

**Committee:** Executive  
**Date:** Monday 16 March 2009  
**Time:** 6.30 pm  
**Venue:** Bodicote House, Bodicote, Banbury, OX15 4AA

### Membership

<b>Councillor Barry Wood (Chairman)</b>	<b>Councillor G A Reynolds (Vice-Chairman)</b>	
<b>Councillor Norman Bolster</b>	<b>Councillor Kieron Mallon</b>	<b>Councillor Nicholas Turner</b>
<b>Councillor Michael Gibbard</b>	<b>Councillor Nigel Morris</b>	
<b>Councillor James Macnamara</b>	<b>Councillor D M Pickford</b>	

## AGENDA

1. **Apologies for Absence**
2. **Declarations of Interest**

Members are asked to declare any interest and the nature of that interest that they may have in any of the items under consideration at this meeting.

3. **Petitions and Requests to Address the Meeting**

The Chairman to report on any requests to submit petitions or to address the meeting.

4. **Urgent Business**

The Chairman to advise whether they have agreed to any item of urgent business being admitted to the agenda.

5. **Minutes** (Pages 1 - 8)

To confirm as a correct record the Minutes of the meeting held on 2 March 2009.

## **Strategy and Policy**

### **6. Access Strategy (Pages 9 - 47)**

**6.35pm**

Report of Strategic Director Customer Service and Resources

#### **Summary**

To update the Executive on the development of the Access Strategy and ask for comment on the direction it takes and the action plan it proposes, prior to finalising the draft.

#### **Recommendations**

The Executive is recommended to:

- (1) Agree the vision, aim and objectives of the strategy
- (2) Agree all, some or none of the main pillars of the action plan:
  1. deliver the services most face to face customers want (not just our local office customers), at locations near them.
  2. deliver more services through the telephone contact centre so that more customers have their enquiry or request satisfied at first contact.
  3. deliver the services our online customers want to access themselves, and persuade those customers to change from phone to online.
  4. Use information from customers to improve service delivery, ultimately reducing the amount of contact we handle that is classified as “avoidable” in the definition of NI14.
  5. use NI14 data, customers’ own feedback, complaints and compliments, mystery shopping and customer consultation, to improve our service processes so that the customer need be less proactive and the Council can make best use of its resources – principally staff time.
  6. identify potential efficiencies and improvements to service processes and the investment to achieve those efficiencies, and put in place a means of getting decisions about whether to realise those efficiencies and improvements.
- (3) Instruct the access strategy development group to complete work on the strategy and action plan and bring it back to the Executive for adoption

### **7. Management Information Strategy (Pages 48 - 66)**

**6.50pm**

Report of Head of Improvement

#### **Summary**

The report presents a Management Information Strategy and action plan for Cherwell District Council which will deliver continuous improvement in its information management arrangements, helping to improve service delivery and respond effectively to the new CAA assessment regime.

#### **Recommendations**

The Executive is recommended:

- (1) To identify any additional actions or initiatives to be included in the strategy and action plan
- (2) To agree the management information strategy and action plan
- (3) To require officers to report back on progress with the implementation of the strategy and action plan in March 2010

## **Value for Money and Performance**

### **8. Working in Partnership Annual Report (Pages 67 - 95)**

**7.00pm**

Report of Chief Executive

#### **Summary**

This Annual Partnerships Report:

- reviews the achievements of the Council's significant partnerships in 2008/09
- sets out the progress made improving the governance and performance management of the Council's significant partnerships.
- Sets out the key activities for significant partnerships in 2009/10.

#### **Recommendations**

The Executive is recommended to:

- (1) Note the key achievements of the Council's significant partnerships in 2008/09 and the contribution they make to delivery of the Council's strategic priorities
- (2) Review the progress made during the year in strengthening the governance of the Council's significant partnerships
- (3) Agree the actions proposed by the significant partnerships for 2009/10
- (4) Agree the proposals to improve partnership working detailed at paragraph 1.5 below
- (5) Refer this Annual Partnerships Report to Overview and Scrutiny as part of their future programme of work on the evaluation of partnerships.

### **9. Land Charges Value for Money Review (Pages 96 - 111)**

**7.20pm**

Report of Strategic Director Customer Service and Resources

#### **Summary**

To consider the findings of the Land Charges Value for Money (VFM) Review report and the recommendations arising from the report

## Recommendations

The Executive is recommended to:

- (1) Endorse the overall conclusion of the review that the service is high cost and has low performance in terms of its productivity, but is high quality in terms of its search turnaround times.
- (2) Agree that further improvements in value for money be sought and approve the following recommendations to achieve this;
  - a) Reduce staffing levels by 37hrs per week to eliminate surplus capacity and generate savings of £22,650. This will bring employee hours per thousand population more into line with the average authority. These savings have already been identified and accommodated in the 2009/10 budget.
  - b) Further reduce the capacity within the service by 15hrs per week in recognition of the continuing fall in demand due to the economic slowdown, but re-invest these hours in improving the council's digital records to improve future productivity by allocating them to the council's GIS team. Monitor work volumes and review this arrangement after 6 months in order to maximise possible savings (should search volumes continue to fall) end ensure continuity of the service (should search volumes increase).
  - c) Recalculate the contributions paid to other services through internal recharges so that these are based on a cost per search rather than a fixed overhead. This would produce savings of £24,865 for the service in 2009/10, although these costs would be transferred elsewhere in the council.
  - d) Ascertain the true costs of the service (in anticipation of likely legislative changes allowing cost recovery charging) by carry out a zero based budget analysis of support costs to remove any overhead cost loading on the service. This is to take place in autumn 2009 as part of the routine budget revision process.
  - e) Raise the standard search fee from £80 to £120 (around the average for other Oxfordshire authorities) to raise additional income of £55,000 per annum. This may carry a risk of further reducing demand for searches, although reduced fees have not been shown to have any demonstrable influence on demand.
  - f) If legislation is introduced to allow it, raise the fee for personal searches to at least £25. This would raise additional income of around £30,000 per annum.
  - g) Implement the TLC ICT system to improve the automation of electronically held information for searches
  - h) Move appointments bookings and advance payments for searches to the Customer Contact centre to provide a common standard of customer service to callers and to remove unproductive administrative work from the land charges team
  - i) Develop and introduce an online booking and payments system for appointments to complement the telephone service and further reduce administrative work

- j) Discontinue using Land Charges staff team to deal with personal search appointments in the mornings, transferring this work to reception staff (this has already been agreed and is being undertaken as an early outcome of this review).

## **Other Matters**

**10. The Future of Markets in Cherwell (Pages 112 - 113)**

**7.30pm**

Report of Overview and Scrutiny Committee

**\*\*Please note Appendix 1 is to follow\*\***

### **Summary**

To consider the report of the Task and Finish Group scrutiny review into the future of markets in Cherwell and the supporting recommendations from the Overview and Scrutiny Committee.

### **Recommendations**

The Executive is recommended to:

- (1) note the work of the Task and Finish Group scrutiny review into the future of markets in Cherwell as detailed in Appendix 1;
- (2) agree the Overview and Scrutiny Committee recommendations regarding the markets in Cherwell as detailed in the report from the Task and Finish Group (Appendix 1).

## **Urgent Business**

**11. Urgent Business**

Any other items which the Chairman has decided is urgent.

**12. Exclusion of the Press and Public**

The following reports contain exempt information as defined in the following paragraphs of Part 1, Schedule 12A of Local Government Act 1972.

1 – Information relating to any individual.

3 – Information relating to the financial or business affairs of any particular person (including the authority holding that information).

4 – Information relating to any consultations or negotiations, or contemplated consultations or negotiations, in connection with any labour relations matter arising between the authority or a Minister of the crown and employees of, or office holders under, the authority.

Members are reminded that whilst the following items have been marked as exempt, it is for the meeting to decide whether or not to consider each of them in private or in public. In making the decision, members should balance the interests of individuals or the Council itself in having access to the information. In considering their discretion members should also be mindful of the advice of Council Officers.

Should Members decide not to make a decision in public, they are recommended to pass the following recommendation:

“That, in accordance with Section 100A(4) of Local Government Act 1972, the press and public be excluded from the meeting for the following item(s) of business, on the grounds that they could involve the likely disclosure of exempt information as defined in paragraphs 1, 3 and 4 of Schedule 12A of that Act.”

13. **2009/10 Environment and Community Budget Reductions & Service Implications** (Pages 114 - 125) **7.40pm**

Report of Strategic Director Environment and Community

14. **Revenues and Benefits Service Delivery Options Appraisal** (Pages 126 - 134) **7.55pm**

Report of Strategic Director Customer Service and Resources

*(Please note Appendix 1 is to follow.)*

15. **Banbury Market** (Pages 135 - 143) **8.10pm**

Report of Head of Urban and Rural Services

**(Meeting scheduled to close at 8.25pm )**

## **Information about this Agenda**

### **Apologies for Absence**

Apologies for absence should be notified to [democracy@cherwell-dc.gov.uk](mailto:democracy@cherwell-dc.gov.uk) or 01295 221587 prior to the start of the meeting.

### **Declarations of Interest**

Members are asked to declare interests at item 2 on the agenda or if arriving after the start of the meeting, at the start of the relevant agenda item. The definition of personal and prejudicial interests is set out in Part 5 Section A of the constitution. The Democratic Support Officer will have a copy available for inspection at all meetings.

**Personal Interest:** Members must declare the interest but may stay in the room, debate and vote on the issue.

**Prejudicial Interest:** Member must withdraw from the meeting room and should inform the Chairman accordingly.

With the exception of the some very specific circumstances, a Member with a personal

interest also has a prejudicial interest if it is one which a Member of the public with knowledge of the relevant facts would reasonably regard as so significant that it is likely to prejudice the Member's judgement of the public interest.

### **Local Government and Finance Act 1992 – Budget Setting, Contracts & Supplementary Estimates**

Members are reminded that any member who is two months in arrears with Council Tax must declare the fact and may speak but not vote on any decision which involves budget setting, extending or agreeing contracts or incurring expenditure not provided for in the agreed budget for a given year and could affect calculations on the level of Council Tax.

### **Queries Regarding this Agenda**

Please contact James Doble, Legal and Democratic Services james.doble@cherwell-dc.gov.uk (01295) 221587

**Mary Harpley**  
**Chief Executive**

Published on Friday 6 March 2009

# Agenda Item 5

## Cherwell District Council

### Executive

Minutes of a meeting of the Executive held in at Bodicote House, Bodicote, Banbury, OX15 4AA, on 2 March 2009 at 6.30 pm

Present: Councillor Barry Wood (Chairman)

Councillor G A Reynolds  
Councillor Norman Bolster  
Councillor Michael Gibbard  
Councillor James Macnamara  
Councillor Kieron Mallon  
Councillor Nigel Morris  
Councillor D M Pickford  
Councillor Nicholas Turner

Also present: Councillor Leslie Sibley

Officers: Mary Harpley, Chief Executive and Head of Paid Service  
Ian Davies, Strategic Director - Environment and Community  
Julie Evans, Strategic Director - Customer Service & Resources  
John Hoad, Strategic Director - Planning, Housing and Economy  
Mike Carroll, Head of Improvement  
Liz Howlett, Head of Legal & Democratic Services and Monitoring Officer  
Phil O'Dell, Interim Head of Finance and Section 151 Officer  
Peter Mullins, Interim Chief Accountant  
Tony Brummell, Head of Building Control & Engineering Services  
Gillian Greaves, Head of Housing Services  
David Marriott, Head of Economic Developments & Estates  
Chris Rothwell, Head of Urban & Rural Services  
Pat Simpson, Head of Customer Service & ICT  
Marianne North, Housing Needs Manager  
Jo Smith, Communications Manager  
Lisa Chaney, Urban Centres Development Officer  
Ruth Watkinson, Assistant Conservation Officer  
Alexa Coates, Senior Democratic and Scrutiny Officer

### Recommendations to Council

#### 175 Treasury Management Strategy

The Strategic Director for Customer Service and Resources and the Chief Accountant submitted a report which set out the strategy and policy framework for treasury operations for 2009/10 and outlined the Council's prudential indicators for 2009/10 – 2012/13 as approved by the Council on 23 February 2009.

#### Resolved

- 1) That the Council be recommend to approve the Treasury Management Policy and Investment Strategy 2009/10.



**Reasons** – to determine the Council's policy on the management of its loans and investments with reference to both risk and risk revenue implications.

## Resolutions

### 176 **Declarations of Interest**

7. Integrated Parking Strategy, Residents Parking and Parking Enforcement.  
Councillor Nigel Morris, Personal, in relation to recommendation 5 as a Private Hire  
Taxi Badge Holder.

7. Integrated Parking Strategy, Residents Parking and Parking Enforcement.  
Mary Harpley, Personal, as an occupier of a property in one of the Streets in the  
Banbury residential parking scheme.

### 177 **Petitions and Requests to Address the Meeting**

There were no petitions and requests to address the meeting.

### 178 **Urgent Business**

There was no urgent business.

### 179 **Minutes**

The minutes of the meeting held on 9 February 2009 were approved as a correct  
record and signed by the Chairman.

### 180 **Forward Plan**

The Chief Executive submitted the Forward Plan of key decisions to be taken over  
the next four months.

#### **Resolved**

That the Forward Plan for the next four months be noted.

**Reasons** - to create a Forward Plan for the Council as required by the Local  
Government Act 2000.

### 181 **Integrated Parking Strategy , Residents Parking and Parking Enforcement**

The Head of Urban and Rural Services submitted a report to present progress on a  
number of key vehicle parking initiatives in the District, specifically: Civil Parking  
Enforcement; the outcome of a public consultation exercise on the Bicester  
Residents Parking scheme; proposals for and public consultation on a Banbury  
Residents Parking Scheme; implementation of the Council's Vehicle Parks  
Enforcement Policy and the provision of Hackney Carriage Ranks in Banbury,  
Bicester and Kidlington.

Councillor Morris requested that his abstention from the vote be recorded.

#### **Resolved**

(1) With regard to Civil Parking Enforcement that:

- a) the proposals and outline timetable for the introduction of Civil Parking Enforcement (CPE) across the Cherwell District be approved.
  - b) negotiations with Oxfordshire County Council (OCC) on the basis of implementing CPE in Cherwell on the basis of no or lowest cost to the Council be approved.
  - c) investigation of a phase two which considers on street paid parking provided that there are benefits to the Council in doing so be approved.
  - d) officers report back on progress early in 2009/10.
- (2) That the interim and long-term proposals for the Bicester Residents Parking Scheme be approved, and the confirmation of final scheme details be delegated to the Head of Urban and Rural Services in consultation with the Executive Member for Urban and Rural Services.
- (3) That the process for considering a Residents Parking Scheme for Banbury, including the following elements be approved:
- a) The scheme principles
  - b) The consultation process
  - c) The outline timescales
  - d) The amendment to the previously agreed evaluation criteria
  - e) That areas consulted that do not wish Residents Parking to be introduced are not re-consulted within a two year time period.
- (4) That the implementation of the Council's revised Vehicle Parks Enforcement Policy as approved at the October 2008 Executive be noted.
- (5) With regard to Hackney Carriage ranks in Banbury, Bicester and Kidlington that:
- a) progress on the provision of Hackney Carriage ranks in Banbury, Bicester and Kidlington be noted.
  - b) any decision on additional and /or amendments to existing ranks be delegated to the Head of Urban and Rural Services in consultation with the Leader.

