was agreed at Operational CMT.

- creating links to the Cabinet Forward Plan

See previous point.

- reduction in number of templates; and

Approximately 10 sub-sections have been removed, compared to the original template approved for 2007/08.

- merging of templates e.g. key deliverables, value for money, customer first, equalities etc.

The balanced scorecard, used in the Council is a single merged approached and this could be used in the service business plans; however, in order to keep change to a minimum and build on last year's progress, this suggestion has been rejected, but will be considered in future years.

3.2 Corporate Management Team have agreed a annual cycle of reports (see Appendix 3). Service business planning forms an important part of this cycle, making the link, between the Council's strategic plans and service delivery in each department. They are part of the "golden thread". The specific timetable for 2008/09 service business planning is as follows:-

Date	Action	Comment
17 August 2007	Issue template and guidance.	After approval at Leader's.
25 September 2007	First draft service business plans to ACE.	To bring together into single report to CMT.
02 October 2007	Dedicated CMT on service business plans.	CMT will need to be extended.
17 October 2007	Detailed budget options to go forward to Leader's.	Based on Appendix 6.
31 October 2007	Quality checklist on plans returned to Heads of Service.	Best practice approach from Rotherham MBC.
14 March 2008	Service business plans finalised and sent to ACE.	
31 March 2008	Service business plans placed on Intranet.	Council Plan will be published on Internet on same day.
30 April 2008	Team plans and PDRs completed and returned to ACE and Training and	Should we consider supporting team managers with away

	Development Manager.	days in January/February?
--	----------------------	------------------------------

3.3 Annual service business plans will be completed within the more strategic three year timetable for the medium term financial strategy. For information, this timetable is set out in Appendix 4.

#### 4. **FINANCIAL IMPLICATIONS**

4.1 See sections 5.3 and Appendix 6 of the template.

#### 5. **LEGAL IMPLICATIONS**

5.1 None.

#### 6. **COUNCIL OBJECTIVES**

6.1 Appendices 1 and 6 have been updated to reflect the draft new priorities 2008/2011 as per the Council Plan Part 1 report.

#### 7. **RISK MANAGEMENT**

7.1 Each department must complete a risk register and action plan based on their business plan key deliverables. This is an excellent approach.

#### 8. **CUSTOMER IMPLICATIONS**

8.1 This section has been simplified and the Customer First Officer will attend each departmental management team away day to help improve these standards, so that they can be published in December 2007 in line with the Improvement Plan 2007/08.

#### 9. **EQUALITIES AND DIVERSITY IMPLICATIONS**

9.1 Two new sections were added last year and these have been maintained in the updated template.

#### 10. **OTHER IMPLICATIONS**

Procurement Issues: None.
Personnel Implications: Team Planning.
Governance/Performance Management: Service business planning is a key part of the Council's performance management template.
Community Safety including Section 17 of Crime and Disorder Act 1998: None.

Policy: When determining their key deliverables, departments will need to consider the policy context within which they operate.
Environmental: None.

## 11. OTHERS CONSULTED ON THE REPORT

Please include the following table and indicate 'Yes' or 'No' as appropriate. Delete the words in italics.

Portfolio Holder	<b>At Leader's Group.</b>
Chief Executive	<b>Yes.</b>
Corporate Director (Services)	<b>Yes.</b>
Assistant Chief Executive	<b>Yes.</b>
Head of Service <i>(i.e. your own HoS)</i>	<b>Yes.</b>
Head of Financial Services <i>(must approve Financial Implications before report submitted to Leader's Group)</i>	<b>Yes.</b>
Head of Legal, Equalities & Democratic Services <i>(for approval of any significant Legal Implications)</i>	<b>Yes.</b>
Head of Organisational Development & HR <i>(for approval of any significant HR Implications)</i>	<b>Yes.</b>
Corporate Procurement Team <i>(for approval of any procurement implications)</i>	<b>No.</b>

## 12. APPENDICES

- Appendix 1 Service Business Plan Template 2008/09
- Appendix 2 VFM Self Assessment Form
- Appendix 3 Annual Cycle of Reports
- Appendix 4 Timetable for Review of the Medium Term Financial Plan

## 13. BACKGROUND PAPERS

**CONTACT OFFICER**

Name: Hugh Bennett  
E Mail: h.bennett@bromsgrove.gov.uk  
Tel: (01527) 881430



**Department**

**2008/2009**

**Service Business Plan**

**(cover to be inserted)**

## **Contents**

- 1. Service Strategy**
  - 1.1 Service Statement of Purpose
  - 1.2 How the Service Contributes to the Council's Objectives and Priorities
  - 1.3 Three Year Strategic Key Deliverables
- 2. 2007/08 Performance Review**
  - 2.1 Key Deliverables - Achievements in 2007/08
  - 2.2 Other Achievements in 2007/08
  - 2.3 Performance Exceptions
- 3. Key Deliverables, Indicators and Project/Task Milestones**
- 4. Customer First and Equalities**
  - 4.1 Community Engagement
  - 4.2 Customer Standards
  - 4.3 Equalities High Level Action Plan
- 5. Resources**
  - 5.1 Employee Opinion and Involvement
  - 5.2 Training & Development Plan
  - 5.3 Three Year Departmental Budget
- 6. Risk Management**
- 7. Value for Money**
  - 7.1 Value for Money Action Plan

# Appendices

Appendix 1	Council's Vision, Values, Objectives and Priorities
Appendix 2	Council's Performance Management Framework
Appendix 3	Departmental Performance Indicators and Targets
Appendix 4	Departmental Cabinet Forward Plan
Appendix 5	Departmental Structure Chart
Appendix 6	Departmental Funding Requests and Savings Target
Appendix 7	VFM Scores and Targets

# 1. Service Strategy

1.1 Service Statement of Purpose

1.2 How the Service Contributes to the Council's Objectives and Priorities

1.3 Three Year Key Deliverables

KD Ref.	Key Deliverable Title	Position @ 31 March 2011	Action to Deliver These
KDX			
KDX			
KDX			
KDX			
KDX			
KDX			
KDX			
KDX			
KDX			
KDX			
KDX			
KDX			

## 2. 2007/08 Performance Review

### 2.1 Key Deliverables – Achievements in 2007/08:-

KD Ref	Performance Review of 2007/08	Corporate Objective/Priority Ref.
KDX	<b>Insert Title of Key Deliverable.</b> Insert commentary on progress in 2007/08.	Council Objective X Priority X (if applicable)
KDX	<b>Insert Title of Key Deliverable.</b> Insert commentary on progress in 2007/08.	Council Objective X Priority X (if applicable)
KDX	<b>Insert Title of Key Deliverable.</b> Insert commentary on progress in 2007/08.	Council Objective X Priority X (if applicable)
KDX	<b>Insert Title of Key Deliverable.</b> Insert commentary on progress in 2007/08.	Council Objective X Priority X (if applicable)
KDX	<b>Insert Title of Key Deliverable.</b> Insert commentary on progress in 2007/08.	Council Objective X Priority X (if applicable)
KDX	<b>Insert Title of Key Deliverable.</b>	Council Objective X Priority X (if applicable)

	Insert commentary on progress in 2007/08.	
KDX	<b>Insert Title of Key Deliverable.</b> Insert commentary on progress in 2007/08.	Council Objective X Priority X (if applicable)
KDX	<b>Insert Title of Key Deliverable.</b> Insert commentary on progress in 2007/08.	Council Objective X Priority X (if applicable)
KDX	<b>Insert Title of Key Deliverable.</b> Insert commentary on progress in 2007/08.	Council Objective X Priority X (if applicable)
KDX	<b>Insert Title of Key Deliverable.</b> Insert commentary on progress in 2007/08.	Council Objective X Priority X (if applicable)
KDX	<b>Insert Title of Key Deliverable.</b> Insert commentary on progress in 2007/08.	Council Objective X Priority X (if applicable)

2.2 Other achievements in 2007/08. (Please detail key achievements within 2007/08 that were not planned for as part of the original key deliverables for your Service).

2.3 The following list of key deliverables as set out in the 2007/08 service business plan will not be delivered by the year end. Shortfalls and planned corrective actions are detailed below:-

KD Ref	Performance Exception	Corrective Action
KDX		
KDX		
KDX		
KDX		
KDX		

### 3. Key Deliverables, Indicators and Project/Task Milestones

3.1 The Service has itself 10 key deliverables for 2007/08. These are cross-referenced to the Council Objectives (CO) and Council Priorities. The Service has also set itself key performance indicators (KPIs) and/or project task milestones for each of its key deliverables, so that we can monitor progress. The Council's vision, values, objectives and priorities are set out in Appendix 1 and the Council's performance management framework in Appendix 2.

KD Ref.	Key Deliverable Title	Council Objective/Priority Ref.

Ref.	Key Performance Indicator	2006 / 2007 Actual	2007 / 2008 Est. Outturn	2008 / 2009 Provisional Target	Measure Frequency

Ref.	Project / Task	Lead Officer
	Insert Project/Task Title	Insert Lead Officer Initials
Planned position at 30 <sup>th</sup> Jun 2008		
Planned position at 30 <sup>th</sup> Sep 2008		



Planned position at 31 <sup>st</sup> Dec 2008		
Planned position at 31 <sup>st</sup> Mar 2009		

The Key Deliverables identify priorities for each service and measures of success. Appendix 3 details all Performance Indicators for each Service and targets for 2007/08/09/10.

3.2 Based on the key deliverables, Appendix 4 sets out the Department's key report dates for the Cabinet Forward Plan.

## 4. Customer First and Equalities

### 4.1 Community Engagement

4.1.1 Key consultations the Service is planning to undertake in 2008/09.

Consultation to be undertaken	Category of Consultation (A-E) (See below)	Who is being consulted?	How will the results be used?	Estimated Cost (£)	Start Date/ Finish Date	Lead Officer

All consultation needs to be 'categorised' according to the following definitions:

- A Information Gathering
- B Seeking Views
- C Making Choices
- D Generating Ideas
- E Participation/Joint Decision Making

## 4.2 Customer Standards

4.2.1 The Department's key customer standards for 2008/09 are:-

Departmental Customer Standard	How will they be measured?	Measuring Frequency

4.2.2 Actions planned to take place in 2007/08 to improve the customer's experience include:

### 4.3 Equalities High Level Action Plan 2008/09

4.3.1 Equalities are one of the Council's four Values. The Department determines what action it needs to take on equalities through:-

- the impact assessments undertaken during 2007/08;
- the requirements of Level 3 of the Local Government Equality Standard; and
- any feedback you have received on equalities from inspections, customers or staff, please identify the key actions you intend to implement in 2008/2011.

The following table shows the key actions to deliver service improvements in 2007/08:-

Action Required	By Whom	By When	Signed Off By	Priority	How Will This Action Promote Equality?

4.3.2 The Department will also undertake a number of impact assessments in line with the Council's All Inclusive Equalities Scheme:-

## 5. Resources

### 5.1 Employee Opinion and Involvement

5.1.1 Planned actions within the Department as a result of the 2007 Employee Survey and Investors in People assessment includes:-

Employee Issue	Agreed Action	When	Responsible Officer

5.1.2 The Department's structure chart is set out in Appendix 5.

### 5.2 Training and Development

5.2.1 Planned training and development is dealt with through the Corporate Training Plan and individual Personal Development Reviews.

### 5.3 Three Year Departmental Budget

5.3.1 The Department's base budget and agreed changes for the next three years are detailed below (this section will be completed by your service accountant).

<b>Description</b>	<b>Base Budget 2008/09 £</b>	<b>2008/09 Changes £</b>	<b>2009/10 Changes £</b>	<b>2010/11 Changes £</b>	<b>Explanation of Changes</b>
<b>Expenditure:</b> Employee costs Premises costs Transport costs Supplies and Services Contract costs Transfer costs Support Service costs Capital costs					
<b>Gross Expenditure</b>					
<b>Income</b>					
<b>Net EXPENDITURE</b>					

5.3.2 The Department's budget bids and savings are set out in Appendix 6.

## 6. Risk Management

- 6.1 The Department has completed a risk register and action plan as required by the Council's Risk Management Strategy. Risks are identified for each key deliverable. The Departmental Risk Register is examined by the Corporate Risk Management Steering Group and is available on request.

## 7. Value for Money

- 7.1 The Department has scored itself on value for money, using the value for money self assessment matrix. The matrix and scores can be found in Appendix 7. The following Value for Money Action Plan is based on the self assessment:-

Ref.	Project/Task Title	Measure of Success (SMART)	Start Date	Finish Date	Resource	Lead	Priority (H, M, L)

## Council's Vision, Values, Objectives and Priorities

Updated diagram to be inserted by the Corporate Communications, Policy & Performance Team. Draft objectives and priorities as follows:-

Objective	Priority
CO1 – Regeneration	CP1 – A thriving market town.
CO2 – Improvement	CP2 – Customer Service
CO3 – Sense of Community and Well Being	CP3 – Sense of Community
CO4 – Environment	CP4 – Clean Streets and Recycling



**Council's Performance Management Framework**

To be inserted by the Corporate Communications, Policy & Performance Team

## Departmental Performance Indicators and Targets

Ref.	Description	2006/2007 Actual	Est. 2007/08 Outturn	2006/07 District Council Median	2008/09 Target	2009/10 Target	2010/11 Target	Commentary (if target worse than median)

## Departmental Cabinet Forward Plan

Note: This version is for internal use only and indicates when reports need to be considered by the Leader's Group (LG)

Item No.	Portfolio Holder/ Lead Member Responsibility	Subject	Details of Proposed Decision	Expected Date of Decision	Original Expected Date of Decision	Principal Groups or Organisations to be consulted and date and method of consultation	Documents to be considered in relation to the Decision	Comments
					Insert Cabinet Date  (Insert Leader's Group Date)			

## **Departmental Structure Chart**

Please show the first three tiers of your structure, starting with the Head of Service. For each post, please show the post holder's name and job title. Please provide the total establishment FTE for your department as part of the diagram.

