

Overview and Scrutiny Board

2026

15th September

Finance and Budget Working Group – Review of Terms of Reference

Relevant Portfolio Holder	Councillors K.J. May and S.T. Nock
Portfolio Holder Consulted	No
Relevant Head of Service	Claire Felton, Assistant Director of Legal, Democratic and Procurement Services
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Wards Affected	N/A
Ward Councillor(s) consulted	N/A
Relevant Council Priorities	Sustainability
Non-Key Decision	
If you have any questions about this report, please contact the report author in advance of the meeting.	

1. RECOMMENDATIONS

The Overview and Scrutiny Board is asked to RESOLVE that:

- 1) The proposed amendments to the Finance and Budget Working Group's Terms of Reference for the 2026/27 municipal year be approved;**
- 2) The following members be appointed to the Finance and Budget Working Group (FBWG) for the municipal year 2026/27:**

Councillor J. Clarke
Councillor C. Hotham
Councillor B. Kumar
Councillor P.M. McDonald
Councillor B.M. McEldowney
- 3) The appointment of one of the members listed at resolution 2 above (to be specified at the meeting) as Chairman of the FBWG for the 2026/27 municipal year be approved.**

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2. BACKGROUND

- 2.1 The Finance and Budget Scrutiny Working Group (FBWG) was set up by the Overview and Scrutiny Board to carry out detailed scrutiny of a number of Financial Reports (listed in the Terms of Reference (TOR)) and to assist in scrutiny of the Council's budget setting.
- 2.2 The constitution states that the Council is required by law to have arrangements for Overview and Scrutiny by which recommendations on the development of policies can be made and the Cabinet can be held to account for the decisions they make. The Finance and Budget Working Group (FBWG) forms part of this important role.
- 2.3 To ensure that the FBWG's arrangements remain fit for purpose, it is helpful to review the TOR from time to time. The last time the TOR were reviewed was in June 2025 and therefore a review at this stage would be timely.
- 2.4 The FBWG's TOR are attached at Appendix 1 to the report. These currently require that:
- There should be a maximum of 7 members of the Group.
 - These must be all non-Cabinet members.
 - Priority is given to members of the Overview and Scrutiny Board to be members of the group, although membership is extended to non-board members where vacancies arise.
 - The Chairman of the Audit, Standards and Governance Committee is automatically appointed (and makes up one of the 7 members).
 - The Chairman of the FBWG must be a member of the Board, who will provide regular updates on the work of the group.
 - The quorum for meetings of the group is 3.
- 2.5 In reviewing the TOR, consideration has been given to changes being made to enhance the work of the FBWG.
- 2.6 The Audit, Standards and Governance Committee's main role is to ensure good stewardship of the Council's resources and to assure the Council about the objectivity and fairness of the financial reporting and

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performance of the Council, the adequacy of the risk management framework and associated controls within the Council, and that any issues arising from the drawing up, auditing and certifying of the Council's accounts are properly dealt with. This is an extremely important role and separate to the role of scrutiny. With this in mind, the Chairman of the Audit, Standards and Governance Committee should not be a member of the FBWG in order to remain fully independent from the scrutiny process.

- 2.7 Should the change to the TOR for the Chairman of the Audit, Standards and Governance Committee to not be a member of the working group be agreed, then it is suggested that the maximum number of members of the group be reduced to 6.
- 2.8 The purpose of this report is to agree the proposed amendments to the FBWG's TOR for the 2026/27 municipal year. Agreeing to changes at this point, will ensure that a consistent approach can be taken to meetings of the FBWG during the 2026/27 municipal year.

3. OPERATIONAL ISSUES

Membership

- 3.1 Scrutiny Working Groups are not required to be politically balanced, although it is good practice to have each political group represented.
- 3.2 It should be noted that the terms of reference for the group state that Members must be Members of the Overview and Scrutiny Board. However, the Terms of Reference for the Working Group also state *"Should a vacant post remain after Members of the Overview and Scrutiny Board had been approached, Members of the Overview and Scrutiny "pool" (i.e. those who do not sit on the Scrutiny Board and are also not Cabinet Members) may be appointed to fill the vacancy."*
- 3.3 During the Overview and Scrutiny Board meeting held on 21st July 2026, it was suggested that Councillors Clarke, Kumar and McDonald be included on the FBWG for the municipal year 2026/27.

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- 3.4 Following an email sent on 22nd July 2026 to all Board Members, an expression of interest was received from Councillor Hotham on 23rd July 2026 to be appointed to the FBWG.
- 3.5 Following an email sent on 30th July 2026 for expressions of interest from Members of the Overview and Scrutiny “pool” (i.e. those who do not sit on the Scrutiny Board and are also non-Cabinet Members), an expression of interest was received from Councillor McEldowney by email on 9th August 2026.
- 3.6 Should this membership be approved at the September meeting of the Board, this would leave 1 vacancy on the FBWG.
- 3.7 Meetings have been scheduled for this year as per below, although there may be a need for extra meetings when the need is identified, particularly during the budget setting period. Conversely, meetings may be cancelled if there is no business to be considered on the particular date.
- 16th September 2026
 - 16th November 2026
 - 4th January 2027
 - 10th February 2027
 - 22nd March 2027
- 3.8 All meetings are due to start at 6.00pm, unless otherwise agreed, and will be held remotely (on Microsoft Teams). Any meetings held on Friday will commence at 1.00pm.

4. FINANCIAL IMPLICATIONS

- 4.1 There are no direct financial implications in respect of this report. Although it should be noted that there are resource implications in respect of officer time in attending and preparing for the meetings.

5. LEGAL IMPLICATIONS

- 5.1 There are no direct legal implications relating to this report, other than those in respect of the Overview and Scrutiny function as a whole. The Working Group is currently not constituted, but merely an arrangement set up by the Overview and Scrutiny Board to improve its work going

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forward in respect of scrutinising the budget and finances of the Council.

- 5.2 In line with the constitution it is a legal requirement that only non-Cabinet members can serve on scrutiny bodies such as the FBWG.

6. OTHER – IMPLICATIONS

Local Government Reorganisation Implications

- 6.1 There are no implications for Local Government Reorganisation.

Relevant Council Priority

- 6.2 The work of the FBWG contributes towards ensuring that the Council continues to provide sustainable services to its residents.

Climate Change Implications

- 6.3 There are no climate change implications in respect of this report.

Equalities and Diversity Implications

- 6.4 There are no direct customer/equality and diversity implications in respect of this report.

Community Impact Implications

- 6.5 There are no community safety or health and well-being implications.

7. RISK MANAGEMENT

- 7.1 No specific risks have been identified.

8. APPENDICES and BACKGROUND PAPERS

Appendix 1 – Terms of Reference of the Finance and Budget Scrutiny Working Group (suggested amendments in track changes).