**Reason** – to plan the Council's priorities in relation to resident's parking schemes, Civil Parking Enforcement and investigation and provision of Hackney Carriage Ranks.

## 182 **Choice Based Lettings Scheme - Allocations Policy**

The Head of Housing Services submitted a report which sought approval to adopt a new Allocation Scheme and to enter into a Sub-Regional Choice Based Letting Framework.

### **Resolved**

- (1) That the adoption of the Allocation Scheme effective from 1 June 2009 be approved.
- (2) That the Head of Housing Services in consultation with the Portfolio Holder for Planning & Housing be given delegated authority to amend this effective date, if required.

**Reasons** – to enable the Council to participate in the Oxfordshire Sub-Regional Scheme as recommended by the Oxfordshire Housing Partnership.

183 **Juniper Hill Conservation Area Appraisal**

The Head of Planning and Affordable Housing submitted a report on the consultation responses to the draft review of the Conservation Area appraisal.

**Resolved**

That the Juniper Hill Conservation Area appraisal be approved and that the boundary be extended with immediate effect under Section 69 of the Planning (Listed Buildings and Conservation Areas) Act 1990.

**Reasons** - The Council has a duty under Planning (Listed Building and Conservation Areas) Act 1990 to review Conservation Areas from time to time.

184 **Risk Management Strategy**

The Strategic Director Customer Service and Resources submitted a report which presented an updated Risk Management Strategy.

**Resolved**

That the updated Risk Management Strategy be approved and that the Strategic Director Customer Services and Resources be delegated to authorise the adoption of the strategy following any comments from the Account, Audit and Risk Committee.

**Reasons** - The Risk Management Strategy is designed to support the achievement of the Council's objectives as outlined in all its other policies. It is therefore important that it is reviewed regularly and kept up to date.

185 **Service Delivery in Kidlington**

The Head of Customer Service and Information Systems submitted a report on research conducted into service access in Kidlington which sought Executive support for the preferred option for the development of multi-agency service delivery in Kidlington.

**Resolved**

- (1) That the the proposal to fully investigate the provision of a multi-agency service point at Exeter Hall in Kidlington in partnership with Kidlington Parish Council, and the development of a programme of co-hosted service delivery activities with the Oxfordshire Library Service be supported.
- (2) That a report on the outcome of that investigation be brought to the Executive at its meeting in July 2009.

**Reasons** – to develop multi-agency service delivery in Kidlington.

### **Parsons Street Pedestrianisation Scheme Traffic Regulation Order**

The Head of Economic Development and Estates submitted a report which considered amendments to the draft Parson Street/Market Place traffic regulation order.

#### **Resolved**

- (1) That the draft Parsons Street, Bridge Street and Market Place Order be amended to delete the evening core period between 8.00pm and 1.00am each day, in accordance with the Inspector's recommendation.
- (2) That the draft order be amended to make it clear that the exemption for vehicles delivering mail extends to all Licensed Postal Operators, as defined by the Postal Services Commission, following de-regulation of postal services.
- (3) That the arrangements relating to the issue of residential exemption certificates issued to residents having private off-street parking spaces within the area be varied, to enable them to have two certificates per space which can be used by residents or visitors.
- (4) That the arrangements relating to commercial exemption certificates be varied similarly, so that two certificates can be issued in respect of each private business parking space.
- (5) That the arrangements relating to commercial exemption certificates issued to the owners of private business parking spaces, street and market traders, to entitle them to enter the pedestrianised areas during the core period be varied, for the purposes of accessing their premises or stall.
- (6) That the County Council's authority be sought to make an amendment order to amend the existing High Street and Sheep street Orders, to make similar provisions for commercial exemption certificates.
- (7) That the Head of Economic Development and Estates be delegated authority to make other minor adjustments to the wording of the draft order recommended by the Inspector to clarify the Council's intentions.
- (8) That the Council's intention to make these amendments be advertised, and any objections received be considered at a future meeting.

**Reasons** - If the Council were not minded to accept the Inspector's recommendations, and wished to proceed with the order including the evening core period, it would be necessary to seek the consent of the Secretary of State. He is likely to be concerned by any refusal to accept the Inspector's advice.

If no amendments to the order are made to permit the markets to operate as they currently do, and the order does not allow traders to access market place until 4.30pm, it is considered likely that this will have a detrimental affect on the market.

### **Food Waste Recycling Service**

The Head of Environmental Service submitted a report which sought approval to launch the rollout of food waste recycling across the district from October 2009.

**Resolved**

- (1) That the proposed timescales for the plans in launching a Food Waste recycling scheme using the existing brown bin be noted.
- (3) That the launch of food recycling across the district from October 2009 be authorised subject to a satisfactory analysis of the financial and environmental impacts of the interim arrangements.

**Reasons** - Residents concern about food waste is the main barrier to increasing customer satisfaction on the refuse collection service. Launching food waste will address this concern as well as substantially increasing the recycling rate and reducing the amount of waste going to landfill.

Launching a food waste service does require some one off expenditure. It will also increase waste and recycling costs from 2010/11 due to the loss of a £20/tonne benefit on composting garden waste. However, this increase is substantially reduced due to payments made for out performing landfill targets. These payments could reduce the increase to around £100k/year from 2010/11.

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**Performance Management Framework Quarter 3 Report**

The Chief Executive and Head of Improvement submitted a report which reported the Council's performance against the Performance Management Framework for the period October – December 2008.

The Executive were advised that recommendation 3 was out of date due to the deferment of this report due to bad weather in February 2009 and needed to be deleted.

**Resolved**

- 1) To note the progress made on delivering against the Corporate Scorecard and the other performance frameworks appended to this report.
- 2) To note the responses to the issues raised in the 2nd quarter report and to seek further information in the next quarterly Performance Management Framework report if required.
- 3) To agree that in the next quarterly report there will be an update on the following:
  - a) The target for reducing acquisitive crime by 5% is unlikely to be met and current projections suggest a 2% reduction will be achieved.
  - b) The amount of waste sent to landfill. This is expected to be reduced by a minimum of 1400 tonnes but with the real possibility of further improvement to achieve the annual target of 1500 tonnes.
  - c) The worsening performance on fly tipping and prosecutions.
  - d) The time taken to process minor and other planning applications. These met 59% and 71% of the respective performance targets and are rated Red and there has been a slight deterioration in the performance of both since the last quarter.

- e) The delay in introducing the Food Waste Recycling Service. It is now likely to be Autumn 2009 before the delayed local food waste processing facility is built by the County Council.
- f) The increase in the number of days lost through sickness from 3.58 per full time employee a year to 6.31.

**Reasons** - The purpose of the report is to show the Council's performance against the performance measures in the Performance Management Framework. From this information the Executive can make an overall judgement about the progress the Council is making in meeting its objectives and identify the achievements it wishes to celebrate and the areas where action is required to improve performance.

The meeting ended at 8.40 pm

Chairman:

Date:

## Executive

### Access Strategy

16 March 2009

### Report of the Strategic Director of Customer Service and Resources

#### PURPOSE OF REPORT

To update the Executive on the development of the Access Strategy and ask for comment on the direction it takes and the action plan it proposes, prior to finalising the draft.

This report is public

#### Recommendations

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The Executive is recommended to:

- (1) Agree the vision, aim and objectives of the strategy
- (2) Agree all, some or none of the main pillars of the action plan:
  1. deliver the services most face to face customers want (not just our local office customers), at locations near them.
  2. deliver more services through the telephone contact centre so that more customers have their enquiry or request satisfied at first contact.
  3. deliver the services our online customers want to access themselves, and persuade those customers to change from phone to online.
  4. Use information from customers to improve service delivery, ultimately reducing the amount of contact we handle that is classified as “avoidable” in the definition of NI14.
  5. use NI14 data, customers’ own feedback, complaints and compliments, mystery shopping and customer consultation, to improve our service processes so that the customer need be less proactive and the Council can make best use of its resources – principally staff time.
  6. identify potential efficiencies and improvements to service processes and the investment to achieve those efficiencies, and put in place a means of getting decisions about whether to realise those efficiencies and improvements.
- (3) Instruct the access strategy development group to complete work on the strategy and action plan and bring it back to the Executive for adoption



## **Executive Summary**

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### **Introduction**

- 1.1 The Council has an agreed strategic priority of being an accessible, value for money organisation. This strategy is about achieving that ambition, focusing on removing barriers to access and providing choices to customers, by preventing unnecessary contact and making sure the most cost effective access channels are available and known about.
- 1.2 Unnecessary or avoidable contact is both costly to the Council and an irritation and barrier to customers. Reducing it will enable more services to be delivered within existing resources.
- 1.3 People who use online methods to book holidays and go shopping are not yet able to take that approach to getting the most popular Council Services or doing business with the Council so must phone us when we're open or complete paper forms and so on.
- 1.4 Established processes and procedures can get in the way of easy access, prolonging contact as forms are sent back and forth, both delaying the customer getting what they need, and wasting our own resources.

### **Proposals**

- 1.5 To implement and deliver a strategy that ensures that the processes we use to deliver our services are as simple and quick for customers as possible, and available to them in ways they want that maximise the use of council resources.
- 1.6 To include in the strategy clear objectives and actions that identify and reduce "avoidable contact" as defined by NI14, on all our access channels – face to face, phone, online.
- 1.7 To include in the strategy actions that identify ahead of time the efficiencies that are available through changing a particular process and then capture that efficiency in a clearly identifiable way.
- 1.8 To include in the strategy the implementation of a robust and simple service improvement loop, taking all the information customers provide to use through our feedback channels (Govmetric (the smiley faces on the website, feedback panel in Banbury and phone survey), monthly satisfaction enquiry, annual satisfaction survey, mystery shopping, complaints and compliments, and avoidable contact (NI14 recording)) and making it available in a simple form to service managers to take action.

### **Conclusion**

- 1.9 A draft access strategy has been prepared and comment and feedback on its objectives and aims is sought from the Executive is invited prior to finalising the strategy and its action plan. The draft is attached at Appendix 1.

## Background Information

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- 2.1 The arrangements the council has put in place to improve access to services are an excellent platform from which to understand and manage access. Directing customers through a single team allows a wealth of management information to be collated and acted upon.
- 2.2 In particular, information about avoidable contact is able to be collected and used to improve services, remove barriers to access, and free up resources to deliver more services. The definition of NI14 is attached as Appendix 2.
- 2.3 This strategy applies this approach to more strands than just access to services, embracing access to information, engagement and decision-making, physical buildings and facilities, doing business with the council, and to equal treatment.

## Key Issues for Consideration/Reasons for Decision and Options

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- 3.1 The Executive could decide to restrict the remit of this strategy just to customer service. However, the avoidable contact and barriers to service reside in the services themselves; the customer service function can only flag up what is getting in the way of customers accessing services. Service improvement and the reduction of avoidable contact must be a partnership between customer service and the services themselves.
- 3.2 Similarly, information about services and the council as a whole is very important in making sure customers know what is available and what to expect, and therefore has a key role in minimising avoidable contact.
- 3.3 Some services are not accessed through the customer service team. Access to doing business with the Council is one area where, particularly in the current economic climate, a strategic approach to reviewing how people access the council is appropriate. By encompassing these areas in the strategy we ensure a consistent and systematic approach.

The following options have been identified. The approach in the recommendations is believed to be the best way forward

**Option One**                      Limit the scope of the strategy to customer service and develop a customer service access strategy instead. The downside of this is that customer service is simply the common “front end” to many Council services, and so requires an holistic approach.

**Option Two**                      Don’t have a separate access strategy but require access issues to be embedded in all service strategies. The downside of this approach is that there is no consistency of approach and that similar processes carried out by different services – issuing forms, verifying age etc – are conducted differently and efficiencies are not realised.

**Option Three**                      Separate out NI14 data collection from the concept of access, and simply choose to “tick the box” on data

collection. The downside of this approach is that we would then be expending effort collecting the data with no benefit to the council. The real merit of NI14 is using the information to change our information, processes and services so that customers do not need to contact us for clarification, additional information or because they don't know where else to go, and thereby saving the customer unnecessary effort and removing value-less activity from our customer service and other service teams.

## **Consultations**

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Consultation on the draft strategy will be carried out once the final format and content is agreed.

## **Implications**

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(Financial, Legal and Risk and other implications e.g. Equalities, Human Resources, Data Quality and Environmental where relevant)

### **Financial:**

Setting targets to reduce avoidable contact will enable the customer service function to take on more customer handling from other services without increasing its own resource, and therefore preserve services while generating savings.

Similarly, taking a proactive approach to managing customer access so that use of the most cost effective channels is maximised, is intended to release resource for use delivering additional services.

It is however important that the savings are specified ahead of time so that achievement of them is able to be clearly identified. Application of a technique such as activity-based-costing will help identify and realise efficiency benefits.

Comments checked by Denise Westlake, Service Accountant 01295 221559

### **Legal:**

Any access strategy must ensure the Council has complied with all equalities legislation and ensure all reasonable adjustments are made for services to be accessible to all.

Comments checked by Liz Howlett, Head of Legal and Democratic Services/Monitoring Officer 01295 221686

### **Risk Management:**

The "do more for the same" approach relies on being able successfully to remove wasteful contact, which is not yet proven. There is a risk that the targets being set for this are not achievable.

Comments checked by Rosemary Watts, Risk Management and Insurance Officer 01295 225566

### **Equalities impact:**

The overarching aim of this strategy is to make it easier for all people to get what they need from the council. A

"hard-to-reach" group consultation on Customer Service was carried out as one of the fast-track full Equality Impact Assessments (EqIA) resulting in an action plan which includes requirements for physical changes to buildings such as automatic door openers and signage and, staff development such as training for staff in cultural differences and dealing with aggressive or abusive . Similar consultation is planned for the EqIA of online services.

Comments checked by Grahame Helm, Head of Safer Communities and Community Development 01295 221615

**Wards Affected**

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All

**Corporate Plan Themes**

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Strategy Priority 4: An accessible, value for money Council; Improvement strategy aims: Deliver value for money by achieving the optimum balance between cost, quality and customer satisfaction for all services; ensure there is a culture of continuous improvement and innovation across the Council; recognise the diverse needs of the population and communities of Cherwell.

**Executive Portfolio**

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**Councillor Nicholas Turner**  
**Portfolio Holder for Customer service and IT**

**Document Information**

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<b>Appendix No</b>	<b>Title</b>
Appendix 1	The Draft Access Strategy
<b>Background Papers</b>	
None	
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***Cherwell***

DISTRICT COUNCIL  
NORTH OXFORDSHIRE

## **Customer Access Strategy**

**Breaking down the barriers between our  
customers and our services**

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# Customer Access Draft Strategy 2008 – 2012

## *Introduction and purpose of the strategy*

This document sets out the council's strategies for improving customer access to its services, information, facilities and business opportunities. It is intended to set out a means of managing service delivery channels that balances the wishes of customers against the business requirements of the council providing a coherent, consistent, high quality experience for people dealing with the council. It brings appropriate technology to bear on the problems of ensuring everyone, regardless of age, gender, ethnicity, ability or location, has the same opportunity to deal with the council and get what they need in ways that suit both them and the Council's capacity to deliver.