## Funding request 2008/09 - 2010/11

The purpose of this Appendix is to outline funding requests in support of the Department's key deliverables. A full business case may be requested by the Head of Financial Services, depending on the size of the bid. The bids will be ranked by CMT and a formal request will go forward to Executive Cabinet for funding as part of the 2008/09 budget..

**Prepared by:**

**Date:**

### Details of Proposed Capital/Revenue\* Scheme

Title of Scheme:	Capital Cost £	Revenue Cost First year £	Ongoing revenue cost £	Start Year:
------------------	-------------------	---------------------------------	---------------------------	-------------

\* delete as appropriate

### Definition

**Briefly state what the project is and what it will deliver.**

The consequential risks to the Council arising from not implementing the requested project

**Briefly state the consequential risks.**

**1. Council Objectives**

How will the funds requested be used to help the Council achieve its Objectives (enter details for each relevant priority)?

**1. Regeneration**

Council Priority 1 – Town Centre

**Regeneration:**

**2. Improvement**

Priority 2 – Customer Service

**Improvement:**

**3. Environment**

Priority 3 – Clean Streets and Recycling

**Environment:**

**4. Sense of Community and Well Being**

Priority 4 – Stronger Communities

**Sense of Community and Well Being:**

Departmental Savings Target/Income Generation 2008/09 - 2010/11

Year	Savings/Income Generation Target) *	How Will This Target Be Achieved?	Risks and Consequences

\* note:- to be supplied by the Financial Services Department.

## VFM Scores and Targets

The following scores and targets are based on the completion of a VFM scoring matrix for each department. These are available on request from the Head of Service.

	Insert Service Area Title				Insert Service Area Title				Insert Service Area Title			
	2007/08 Est.	2008/09 Target	2009/10 Target	2010/11 Target	2007/08 Est.	2008/09 Target	2009/10 Target	2010/11 Target	2007/08 Est.	2008/09 Target	2009/10 Target	2010/11 Target
Service Performance												
Customer Satisfaction												
Quality Measures												
Cost Performance and Comparisons												
Budgetary Control												
External Inspection												
Procurement												

Repeat table if required.



## VFM Self Assessment Form

Team Name:- Insert Name, complete matrix and repeat as necessary.

	Statement	Evidence	Score ( 0 to 3 )
<b>Service Performance</b>	More than 75% of PIs are within top quartile – 3		
	More than 50% of PIs are within BDC target – 2		
	More than 50% are below BDC target -1		
	More than 75% are below BDC target – 0		

	Statement	Evidence	Score ( 0 to 3 )
<b>Customer Satisfaction</b>	Customer satisfaction results show 60% are satisfied – 3		
	Customer satisfaction results show 50% are satisfied – 2		
	Customer satisfaction results show 40% are satisfied – 1		
	Customer satisfaction results show below 40% are satisfied – 1		

	Statement	Evidence	Score ( 0 to 3 )
<b>Quality Measures</b>	The service has achieved a quality mark -3		
	The service is working towards a quality mark -2		
	The service has no aim for recognition by quality charter over next 3 years – 1		

	Statement	Evidence	Score ( 0 to 3 )
<b>Cost Performance and Comparisons</b>	The service demonstrates comparable service and cost to other organisations – 3		
	The service has identified key unit costs for performance and cost comparison - 2		
	The service has no unit costs for comparison of delivery of service - 1		

	Statement	Evidence	Score ( 0 to 3 )
<b>Budgetary Control</b>	The service is within 2% of the approved budget ( underspend) -3		
	The service is within 10% of the approved budget ( underspend) -2		
	The service is more than 10% overspent to budget - 1		
	The service is more than 20% overspent to budget – 0		

	Statement	Evidence	Score ( 0 to 3 )
<b>External Inspection</b>	The service is rated 3* or 4 out of 4 on a CPA KLOE – 3		
	The service is rated 2* or 3 out of 4 on a CPA KLOE – 2		
	The service is rated 1* or 2 out of 4 on a CPA KLOE – 1		
	The service is rated 0* or 1 out of 4 on a CPA KLOE – 0		

	<b>Statement</b>	<b>Evidence</b>	<b>Score ( 0 to 3 )</b>
<b>Procurement</b>	The service has been market tested in the last two years – 3		
	The service has been market tested in the last two to four years – 2		
	The service is planning to market test -1		
	The service has not been market tested and there are no plans to do so – 0		

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## Appendix 3

### Annual Cycle of Key Reports

	<u>January</u>	<u>February</u>	<u>March</u>	<u>April</u>	<u>May</u>	<u>June</u>	<u>July</u>	<u>August</u>	<u>September</u>	<u>October</u>	<u>November</u>	<u>December</u>
<b><u>Annual review of members roles</u></b>						x						
<b><u>Annual external Audit report</u></b>										x		
<b><u>Annual Statement of Internal control approved</u></b>					x							
<b><u>Bright Ideas monthly award</u></b>	x	x	x	x	x	x	x	x	x	x	x	x
<b><u>Business Planning</u></b>												
Financial prosepcts for coming three years							x					
Outline Budget remit set								x				
Review content of Business Plans												
- Service and Council								x				
Budget options considered												
- by CMT (Cap +Rev)									x			
- by Group										x		
- by Cabinet											x	
Public consultation on Budget												x
Band D calculation	x											
Capital programme finalised				x								
Council Tax set				x								
Service Plans finalised				x								
Council Plan issued					x							
<b><u>Community Plan update</u></b>											x	
<b><u>Communication Planner</u></b>	x	x	x	x	x	x	x	x	x	x	x	x
<b><u>Council results reported</u></b>							x					
<b><u>Determine Member training Plan</u></b>							x					



**TIMETABLE FOR REVIEW OF MEDIUM TERM FINANCIAL PLAN 2008/09-2010/11**

The timetable and process for the budget review is as follows:

5 Sept Cabinet to be presented with initial budget schedule to include assumptions of additional funds required to support the delivery of objectives together with an estimate of savings to be achieved to resource the pressures.

17 Sept A hard copy of the budget spreadsheets (also sent electronically) will be sent out to all budget holders. The spreadsheet will detail actual expenditure 2006/07, latest estimate 2007/08 and the base budgets for each of the years 2008/09, 2009/10, 2010/11 for each cost centre for which they are responsible.

Note: a copy of the relevant payroll estimates for each of the years 2008/09 to 2010/11 will be sent to each budget holder with the budget holder being responsible for ensuring that all posts / personnel / scale points and fixed term contract details are correct. The budget holders must check the payroll estimates with the schedule prepared by HR & OD for completeness of the establishment.

17 Sept Guidance and documentation to be issued on business cases and options for change.

17 Sept Support Service recharges - Accountancy Services to issue a "Charging Form" to Budget Holders asking them to provide a split of staff time (for each post in the structure) over the various services. At the same time non-staff related data such as estimated number of debtor invoices, creditor invoices etc. will be requested. In completing the charging forms budget holders should have regard to what staff will be doing in the future rather than what they are doing now, they should also identify a split for each year. For the majority of staff this will be the same from year to year however for some staff they will be involved in project work that will alter the split of their time.

End Sept Revised Service Business Plans to be completed (to include high level analysis of additional resource requirements – if supported by members these will need to be developed into a more detailed business case).

17 Sept to 2 Nov Budget holders to meet with their accountant to discuss any changes to the existing budgets (contained within the papers sent out on 17 September). The only changes that will be permitted to the existing base budgets will be by way of virement (however additional income cannot be utilised to fund expenditure without completing the budget bid process), plus identification of any savings. Any bids for increased resources will be dealt with as part of the business planning process outlined above.

Inflation and profiling of budgets will also be discussed at the meetings.

Note: In order to improve the robustness of our budget process officers need to improve the way that budgets for major items of income are calculated – planning fees, land charges, building control, car parking charges. The likely level of income needs to be calculated based on usage and level of fees

rather than simply rolling forward the budget – the risks associated with these levels of income also needs to be assessed. A template will be prepared by accountancy for the calculation of income and to identify the associated risks. Managers must be aware of the concessions policy when estimating income generated.

17 Sep to 2 Nov	Accountancy Services to undertake work on different scenarios with regard to major elements of expenditure e.g. different levels of pay award and the impact on budgets.
17 Sep to 2 Nov	Budget holders to give consideration to fees and charges and submit to Accountancy Services the proposals.
2 Nov	Return of Charging form by budget holders to Accountancy Services.
3 Nov	Return of all other budget information
17 Nov	First draft base budgets available (including recharges and capital charges).
	Note: There will need to be continued discussion between support service provider and receiver until agreement is reached. Detailed analysis of the impact of support services on the leisure centres to be undertaken if the decision to transfer to trust is approved.
3 Nov	Officers / Members to have identified specific work / projects required to achieve Council priorities. Budget holders must ensure that Accountancy Services are involved in “costing up” of proposals.
Mid Dec	Calculation of base budget requirement (variety of scenarios), together with cost of priorities, and including Government Grant indications, to be completed.
Dec	Presentations to Scrutiny Committees on the budget process and draft base budget.
5 Dec	Executive Cabinet to consider base budget, cost of priorities and the process to be followed for consideration of the budget.
Mid Dec to 1 Feb	Officers to identify growth and budget reductions (if they are required) in order to balance the budget.
Jan/Feb	Undertake consultation with public on proposed budgets – format to be confirmed and reported to members in December
2 Jan	Consideration by Executive Cabinet of overall budget.
Jan	Service Business plans finalised.
Jan / Feb	Consideration by Scrutiny Committees of detailed budget for each area and proposed growth and budget reductions (if required).
Early Feb	NNDR consultation



- 6 Feb Consideration by Executive Cabinet of budget for 2008/09 and budget strategy to 2010/11. Approval of service business plans.
- 26 Feb Approval by Council of budget for 2007/08 and budget strategy to 2010/11

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# Agenda Item 7

## BROMSGROVE DISTRICT COUNCIL

21<sup>st</sup> AUGUST 2007

### PERFORMANCE MANAGEMENT BOARD

#### IMPROVEMENT PLAN JUNE 2007

Responsible Portfolio Holder	Councillor Roger Hollingworth Leader of the Council
Responsible Officer	Hugh Bennett Assistant Chief Executive

#### 1. SUMMARY

- 1.1 To report to the Performance Management Board to ask them to consider the attached updated Improvement Plan for June 2007.

#### 2. RECOMMENDATION

- 2.1 That the Performance Management Board notes that there are no actions outstanding for June; this being the last month of the current Improvement Plan, all actions are either completed or have been rescheduled into the new Improvement Plan.

#### 3. BACKGROUND

- 3.1 The Council overhauled its Recovery Plan in July 2006 in order to give the plan a more outward focus e.g. performance indicators, customer issues, strategic priorities etc. The new plan, renamed the Improvement Plan, was agreed by Cabinet on 2<sup>nd</sup> August 2006.
- 3.2 The Improvement Plan will be posted onto the Council website at the address at the end of this report, with a hard copy placed in the Members' Room.

#### 4. PROGRESS IN JUNE 2007

- 4.1 Overall performance as at the end of June 2007 is as follows: -

June 2007			May 2007		
<b>RED</b>	<b>0</b>	<b>0%</b>	<b>RED</b>	<b>3</b>	<b>5%</b>
<b>AMBER</b>	<b>0</b>	<b>0%</b>	<b>AMBER</b>	<b>1</b>	<b>2%</b>
<b>GREEN</b>	<b>58</b>	<b>84%</b>	<b>GREEN</b>	<b>50</b>	<b>76%</b>

Where: -

	<b>On Target or completed</b>
	<b>Less than one month behind target</b>
	<b>Over one month behind target</b>
	<b>Original date of planned action</b>
	<b>Re-programmed date.</b>

4.2 Out of the total of 69 actions for the month, 12 actions have been deleted, suspended or the timescales have been extended into the new 2007/08 Improvement Plan. This equates to 16% of the plan

4.3 No Exception Report detailing corrective actions is required for June.

## **5. FINANCIAL IMPLICATIONS**

5.1 No financial implications.

## **6 LEGAL IMPLICATIONS**

6.1 No Legal Implications.

## **7. CORPORATE OBJECTIVES**

7.1 The Improvement Plan relates to all of the Council's four objectives and ten priorities as approved on the 19<sup>th</sup> September 2006 Full Council.

## **8. RISK MANAGEMENT**

8.1 The risks associated with the Improvement Plan are covered in the corporate and departmental risk registers.

## **9. CUSTOMER IMPLICATIONS**

The Improvement Plan is concerned with strategic and operational issues that will affect the customer.

## **10 OTHER IMPLICATIONS**

Procurement Issues: Delivery of the Improvement Plan involves various procurement exercises.
Personnel Implications: See Section 18 of the Improvement Plan.
Governance/Performance Management: See Section 4 of the Improvement Plan.

Community Safety including Section 17 of Crime and Disorder Act 1998: See sections 12.2 and 12.3
Policy: See Section 4 of the Improvement Plan.
Environmental: See Section 8 of the Improvement Plan.
Equalities and Diversity: See Section 3 of Improvement Plan.