This strategy builds upon the Customer Research and Exit Surveys carried out in August 2007. It makes full use of geo-demographical information enabling us to define access and deliver a cost effective, meaningful service to the communities within our district.

Its primary object is to increase the degree to which the council is accessible and seen to delivery value for money. Its three principle aims are

- To understand as completely as possible our different customer groups, their needs and preferences in terms of services and ways of accessing them.
- To identify and implement ways of working – including the use of technology – that maximise all customers' opportunity to know about and access what they need in the context of value for money
- To provide consistent, equal access to the council throughout the district, including those areas most difficult to serve.

## *Timeframe of strategy*

This is a medium-term strategy covering the period April 2009) to March 2012.

## ***Strategy Review and Performance***

The strategy aims, objectives and actions outlined in this document and action plan will be reviewed and updated on an annual basis taking into account new policy developments and changes in local requirements, areas identified for improvement and national policy initiatives and ensure these are reflected in new actions as required.

Performance, in terms of implementing the action plan, will be reviewed by officers on a quarterly basis as part of the Customer Services and Information Services Team's service plan.

## ***Strategic Vision***

Cherwell District Council wants to make it as easy as possible for people to know about and access public services, participate in decision-making, do business with the council or carry out a business in the District, and use our buildings, in a culture that promotes equal access for everyone, whatever their circumstances. At the same time the council is intent on making sure that it gets value for money from its own resources, identifying and stripping out wasteful activity and inefficient processes that impede customer contact.

## ***Strategic Aim***

This strategy is directed at delivering the vision: making the right services available in the most accessible ways to the appropriate customer group, identifying and removing barriers to access, and maximising the council's use of resources. It is anchored in the council's strategic priority 4: an accessible, value for money Council

- > Be easy to contact, approachable and responsive
- > Always treat everyone with dignity and respect
- > Deliver value for money by achieving the optimum balance between cost, quality and customer satisfaction
- > Reduce the financial burden to local taxpayers
- > Work with others to provide local services



## ***Strategic Objectives***

Our objectives are to:

- > To be a gateway to as wide a range of services as possible
- > To push our services closer to our customers
- > To balance customer needs and preferences against efficient delivery and value for money
- > To make available, and remove barriers to accessing
  - > relevant and timely information about the council and its services
  - > engagement and involvement
  - > business relationships with the council
  - > engagement and dialogue with the council
  - > our buildings and facilities
  - > equal treatment

## **What is access to services?**

We provide a range of opportunities to allow the customer to interact with us, whether it is to seek information, guidance or service delivery. (Where appropriate this extends to partner organisations). We recognise that our customers want to use different channels for different purposes at different times and that some contact is more appropriate to some channels than others. It is important therefore that we provide multiple service channels but that the same high level of service is delivered through all of them.

We have already reorganised our face to face to delivery to ensure equal hours of opening in all locations. Both phone and face to face contact is handled by the same team, ensuring consistency of service. The same information systems are available to customer service staff wherever they are, so again, consistency is ensured whatever route customers choose to come to us. This provides a sound basis for starting to dismantle other barriers to customer access in a measured, consistent way, to maximise the value of the customer service resource now in place, and ensure the most open access for customers.

## **Our customers – who is accessing our services, and how?**

**We recognise four broad categories of service “interaction” type.**

- Information enquiry. When are you open, Do you need a parking permit?...A simple question answered and finished with there and then.
- Accessing a service. Making an application, buying a bin.... Something the customer can complete the first stage of there and then but may require some subsequent activity, scheduling, etc before the service can be considered delivered.
- Paying a bill. Council Tax, business rates... This involves a reference number or account number and paying for something distant from its delivery.
- Paying for something there and then: an application, pest control, a bulky waste collection, bus pass....

**We refer to three main channels of access:**

According to the combination of service content and interaction type, some access channels are more suitable

- Face to face: one stop shops, partners, exhibitions, talks, visits, surgeries...
- Phone – current mix of contact centre, DDI and switch. This will extend to text messaging.
- Online – information and transactional, self service and mediated, in home and at access points

(Reference pack pg 1)

## **Our face to face channel and its customers**

Hard-pressed, older and disabled residents favour “face to face”. This has service access implications for how we setup our buildings, compliance with DDA and Building Regulations PartM; where our facilities are actually located, their opening hours and the groups of services we make available to personal visitors.

But we must also ask: Why is this the channel of choice for these groups? And why not for other groups? What can we do to make it easy for those who clearly prefer it, without disenfranchising those who maybe don't feel it's “for them”.

There is a mismatch between the services required by the customers who *prefer coming to our local offices* in person, and the services customers *prefer to access face to face* – or indeed services that can only be delivered face to face – local land search, registering as homeless, planning issues for example. These services and others are currently only available to personal visitors to Bodicote House.

What can we do to make our service delivery buildings attractive to customers of all for those services? How can we get those services delivered through those offices.

Over the next three years plans are in place to re-invent our service delivery in Kidlington, providing a co-located multi-agency service point. In Bicester completely new civic buildings provide a similar opportunity to examine how we can take our services into the heart of our key communities. (Reference pack pg2)

**This strategy sets out the route to delivering the services most face to face customers want (not just our local office customers), at locations near them.**

## **Our phone channel and its customers**

Telephone remains the most popular route to service delivery. The annual satisfaction survey shows more than half the people who contacted us in the previous twelve months did so by phone. As a whole organisation we receive well over half a million phone calls a year, around 120000 of which are directed through the phone contact centre operated by Customer Service. More than 90% of these calls are completed at that first contact, as the team has the training and information to hand to deal with those services for which contact centre numbers are published. In addition, these calls provide a wealth of management information about how long people wait, how quickly their call is dealt with, reasons for contact and so on. But we currently (January 2009) publish many dozens of numbers for different services.

**This strategy sets out the route to delivering more services through the telephone contact centre so that more customers have their enquiry or request satisfied at first contact**

**The telephony strategy that sits alongside, sets out in detail the route to giving customers a simple choice of just a handful of numbers to call to get hold of key groups of services.**

Looking at the actual usage of our phone channel in 2008/09, a similar question is posed as came up when looking at the face to face usage: How come so many “online people” still ring us up? We know that online usage is high in “urban prosperity” group. They do much of the rest of their life online – shopping, arranging holidays and so on. We know that a key barrier is the availability of the services they want, online. In January 2009 it was clear from customer feedback on the phone and via the website that information about seasonal bin collections was a key service wanted for self-service. In response, an online address search for bin collection day has been implemented. This service is clearly not just for customers to use themselves but ensures consistency of information as our customer service advisers use the same facility when talking to customers on the phone or in person. (Reference pack pg3)

### ***Our online channel and its customers***

We deliver a growing range of services over the internet. We take bill payments; we accept planning applications via “The Planning Portal” national service, and people can submit their comments and responses to planning consultations; all publicly available documents can be downloaded; complaints and compliments can be submitted; council meetings can be viewed; reporting of highways issues (potholes, street lights etc), a wide range of environmental issues (fly tips, graffiti); and access to many dozens of information types available to be presented on maps showing “my nearest”. (for evidence pack pg 4)

However, we are only now, at the start of 2009, beginning to develop online forms that will allow customers to request services such as a bulky refuse collection, additional bin purchase, pay for it and have the date/time confirmed without the intervention of a customer service adviser. Making it possible for customers who want to, to access services they need themselves, will free customer service resources for other services not suited to online delivery, and other customers not able to access online delivery

**This strategy sets out the route to delivering the services our online customers want to access themselves, and proposes the means to persuade customers to change from phone to online.**

## ***Our resources – are they deployed efficiently?***

We need to promote cost effective ways of accessing services and to ensure that we make the connections between various access channels. Around half the customer service team work in a face to face environment and half in the contact centre. Approximately half a full time post is given over to handling email and online enquiries which are directed to “customer service”. The team rotate around all the offices and the contact centre. Looking just at their use of time, not at building costs and so on, we can calculate the “cost to serve”:

- > phone costs (5 min customer service team member): £2
  - > (national benchmark £3.76)
- > face to face costs (15 min exc. building costs): £6
  - > (national benchmark £9.34)
- > Our estimated self service costs: £0.25
  - > (national benchmark £0.27)

The benchmark figures are provided through the Society of IT Managers who have calculated through liaison with hundred of local authorities. Cost per transaction is not necessarily a “real” cost but it provides a useful numerator to put a value on capacity. (Reference pack pg 4)

Currently around a quarter of all contact could be avoided and our customers saved the trouble of having to ring, email or visit us. That is a key element of the cost to serve, tying up resources that could be better deployed elsewhere. Detailed breakdown for our most used channel, the phone is as follows:

### ***Avoidable contact – National Indicator 14***

Around 50% of our current phone contact is currently avoidable, as categorised by NI14 – when:

- Customers don't understand what service to expect
- Customers don't know the timeframe within which something can happen
- When we make a mistake or omission

Stripping out avoidable contact will free customer service resources to handle more service contact at no increase in resource. Combining this with a migration plan that moves customers between channels, makes best use of our resources:

This strategy sets out the route to taking this information and using it to improve service delivery, ultimately reducing the amount of contact we handle that is classified as “avoidable” in the definition of NI14. (Evidence pack pg 5)

### ***Our services – are they optimally designed?***

To help reduce avoidable contact it is necessary to look at the way we organise our services and present them to our customers. If they are not finding it easy to understand what service to expect, how can we make it clearer and reduce the need for customers to ring us up and ask us what we meant.

This strategy sets out the route by which NI14 data, customers’ own feedback through GovMetric, complaints and compliments, mystery shopping and customer consultation, can be applied to our service processes to improve them so that the customer need be less proactive and the Council can make best use of its resources – principally staff time.

## Our systems – are they optimally configured?

Channel	Current
Face to Face	<p>Through our offices in Banbury Town Centre, Bicester and Kidlington.</p> <p>All of our offices are open Monday to Friday 8.45am (10am Wed) until 5.15pm.</p> <p>Through the one stop shop at our headquarters at Bodicote House, open Monday to Friday 8.45am until 5.15pm.</p> <p>The offices are staffed by the Council's customer service team, and offer a developing range of surgeries with the Council's service delivery partners such as CAB and Sanctuary Housing.</p>
Telephone	<p>Most high volume services are accessed through the council's contact centre, staffed by our customer service team who handle a significant part of the Council's customer contact. Services handled as at Jan 2009: Waste and recycling, Council Tax, Housing and Council Tax Benefits, Abandoned vehicles, Noise complaints, Food safety, Pest control and general enquiries. More services will be transferred.</p> <p>Voice over Internet Protocol (VoIP) telephony has been installed at the Bicester and Kidlington offices which allow the customer service team members there to "plug in" to the contact centre phone system and take calls when personal visitors are few in number.</p>
Self Service	<p>Self service computers at all the local offices and at Bodicote House, providing access to a limited range of websites for customers to access services including online reporting, payments, downloads and webcams of council meetings.</p>

Many of our services are managed through the use of computer systems. Access to those systems, the information held in them can affect the ease with which customers get the services they need.

Some of our services have not yet been able to take advantage of the investment the Council has made in improved information storage and retrieval such as our Geographical Information Systems, to improve the speed, reliability and efficiency of their service delivery, or to present a self-service option to customers.

We know from others' experience that there are significant efficiencies to be achieved through being able, for example, to take a service request such as for a bulky refuse collection, direct from a customer using a form on our website and generating a job in an individual team's work calendar, without the need for customer service intervention. Taking such a step towards "deep integration" can be expensive but it can mean fewer people are needed in the long run. For some services the initial investment will not be able to recoup sufficient long-term efficiencies, but for others the return could be rapid and significant. (Reference pack pg 6 *Current Model of service delivery (January 2009)*)

## Underpinning principles to our approach to service improvements

Channel	Future
Face to Face	<p>Developing the range of services provided by Customer Services and integrating with the CRM will result in increased resolution of enquiry at first point of contact.</p> <p>Developing the range of services offered through the CRM will allow service experts to deal with more complex issues.</p> <p>Provide more joined up services in collaboration with other partners, both in surgery form and through direct service delivery.</p> <p>Expand and improve access to services in Kidlington.</p> <p>Smartcards have been described as a personal, portable and highly secure means of accessing facilities and paying for goods. In practice they are cards containing chips (or integrated circuits) which have the capability to store data. More advanced cards contain data processing facilities. A wide range of functions could be supported by Smartcards. Some authorities' smart cards also offer discounts for local shops and services to local residents. The cost required to produce and the resource required for delivering and maintaining the Smartcard system is high some larger council's are using a phased approach as current Library/Leisure cards expire.</p>
Telephone	<p>Implement much more sophisticated telephony to remove the bottleneck of switchboard and give customers a simple choice of a few numbers to access all the main areas of service, bringing resolution to their query closer and quicker.</p> <p>Ensure equal cost of phone access to customers wherever they are in the District – or beyond.</p> <p>Bring about consistent telephone response standards across the organisation including individual service phones, so whether or not the customer come through the customer service team they get the same standard of service.</p>
Self Service	<p>Develop services available online to include service requests for high volume services (particularly in environment and amenities) and a booking facility for Leisure and Amenity services.</p> <p>Interactive Digital TV (iDTV) gives customers the ability to interact online and access services through their TV, making communication, transactions, information and news available to citizens at their convenience. Advantages are that potentially there is greater population reach as nearly all homes have a television (albeit not digital as yet).</p> <p>Where appropriate implement local access points, bringing the online channel to locations and communities less well served with other access channels. Investigate mobile service delivery first through the use of the Health Bus and then in partnership with others.</p>

**This strategy sets out the route by which potential efficiencies and improvements to service processes can be identified, the investment to achieve those efficiencies identified, and decisions made about realising those efficiencies and improvements. (Evidence pack pg 7 A model of complete “deep integration”)**