## 10 **OTHERS CONSULTED ON THE REPORT**

Portfolio Holder	<b>No</b>
Chief Executive	<b>At CMT</b>
Corporate Director (Services)	<b>At CMT</b>
Assistant Chief Executive	<b>No</b>
Head of Service <i>(i.e. your own HoS)</i>	<b>At CMT</b>
Head of Financial Services <i>(<u>must</u> approve Financial Implications before report submitted to Leader's Group)</i>	<b>At CMT</b>
Head of Legal & Democratic Services <i>(for approval of any significant Legal Implications)</i>	<b>At CMT</b>
Head of Organisational Development & HR <i>(for approval of any significant HR Implications)</i>	<b>At CMT</b>
Corporate Procurement Team <i>(for approval of any procurement implications)</i>	<b>No</b>

## 11 **APPENDICES**

None.

## 12 **BACKGROUND PAPERS:**

Improvement Plan June 2007 (copies in Member's Room and on Internet).

Full Improvement Plan for June can be found at [www.bromsgrove.gov.uk](http://www.bromsgrove.gov.uk) under meetings Minutes and Agendas where there is a direct link to the Improvement Plan.

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**BROMSGROVE DISTRICT COUNCIL**  
**PERFORMANCE MANAGEMENT BOARD**

**21<sup>ST</sup> AUGUST 2007**

**JUNE (QUARTER 1) PERFORMANCE REPORTING**

Responsible Portfolio Holder	Councillor Roger Hollingworth Leader of the Council Councillor Geoff Denaro Cabinet Member for Finance
Responsible Head of Service	Hugh Bennett Assistant Chief Executive Jayne Pickering, Head of Financial Services

**1. SUMMARY**

To report to the Board on the Council's performance at 30<sup>th</sup> June 2007 (period 3/quarter 1).

**2. RECOMMENDATIONS**

- 2.1 That the Board notes that 67% of indicators are improving or stable at the quarter end, (compared to 80% in the previous period).
- 2.2 That the Board notes that 65% of indicators are achieving their targets at the quarter end, (compared to 66% in the previous period).
- 2.3 That the Board approves the revised targets as proposed in section 4.1.
- 2.4 That the Board notes the financial position for both revenue and capital funding for the first quarter of £269k underspend and £126k respectively.

**3. BACKGROUND**

- 3.1 The format of the quarterly report to the Board has been changed to provide an integrated report, both at department and overall council level, of performance, finance and risk issues. Detailed information on performance will continue to be provided as appendices to CMT, PMB and Cabinet. This is the first quarter report of the new financial year and it includes the revised set of PI's for quarterly reporting.

**4. PROGRESS IN THE QUARTER**

4.1 Revised targets for PI's are proposed as follows :-

- CSC - 35 seconds or less (currently 20 seconds)
- CSC% of Calls Answered = 75% or more of the answerable customer calls will be answered by the Customer Contact Centre before the customer abandons the call (currently 85%)
- Planning checklist – 94% of planning checklist met ( currently 100% - this will be achieved following implementation of the spatial project)

<b>Ref.</b>	<b>Description</b>	<b>Current target</b>	<b>Revised target</b>	<b>Rationale</b>
BV205	Quality of planning checklist	100%	94%	We are currently achieving 83% for this BVPI. This figure will increase to 89% due to a formal agreement with an Urban Design consultant and then further to 94% with the implementation of a project management approach to major planning applications. The 100% target will not be achievable until implementation of the 'spatial' project as the remaining items on the checklist relate to; on-line receipt of planning applications into the back-office system and on-line payment of applications. The target was originally set with the presumption that the spatial project would be implemented during 2007, but it has since been put back until early 2008.
CSC LPI	Average Answer Time (telephone)	20 secs	35 secs	The current targets were taken from generic private sector standards rather than ones that relate specifically to Bromsgrove at this stage in the journey of planned improvement. It is therefore proposed, on the advice of the Improvement Director, to revise the targets so that they are more objective in relation to Bromsgrove and as the Council moves forward with improvement the targets can be adjusted accordingly. This means they can be used constructively to demonstrate improvement rather than negatively to be critical of service.  It is important to note that call volumes are generated as a result of an action or lack of action relating to services delivered by the Council and as services improve call volumes will begin to reduce supporting improvement by the CSC. The CSC is currently working across all services to understand what is driving the call volume



				with objective identifying what action can be taken to reduce the volumes and improve overall service.
CSC LPI	% of calls answered	85%	75%	As above

<b>Corporate Services Department</b>	<b>Quarter 1 (June 30<sup>th</sup>) 2007/08</b>
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### Performance Summary

No. of PI's improving (I)	1	No. of PI's meeting YTD target	0	No. of PI's where est. outturn projected to meet target	1
No. of PI's Stable (S)	0	No. of PI's missing YTD target by < 10%	1	No. of PI's projected to miss target by < 10%	0
No. of PI's worsening (W)	0	No. of PI's missing YTD target by >10%	0	No. of PI's projected to miss target by >10%	0

### Achievements

Council Plan 2007/2010 published.  
 CPA "Poor" result effectively communicated.  
 Draft Community Strategy out for consultation.  
 Performance clinics helping HoS address performance issues.

### Issues

The Corporate Communications, Policy and Performance Team is currently carrying one vacancy (in a small team), but the new person is expected in post at the end of August.

The Team needs to continue its focus on performance, but also step up its work on the Customer Panel, implementation of the corporate complaints system and development of customer standards.

### Revenue Budget summary April- June 2007/08

Service	Revised Budget £'000	Profiled budget YTD £'000	Actual spend YTD £'000	Variance to date £'000	Projected outturn £'000	Projected variance £'000
<b>Corporate Projects</b>	100	50	50	-	100	-
<b>Policy &amp; Performance</b>	9	2	3	1	9	-
<b>Corporate Management</b>	776	227	196	-31	776	
<b>TOTAL</b>	<b>885</b>	<b>280</b>	<b>250</b>	<b>-30</b>	<b>885</b>	<b>-</b>

### Financial Commentary

The budgets include the senior management team together with anticipated costs associated with key projects eg. Longbridge and the successful delivery of the improvement plan.

<b>Culture &amp; Community Services</b>	<b>Quarter 1 (June 30<sup>th</sup>) 2007/08</b>
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### Performance Summary

No. of PI's improving (I)	4	No. of PI's meeting YTD target	3	No. of PI's where est. outturn projected to meet target	5
No. of PI's Stable (S)	2	No. of PI's missing YTD target by < 10%	2	No. of PI's projected to miss target by < 10%	1
No. of PI's worsening (W)	1	No. of PI's missing YTD target by >10%	2	No. of PI's projected to miss target by >10%	1

### Achievements

- Reaccreditation of Green Flag Award at Sanders Park.
- Delivery of two new play areas at Callow Brook Park and the former Barnsley Hall Site.
- Major reduction in staff sickness level.
- Establishment of a Community Sports Network for Bromsgrove and success CIF (community investment fund) bids to sport England worth 29k.
- Achieved Sponsorship of the bandstand programme for the next 2 years to ensure the service continues to be provided

### Issues

Violent crime and robberies figures remain high and worse than target. Both have been raised at the tasking group and the Police are responding by tasking officers and CID to focus on these issues in Bromsgrove. Officers are also reviewing the profiling of these issues to monitor seasonal peak and troughs ensure that the projected out turns are as accurate as possible, this work will be completed by the end of Aug 07.

### Revenue Budget summary April- June 2007/08

Service	Revised Budget £'000	Profiled budget YTD £'000	Actual spend YTD £'000	Variance to date £'000	Projected outturn £'000	Projected variance £'000
<b>Arts Services</b>	278	103	96	-7	276	-2
<b>Cemeteries</b>	-35	-8	-11	-3	-35	-
<b>Community Safety</b>	641	174	182	8	658	17
<b>Parks &amp; Open Spaces</b>	900	227	218	-9	913	13
<b>Leisure Facilities</b>	1,113	365	389	24	1171	58
<b>Sport &amp; Recreation General</b>	281	70	66	-4	287	6
<b>TOTAL</b>	<b>3,178</b>	<b>930</b>	<b>940</b>	<b>10</b>	<b>3,272</b>	<b>94</b>

### Financial Commentary

- Underspends in relation to staffing vacancies and general supplies and services are offset by shortfalls in estimated income on the Woodrush (now closed) and the Dolphin Centre.

- It was anticipated that the Phase 2 Dolphin Centre would have been in operation by 2007/08 and an income target of £60k was set for this operation. With the delays in this project due to the potential transfer to a leisure trust this income will not be achieved.
- Actions are in place within culture and community to ensure there is a full range of leisure activities in place in order to reduce the impact of the shortfall to income target.
- The overspends in community safety are due to the requirement to use additional resources to support the lifeline operatives.
- There is an additional cost within parks due to the de-silt of the pond at Sanders Park

### Capital Budget summary April- June 2007/08

Service	Revised Budget £'000	Profiled budget YTD £'000	Actual spend YTD £'000	Variance to date £'000	Projected outturn £'000	Projected variance £'000
<b>Cemeteries</b>	15	3	3	-	14	-1
<b>Community Safety</b>	18	8	8	-	18	-
<b>Parks &amp; Open Spaces</b>	492	74	74	-	492	-
<b>Leisure Facilities</b>	55	-	-	-	55	-
<b>Sport &amp; Recreation General</b>	767	21	41	20	448	-319
<b>TOTAL</b>	<b>1,347</b>	<b>106</b>	<b>126</b>	<b>20</b>	<b>1,027</b>	<b>-320</b>

#### Financial Commentary

- Extra funding has been granted by The Youth Capital Works for Charford S106 Schemes, to increase the Capital Budget in 2007/08 to £150k. This scheme is underway and is due for completion by the end of July 2007.
- Within the sport and recreation general there are schemes for 2007/08 including the Bromsgrove and Alvechurch Youth Schemes and the development of a pitch at Bromsgrove Hockey Club have seen delays as they are still in the discussion stages.

<b>Planning &amp; Environmental Services</b>	<b>Quarter 1 (June 30<sup>th</sup>) 2007/08</b>
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### Performance Summary

No. of PI's improving (I)	2	No. of PI's meeting YTD target	6	No. of PI's where est. outturn projected to meet target	6
No. of PI's Stable (S)	3	No. of PI's missing YTD target by < 10%	0	No. of PI's projected to miss target by < 10%	0
No. of PI's worsening (W)	1	No. of PI's missing YTD target by >10%	0	No. of PI's projected to miss target by >10%	0

### Achievements

Planning performance has remained at the high levels achieved so far this year, with the 4 indicators for planning applications and appeals performing well above top quartile levels throughout the quarter.

### Issues

### Revenue Budget summary April- June 2007/08

Service	Revised Budget £'000	Profiled budget YTD £'000	Actual spend YTD £'000	Variance to date £'000	Projected outturn £'000	Projected variance £'000
<b>Development &amp; Building Control</b>	711	178	98	-79	704	-7
<b>Environmental Health</b>	1,040	261	216	-45	1,015	-25
<b>Licensing</b>	13	3	-7	-10	4	-10
<b>Planning Admin</b>	-9	2	23	21	-4	5
<b>Strategic Housing</b>	3,352	855	876	20	3,359	7
<b>Strategic Planning</b>	624	156	127	-29	612	-12
<b>Economic Development</b>	122	47	42	-5	122	-
<b>TOTAL</b>	<b>5,853</b>	<b>1503</b>	<b>1374</b>	<b>-129</b>	<b>5,811</b>	<b>-42</b>

### Financial Commentary

- The current underspends are due to a number of vacancies within the department that

have only recently been filled together with the limited use that the department has had for specialist planning advice that was originally anticipated for the first quarter of the year.

- As the majority of posts have now been filled there will be a reduced underspend by the end of the financial year.

### Capital Budget summary April- June 2007/08

Service	Revised Budget £'000	Profiled budget YTD £'000	Actual spend YTD £'000	Variance to date £'000	Projected outturn £'000	Projected variance £'000
<b>Strategic Housing</b>	3,616	169	184	15	2,502	-1,114
<b>TOTAL</b>	<b>3,616</b>	<b>169</b>	<b>184</b>	<b>15</b>	<b>2,502</b>	<b>-1,114</b>

#### Financial Commentary

- The majority of expenditure in 2007/08 to date has been on Disabled Facilities Grants and Discretionary Home Repair Grants- where £80k has already been spent to date. There is however a likely end of year underspend showing on these DFG schemes of (£321k) which is due to the vacant position of manager of this section which may mean there is a delay on spending in these projects until a replacement is found.
- Grants to RSL schemes are also well under way in this year with £104k being spent to date and a total capital budget being £200k. The Grants to BDHT for buybacks, which is a new 2007/08 scheme has already been completed within the year.
- The Extra Care Sheltered Housing- Gilbert Court, Charford project is expected to commence in September 2007. There will be an underspend in relation to this that will be c/fwd into 2008/09.

<b>Street Scene &amp; Waste Management</b>	<b>Quarter 1 (June 30<sup>th</sup>) 2007/08</b>
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### Performance Summary

No. of PI's improving (I)	2	No. of PI's meeting YTD target	9	No. of PI's where est. outturn projected to meet target	10
No. of PI's Stable (S)	3	No. of PI's missing YTD target by < 10%	1	No. of PI's projected to miss target by < 10%	0
No. of PI's worsening (W)	5	No. of PI's missing YTD target by >10%	0	No. of PI's projected to miss target by >10%	0

#### Achievements

High levels of garden waste collection have resulted in a 50% recycling rate for the first quarter. This will reduce slightly as the year progresses.