## Summary of Access to Services barriers and how they may be resolved

Issues of efficiency and impediment	Routes to resolution
<p>Our local LinkPoints are predominantly used by older people making payment in person. This ties up resource and may make other customer groups feel the face to face channel is not for them: they continue to travel to Bodicote House for, for example, planning services</p>	<ul style="list-style-type: none"> <li>• Be pro-active in promoting alternative routes to payment of bills and make it easy for people to change</li> <li>• Be pro-active in communicating the range of services available locally to customer groups who continue to use Bodicote House</li> </ul>
<p>A large proportion of the District population are online-savvy and entirely at home using online channels to book holidays, buy goods etc. However, they continue to make up a large part of our telephone customers thus using resource that could be better applied to other customers.</p>	<ul style="list-style-type: none"> <li>• Develop a timed programme to make available online access for a wide range of services according to identified need.</li> <li>• Look at and plan for integrating self service routes (online forms, largely) into service delivery computer systems to reduce the double or triple handling of service requests.</li> <li>• Ensure the availability of online access is promoted strongly to those best placed to take advantage of it and who currently use other access methods.</li> <li>• Establish targets for reducing the volume of contact for online-available services that is made by phone and increasing the volume via self-service.</li> </ul>
<p>People are not expert at distinguishing the various responsibilities for different levels of local government and a proportion of our customer service resource is spent signposting to other suppliers rather than delivering services.</p>	<ul style="list-style-type: none"> <li>• Bring more service providers into our local LinkPoints</li> <li>• Deliver more services on behalf of other providers</li> </ul>
<p>The cost to serve varies greatly across channels. Currently around 38% of our customer contact is through the phone contact centre and represents about 42% of the cost to serve, while 32% is through our face to face locations but represents almost three quarters of the cost to serve.</p>	<ul style="list-style-type: none"> <li>• Ensure those services that most benefit from face to face delivery – where there are complexities and different circumstances to consider, and where the opportunity to “bundle” services would be beneficial – are prioritised for this route, and alternative channels for other services are promoted.</li> </ul>
<p>At the end of 2008/09 approximately a quarter of the customer contact handled by customer service is classed (NI14) as “avoidable”. This can be quantified as around 330 man-hours a month, or £95,000 per year. Reducing this will enable the team to do more,</p>	<ul style="list-style-type: none"> <li>• Electronic forms ensure the right information is collected, and greatly reduce errors and omissions and the need to prolong contact.</li> <li>• Embedding the principle of the improvement loop so that causes of avoidable contact are fed into services for them to resolve.</li> <li>• Process review of all services whose contact is handled by customer service to</li> </ul>

<b>Issues of efficiency and impediment</b>	<b>Routes to resolution</b>
<p>within the same resource.</p>	<ul style="list-style-type: none"> <li>• identify potential causes of unnecessary contact.</li> <li>• Establish targets for reducing the volume of contact defined as avoidable (NI14) .</li> <li>• Improve first time resolution so customers need not make repeat contact.</li> <li>• Develop and publish a programme of monthly satisfaction surveys (phone), mystery shopping, GovMetric reporting</li> <li>• Ensure all service information is clear and unambiguous so customers do not need to call us for clarification. This to include achieving crystal mark for the website.</li> </ul>
<p>Volume of phone contact into the contact centre is volatile, varying according to service “triggers” (letters to customers, advertising campaigns, news coverage etc.). Generating avoidable peaks in calls prevents people getting through and to call back several times, thus preventing more customers from access.</p>	<ul style="list-style-type: none"> <li>• A coordinated calendar of outward-bound customer contact will help remove peaks of contact, and customer access for one service being disrupted by those of another.</li> <li>• Real time information into the contact centre about activities occurring that will provoke customer contact.</li> <li>• Establish a reducing wait time target for contact centre callers that leads to us achieving a “five minute” ring to resolution target within three years.</li> </ul>
<p>A third of our population live in rural areas, away from where our local LinkPoints are located.</p>	<ul style="list-style-type: none"> <li>• Implement local access points.</li> <li>• Promote PayPoint through the community contract in place with the Council</li> <li>• Improve access to services in Kidlington.</li> <li>• Investigate mobile service delivery first through the use of the Health Bus and then in partnership with others.</li> <li>• Home visits?</li> </ul>
<p>There are channels popular with our customers that we currently do not use, and others that will emerge in the future such as smartcards (via National ID Card)</p>	<ul style="list-style-type: none"> <li>• Look at what services and communication can be implemented through texting SMS</li> <li>• Examine the case for iDTV (interactive digital television)</li> </ul>
<p>There are a large number of contact numbers published for services, making it probable that some calls will go unanswered, many have no management information associated with them, and customers need a directory to find an appropriate number.</p>	<ul style="list-style-type: none"> <li>• Review and reduce the number of phone numbers so that customers have a simple choice of a handful of numbers associated with main service areas.</li> <li>• Remove the access bottleneck that is the switchboard.</li> <li>• Exploit the flexibility of the contact centre system to manage calls and provide management information.</li> <li>• Implement a timed programme of transferring clearly identified customer-handling aspects of as many services as possible to the customer service team, with</li> </ul>

<b>Issues of efficiency and impediment</b>	<b>Routes to resolution</b>
	<p>associated process review, automation, and self-service development where appropriate.</p> <ul style="list-style-type: none"> <li>• Ensure equal cost of telephone contact for all customers</li> <li>• Bring about consistent telephone response standards across the organisation including individual service phones, so whether or not the customer come through the customer service team they get the same standard of service.</li> </ul>
Some service delivery processes are not well designed and generate avoidable contact	<ul style="list-style-type: none"> <li>• Review processes from a customer perspective, map and analyse end to end to identify inefficiencies and the impact on our customers</li> </ul>
The potential benefits of deep integration of some services have not yet been quantified	
A simple and accessible online complaints system	<ul style="list-style-type: none"> <li>• Setting up a simple form for integration into the councils CRM system allows customer advisors on behalf of customers and customers to self serve and complete a complaints form online. This enables a prompt response to be made to customers and enables us to use the information which we gain from complaints in an intelligent way to further improve our services</li> </ul>

## Accessing Information

### Producing clearer, simpler, quicker communications for Cherwell residents and staff

Issues of efficiency and impediment	Routes to resolution
Print, letters - info in writing	<ul style="list-style-type: none"> <li>Revisit the language we use, making our publications easy for people to read and understand. Eradicate nonsense words which could mislead our customers. Promote plain English in all communications</li> <li>Increase recognition of the Cherwell logo and its brand values. Clarity on this will help residents feel more closely associated with Cherwell as a district and with the council as a service provider they can identify and trust</li> </ul>
Service information eg bin collection schedules, info in tables etc	<ul style="list-style-type: none"> <li>Our website provides comprehensive information on services. Downloadable pdf's are available for environmental services calendars and information on leisure activities in the district. Local view provides our customers with a range of service and public sector information about the place they live, ranging from local democracy to information on schools and hospitals</li> </ul>
Online channels – need equipment and reading	<ul style="list-style-type: none"> <li>Screen reading software</li> <li>Crystal mark</li> </ul>
Translation, interpretation and format	<ul style="list-style-type: none"> <li>We offer translation services from all of our LinkPoints and over the telephone. Our written information is available in other languages and formats such as large print, audio tape on request.</li> <li>A translation service for our web pages is in development</li> </ul>
Queue messages on the contact centre phones Proactive – tell me when, and tell me in this way	<ul style="list-style-type: none"> <li>Improve telephony technologies</li> <li>Introduce automated response on services with high telephone traffic to alleviate customer wait time</li> </ul>

## Accessing engagement and involvement

How we consult and engage with local people and communities, including residents, people who work in the district, local businesses and the voluntary and public sectors....

Issues of efficiency and impediment	Routes to resolution
<p>Consultations</p> <p>Why we consult</p> <p>How we consult</p>	<ul style="list-style-type: none"> <li>• The Consultation and engagement strategy sets out a broad framework for consultation and engagement. This framework will be used as the basis for a medium term action plan to guide the work of the Council in this area during the period 2009-2012. As part of the strategy a charter will be developed that clearly and concisely outlines what members of the public and other stakeholders can expect from the Council in terms of the consultation and engagement activities that we undertake. Guidance, training and 'toolkits' will also be developed to ensure that Council employees have the necessary support and training to meet the objectives in this strategy.</li> <li>• The main purpose of consultation and engagement is to ensure that our services reflect the needs of the local community. This requires us to actively undertake consultation to inform strategy, policy, service development and the allocation of the council budget. Key requirements include: <ul style="list-style-type: none"> <li>○ To support the role of Councillors in understanding the needs and wishes of the Cherwell community</li> <li>○ The need to inform the community strategy and provide a solid knowledge base for developing services and service strategies</li> <li>○ To measure customer satisfaction and opinion in relation to service delivery and be able to track changes over time and in relation to service changes</li> <li>○ To measure issues around quality of life, such as the fear of crime</li> <li>○ To measure Local Area Agreement (LAA) targets and other performance indicators</li> <li>○ To improve the delivery and take up of our services</li> <li>○ To support bids for resources or the allocation of resources</li> </ul> </li> <li>• We are committed to using consultation and engagement methods that are inclusive and appropriate for the target audience. The council is also keen to consult in partnership with others and works with partners to jointly commission consultation. We</li> </ul>

Issues of efficiency and impediment	Routes to resolution
<p>Planning</p> <p>Who do we consult</p>	<p>recognise that there may be people or groups that are less likely to take part in consultations for a number of reasons for example they may have language or other accessibility requirements, they may not use many council services, they may be busy or spend a lot of time outside the district. These groups are often called 'harder to reach' and different approaches are usually required to establish and maintain contact with them, so that their views are not overlooked.</p> <ul style="list-style-type: none"> <li>• We ensure that all sectors of the community have the opportunity to have their say in how their community is planned and developed irrespective of age, sex, ability, ethnicity, background or disability. Consultation techniques set out in this SCI will therefore be tailored to meet the specific needs and characteristics of all people in the District interested in planning for their area.</li> <li>• The people and organisations that the Council will consult as part of the planning process are defined by the Town and Country Planning (Local Development) (England) Regulations 2004 as: <ul style="list-style-type: none"> <li>• Specific Consultation Bodies - bodies that the Council is statutorily required to consult as part of the planning process; and</li> <li>• General Consultation Bodies - individuals or organisations whose support or opposition to development may be significant, or who have particular expertise.</li> </ul> </li> <li>• We understand that, given the range of issues to be addressed by Development Plan Documents (DPDs) and Supplementary Planning Documents (SPDs) and the wide range of Consultation Bodies that the Council will involve during the Local Development Framework (LDF) preparation process, it is important to tailor consultation arrangements to meet the needs of specific groups. In particular, efforts will be made to ensure people who traditionally have not been involved have the opportunity to have their view heard. These people include the elderly, the young, disabled, ethnic minorities and residents of deprived areas. The Council will work with people from these groups to design consultation methods they can engage with.</li> </ul>

## ***Accessing our buildings and facilities***

**It is essential that all of our corporate buildings are maintained to a high standard to ensure the properties are safe and accessible for our staff and customers and our property assets retain their value**

<b>Issues of efficiency and impediment</b>	<b>Routes to resolution</b>
<p>Maintain regular DDA Audits</p> <p>Part M compliance and codes of practice</p>	<ul style="list-style-type: none"> <li>• The resource is no longer available in house so the provision of DDA Audits will be outsourced</li> <li>• The Councils Property Team work closely with Building Control to ensure all of our properties meet required building regulations. Providing regular monitoring and servicing of all water systems to ensure compliance with the Approved Code of Practice L8 – the control of Legionella via an external provider. In-house inspections for asbestos to ensure compliance with the Control of Asbestos Regulations 2006 and ACoP</li> </ul>

## Access to doing business with the council

### Supporting economic development at a local level for businesses and residents of our district

Issues of efficiency and impediment	Routes to resolution
<p>Buying and selling Services</p> <p>Enforcement</p> <p>Support and economic development</p>	<ul style="list-style-type: none"> <li>• In October 2008 Cherwell District Council convened a Local Business Liaison Group whose key objective is to provide direction and facilitate action for the Council's proactive engagement with local businesses with a particular focus on SMEs. This objective is based upon the principles of the Small Business Friendly Concordat (launched by the LGA and the DTI in March 2005). The following support is provided via our website to local SME's:             <ul style="list-style-type: none"> <li>• A Guide to doing business with the public sector.</li> <li>• A Contracts Register listing contracts with a value of more than £10k p.a. - i.e. indicating forthcoming opportunities.</li> <li>• A page containing adverts on forthcoming opportunities.</li> <li>• Information on other sources of tender opportunities - particularly the Supply2Gov website that lists opportunities across the public sector for contracts worth under £100k p.a.</li> </ul> </li> </ul> <p>The group is made up of officers from across the Council, including Business Development, Communications, Community Planning and Procurement and also has Member representation.</p> <ul style="list-style-type: none"> <li>• All contractors are pre-qualified and encouraged to abide by best practice, Equal opportunities and Diversity guidelines</li> <li>• We host the Oxfordshire Business Enterprises service <a href="http://www.oxonbe.co.uk">www.oxonbe.co.uk</a> - helping residents to start-up their own businesses (and offering specialist help to tackle problems). This service is accessible by phone, email and from our website and the service is provided face-to-face at 9 venues throughout the County. (Venues list evidence pack separately).</li> <li>• We help businesses find new sites and premises in and around Banbury, by co-ordinating the Cherwell Investment Partnership (CHIP) - <a href="http://www.cherwell-m40.co.uk">www.cherwell-m40.co.uk</a> This service is available by phone, email and from our website.</li> </ul>



Issues of efficiency and impediment	Routes to resolution
	<ul style="list-style-type: none"> <li>• We help local businesses to establish a Local Employer Network to help businesses work with each other for mutual &amp; wider community benefit. Accessible through the new CHIP website.</li> <li>• We work closely with Banbury Chamber and business groups.</li> <li>• We co-ordinate the Banbury Job Club and produce a redundancy guide to help employers and employees. "Help for residents facing redundancy". <a href="http://www.cherwell.gov.uk/media/pdf/t/7/Redundancy_Guide.pdf">http://www.cherwell.gov.uk/media/pdf/t/7/Redundancy_Guide.pdf</a></li> <li>• We sponsor the local business awards, innovations awards and expos to recognise and promote success.</li> </ul>

**Access to equal treatment**

<b>Issues of efficiency and impediment</b>	<b>Routes to resolution</b>
Equality Standard Changing demography?	The OSS (and other) EqIA

## **Impact Assessment**

There is potential for positive environmental impact from this strategy, as the more we can deliver through local offices the less travel up and down the district there can be.

There is also significant potential for positive financial impact as the principle of clearing wasteful and unnecessary contact to make room for meaningful contact means we do more for the same.

## **Risk Assessment**

What are the risks associated with managing contact and access? First thoughts (without controls or mitigation, likelihoods or impacts) and only from a customer service perspective – there will be others associated with the other strands, I'm sure:

## **Page 36**

### **Operational**

Professional – will vary by service; customer service may suffer if resource not released through successful channel migration and avoidable contact removal

Financial –target resource release may not be achieved so doing more with the same resource may not be achieved; costs associated with integrating online forms with service deliver computer systems may be significant and won't be revealed til projects are scoped.

If we are not providing a good access route to the market we risk failure in achieving value for money with our contacts. A robust and continually developing access strategy when it comes to doing business with the Council ensures that we receive the best value for money and in turn stimulates the local economy.