#### Issues

Staff are currently implementing the 2 man working on refuse collection which has met some resistance from teams this has resulted in some worsening of performance on missed collections.

A number of fly tips have been classed as hazardous waste requiring external contractor assistance. This has delayed the timescale for removal.

### Revenue Budget summary April- June 2007/08

Service	Revised Budget £'000	Profiled budget YTD £'000	Actual spend YTD £'000	Variance to date £'000	Projected outturn £'000	Projected variance £'000
<b>Car Parks</b>	-677	-104	-110	-6	-689	-12
<b>Cleansing</b>	1,270	332	325	-7	1,216	-54
<b>Depot- Misc</b>	-7	72	55	-17	-38	-31
<b>Environmental Enhancements</b>	7	2	3	1	-7	-14
<b>Garage</b>	151	38	34	-4	135	-16
<b>Grounds Maintenance</b>	573	152	151	-1	584	11
<b>Highways</b>	234	69	85	16	351	117
<b>Refuse Collection</b>	2,837	622	659	37	2,881	44
<b>Travel Concessions</b>	427	107	106	-1	426	-1
<b>TOTAL</b>	<b>4,816</b>	<b>1,289</b>	<b>1,308</b>	<b>18</b>	<b>4,858</b>	<b>42</b>

#### Financial Commentary

- The financial management arrangements within Street Scene are more robust than in previous years as can be seen by the financial position at the end of the first quarter.
- The reasons for the current variations include:
  - Cleansing – current and projected underspends due to vacant posts and improving the efficiency of the service by using less operatives.
  - Highways – shortfalls on projected income as the Highways partnership no longer rent the Burcot Room together with income targets set for general highways and drainage work that is now undertaken by the County Council.

- There is a current phased reduction in the number of operatives carrying out refuse collection and it is anticipated that the overspend on this area will reduce by year end.

### Capital Budget summary April- June 2007/08

Service	Revised Budget £'000	Profiled budget YTD £'000	Actual spend YTD £'000	Variance to date £'000	Projected outturn £'000	Projected variance £'000
<b>Car Parks</b>	18	-	-	-	18	-
<b>Cleansing</b>	579	192	140	-52	563	-16
<b>Depot- Misc</b>	94	23	13	-11	94	-
<b>Garage</b>	59				59	-
<b>Grounds Maintenance</b>	123	31	18	-13	123	-
<b>Highways</b>	21	-	-	-	21	-
<b>Refuse Collection</b>	603	135	105	-29	393	-210
<b>Travel Concessions</b>	20	-	-	-	20	-
<b>TOTAL</b>	<b>1,517</b>	<b>381</b>	<b>276</b>	<b>-105</b>	<b>1,291</b>	<b>-226</b>

#### Financial Commentary

- The new 2007/08 Scheme for the 10 year Vehicle Replacement Programme has already incurred expenditure of £124k with the purchase of 2 second hand recycling vehicles and 3 chariot lawnmowers. There will be an underspend at year end due to the reduced cost of secondhand vehicles.
- There has also been £140k that has been spent on Street Cleaning Vehicles and Equipment against a budget of £192k. The new purchases include 1 large sweeper and 3 pick up vehicles which have already been delivered in 2007/08.



**Performance Summary**

No. of PI's improving (I)	3	No. of PI's meeting YTD target	2	No. of PI's where est. outturn projected to meet target	3
No. of PI's Stable (S)	1	No. of PI's missing YTD target by < 10%	3	No. of PI's projected to miss target by < 10%	2
No. of PI's worsening (W)	1	No. of PI's missing YTD target by >10%	0	No. of PI's projected to miss target by >10%	0

**Achievements**

BV12 – sickness absence – sickness levels fell in June, following the rise in May, and are now back down to similar levels to the low achieved in April. If sickness can be maintained at the June level then the target will be comfortably met.

**Issues**

BV12 – continued monitoring and management action is required to ensure target is achieved

**Revenue Budget summary April- June 2007/08**

Service	Revised Budget £'000	Profiled budget YTD £'000	Actual spend YTD £'000	Variance to date £'000	Projected outturn £'000	Projected variance £'000
HR & OD	68	18	-28	-46	65	-3

**Financial Commentary**

- Current underspends are due to the relaunch of the member training following the election in addition to the phasing of the corporate training budget in line with training identified in the employees Personal Development Reviews.

**Capital Budget summary April- June 2007/08**

Service	Revised Budget £'000	Profiled budget YTD £'000	Actual spend YTD £'000	Variance to date £'000	Projected outturn £'000	Projected variance £'000
HR & OD	30	-	-	-	30	-

**Financial Commentary**

The £30k budget carried forward from 2006/07 is still unspent to date- this scheme has seen delays due to the organisational restructure in 2006/07. Research is still under way to identify the requirements of the new system, before a tender specification can be prepared.

### Performance Summary

No. of PI's improving (I)	0	No. of PI's meeting YTD target	2	No. of PI's where est. outturn projected to meet target	2
No. of PI's Stable (S)	2	No. of PI's missing YTD target by < 10%	0	No. of PI's projected to miss target by < 10%	0
No. of PI's worsening (W)	0	No. of PI's missing YTD target by >10%	0	No. of PI's projected to miss target by >10%	0

### Achievements

- The Council has been awarded level 2 in the Local Government Standard for Equality and Diversity
- The section has revised the constitution
- Elections run efficiently and effectively incorporating the introduction of changes to postal voting
- Developed and implemented an Induction Training program for members
- Organised a series of development initiatives for members – mock council, scrutiny, code of conduct
- Started the polling district review

### Issues

The electoral services team is currently undergoing a restructure and recruitment programme

### Revenue Budget summary April- June 2007/08

Service	Revised Budget £'000	Profiled budget YTD £'000	Actual spend YTD £'000	Variance to date £'000	Projected outturn £'000	Projected variance £'000
<b>Admin and Registration</b>	947	237	217	-20	934	-13
<b>Committee Services</b>	0	0	-7	-7	-14	-14
<b>Corporate Facilities</b>	0	1	-3	-4	3	3
<b>Elections</b>	97	59	97	38	152	55
<b>Facilities Management</b>	-122	175	125	-50	-143	-21
<b>Legal Services</b>	4	1	3	2	-12	-16
<b>TOTAL</b>	<b>926</b>	<b>476</b>	<b>433</b>	<b>-40</b>	<b>919</b>	<b>-7</b>

### Financial Commentary

- The vacancies within the registration department have been offset by additional costs of agency staff used to support the management of the election.
- Current underspends on utility costs will be monitored over the next quarter and if the reduction continues this will be transferred to balances to support the council tax in 2008/09.
- Additional income generated by the legal team through contracts with BDHT has ensured

that there will be a net saving during the financial year.

### Capital Budget Summary April- June 2007/08

Service	Revised Budget £'000	Profiled budget YTD £'000	Actual spend YTD £'000	Variance to date £'000	Projected outturn £'000	Projected variance £'000
<b>Elections</b>	15	-	-	-	24	9
<b>Facilities Management</b>	178	44	1	-43	171	-7
<b>Legal Services</b>	14	-	-	-	14	
<b>TOTAL</b>	<b>207</b>	<b>44</b>	<b>1</b>	<b>-43</b>	<b>209</b>	<b>2</b>

#### Financial Commentary

- The underspend that is showing to date, is mainly due to schemes still being in the planning and discussion stages – e.g being the Alterations at the Council House for DDA Improvements, whereby SCOPE have identified 218 priority 1 changes that need to be made. It is anticipated that the works will be undertaken by year end.

**Performance Summary**

No. of PI's improving (I)	4	No. of PI's meeting YTD target	3	No. of PI's where est. outturn projected to meet target	6
No. of PI's Stable (S)	1	No. of PI's missing YTD target by < 10%	3	No. of PI's projected to miss target by < 10%	0
No. of PI's worsening (W)	1	No. of PI's missing YTD target by >10%	0	No. of PI's projected to miss target by >10%	0

**Achievements**

BV8 ( Invoices paid on time) has seen considerable improvement in June, up by more than 3 percentage points, performance in June was above target. Performance has to continue at this level to ensure the target is achieved.

BV78a – time to process new benefit claims – actions taken following meetings between the system supplier have resulted in an improvement in performance in June, halting the decline in previous months. There is daily contact between the operational staff and the supplier to address any issues and the first couple of weeks in July are continuing to demonstrate the improvements in performance.

The Statutory deadline for the production and presentation of the Statement of Accounts for 2006/07 was met by the department.

**Issues**

Although BV8 has seen considerable improvement the year to date performance is still below target due to poor performance in earlier months and so this needs to continue to receive close monitoring and management.

BV78a –Although performance rose in June the YTD figure is worse than the 28 day target and performance will need to average 25 days over the remaining months of the year in order to hit target (June performance was 33.5 days). Elimination of delays caused by IT system issues is the key to improving performance. An upgrade to a new version of the system is scheduled for early August. Continued close monitoring and management is required.

There is a senior post of accountancy services manager currently vacant within the department to which there has been one unsuccessful recruitment campaign undertaken. Part time Interim support has been sourced to ensure the performance of the section does not decline.

### Revenue Budget summary April- June 2007/08

Service	Revised Budget £'000	Profiled budget YTD £'000	Actual spend YTD £'000	Variance to date £'000	Projected outturn £'000	Projected variance £'000
<b>Benefit Payments &amp; Administration</b>	290	72	127	55	305	15
<b>Central Overheads</b>	121	30	41	11	121	0
<b>Accountancy &amp; Audit</b>	-17	-27	-70	-43	-27	-10
<b>Grants</b>	86	39	36	-3	84	-2
<b>Council Tax &amp; NNDR</b>	1014	299	276	-23	1012	-2
<b>TOTAL</b>	<b>1,494</b>	<b>414</b>	<b>410</b>	<b>-4</b>	<b>1,494</b>	<b>-</b>

#### Financial Commentary

- The delays in the successful recruitment of benefit and fraud officers has led to overspend in this section as agency staff have covered the posts to ensure continuity of service. The full complement of permanent staff is now in place and therefore the additional costs will reduce over the remainder of the year.

### Capital Budget summary April- June 2007/08

Service	Revised Budget £'000	Profiled budget YTD £'000	Actual spend YTD £'000	Variance to date £'000	Projected outturn £'000	Projected variance £'000
<b>Accountancy &amp; Audit</b>	<b>45</b>	<b>9</b>	<b>9</b>	<b>-</b>	<b>45</b>	<b>-</b>

#### Financial Commentary

- The Purchase Order Processing system is in pilot stages in accountancy and ICT departments. It is anticipated that the system will be rolled out to all sections of the Council by March 2008.
- The majority of this scheme was completed in 2006/07 and the budget for this year is mainly for the backfilling of staff.

<b>E-Government &amp; Customer Services</b>	<b>Quarter 1 (June 30<sup>th</sup>) 2007/08</b>
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### Performance Summary

No. of PI's improving (I)	1	No. of PI's meeting YTD target	2	No. of PI's where est. outturn projected to meet target	4
No. of PI's Stable (S)	0	No. of PI's missing YTD target by < 10%	1	No. of PI's projected to miss target by < 10%	0
No. of PI's worsening (W)	3	No. of PI's missing YTD target by >10%	1	No. of PI's projected to miss target by >10%	0

#### Achievements

Installed a new queue management system at the CSC  
 Implemented new corporate Internet and Intranet websites  
 Implemented the Civica Icon financial system  
 Improved performance at the CSC for face to face and walk in customers  
 Implemented the Modern.gov web application for the production of Council minutes and agendas  
 Introduced mobile working using Blackberry devices

#### Issues

Average speed of answer and % of calls answered have worsened as a result of the consequence of the number of calls received. Work is currently being undertaken to identify the underlying reasons creating the call volume and to establish more constructive and meaningful performance targets

### Revenue Budget summary April- June 2007/08

Service	Revised Budget £'000	Profiled budget YTD £'000	Actual spend YTD £'000	Variance to date £'000	Projected outturn £'000	Projected variance £'000
<b>E-Government</b>	61	25	12	-13	56	-5
<b>Customer Services</b>	84	88	53	-35	91	6
<b>TOTAL</b>	<b>145</b>	<b>113</b>	<b>65</b>	<b>-49</b>	<b>147</b>	<b>2</b>

#### Financial Commentary

Current savings within customer services staffing and payment of business rates are anticipated to be fully committed by end of financial year.

### Capital Budget summary April- June 2007/08

Service	Revised Budget £'000	Profiled budget YTD £'000	Actual spend YTD £'000	Variance to date £'000	Projected outturn £'000	Projected variance £'000
<b>E-Government</b>	537	18	5	-13	537	-
<b>Customer Services</b>	30	-	-	-	30	-
<b>TOTAL</b>	<b>567</b>	<b>18</b>	<b>5</b>	<b>-13</b>	<b>567</b>	<b>-</b>

**Financial Commentary**

- The majority of the schemes are now underway and the new 2007/08 scheme, with a budget of £75k for the Replacement of Desktop Printers is currently being rolled out and installed throughout the Council.
- Progress is also being made of the Provision of Queue management system at the CSC. This £30k scheme, has been delivered and installed and is due to go live in October 2007.

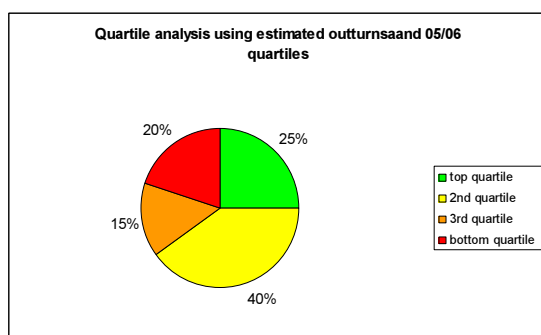
### Performance Summary

No. of PI's improving (I)		No. of PI's meeting YTD target	27	No. of PI's where est. outturn projected to meet target	37
No. of PI's Stable (S)		No. of PI's missing YTD target by < 10%	11	No. of PI's projected to miss target by < 10%	3
No. of PI's worsening (W)		No. of PI's missing YTD target by >10%	3	No. of PI's projected to miss target by >10%	1

#### Achievements

- 67% of indicators are improving or stable
- 65% of indicators are achieving their target
- 90% of indicators are projected to meet target

NB not all BVPI indicators are gathered quarterly, so the pie chart does not give a full picture of the projected position at the year end



#### Issues

### Revenue Budget summary April- June 2007/08

Department	Revised Budget £'000	Profiled budget YTD £'000	Actual spend YTD £'000	Variance to date £'000	Projected outturn £'000	Projected variance £'000
<b>Corporate Services</b>	885	280	250	-30	885	0
<b>Culture &amp; Community</b>	3,178	930	940	10	3,272	94
<b>E-Government &amp; Customer Services</b>	145	113	65	-48	147	2
<b>Financial Services</b>	1,494	414	410	-4	1,494	0
<b>Legal, Equality &amp; Democratic Services</b>	925	473	433	-40	919	-6
<b>Human Resources &amp;</b>	68	18	-28	-46	65	-3



<b>Organisational Development</b>						
<b>Planning &amp; Environment</b>	5,853	1,503	1,374	-129	5,811	-42
<b>Street Scene and Waste Management</b>	4816	1289	1308	19	4858	42
<b>TOTAL</b>	<b>17,366</b>	<b>5,020</b>	<b>4,751</b>	<b>-269</b>	<b>17,451</b>	<b>85</b>

#### **Financial Commentary**

The Council is significantly underspent in the first quarter due to the impact of vacant posts. Due the majority of these posts being filled the budget holders are to continue the regular monitoring of financial performance to identify any areas of concern to ensure they are addressed in a timely manner to reduce the potential overspend.

#### **Capital Budget summary April- June 2007/08**

Department	Revised Budget £'000	Profiled budget YTD £'000	Actual spend YTD £'000	Variance to date £'000	Projected outturn £'000	Projected variance £'000
<b>Corporate Services</b>	20	-	-	-	20	-
<b>Culture &amp; Community</b>	1,347	106	126	20	1,027	-320
<b>E-Government &amp; Customer Services</b>	567	18	5	-13	567	-
<b>Financial Services</b>	45	9	9	-	45	-
<b>Legal, Equality &amp; Democratic Services</b>	207	44	1	-43	209	2
<b>Human Resources &amp; Organisational Development</b>	30	-	-	-	30	-
<b>Planning &amp; Environment</b>	3,616	169	184	15	2,502	-1,114
<b>Street Scene and Waste Management</b>	1,517	381	276	-105	1,291	-226
<b>Budget for Support Services Recharges</b>	127	-	-	-	127	-
<b>TOTAL</b>	<b>7,476</b>	<b>727</b>	<b>601</b>	<b>-126</b>	<b>5,818</b>	<b>-1,658</b>

## **Financial Commentary**

Underspenders mainly due to Disabled Grants, Gilbert Court and purchase of vehicles as detailed above.

### **5.0 TREASURY MANAGEMENT**

#### **5.1 Investment Interest**

5.1.1 For the quarter to 30<sup>th</sup> June 2007 the Council received net investment income amounting to £185k against predicted year to date receipts of £158k. This income is a combination of interest earned on in-house managed funds (cash currently surplus to cash flow requirements that is placed on short-term deposit) and the investment income arising on the externally managed funds (Invesco and HSBC fund managers). The increased interest has arisen due to slippage on the capital programme which has made additional surplus cash available for deposit.

5.1.2 Details on the individual fund managers' performance is detailed below.

#### **5.2 INVESCO**

##### **5.2.1 Investment Objectives**

To optimise returns commensurate with the containment of risk and to achieve a target return of 110% of the benchmark, net of fees, over a 3 year rolling period.

##### **5.2.2 Portfolio Performance**

At 1 April 2007 the Council's investment was valued at £10.886 million. In the quarter to June the investment earned income amounting to £135k and management fees applied to the portfolio for the period totalled £7k. The market value of the funds invested with Invesco was £11.014 million as at 30 June 2007.

##### **5.2.3 Future Plans**

As part of our investment strategy arrangements are currently being put in place to recall funds held with Invesco. The funds will be managed in-house thereby saving management fees of approximately £23k per annum net.

#### **5.3 HSBC**

##### **5.3.1 Investment Objectives/Level of Risk**

The investment objective is set out in the Client Agreement with HSBC with a portfolio mandate of short maturity with a medium level of risk.

##### **5.3.2 Portfolio Performance**

At 1 April 2007 the Council's investment was valued at £10.422 million. In the quarter to June the investment earned income amounting to £14k. Management fees applied to the portfolio for the period totalled £6k. The market value of the funds invested with HSBC was £10.430 million as at 30 June 2007.

**6. FINANCIAL IMPLICATIONS**

Covered in the report

**7. LEGAL IMPLICATIONS**

None

**8. COUNCIL OBJECTIVES**

8.1 The report demonstrates how the Council is managing its financial and operational performance to deliver the objectives

**8. RISK MANAGEMENT**

8.1 The main risks associated with the details included in this report are:

- Decline in performance within the departments
- Significant overspends across the Council

8.2 These risks are being managed as follows:

- Decline in performance

Risk Register: all departmental and corporate registers

Key Objective Ref No: all objectives which link to delivery of BVPI and LPI as detailed in departmental business plans

Key Objective: Delivery of Performance Indicators as presented in Business Plans

- Significant Overspends across the Council :

Risk Register: Financial Services

Key Objective Ref No: 6

Key Objective: To provide an efficient and effective accountancy service to support the financial management across the Council

**9. CUSTOMER IMPLICATIONS**

None as a direct result of this report

**10. EQUALITIES AND DIVERSITY IMPLICATIONS**

None as a direct result of this report

**11. OTHER IMPLICATIONS**

Procurement Issues None
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Personnel Implications None
Governance/Performance Management – subject of the report
Community Safety including Section 17 of Crime and Disorder Act 1998 None
Policy None
Environmental None

## 12. OTHERS CONSULTED ON THE REPORT

Portfolio Holder	
Chief Executive	Yes
Corporate Director (Services)	Yes
Assistant Chief Executive	Yes
Head of Service	Yes
Head of Financial Services	Yes
Head of Legal, Equalities & Democratic Services	Yes
Head of Organisational Development & HR	Yes
Corporate Procurement Team	No

## APPENDICES

- Appendix 1 Performance Summary for June 2007
- Appendix 2 Detail Performance report for June 2007
- Appendix 3 Detailed figures to support the performance report
- Appendix 4 Detail breakdown of sickness figures

## **CONTACT OFFICERS**

Hugh Bennett, Assistant Chief Executive  
 Jayne Pickering, Head of Financial services  
 John Outhwaite, Senior Policy & Performance Officer

SUMMARY - Period 1 (April) 2007/08					
Monthly (April) performance					
	No.	%		No.	%
Improving or stable.	22	63%	On target	23	66%
Declining	13	37%	Missing target by less than 10%	5	14%
No data	0	0%	Missing target by more than 10%	7	20%
			No data	0	0%
<b>Total Number of Indicators</b>	<b>35</b>	<b>100%</b>	<b>Total Number of Indicators</b>	<b>35</b>	<b>100%</b>

SUMMARY - Period 1 (April 2007/08)					
Estimated Outturn					
	No.	%		No.	%
On target	30	86%	1st quartile	6	40%
Missing target by less than 10%	0	0%	2nd quartile	4	27%
Missing target by more than 10%	1	3%	3rd quartile	3	20%
No data	4	11%	4th quartile	2	13%
			(2005/06 quartiles used)		
<b>total</b>	<b>35</b>	<b>100%</b>	<b>total*</b>	<b>15</b>	

\* only BVPI's with quartile data are counted

SUMMARY - Period 2 (May) 2007/08					
Monthly (May) performance					
	No.	%		No.	%
Improving or stable.	28	80%	On target	23	66%
Declining	7	20%	Missing target by less than 10%	8	23%
No data	0	0%	Missing target by more than 10%	4	11%
			No data	0	0%
<b>Total Number of Indicators</b>	<b>35</b>	<b>100%</b>	<b>Total Number of Indicators</b>	<b>35</b>	<b>100%</b>

SUMMARY - Period 2 (May) 2007/08					
Estimated Outturn					
	No.	%		No.	%
On target	34	97%	1st quartile	6	40%
Missing target by less than 10%	0	0%	2nd quartile	4	27%
Missing target by more than 10%	1	3%	3rd quartile	3	20%
No data	0	0%	4th quartile	2	13%
			(2005/06 quartiles used)		
<b>total</b>	<b>35</b>	<b>100%</b>	<b>total*</b>	<b>15</b>	

\* only BVPI's with quartile data are counted

SUMMARY - Period 3 (June) 2007/08					
Monthly (May) performance					
	No.	%		No.	%
Improving or stable.	29	67%	On target	27	63%
Declining	12	28%	Missing target by less than 10%	11	26%
No data	2	5%	Missing target by more than 10%	3	7%
			No data	2	5%
<b>Total Number of Indicators</b>	<b>43</b>	<b>100%</b>	<b>Total Number of Indicators</b>	<b>43</b>	<b>100%</b>

SUMMARY - Period 3 (June) 2007/08					
Estimated Outturn					
	No.	%		No.	%
On target	38	88%	1st quartile	5	25%
Missing target by less than 10%	3	7%	2nd quartile	8	40%
Missing target by more than 10%	1	2%	3rd quartile	3	15%
No data	1	2%	4th quartile	4	20%
			(2005/06 quartiles used)		
<b>total</b>	<b>43</b>	<b>100%</b>	<b>total*</b>	<b>20</b>	

\* only BVPI's with quartile data are counted

Ref	Description	Report-ed?	Cum or Snap?	2006/07				2007/08							Comments (inc. budgetary)						
				Actuals	Quartile	Higher or lower	Median (05/06 quartile)	April Target	April Actual	Target &Trend	May Target	May Actual	Target &Trend	June Target		June Actual	Target &Trend	Target	Est. Outturn	Est. Outturn Target &Trend	Est. Outturn Quartile
<b>Chief Executive's Department</b>																					
LPI CEOACE	% of press articles which enhance our reputation	M	C	84.00	n/a	n/a	n/a	80.00	73.84	W	80.00	69.12	W	80.00	72.36	I	80.00	80.00	S	n/a	
<b>Legal &amp; Democratic Services</b>																					
BV174	The number of racial incidents reported to the Council per 100,000 population	M	C	0	n/a	n/a	n/a	0.00	0.00	S	0.00	0.00	S	0.00	0.00	S	0.00	0.00	S	n/a	On target
BV175	The percentage of those racial incidents that have resulted in further action	M	C	100	4	H	100	100.00	100.00	S	100.00	100.00	S	100.00	100.00	S	100.00	100.00	S	1	No reported incidents requiring further action
<b>Human Resources &amp; Organisational Development</b>																					
BV12	The average number of working days lost due to sickness.	M	C	10.66	3	L	9.54	0.73	0.71	S	1.46	1.49	W	2.19	2.21	I	9.00	8.82	I	2	There was improvement in the levels of sickness during June compared to May. The June figure is although just a little higher than the low recorded in April. If sickness levels can be held at the same level as in June for the rest of the year then the target will be comfortably met. However management action to contain sickness absence needs to be maintained
BV14	The percentage of employees retiring early (excluding ill-health)	Q	C		1	L	0.40							0.80	0.00	S	0.80	0.00	S	1	No employees retired early during April-June
BV15	The percentage of employees retiring on grounds of ill-health	Q	C		1	L	0.25							0.20	0.25	W	0.20	0.25	W	2	One employees retired on the grounds of ill-health during April-June
BV16a	The percentage of employees with a disability	Q	S		4	H	3.11							1.80	1.99	I	1.80	1.99	I	4	There are currently 8 members of staff who consider they have a disability
BV17a	The percentage of employees from minority ethnic communities	Q	C		4	H	1.40							2.00	1.74	I	2.00	1.74	W	2	The council currently employs 7 members of staff from minority ethnic communities
LPI Human Resources	% of posts vacant	Q	S		n/a	n/a	n/a							7.60						n/a	(New Indicator)The Council currently has 37 vacant posts
<b>Financial services</b>																					
BV78a	The average number of days taken for processing new claims.	M	C	32.05	3	L	31.00	28.00	34.10	W	28.00	35.48	W	28.00	34.83	I	28.00	28.00	S	2	Meeting has taken place with Anite re Workflow and action plan for addressing problems is underway. Close liaison with Anite via Customer Service officer and weekly conference call. Waiting for new upgrade 4.39 to be installed which will address certain problems. Performance however has improved from May.
BV78b	The average number of days taken for processing changes in circumstances	M	C	8.30	1	L	11.90	10.00	14.31	W	10.00	9.95	I	10.00	9.55	W	9.00	9.00	S	2	Within target
BV79a	The percentage of cases for which the amount of benefit due was calculated correctly.	Q	C		4	H	98.20													4	Quality checks are carried out each quarter and Q1/2007 will not be available from the DWP until the end of July 2007
BV79bii	The percentage of recoverable HB (all-years outstanding) overpayments recovered.	M	C	30.99	3	H	34.11	2.08	2.85	I	4.16	7.27	I	6.25	9.80	I	30.00	30.00	S	3	Improving
BV8	Percentage of invoices paid on time	M	C	94.74	3	H	95.00	97.00	94.38	W	97.00	94.66	I	97.00	95.82	I	97.00	97.00	S	2	98.18% achieved in the month of June, which is a 3.27 percentage point improvement over May, due to the focus that departments have on payment of invoices since the performance clinics - 10 invoices paid late. Any departments that have paid invoices late in June are to be given 48 hours to process invoices back to finance in July.
BV9	Percentage of Council Tax collected	M	C	98.40	2	H	98.11	11.07	12.00	I	20.51	20.83	I	30.36	30.16	S	98.70	98.06	S	2	On Target