Legal – delivering services on others' behalfs will require SLAs which carry some legal standing

Technological – integrated self service may not be quickly achievable; project scope will reveal costs in financial and time terms

### **Strategic**

Political – we don't achieve the targets in this strategy

Economic – growth in benefits applicants and requests for other services related to current external economic circumstances may compromise capacity

Social – again, current economic climate, known changes to the population demographic etc. result in service demand that compromise capacity

Technological – new channels come into being at a pace the council is unable to keep up with and so customer choice is compromised and opportunities for efficiencies missed  
Legislative – we may be prevented from delivering services on behalf of some partners



DISTRICT COUNCIL  
NORTH OXFORDSHIRE

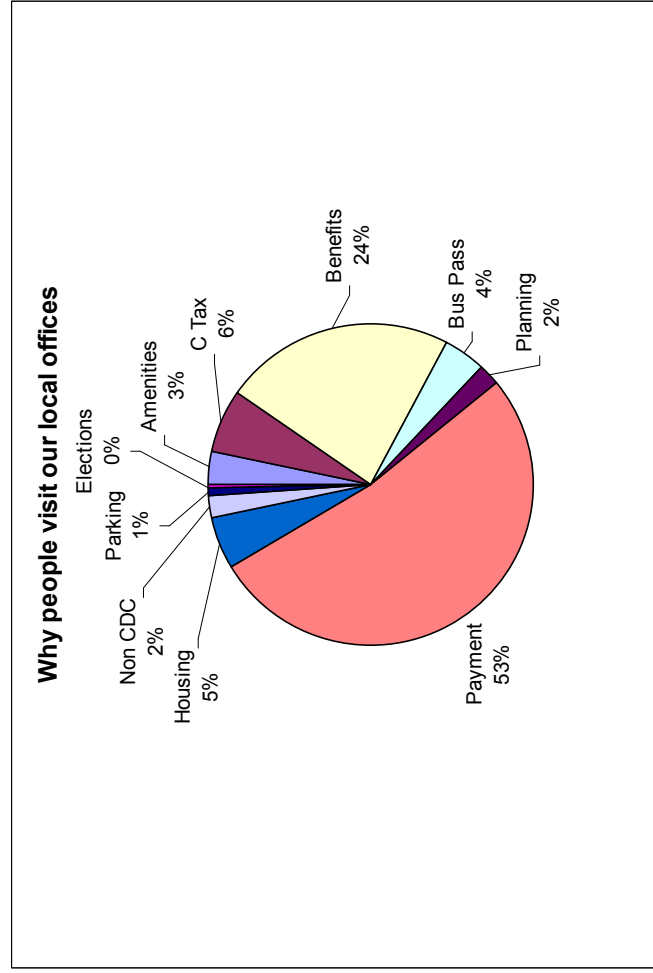
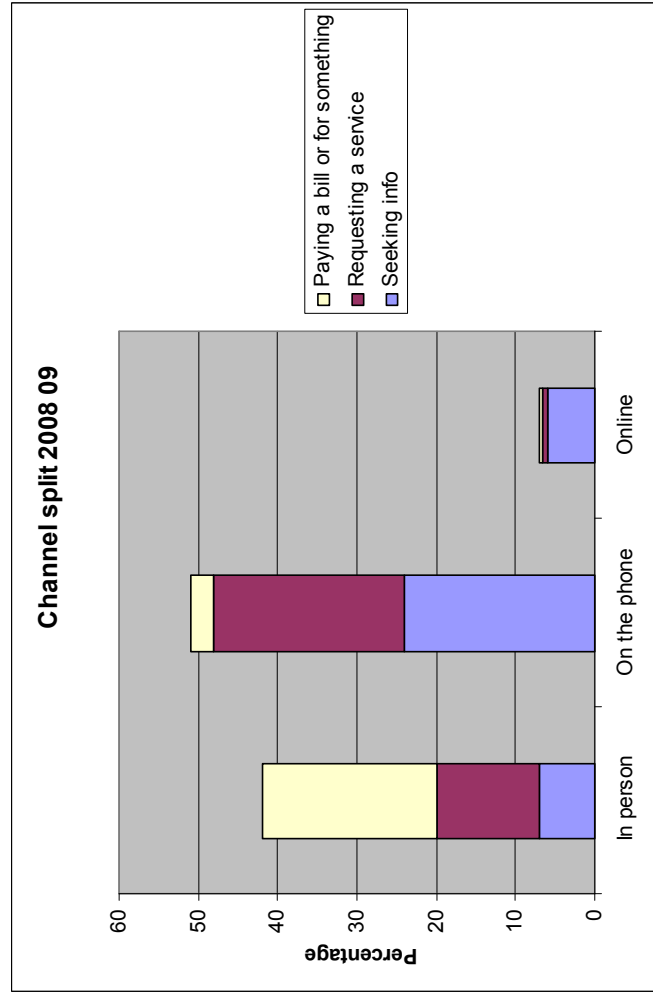
# Customer Access Strategy

## Reference Pack

# Contents

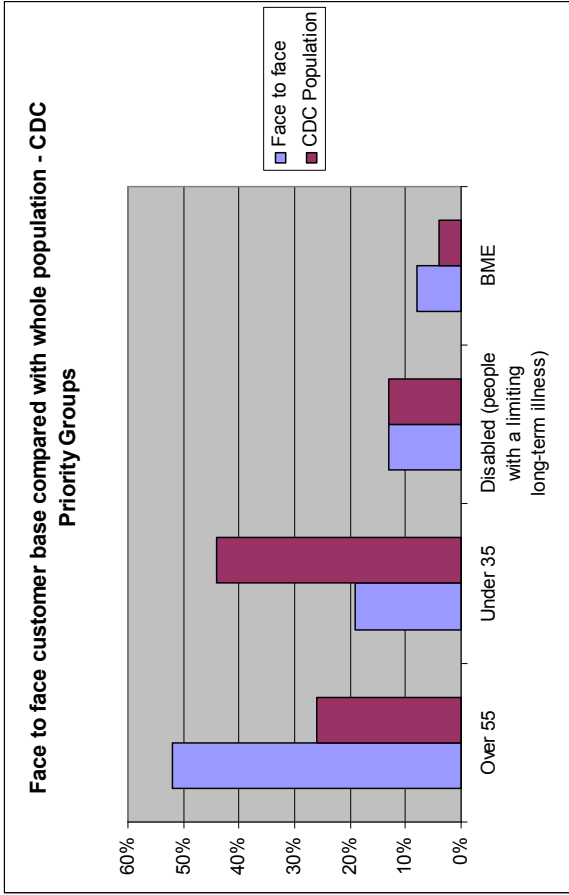
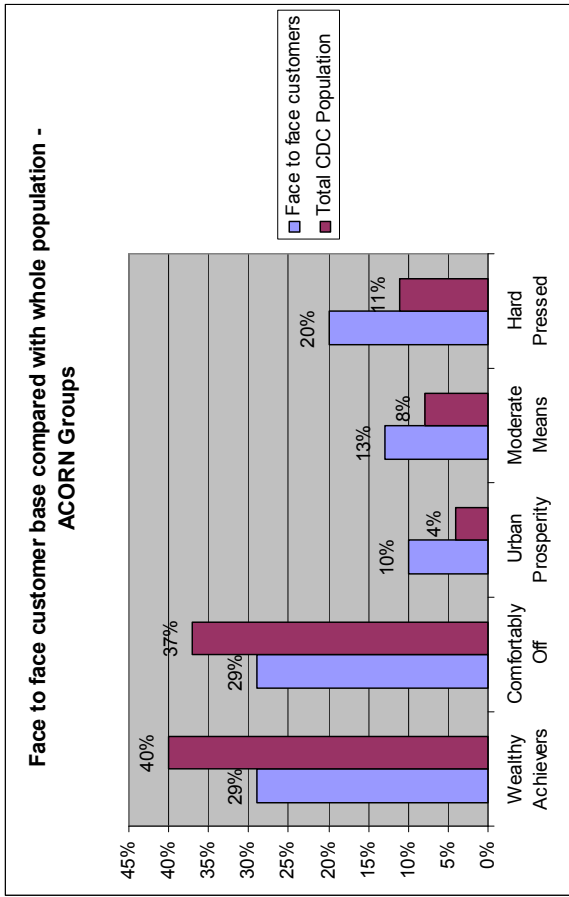
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## 1. Our customers – who is accessing our services, and how?

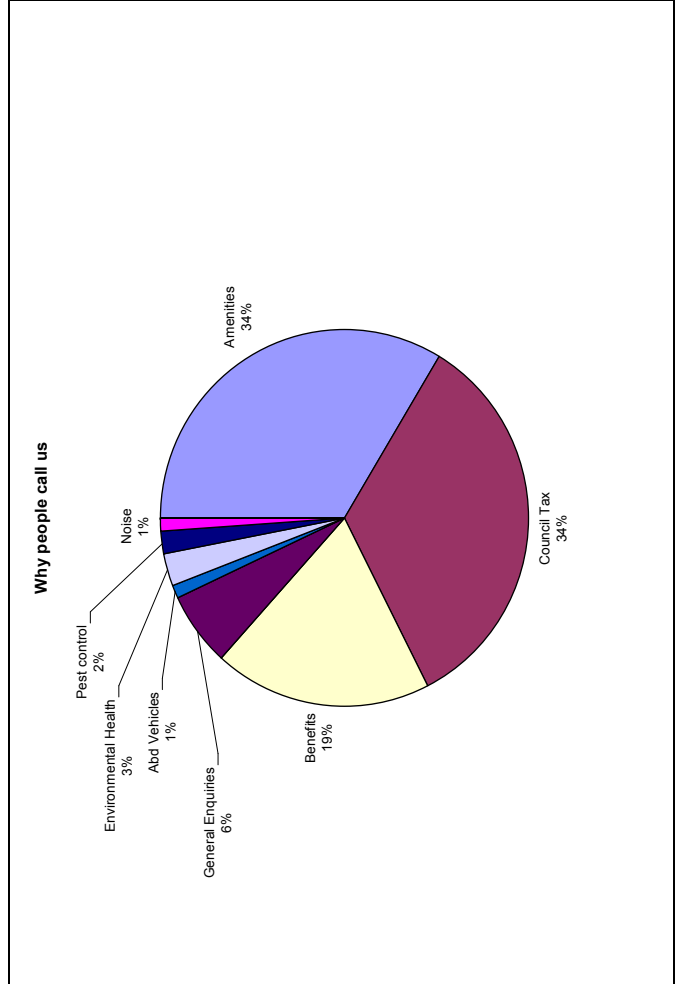


## 2. Our face to face channel and its customers

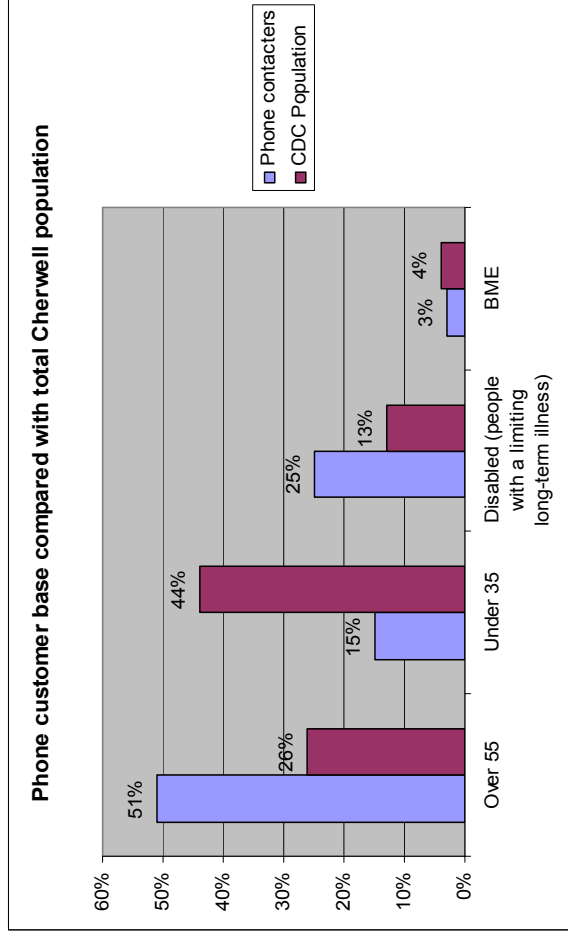
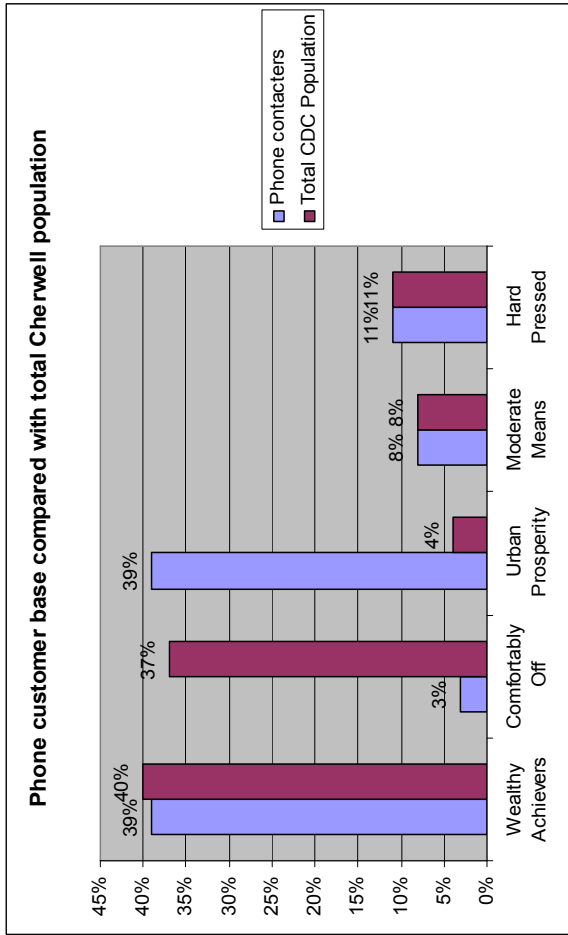
Hard-pressed, older and disabled residents favour "face to face". This has service access implications for how we setup our buildings, compliance with DDA and Building Regulations PartM; where our facilities are actually located, their opening hours and the groups of services we make available to personal visitors.



### 3. Our phone channel and its customers







#### 4. Our resources – are they deployed efficiently?

The costs used for phone and face to face are based solely on customer service team. The online cost is an average across all services as it takes into account mail direct to publicly advertised mailboxes, payments across all services, all documents etc.