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Ref	Description	Report - ed?	Cum or Snap?	2006/07				2007/08							Comments (inc. budgetary)						
				Actuals	Quartile	Higher or lower	Median (05/06 quartile)	April Target	April Actual	Target &Trend	May Target	May Actual	Target &Trend	June Target		June Actual	Target &Trend	Target	Est. Outturn	Est. Outturn Target &Trend	Est. Outturn Quartile
BV10	Percentage of Non-Domestic Rates collected.	M	C	98.20	4	H	99.00	9.70	9.50	S	18.64	20.46	I	27.98	31.19	I	98.70	98.70	I	3	Improvement in collection due to Council Business Rates being paid in May. Collection of other NNDR payees on target for 2007/08

**E-Government & Customer Services**

CSC	Monthly Call Volumes Customer Contact Centre	M	S	n/a	n/a	n/a	n/a		8,410			6,399				7,628				n/a	Calls have to customer contact centre have increased by 7% this month
CSC	Monthly Call Volume Council Switchboard	M	S	n/a	n/a	n/a	n/a		7,718			7,310				7,060				n/a	Calls to council switchboard continue to fall down 3% compared to last month
CSC	Resolution at First Point of Contact all services (percentage)	M	C	83.00	n/a	n/a	n/a	85.00	90.38	I	85.00	91.00	S	85.00	92.00	I	85.00	85.00	S	n/a	
CSC	Average Speed of Answer (seconds)	M	C	48	n/a	n/a	n/a	20.00	67.00	W	20.00	47.00	I	20.00	53.00	W	20.00	20.00	S	n/a	The increase in call volume to contact centre has impacted on the average answer time which has increased by 6 seconds compared to Mays figure
CSC	% of Calls Answered	M	C	76	n/a	n/a	n/a	85.00	60.00	W	85.00	87.00	I	85.00	79.00	W	85.00	85.00	S	n/a	% of calls answered has fallen this month compared to may driven by the increase in call volume experienced during this month
LPI IT Services	% of helpdesk call closed within timescales	M	C	83.99	n/a	n/a	n/a	86.00	92.88	W	86.00	95.45	I	85.00	89.85	W	86.00	86.00	S	n/a	Call resolution has suffered due to the increased work load involved in getting the new councillors online. However, the actual is still above the target and the drop was only for one week within the month.

**Street Scene & Waste Management**

BV82ai	The percentage of household waste that has been recycled	M	C	21.42	2	H	18.50	17.00	17.44	W	17.00	18.14	I	17.00	18.10	W	21.50	21.50	S	2	Bring bank tonnages are unconfirmd so figures may change. Percentage is kept low this time of year due to large volumes of green waste collected
BV82bi	The percentage of household waste that has been composted	M	C	8,242.31	1	H	8.29	30.00	33.78	I	30.00	31.98	W	30.00	32.00	I	19.60	20.00	S	1	Bring bank tonnages are unconfirmd so figures may change. High volumes of green waste as per last year. Approximately 200 T additional on same period last year
BV218a	The percentage of new reports of abandoned vehicles investigated within 24 hours of notification	M	C	95.00	2	H	87.00	95.00	100.00	I	95.00	100.00	S	95.00	100.00	S	95.00	100.00	S	1	7 vehicles reported and 7 investigated within timescale
BV218b	The percentage of abandoned vehicles removed within 24 hours of legal entitlement	M	C	95.00	1	H	77.50	95.00	100.00	I	95.00	100.00	S	95.00	100.00	S	95.00	100.00	S	1	5 vehicles to be removed and 5 removed within timescale
LPI Depot	% animal/debris cleared within timescales	M	C	82.00	n/a	n/a	n/a	95.00	100.00	I	95.00	100.00	S	95.00	100.00	S	95.00	100.00	S	n/a	12 animals reported and 12 removed within timescale
LPI Depot	% of fly tips dealt with in response time	M	C	96.00	n/a	n/a	n/a	95.00	97.50	I	95.00	98.75	I	95.00	98.63	W	95.00	98.63	S	n/a	131 incidents reported 129 dealt with within timescale, figures affected because a contractor was employed for removal of some hazardous waste
LPI Depot	Number of missed household waste collections	M	C	1630	n/a	n/a	n/a	133	99	I	266	172	I	399	311	W	1,596	1,463	W	n/a	139 missed collections in June
LPI Depot	Number of missed recycle waste collections	M	C	748	n/a	n/a	n/a	66	31	I	132	62	I	198	109	W	800	372	S	n/a	48 missed recycling collections in June
LPI Depot	Number of written complaints	M	C	334	n/a	n/a	n/a	22	27	W	44	38	I	66	44	I	264	98	I	n/a	6 letters in June
LPI Transport Services	% responses to Excess Charge appeals in 10 days	M	C	94.00	n/a	n/a	n/a	95.00	96.00	W	95.00	93.07	W	95.00	92.91	W	95.00	95.00	S	n/a	268 ECN appeals of which 249 dealt with within timescale

**Planning & Environment Services**

BV109a	The percentage of major planning applications determined within 13 weeks	M	C	73.00	2	H	66.67	55.00	100.00	I	55.00	100.00	S	55.00	100.00	S	60.00	65.00	I	3	This represented 2/2 decisions made in time which equated to 100%. Quarterly - 11/11 application equating to 100%.
BV109b	The percentage of minor planning applications determined within 8 weeks	M	C	72.00	3	H	74.01	77.00	91.00	I	77.00	82.00	W	77.00	89.00	I	65.00	75.00	I	2	Minors 18/18 equating to 100%. This BVPI is affected by the relatively low number of applications submitted, meaning that each application represents an above average percentage. That makes this performance very pleasing and reflects the focus officers have given to this group of applications. Quarterly - 41/46 equating to 89%. This statistic reflects the improved performance for June and means the BVPI of 65% has been significantly exceeded for this category

Ref	Description	Report - ed?	Cum or Snap?	2006/07				2007/08							Comments (inc. budgetary)						
				Actuals	Quartile	Higher or lower	Median (50th quartile)	April Target	April Actual	Target &Trend	May Target	May Actual	Target &Trend	June Target		June Actual	Target &Trend	Target	Est. Outturn	Est. Outturn Target &Trend	Est. Outturn Quartile
BV109c	The percentage of other planning applications determined within 8 weeks	M	C	84.00	3	H	88.23	89.00	100.00	I	89.00	96.00	W	89.00	96.00	S	80.00	80.00	S	4	Others 78/81 equating to 96%, which is an improvement on the May figure of 91% and given the improvement in Minors is significant. Quarterly - 239/248 equating to 96% again the BVPI of 80% has been significantly exceeded
BV204	The percentage of planning appeal decisions allowed	M	C	27.80	n/a	n/a	n/a	40.00	0.00	I	40.00	0.00	S	40.00	0.00	S	33.00	33.00	S	n/a	3 appeals submitted and all dismissed which relates to 0% allowed which is excellent. Quarterly - 6/6 all appeals have been dismissed meaning that the decisions that have been made have been robust enough to withstand examination by an independent Inspector. This returns a BVPI of 0% appeals allowed.
LPI Planning	Score on Building Control performance matrix	Q	S		n/a	n/a	n/a							60.00	74.50	W	60.00	75.00	S	n/a	The reduction on last period is due to staff problems. This is predicted in the next period too, however this is an isolated change rather than a trend.
LPI CEO	Number of small business start ups	Q	C		n/a	n/a	n/a							6	8	I	25	25	S	n/a	A brisk start to the year with good indications for the future.

**Culture & Community Services**

BV126 (proxy)	The number of domestic burglaries	M	C		n/a	n/a	n/a	33	32	S	67	66	W	99	100	S	404	396	S	n/a	On Target. Aware of risk of falling behind, raised at Tasking and Bromsgrove Police will put additional resource to tackle if required.
BV127a (proxy)	The number of violent crimes	M	C		n/a	n/a	n/a	92	102	W	184	187	I	276	287	W	1114	1122	S	n/a	Special focus via Bromsgrove CID to reduce figures. Raised at Tasking, Bromsgrove Police have CID Team to tackle this specific issue.
BV127b (proxy)	The number of robberies	M	C		n/a	n/a	n/a	3	5	W	6	13	W	9	21	S	42	78	S	n/a	3.23% (9 actual) over target Police are tasking officers as a priority to reduce. Raised at Tasking, issues around Police recording a wide range of minor crimes being flagged as robberies. Again Police tasking officers to focus.
BV128 (proxy)	The number of vehicle crimes	M	C		n/a	n/a	n/a	76	72	S	152	130	I	228	183	I	917	762	S	n/a	Substantially reducing. Vulnerable Vehicle / Beauty Spot initiatives inc. leaflet drops, press releases and signage.
LPI Community Services	Number of attendances at arts events	M	C	18,515	n/a	n/a	n/a	250	265	S	775	540	I	1,275	1,050	I	23,000	23,000	S	n/a	As per comments in May, poor weather conditions having an impact on audience attendance.
LPI Sports Services	Sports Centres Usage	M	C		n/a	n/a	n/a	64,171	65,143	S	125,957	129,076	W	173,910	181,261	I	621,600	621,600	S	n/a	Haybridge - Work to be done on after school programme. School usage numbers should increase in September onwards, currently low due to exams. Party advertising and marketing to be revamped/updated.
LPI Community Safety	Respond to emergency calls in 30 secs (percentage)	Q	C		n/a	n/a	n/a	n/a	n/a		n/a	n/a		80.00	98.54	I	80.00	90.00	I	n/a	National Target of 80%



Monthly Performance detailed figures

Ref	Description	Freq	C or S	2007/08 Monthly Performance figures											
				Apr.	May.	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.

Chief Executive's Department

LPI CEOACE	% of press articles which enhance our reputation	M	C	Target												
				Actual	73.84	64.78	79.37									

Legal & Demorcatic Services

BV174	The number of racial incidents reported to the Council per 100,000 population	M	C	Target	0.00	0.00	0.00									
				Actual	0.00	0.00	0.00									
BV175	The percentage of those racial incidents that have resulted in further action	M	C	Target	100.00	100.00	100.00									
				Actual	100.00	100.00	100.00									

Human Resources & Organisational Development

BV12	The average number of working days lost due to sickness.	M	C	Target	0.73	0.73	0.73									
				Actual	0.65	0.84	0.68									
BV14	The percentage of employees retiring early (excluding ill-health)	Q	C	Target	n/a	n/a	0.80									
				Actual			0.25									
BV15	The percentage of employees retiring on grounds of ill-health	Q	C	Target			0.20									
				Actual			0.00									
BV16a	The percentage of employees with a disability	Q	S	Target			1.80									
				Actual			1.99									
BV17a	The percentage of employees from minority ethnic communities	Q	C	Target			2.00									
				Actual			1.74									
LPI Human Resources	% of posts vacant	Q	S	Target												
				Actual			7.60									

Financial Services

Monthly Performance detailed figures

BV78a	The average number of days taken for processing new claims.	M	C	Target	28.00	28.00	28.00										
				Actual	34.10	36.44	33.57										
BV78b	The average number of days taken for processing changes in circumstances	M	C	Target	10.00	10.00	10.00										
				Actual	14.31	6.14	7.86										
BV79a	The percentage of cases for which the amount of benefit due was calculated correctly.	Q	C	Target													
				Actual													
BV79bii	The percentage of recoverable HB (all-years outstanding) overpayments recovered.	M	C	Target	25.00	25.00	25.00										
				Actual	2.85	7.27	9.80										
BV8	Percentage of invoices paid on time	M	C	Target	97.00	97.00	97.00										
				Actual	94.38	94.91	98.18										
BV9	Percentage of Council Tax collected	M	C	Target	11.07	20.51	30.36										
				Actual	12.00	20.83	30.16										
BV10	Percentage of Non-Domestic Rates collected.	M	C	Target	9.70	18.64	27.98										
				Actual	9.50	20.46	31.19										

E-Government & Customer Services

CSC	Monthly Call Volumes Customer Contact Centre	M	S	Target													
				Actual	8,410	6,399	7,628										
CSC	Monthly Call Volume Council Switchboard	M	S	Target													
				Actual	7,718	7,310	7,060										
CSC	Resolution at First Point of Contact all services (percentage)	M	C	Target	85.00	85.00	85.00										
				Actual	90.77	90.00	92.00										
CSC	Average Speed of Answer (seconds)	M	C	Target	20.00	20.00	20.00										
				Actual	67.00	47.00	53.00										
CSC	% of Calls Answered	M	C	Target	85.00	85.00	85.00										
				Actual	60.00	81.00	79.00										
LPI IT Services	% of helpdesk call closed within timescales	M	C	Target	86.00	86.00	86.00										
				Actual	92.88	95.45	89.85										