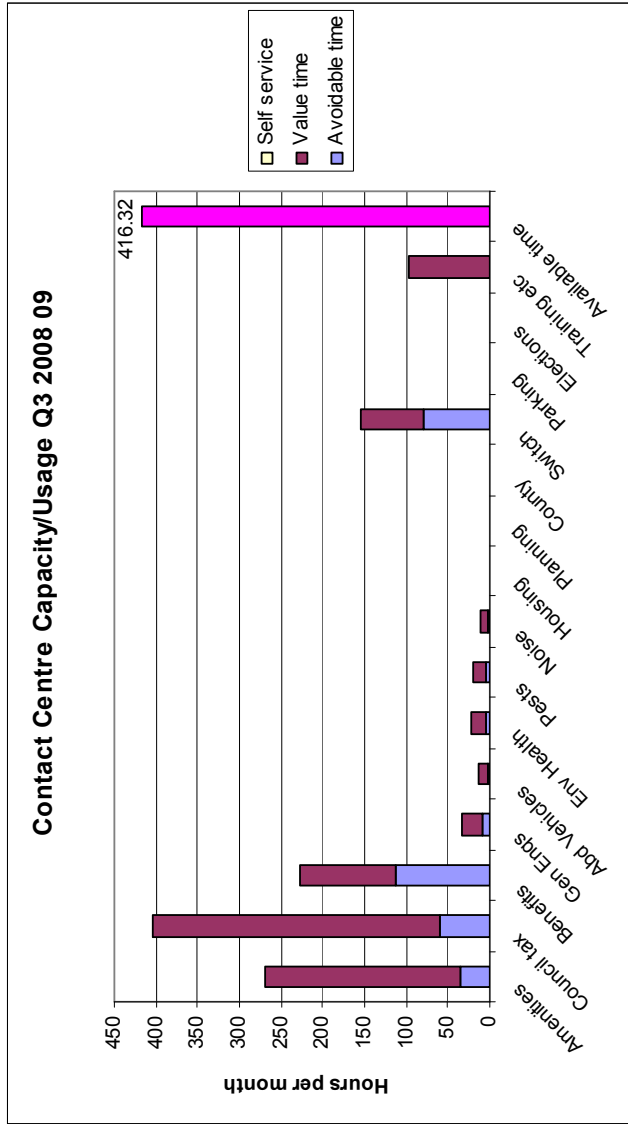
Channel	Annual contacts	%	cost	% total cost
Phone contact	120000	38%	£240,000	42%
Self Service	100000	31%	£25,000	4%
Face to face (service)	50,000	16%	£300,000	53%
Face to face (Payment)	50,000	16%	£120,000	21%
	320000		£565,000.00	

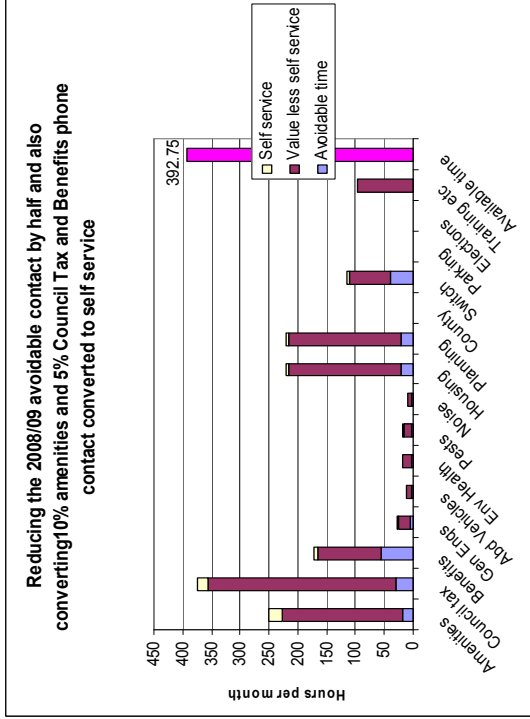
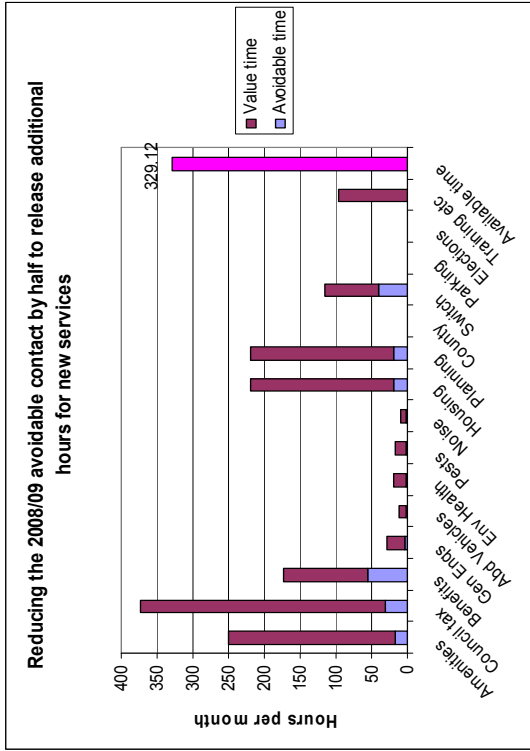
## 5. Avoidable contact – National Indicator 14

The causes of avoidable contact fluctuate according to what we do to provoke contact, and what external events there are. Top causes of avoidable contact in December 08:

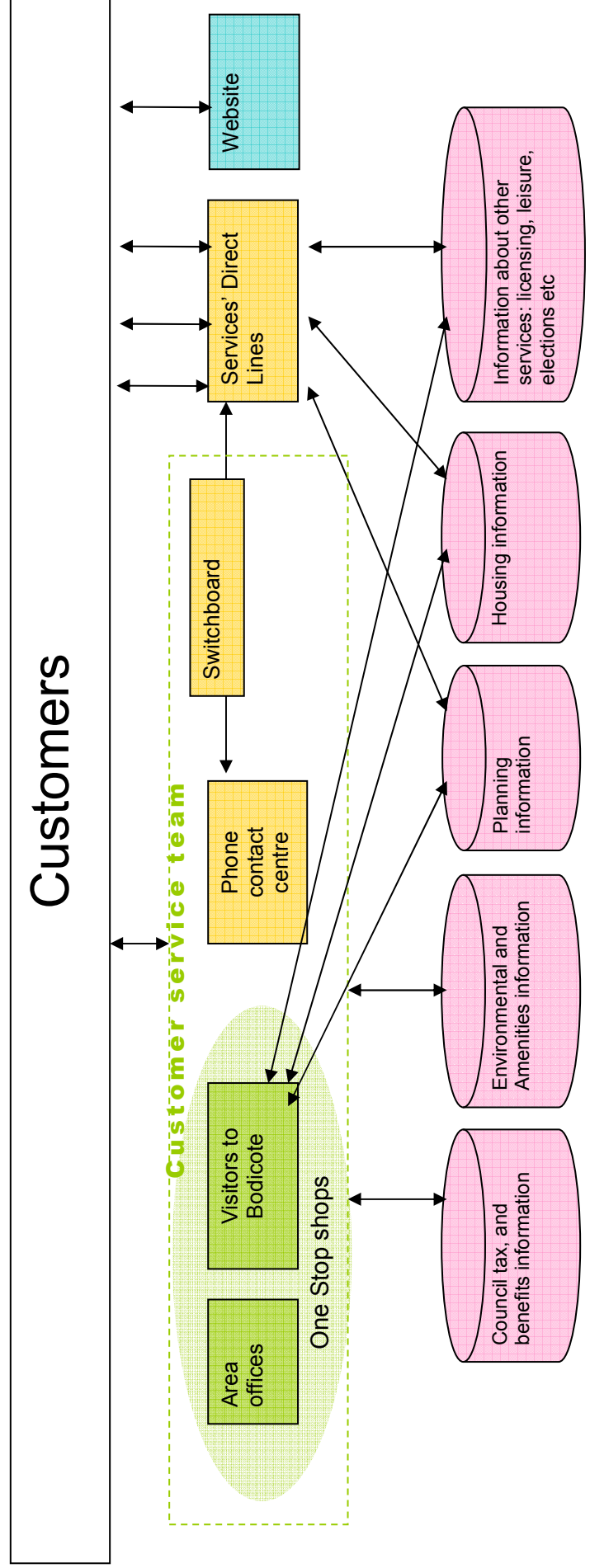
- My bin has not been collected
- My survey did not have a pre-paid envelope in
- What's happened to my claim
- You've sent me a letter asking for information I've already provided
- What's happened to my application for a discount, or my notification that I've moved house?
- I don't understand this letter
- You've sent this to me twice
- When is my Christmas bin collection – not on website!

Each of these reasons is a barrier to service delivery. We have caused the customer to contact us unnecessarily by being insufficiently clear, providing inadequate information and so on.

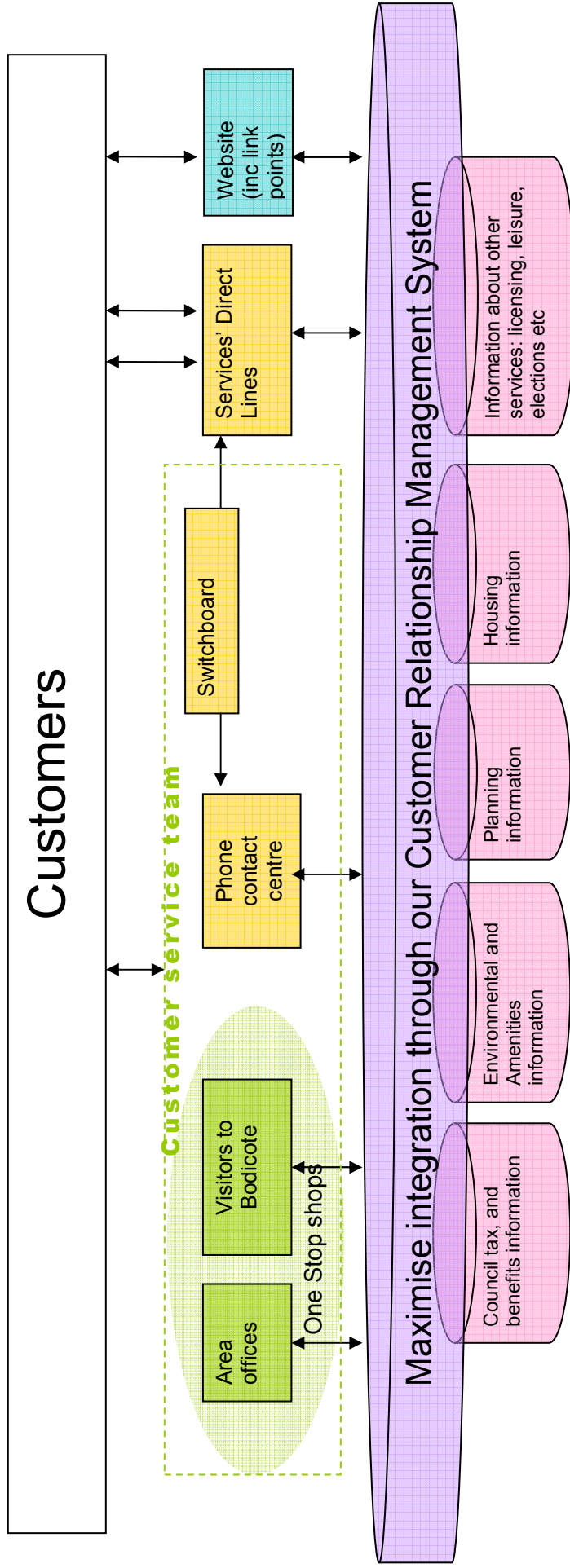




## 6. Current Model of service delivery (January 2009)



7. A model of complete “deep integration”.



## 8. Measures of success

What we measure	How we measure it	Target
Proportions of customer contact on each channel (numbers of contacts)	Contact centre phone system, website monitoring system, count of customers in LinkPoints.	2009/2010 50% online, 30% phone, 20% face to face 2010/2011 60% online, 25% phone, 15% face to face
Proportion of contact for each service on each channel	CRM, website monitoring system, visitor recording system	
Volume of contact deemed avoidable according to NI14	Customer Service Advisers record into the customer relationship management system	2009/2010 25% 2010/2011 17.5%
Number of services available to be accessed through online forms	Count of forms	
Number of online forms integrated with service computer systems (such as job ticketing, scheduling, payment)	Count of forms	
Proportion of contact able to be resolved at one contact, that is so resolved	hmmm	
Number of mystery shops completed	Count	Four in a year
Outcome of mystery shops	Depends on the reporting format of the mystery shop.	
Number of our services and other service providers accessed through self service linkPoint kiosks.	Kiosk usage statistics	
More metrics (but not too many, and only ones that will persist over the years – ideally ones already in service plans/strategies)		

**9. Related Documents and strategies**

# Agenda Item 7

## Executive

### Management Information Strategy

16 March 2009

### Report of Head of Improvement

#### PURPOSE OF REPORT

The report presents a Management Information Strategy and action plan for Cherwell District Council which will deliver continuous improvement in its information management arrangements, helping to improve service delivery and respond effectively to the new CAA assessment regime.

This report is public
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#### Recommendations

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The Executive is recommended:

- (1) To identify any additional actions or initiatives to be included in the strategy and action plan
- (2) To agree the management information strategy and action plan
- (3) To require officers to report back on progress with the implementation of the strategy and action plan in March 2010

#### Executive Summary

---

##### Introduction

- 1.1 The quality and cost of public services depends on the decisions that many people make. Poor quality information can lead to poor decisions or inappropriate conclusions that can affect our services and so impact on the lives of Cherwell residents.
- 1.2 There have been significant improvements in the council's arrangements for information management over the last year. These include better governance arrangements, improved staff awareness, a better performance monitoring framework, external expertise used to test our arrangements, an improved service and financial planning process and progress made in data sharing arrangements with partners. Although this has left the council in a better

position it needs to improve further still in order to respond to recent inspection feedback, new assessment frameworks around CAA and the need to plan and deliver services more in partnership.

- 1.3 This strategy sets out a broad framework of how the council intends to develop its management arrangements for the production, sharing, analysis and interpretation of management information. It will be use as the basis for a medium term action plan to guide improvement activity during the period 2009/10 to 2011/12.

### **Proposals**

- 1.4 The Management Information Strategy will set a clear direction for future improvements in how the council produces, shares, receives and acts on its management information. Its action plan set out how this will be achieved under the five key objectives set out in section 6 of the Strategy. A set of management information principles is also proposed (see section 12).
- 1.5 The action plan will deliver improvements under the following areas;
  - ensuring the council has all the relevant information it needs to help it and its partners make effective decisions;
  - ensuring that the information it uses, produces, shares or accepts from others is of a suitable quality for the purpose it is used for;
  - producing and presenting information in the most appropriate way to satisfy the needs of those who use it, and ensure they understand it;
  - ensuring that people have the skills, knowledge and tools needed to collect, analyse, present and interpret management information;
  - safeguarding the security of our management information.
- 1.6 Progress against the action plan is to be reported back to members on an annual basis.

### **Conclusion**

- 1.7 By agreeing this management information strategy and delivering its action plan the council will;
  - better understand its community and its needs, and so plan to meet them;
  - monitor and manage its performance more effectively;
  - ensure it can deliver better services and outcomes for its residents;
  - ensure it performs well against external assessment frameworks



## Background Information

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### 2.1 The need for high quality management information

The quality and cost of council services depends on the decisions that many people make, staff and members. Poor quality information can lead to poor decisions or inappropriate conclusions that can affect our services and so impact on the lives of Cherwell residents. The key risks arising from relying on information which is not fit-for-purpose are significant, and can include;

- Published information which is misleading
- Poor use of council resources
- Failure to improve services
- Poor policy decisions
- Not recognising and rewarding good performance
- Not identifying and monitoring improvement opportunities

### 2.2 Inspection feedback during 2008

The Audit Commission plays an important role in setting standards for and auditing our information management arrangements. Until recently it has relied on a high degree of costly inspections for BVPIs only, restricting the scope of its audit to a narrow range of management information.

The principle now in use by the Commission is to ensure that overall management arrangements for ensuring good quality data are in place for all aspects of work by means of an annual assessment. The council's first data Quality assessment was carried out for 2006/7 (report received January 2008) which identified the need for;

- Strengthening responsibility and commitment to data quality
- Improving quality of plans, policies, procedures and guidance.
- Introducing a more robust approach to monitoring and reviewing data quality.
- Ensuring systems and controls are fit for purpose.
- Continuing to develop business continuity arrangements.
- Developing arrangements for sharing and validation of data.
- Improving understanding of data quality skills needs across the Council and more effectively targeting training programmes.
- Better demonstrating how performance monitoring is improving delivery of services.
- Ensuring that validation of data is consistent across the organisation.