Street Scene & Waste Management

BV82a	The percentage of household waste that	M	C	Target	17.00	17.00	17.00										
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Monthly Performance detailed figures

Dvoza	has been recycled	M	C	Actual	17.44	18.81	18.10										
BV82bi	The percentage of household waste that has been composted	M	C	Target	30.00	30.00	30.00										
				Actual	33.78	30.29	32.00										
BV218a	The percentage of new reports of abandoned vehicles investigated within 24 hours of notification	M	C	Target	95.00	95.00	95.00										
				Actual	100.00	100.00	100.00										
BV218b	The percentage of abandoned vehicles removed within 24 hours of legal entitlement	M	C	Target	95.00	95.00	95.00										
				Actual	100.00	100.00	100.00										
LPI Depot	% animal/debris cleared within timescales	M	C	Target	95.00	95.00	95.00										
				Actual	100.00	100.00	100.00										
LPI Depot	% of flytips dealt with in response time	M	C	Target	95.00	95.00	95.00										
				Actual	97.50	100.00	98.47										
LPI Depot	Number of missed household waste collections	M	C	Target	133	133	133										
				Actual	99	73	139										
LPI Depot	Number of missed recycle waste collections	M	C	Target	66	66	66										
				Actual	31	30	48										
LPI Depot	Number of written complaints	M	C	Target	22	22	22										
				Actual	27	11	6										
LPI Transport Services	% responses to Excess Charge appeals in 10 days	M	C	Target	95.00	95.00	95.00										
				Actual	96.00	96.12	92.42										

Planning & Environment Services

BV109a	The percentage of major planning applications determined within 13 weeks	M	C	Target	55.00	55.00	55.00										
				Actual	100.00	100.00	100.00										
BV109b	The percentage of minor planning applications determined within 8 weeks	M	C	Target	77.00	77.00	77.00										
				Actual	91.00	76.47	100.00										
BV109c	The percentage of other planning applications determined within 8 weeks	M	C	Target	89.00	89.00	89.00										
				Actual	100.00	90.90	96.30										
BV204	The percentage of planning appeal decisions allowed	M	C	Target	40.00	40.00	40.00										
				Actual	0.00	0.00	0.00										
LPI Planning	Score on Building Control performance matrix	Q	S	Target			60.00										
				Actual			74.50										
LPI	Number of small business start ups	Q	C	Target			6										
				Actual			8										

Culture & Community Services

BV126 (proxy)	The number of domestic burglaries	M	C	Target	33	34	33										
				Actual	32	34	34										
BV127a (proxy)	The number of violent crimes	M	C	Target	92	93	93										
				Actual	102	84	101										
BV127b (proxy)	The number of robberies	M	C	Target	3	4	3										
				Actual	5	8	8										
BV128 (proxy)	The number of vehicle crimes	M	C	Target	76	77	76										
				Actual	72	58	56										
LPI Community Services	Number of attendances at arts events	M	C	Target	250	525	500										
				Actual	265	275	510										
LPI Sports Services	Sports Centres Usage	M	C	Target	64,171	61,786	47,953										
				Actual	65,143	63,932	52,186										

**Bromsgrove District Council  
Sickness Absence Data**

The worksheets contain the following data and charts

**1. Sickness Data.**

This is the base data record for sickness absence.

As previously the data records in detail the number of days lost per Service both for long and short term absence.

It also maintains a quarterly analysis for comparison purposes.

It has been modified at the request of the OMT to take account of variations in staff numbers month by month. The figures per FTE are therefore more accurate.

The data also now reports month by month on the lost days per FTE. This enables a month on month comparison to be made.

Finally the data has been extrapolated to give an indication of the position at the end of the year.

***Number of days sickness per month is shown in the right-hand columns  
Number of employees absent during the current month is shown in column B***

**2. Annual Graph**

This graph plots the number of days lost per month

- due to short term absence
- due to long term absence and
- in total

**3. Graph - Days Lost per Month**

This is a graphical interpretation of the days lost per FTE per month directly comparing all Services within the Council. This also enables trends to be identified.

originally produced by:

**HR & OD Service**

**August 2002**

(FTE - Full Time Equivalent)

Sickness Figures for 2007/2008 by Service

Total FTE @ March 07	Actual no of employees - June	SERVICE	Total Sickness days April 07 & on	Days per FTE - Year to Date	Projected - per FTE	Sickness Target 2007/08	Apr-07	May-07	Jun-07	Jul-07	Aug-07	Sep-07	Oct-07	Nov-07	Dec-07	Jan-08	Feb-08	Mar-08
27.00	8.00	<b>Legal &amp; Democratic</b>	66.50	2.46	9.85	6.0												
	1.00	Short term Absences up to 28 days	28.50	1.06			3.00	7.00	18.50									
		Long term Absences 29 days+	38.00	1.41			12.00	14.00	12.00									
11.00	2.00	<b>CEO &amp; Policy</b>	5.00	0.45	1.82	5.0												
		Short term Absences up to 28 days	5.00	0.45			0.00	2.00	3.00									
		Long term Absences 29 days+	0.00	0.00			0.00	0.00	0.00									
56.00	15.00	<b>Culture &amp; Community</b>	93.50	1.67	6.68	8.0												
		Short term Absences up to 28 days	93.50	1.67			33.00	28.00	32.50									
		Long term Absences 29 days+	0.00	0.00			0.00	0.00	0.00									
30.00	4.00	<b>Egovernement &amp; Customer Services</b>	26.50	0.88	3.53	4.0												
		Short term Absences up to 28 days	26.50	0.88			9.00	8.00	9.50									
		Long term Absences 29 days+	0.00	0.00			0.00	0.00	0.00									
47.00	7.00	<b>Finance</b>	129.50	2.76	11.02	8.0												
	2.00	Short term Absences up to 28 days	46.50	0.99			5.50	28.00	13.00									
		Long term Absences 29 days+	83.00	1.77			21.00	20.00	42.00									
12.00	1.00	<b>HROD</b>	10.00	0.83	3.33	4.25												
		Short term Absences up to 28 days	10.00	0.83			7.00	2.00	1.00									
		Long term Absences 29 days+	0.00	0.00			0.00	0.00	0.00									
62.00	11.00	<b>Planning &amp; Environment Services</b>	92.50	1.49	5.97	7.5												
	1.00	Short term Absences up to 28 days	51.50	0.83			11.00	20.50	20.00									
		Long term Absences 29 days+	41.00	0.66			0.00	20.00	21.00									
114.00	20.00	<b>Street Scene &amp; Waste Management</b>	368.50	3.23	12.93	12.0												
	3.00	Short term Absences up to 28 days	147.50	1.29			45.00	55.00	47.50									
		Long term Absences 29 days+	221.00	1.94			86.00	98.00	37.00									

Total Short Term Absence YTD	409.00
Total Long Term Absence YTD	383.00
<b>TOTAL Days lost YTD</b>	<b>792.00</b>

8.82 9.00

113.50	150.50	145.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
119.00	152.00	112.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>232.50</b>	<b>302.50</b>	<b>257.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>

<b>TARGET sick days per FTE per month</b>	
<b>BVPI 12 Sick Days Per FTE in Month</b>	
<b>TARGET sick days per FTE YTD</b>	
<b>BVPI 12 - Sick Days per FTE YTD</b>	
<b>BVPI 12 Projected Outturn</b>	

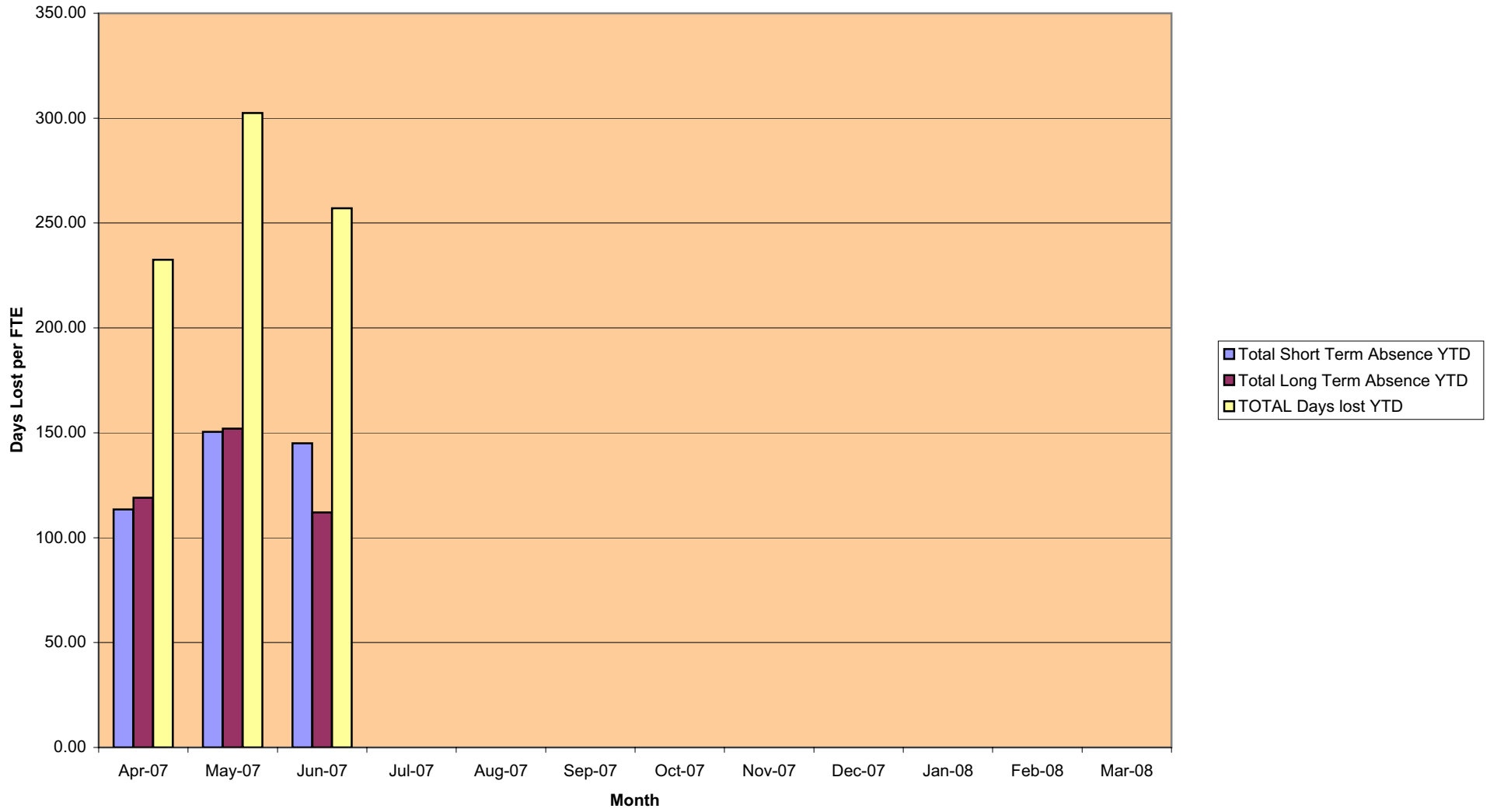
0.73	0.73	0.73	0.73	0.73	0.73	0.73	0.73	0.73	0.73	0.73	0.81	0.81	0.81
0.65	0.84	0.72											
0.73	1.46	2.19	2.92	3.65	4.38	5.11	5.84	6.57	7.38	8.19	9.00		
0.65	1.49	2.21											
7.77	8.94	8.82											

2003-04	4309.83
2004-05	3074.99
2005-06	3570.58
2006-07	3806.00
<b>2007-08</b>	<b>792.00</b>
Year	Annual