### 2.3 Improvements made to date

As a result of the feedback it received the council has been working to improve its management arrangements through a Data Quality Improvement Project managed by the Improvement Team. Since early 2008 a range of initiatives has been introduced to improve our management information arrangements. We have;

- appointed Cllr Pickford, Portfolio Holder for Organisational Development and Improvement, as the 'Member Champion' for data quality;

- developed a draft Data Quality policy during 2008 (this became outdated before it was presented to Executive for approval);
- commissioned KPMG to undertake a detailed data quality audit of Best Value Performance Indicators and hold a series of management team workshops to feed back the results;
- written data quality responsibilities into the job descriptions for key posts;
- created an intranet portal and used internal staff briefings to raise awareness about data quality;
- highlighted data quality issues to Executive through the use of a data quality implications paragraph for relevant reports;
- introduced Performance Indicator Definition Records (PIDRs) to record data quality arrangements for all National Indicators and corporate plan targets for 2008/09;
- commissioned KPMG to assist in ensuring consistency and quality in our PIDRs for new National Indicators;
- commissioned from our internal audit team a data quality audit ahead of our 2007/08 BVPI returns to test our arrangements, resulting in no reservations found on detailed testing by the Audit Commission;
- refreshed our corporate information on the district and its population to ensure managers use up-to-date and shared data for policy development and service planning;
- improved the quality of information used to guide the annual service and financial planning process with greater input on our priorities from hard to reach groups whilst maintaining input from the general public, the business community, the voluntary sector and from members themselves;
- revised our corporate scorecard and improved the clarity of our performance monitoring reports;
- implemented all performance monitoring through our Performance Plus software system;
- worked with our partners towards establishing the joint data sharing and data quality agreements.

#### 2.4 The need for further improvement

Despite this excellent progress further improvements are still needed. The Audit Commission's most recent evaluation of the council's arrangements is made in its Data Quality Assessment for 2007/08 (received February 2009), which concludes that the council is still only meeting minimum requirements.

Although acknowledging the progress that was made during 2007/08 the report highlights that;

- objectives for improving data quality have been process focused, reactive and short term in nature;
- there is more work to do to ensure that procedures and guidance effectively support our objectives;
- arrangements for validation of some high risk performance information are not robust

These observations are likely to be updated through the publication of the council's Corporate Assessment report in March 2009 (currently embargoed

for publication until 17 March 2009). Feedback from the Commission has confirmed that the council is seen as making good use of community information to guide its priorities, and has a highly effective approach to customer consultation and needs assessment.

New expectations on how the council performs in this area have been introduced as a result of the Comprehensive Area Assessment (CAA) and its supporting assessment framework (see 3.2 and 3.3 below). These emphasise the need for effective partnership arrangements for sharing and using strategic information to identify and address the needs of the community.

## 2.5 Outcomes of the Strategy

The outcomes that can be expected from the successful implementation of this Strategy are;

- improved overall management information arrangements which match the council overall improvement objectives;
- high quality strategic information to guide policy and practice (e.g. demographic and ethnicity data) which remains accurate and up to date;
- better documented procedures and guidance that set out the council's requirements and arrangements for good management information to help staff understand how they are expected to perform and leading to raised awareness of what constitutes good quality information;
- robust arrangements for ensuring security of our information in line with national expectations;
- clear arrangements for how we obtain and share information from our partners to ensure we comply with legislation and work together better;
- better assurance for external inspectors on how the council manages its information which will assist in ensuring positive assessments for the council under the Use of Resources and Comprehensive Area Assessment frameworks

These in turn should lead to the council;

- better understanding its community and its needs, and so plan effectively to meet them;
- monitoring and managing its performance more effectively;
- ensuring it can deliver better services and outcomes for its residents;
- ensuring it performs well against external assessment frameworks

## **Key Issues for Consideration/Reasons for Decision**

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3.1 The two important drivers which have contributed to the drafting of this strategy are the new guidelines on how its annual Use of Resources Assessment will be undertaken from 2008/09 and the new Comprehensive Area Assessment framework announced in February 2009.

### 3.2 Use of Resources Assessment 2008/09

Until 2008/09, assessing data quality arrangements had been a subset of the council's value for money assessment, and as such constituted only a small

element of the overall Use of Resources assessment. New guidance for 2008/09 introduces dedicated Key Lines of Enquiry (KLOE) for assessing management information arrangements.

The new KLOE set out to assess if councils produce relevant and reliable data and information to support decision making and managing performance, specifically if they;

- produce relevant and reliable data and work with partners to secure data quality;
- provide information which supports the decision making process;
- ensure data security and compliance with statutory requirements;
- monitor performance against priorities.

Emphasis in this new assessment has shifted from simply looking at the processes in place to wider areas of information management, particularly regarding partners and information sharing, and showing how use of information leads to improved outcomes for residents.

### 3.3 Comprehensive Area Assessment (CAA)

The Audit Commission have already indicated that management information will play an important role in this assessment with the CAA Lead looking to place reliance on the quality of a council's data and use of information to support both the area assessment and the managing performance theme. In forming their judgement about the Area the Commission will use a range of evidence including;

- the National Indicator Set and other nationally available data;
- local performance management information used to monitor local priorities including any self evaluations and evidence from scrutiny; and
- the views of people who use services including residents, third sector organisations and local businesses in the area.

The Commission will consider how effectively this information has been used alongside other evidence to identify priorities and to assess performance and where improvement is most needed.

#### **Consultations**

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**Internal** All Heads of Service have been invited to contribute to the draft Strategy

#### **Implications**

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**Financial:** There are no direct financial implications arising from the adoption of this strategy. The action plan either brings together existing planned activity or introduces new activities that can be undertaken from within existing budgets.

Comments checked by Karen Curtin, Chief Accountant

01295 221551

**Legal:**

Arrangements to comply with existing legislation will be unaffected by the strategy, but will place these within an overall framework for management information. Better data sharing arrangements will ensure that such compliance extends to data shared with partners.

Comments checked by Liz Howlett, Head of Legal and Democratic Services 01295 221686

**Risk Management:**

By failing to plan for improvements in its management information arrangements the council may receive an adverse evaluation under the Use of Resources and CAA assessment frameworks.

Comments checked by Rosemary Watts, Risk Management and Insurance Officer 01295 221566

**Data Quality**

The proposed strategy sets clear information management objectives and a forward looking action plan that will contribute to improved arrangements for data quality within the council.

Comments checked by Neil Lawrence, Project Manager, Improvement 01295 221801

**Wards Affected**

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All

**Corporate Plan Themes**

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Strategic priority 4 – Cherwell: an accessible, value for money council.

**Executive Portfolio**

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**Councillor Mrs D Pickford**  
**Portfolio Holder for Organisational Development and Improvement**

**Document Information**

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<b>Appendix No</b>	<b>Title</b>
Appendix 1	Draft Management Information Strategy
<b>Background Papers</b>	
None	
<b>Report Author</b>	Neil Lawrence, Project Manager – Improvement Agenda
<b>Contact Information</b>	01295 221801 neil.lawrence@cherwell-dc.gov.uk

## Version Control

Version	Comments	Updated by	Date
1.0	1 <sup>st</sup> draft	Neil Lawrence	3 February 2009
1.1	2 <sup>nd</sup> draft after consultation	Neil Lawrence	2 March 2009
1.2	Further amendments for CIP	Neil Lawrence	4 March 2009

## Consultation/Approval

Name	Organisation	Date
Council Management Team	Cherwell District Council	4 February 2009
Extended Management Team	Cherwell District Council	27 February 2009
Executive	Cherwell District Council	16 March 2009

### 1. Introduction and purpose of the strategy

The quality and cost of public services depends on the decisions that many people make. Poor quality information can lead to poor decisions or inappropriate conclusions that can affect our services and so impact on the lives of Cherwell residents.

This strategy sets out a broad framework of how the council intends to develop its management arrangements for the production, sharing, analysis and interpretation of management information. It will be used as the basis for a medium term action plan to guide improvement activity during the period 2009/10 to 2011/12.

### 2. Scope of the strategy

The strategy outlines our general approach and commitment to good quality management information; it looks to future improvements rather than focusing on current arrangements, which are captured in live frameworks and working procedures developed as part of the council's overall approach.

The strategy covers information produced and used by the council, and also that obtained or shared with its partners.

### 3. Timeframe of the strategy

This is a medium term strategy covering the period 2009/10 to 2011/12

### 4. Performance and review

An annual report will be produced that reviews our performance and progress against the strategic aim, objectives and actions outlined in this strategy. The content of the strategy and its action plan will be reviewed on an annual basis taking into account new national expectations or requirements and also the changing needs of the council.

### 5. Strategic aim

This strategy will provide the framework for a consistent, corporate and agreed approach to how we collect, produce, use and share management information at Cherwell.

### 6. Strategy objectives

Our objectives are to:

- Ensure we have all relevant information needed to help the council and its partners make effective decisions
- Ensure the information we produce, share or accept from others is of a suitable quality for the purpose it is used for
- Produce and present information in the most appropriate way to satisfy the needs of those who use it and to ensure they understand it

- Ensure all staff, managers and members have the skills, knowledge and tools needed to collect, analyse, present and interpret management information
- Safeguard the security of our management information

### 7. What is management information?

Management information is derived from a variety of sources and can include the following:-

- Activity information; how much/how many of an item or service is produced or consumed
- Financial; revenue and capital budget and spend, forecasting information
- Demographic; the characteristics of the population of the district, particularly its age and ethnic profile
- Social indicators; for example the economic activity of the district, or the rate of teenage conception
- Trends; how an area under review has changed over time, for example increases in population or the reduction in crime rates in key areas
- Performance indicators; comparative measurements assessing actual performance against national standards or local targets
- Qualitative; commentary or opinions expressed by others about the council or its services

This list is not exhaustive. The distinguishing characteristic of management information is its relevance to directing and assessing council performance alongside the trends of its environment.

### 8. Why is management information important?

The quality and cost of public services depends on the decisions that many people make. Poor quality information can lead to poor decisions or inappropriate conclusions that can affect our services and so impact on the lives of Cherwell residents. The key risks arising from relying on information which is not fit-for-purpose are significant, and may include;

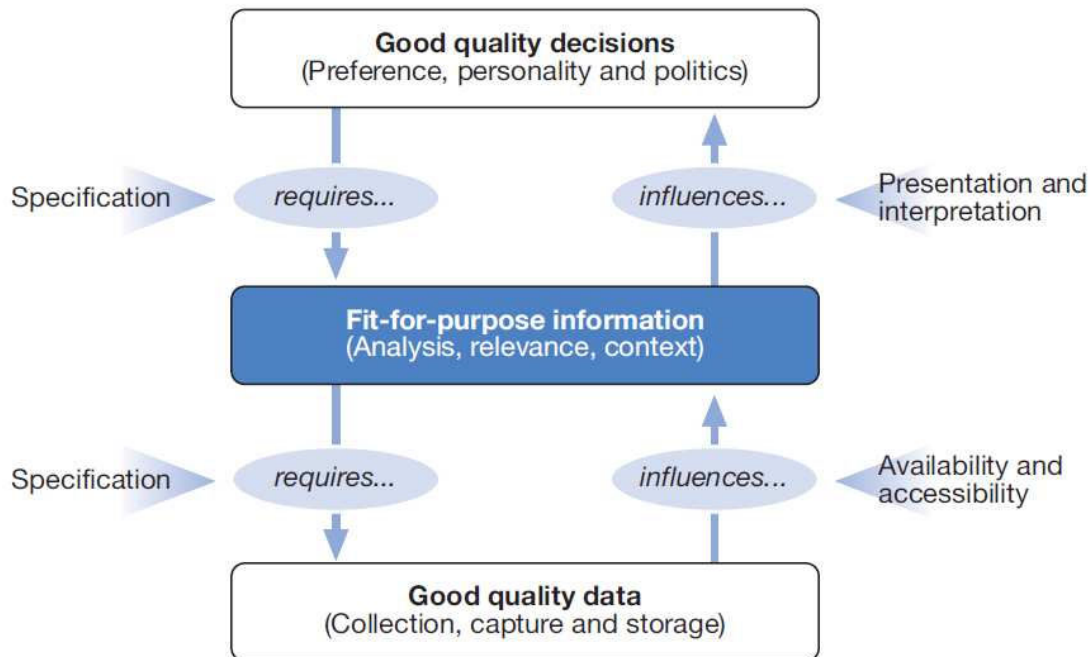
- Published information which is misleading
- Poor use of council resources
- Failure to improve services
- Poor policy decisions
- Not recognising and rewarding good performance
- Not identifying and monitoring improvement opportunities

There are strong links between what we want to achieve as a council and the need for good quality information (see 9. below). It therefore makes good business sense to aim to improve our management information.



Having the right information, and being sure that information provided by other people is right, makes our jobs easier. If we get information right first time there is no need for others to check our work, or recalculate it themselves.

We have specific duties under the Data Protection Act and Freedom of Information Act in relation to the collection, storage, accuracy and use of information. If we fail to safeguard data properly it can have huge consequences for the council's reputation.



Source: "In the know" (Audit Commission 2008)

## 9. How management information fits with the council's objectives and priorities

Good information assists in meeting the following Aims from the council's Strategic Priority 4: "Cherwell; an accessible and value for money council";

- Improve the way we communicate with the public, partners and other stakeholders in order to explain what the council is doing and why
- Demonstrate that we can be trusted to act properly for you

The council's Improvement Strategy has specific aims which require high quality information to be used;

- to be recognised as an 'excellent authority', which includes the target of 'achieving the highest possible rating under central Government's inspection regime
- to ensure decision making is based on high quality management and demographic information' with a target of having accurate and up to date management information available on line that is actively used to deliver service improvement

- to work in partnership with others whenever this will enable us to better deliver our objectives, meet community needs and achieve economies of scale

The council's Partnership Protocol sets out the following commitment on management information;

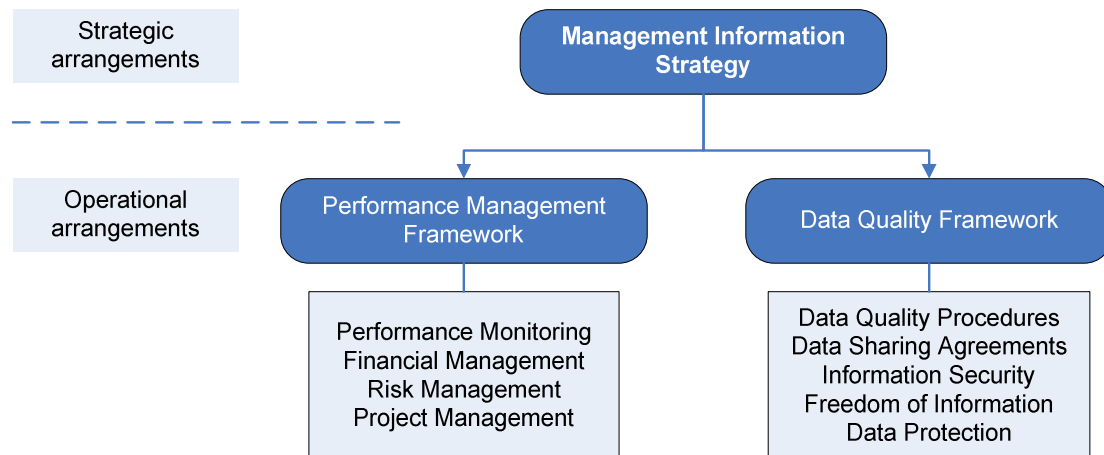
- Partnerships will make decisions based on the data provided. The partner organisations must therefore commit to provide to the partnership the most robust data they are able to. Cherwell will scrutinise the reliability of data and seek assurances as to quality and the processes in place to ensure such quality. Information sharing will be a key part of partnership working. Partner organisations are expected to comply with the provisions of the Data Protection Act 1998 and the Freedom of Information Act 2000. Where confidential information is exchanged there should be an information sharing protocol.