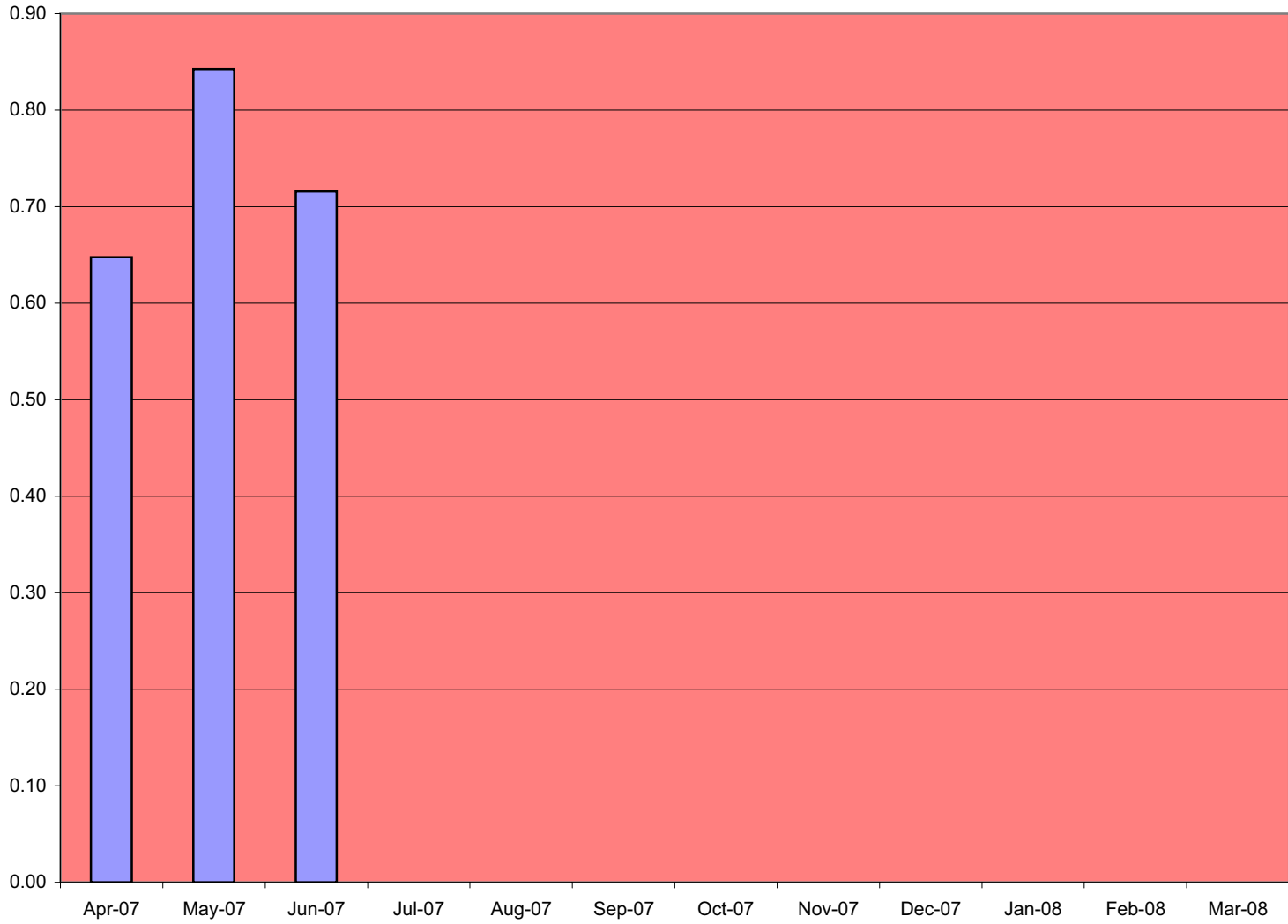
737.50	1112.50	1500.20	959.63
735.87	875.43	836.52	627.17
695.38	949.95	883.98	1041.27
1067.00	959.50	951.00	828.50
<b>792.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
Quarter 1	Quarter 2	Quarter 3	Quarter 4

Key:      more than 10% worse than target         worse than target, but within 10%         on or better than target

Sickness Absence Data 2007 / 2008



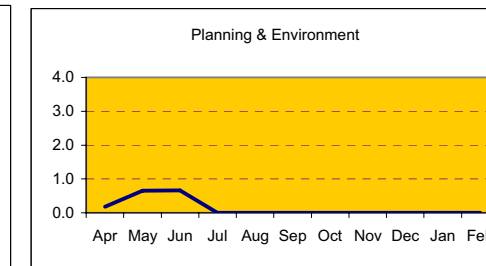
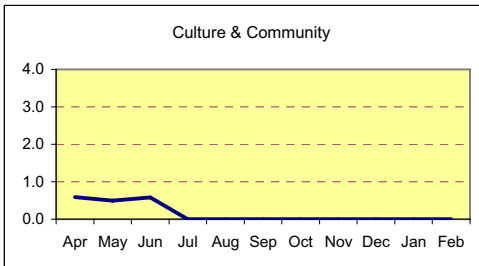
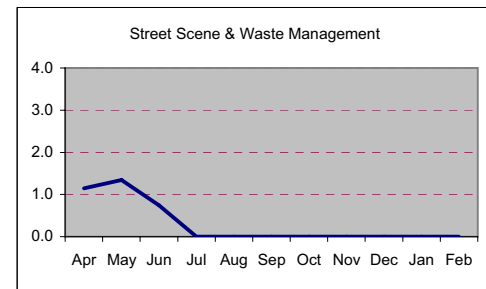
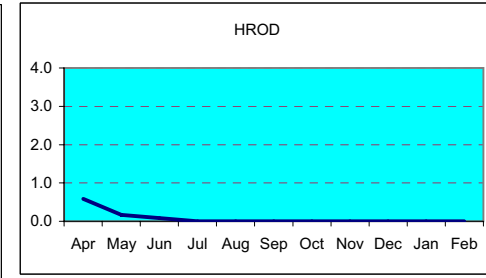
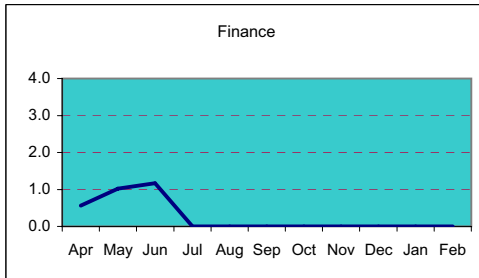
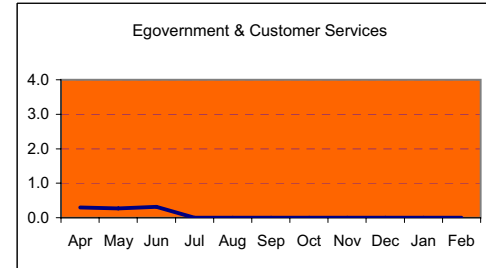
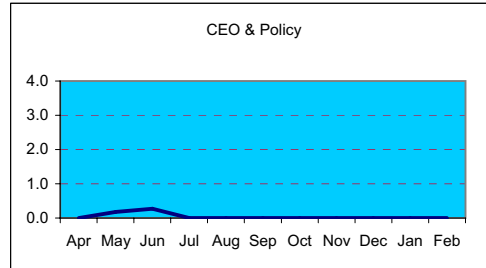
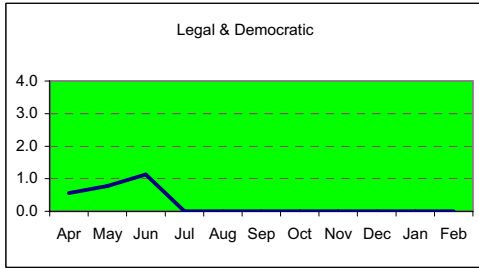
BVPI 12 Sick Days Per FTE in Month



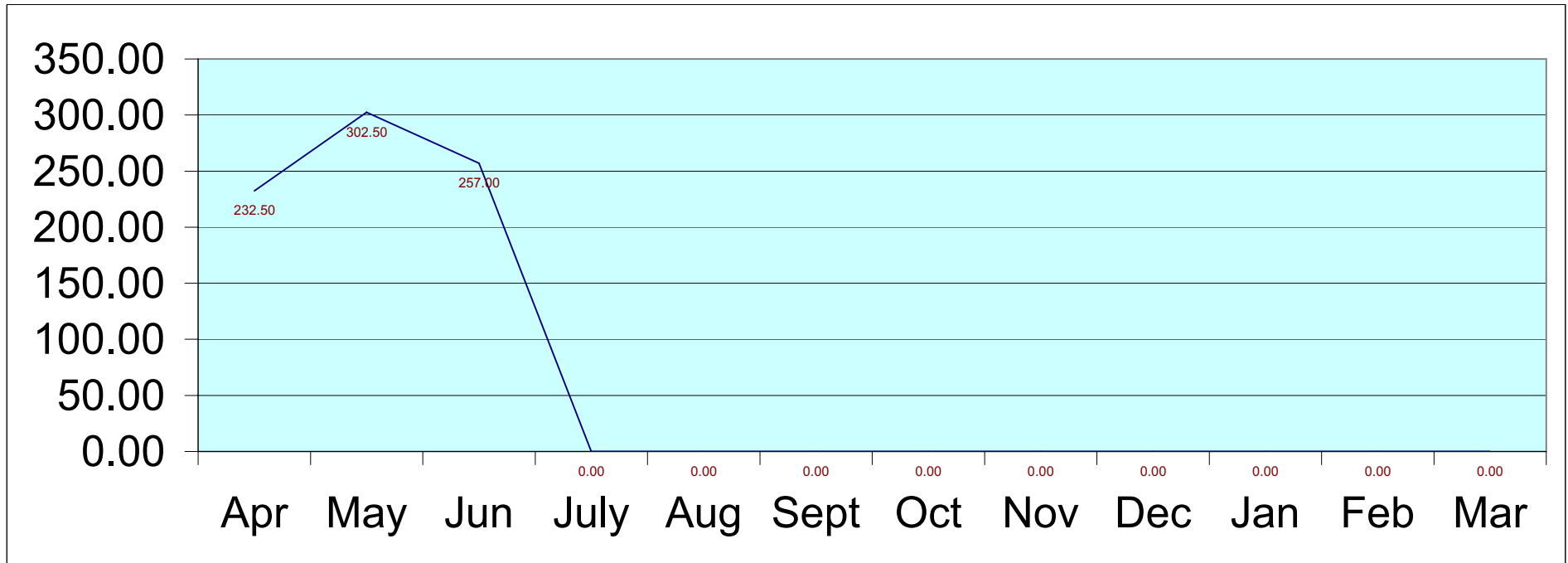
■ BVPI 12 Sick Days Per FTE in Month



# Bromsgrove District Council Confidential



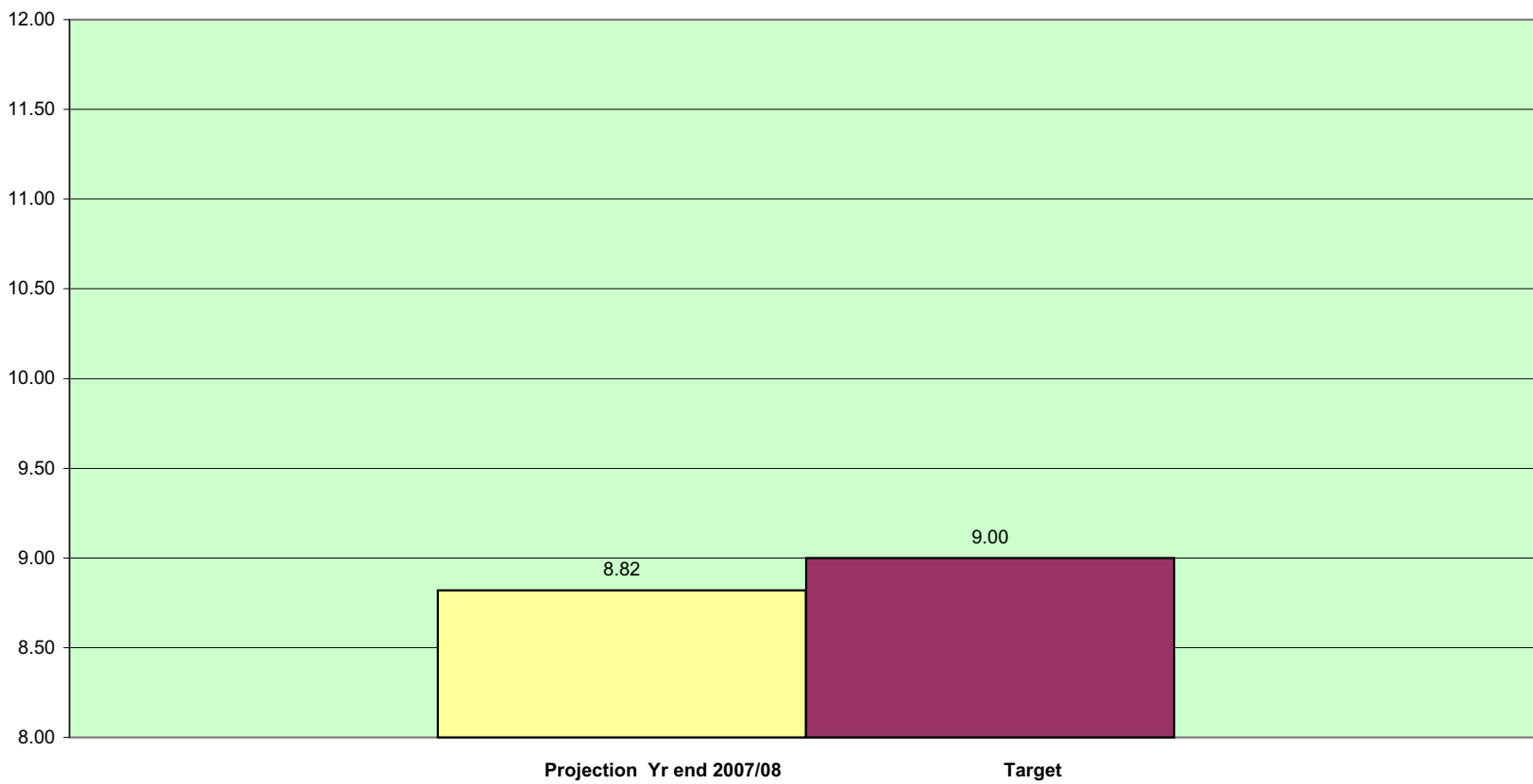
Graph - Total days lost in month  
2007 / 2008  
HR Services

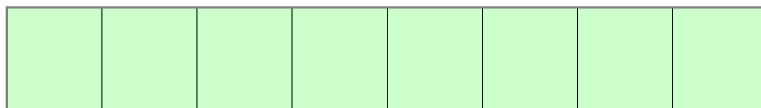


### Total days sickness per FTE



Chart showing projection per FTE against the Councils Target





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