In addition, the council's Code of Governance sets out the following commitment;

- The council will endeavour to provide a high standard of information and advice relevant and timely to community needs to ensure that services are effectively delivered

## 10. How Information is managed

This strategy will sit above our operational frameworks for ensuring good quality information, as set out in the diagram below. These frameworks and their supporting arrangements will be reviewed and updated as regularly as required.



Specific roles and responsibilities for individuals are set out within these frameworks or their supporting arrangements (e.g. the Head of Legal and Democratic Services is the data controller for the council under the Data Protection Act).

## 11. Quality and standards

There is a range of legislation and guidance we will work to in delivering this strategy, including;

- Relevant legislation and supporting guidance, such as that for Freedom of Information Act or Data Protection Act
- Specific guidance for management information, such as *In the know. Using information to make better decisions: a discussion paper* (Audit Commission, 2008)
- National standards such as ISO27001:2005 and *Improving information to support decision making: standards for better quality data* (Audit Commission, Nov 2007)
- The requirements set by others using our information, such as those for Government Connect

### 12. Cherwell management information principles

As part of the strategy we will agree a set of management information principles to work to that embody best practice;

#### **Information is Accurate**

The concept of 'right first time' will be used; making sure that there is no unnecessary checking, correcting or reformatting of information once it has been submitted. Information should be sufficiently accurate for its intended purpose; for example, financial accounts will be held to a higher standard of accuracy than financial forecasts, which by their nature rely on assumptions and will rarely be very accurate. Where the accuracy of information presented is an issue this will be drawn to the attention of the recipient or audience to help inform its interpretation.

#### **Information is Comprehensive**

Information is complete and representative, and is unbiased. Sufficient information is collected, and to a suitable quality, as is needed to draw significant or meaningful conclusions. For example, samples used for surveys will be statistically significant to give a high enough confidence level to draw conclusions about the district as a whole; population surveys will ensure the demographic profile of the district is used in their samples to make their findings representative. Quality measures are used for information where appropriate to advise decision makers.

#### **Information is Relevant**

Information is meaningful and in context. It will have a use and purpose and not be collected for the sake of collection. Where information is no longer relevant it will no longer be collected or used. When being used for decision making the information collected and presented must be relevant to that decision

#### **Information is Valid**

Any definitions and rules relating to information are complied with, and it is stored in an agreed format to ensure it is comparable over time and between bodies, e.g. Services/Directorates, or other local authorities.

#### **Information produced is Timely**

Information is collected as quickly as possible after the event as is feasible, and made available at a frequency and timescale that is deemed appropriate for its use. For example, financial monitoring information is produced and circulated within days

of the end of the month, whereas resident satisfaction information is collected on an annual basis and may require a good deal of analysis and interpretation before it can be made available.

### **Information is made Secure**

Information is stored safely and with appropriate access controls. Sensitive information is only used for the purpose it has been collected for, and only retained for as long as it is needed. Information is only shared with others where the council is satisfied that appropriate controls and safeguards are in place.

### **Information is Reliable**

Information is collected in a consistent way, and sufficient information is collected to be sure of the findings. Reliable sources of external information are to be used wherever possible, for example the Oxfordshire Data Observatory.

### **Information collection and production is Realistic**

The benefit of the information collected outweighs the resources required to collect it and/or analyse it. The concept of 'Collect Once, Use Many Times (COUNT)' will be applied wherever possible, particularly in the collection of performance information.

## **13. Action Plan**

In order to achieve our management information objectives a medium term action plan will be introduced and implemented from April 2009.

**Objective 1: Ensure we have all relevant information needed to help the council and its partners make effective decisions**

Area	Action	Completion date	Lead Officer
Information from the community	Implement a Community Information Hub to gather and summarise data on reported community safety incidents	October 2009	Head of Safer Communities and Community Development
	Carry out customer satisfaction surveys in those areas not covered by the general residents satisfaction survey	September 2010	Relevant Heads of Service
	Introduce an web based system for community consultation exercises	May 2009	Head of Community and Corporate Planning
Demographic information	Introduce arrangements to update our demographic profile routinely through the Oxfordshire Data Observatory	October 2009	Project Manager, Improvement
Performance information	Monitor the deliver of service plans through Performance Plus	July 2009	Head of Improvement
	Introduce integrated risk monitoring with performance monitoring	October 2009	Head of Improvement
Comparative information	Participate fully in all CIPFA benchmarking clubs	Ongoing, each year	Relevant Heads of Service
	Establish a baseline performance comparison on national indicators with CIPFA family comparators	July 2009	Head of Improvement
	Ensure all our services have adequate benchmarking, customer feedback and productivity information	September 2010	Head of Improvement

**Objective 2: Ensure the information we use, produce, share or accept from others is of a suitable quality for the purpose it is used for**

Area	Action	Completion date	Lead Officer
Improving internal data	Refine our PIDRs to capture target profile info for all national indicators and corporate plan targets	April 2009	Project Manager, Improvement
	Carry out regular testing of high risk data and systems	Mid-year, annually	Strategic Director for Customer Service and Resources
	Undertake a risk-based programme of improvement for data and systems	March 2010 (for 1 <sup>st</sup> year audit) then annually each March	Project Manager, Improvement
Using reliable sources of information	Work with our LAA partners to introduce a Local Intelligence System for Oxfordshire	March 2010	Head of Community and Corporate Planning
Improving partnership data arrangements	Ensure all significant partnerships have operational data sharing procedures in place	March 2010	Project Manager, Improvement
	Undertake audits of data received from partners to ensure they meet the council's requirements	October 2009 and annually as required	Project Manager, Improvement
	Undertake a programme of improvement activity for partner data arrangements	March 2010 (for 1 <sup>st</sup> year audit) the annually each March	Relevant Heads of Service

**Objective 3: Produce and present information in the most appropriate way to satisfy the needs of those who use it and to ensure they understand it**

Area	Action	Completion date	Lead Officer
Access to performance information	Make performance information available monthly on the council's intranet	October 2009	Project Manager, Improvement
	Make quarterly performance monitoring information more accessible to the public on the council's website	October 2009	Project Manager, Improvement
Improved internal information sources	Improve the council's intranet to be fit for purpose and easy to use	March 2010	Information Systems Manager
	Expand the range of datasets available on the council's GIS to improve access to spatial information	October 2009	GIS Manager
Information for the public	Produce a high quality annual performance report and summary of accounts each year	September, annually	Head of Communications
	Make information more accessible on the council's websites	March 2010	Information Systems Manager
	Make more spatial information available to the public using LocalView GIS	March 2010	GIS Manager

**Objective 4: Ensure all staff, managers and members have the skills, knowledge and tools needed to collect, analyse, present and interpret management information**

Goal	Action	Completion date	Lead Officer
Raise awareness	Re-brand all data quality and management information improvements under the Cherwell KnowHOW banner	July 2009	Project Manager, Improvement
	Use Inside Cherwell, Cascade and team meetings to raise awareness of this strategy and its supporting frameworks	October 2009	Project Manager, Improvement
Improve guidance	Complete the suite of data quality procedure notes and publicise widely through the council	October 2009	Project Manager, Improvement
	Update working procedures and frameworks as necessary and publicise	As necessary	Project Manager, Improvement
	Introduce a council style guide for producing information in a consistent format	August 2009	Head of Communications
Improve the tools used	Improve the council's intranet to make accessing key information easier for staff	March 2010	Head of Customer Service and Information Systems



**Objective 5: Safeguard the security of our management information**

Goal	Action	Completion date	Lead Officer
Security standards	Expand ISO27001 accreditation to all areas of council activity on a rolling programme	March 2012	Project Manager, Improvement
	Introduce and maintain management information security measures necessary to achieve and retain Government Connect status	April 2009 onwards	Information Systems Manager
Business Continuity	Carry out regular tests of business recovery plans and the emergency plan	As per test schedule	Head of Safer Communities and Community Development
	Develop and implement an risk-based improvement plan based on the results of regular tests	Ongoing, annually	Head of Safer Communities and Community Development

## Executive

### Working in Partnership - Annual Report

Executive 16 March 2009

### Report of the Chief Executive

#### PURPOSE OF REPORT

This Annual Partnerships Report:

- reviews the achievements of the Council's significant partnerships in 2008/09
- sets out the progress made improving the governance and performance management of the Council's significant partnerships.
- Sets out the key activities for significant partnerships in 2009/10.

This report is public

#### Recommendations

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The Executive is recommended to:

- (1) Note the key achievements of the Council's significant partnerships in 2008/09 and the contribution they make to delivery of the Council's strategic priorities
- (2) Review the progress made during the year in strengthening the governance of the Council's significant partnerships
- (3) Agree the actions proposed by the significant partnerships for 2009/10
- (4) Agree the proposals to improve partnership working detailed at paragraph 1.5 below
- (5) Refer this Annual Partnerships Report to Overview and Scrutiny as part of their future programme of work on the evaluation of partnerships.

## **Executive Summary**

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### **Introduction**

- 1.1 In March 2008, the Council agreed a Partnership Protocol and Working Framework. The Framework requires the production of an annual report of the year's achievements focusing on the significant partnerships. The Council's significant partnerships are those key in helping deliver the Council's strategic priorities and the new Local Area Agreement.
- 1.2 Partnership working is becoming increasingly important. It offers the opportunity to achieve common goals while saving resources. Partnership working enables organisations to be more efficient and effective by working together rather than working on their own. Improving outcomes through partnership working is a key aspect of the new national inspection regime called Comprehensive Area Assessment, which replaces Comprehensive Performance Assessment from April 2009.
- 1.3 The Council's aim is to fully exploit the opportunities for partnership working and strengthen the governance and performance management arrangements. This report sets out the achievements in 2008/09 and the actions proposed for 2009/10, both for service delivery and improving the management of partnerships. In doing so, this report shows the contribution partnership working is making to delivering the Council's strategic priorities and the Local Area Agreements.
- 1.4 This report shows that there is still much more to be done to realise the opportunities available to the Council and sets out a significant work programme for 2009/10 and beyond.

### **Proposals**

- 1.5 It is proposed that partnership working is strengthened across Cherwell. Aiming to exploit opportunities to deliver better services using fewer resources. The following sets out a significant work programme of initiatives for 2009/10 and beyond to help deliver this agenda:
  - Improve the service delivery and value for money from Cherwell's significant partnerships
  - Seek out opportunities for new partnership arrangements to improve service delivery and value for money
  - Continue to strengthen governance and accountability arrangements, especially around information and data sharing arrangements
  - With West Oxfordshire District Council, continue to jointly lead the countywide review of the structure and governance arrangements of countywide partnerships
  - As part of this countywide review, achieve agreement on the significant partnerships common to all the local authorities across Oxfordshire and focus resources accordingly
  - Strengthen the support for elected Members involved in partnerships on the Council's behalf through the Member Training and Development Programme
  - Strengthen the links between the Council's partnerships and Executive Members, to be considered as part of the Council's current review of its Constitution
  - Consider hosting a Cherwell Partnerships Conference to celebrate achievements, consider future partnership opportunities, share knowledge and best practice

- Include significant partnerships in the Council's performance management framework and include in the quarterly performance report to the Executive.

1.6 The above proposals will be incorporated into the Council's Corporate Improvement Plan for 2009/10. In addition, there will be an internal audit of partnership working in Spring 2009 and any recommendations for improvement will be incorporated into this programme for improvement.

#### 1.7 Conclusion

The Council's strong partnership working has been recognised as part of the Council's Comprehensive Performance Assessment undertaken in November, 2008. The inspectors praised the Council's strong partnership working, saying that the Council is an effective leader of partnership working locally.

The Council is well placed to exploit the opportunities that are presented by partnership working, whether with the private sector, other authorities and agencies or with the voluntary and community sector. This is particularly important with the increasing pressure on resources and funding arising from the economic downturn.

This report shows there is added value being gained by working in partnership for the benefit of Cherwell residents and that there is considerable progress being made in improving the governance and performance management arrangements of its significant partnerships.

Finally, the proposals in this report detail a work programme that charts a way forward during 2009/10 and beyond, aiming to further improve the Council's partnership working.

## **Background Information**

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### **2.1 Cherwell's Partnership Framework**

In March 2008, the Council adopted a Partnership Protocol and comprehensive Partnership Working Framework. The Framework describes the monitoring and reporting arrangements to the Executive including the production of an annual partnerships report, focusing on the Council's significant partnerships.

### **2.2 Improved Management of Partnerships**

The importance of partnership working to the Council is reflected in the Council's Corporate Plan and Improvement Strategy, which aims to fully exploit the opportunities for partnership working and to have governance and performance regimes in place that ensure partnerships are working effectively. Delivering cost-effective services through well managed partnerships has been a focus for this year and has increasing importance in 2009/10 and beyond with the increasing pressure on resources.

### **2.3 Audit Commission Comprehensive Area Assessment**

The Comprehensive Area Assessment (CAA) framework, including the Use of Resources Assessment, was published on 10 February 2009. This will be used to judge the Council's performance in 2008/09. How well organisations work in partnership is central to the inspection regime, particularly in county and district areas. The process of assessing organisations and agencies across Oxfordshire has already begun, with the final assessment being published late November, 2009.

## **Key Issues for Consideration/Reasons for Decision and Options**

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### **3.1 Significant Partnership Achievements in 2008/09**

The attached appendices highlight the following achievements from the Council's significant partnerships (Appendices 1 & 2):

- Key achievements in 2008/09 for each of the Council's 17 significant partnerships and the value for money offered by those partnerships
- Key actions proposed for 2009/10 for each of the Council's 17 significant partnerships
- Strengthened governance arrangements
- The clear links between significant partnerships and the delivery of the Council's strategic priorities and associated corporate targets
- Delivery of the outgoing Local Area Agreement 1 targets by April 2009 and the new Local Area Agreement 2 National Indicator targets

### **3.2 Defining Significant Partnerships**

The Council's Partnership Register, totalling over 60 partnerships, has recently been refreshed. In particular, the Council's significant partnerships were reviewed, focusing on those partnerships helping deliver the Council's strategic priorities and the new Local Area Agreement. The significant partnership list (detailed in Appendix 1) divides into two categories: countywide partnerships and those that are Cherwell specific.

The countywide partnerships report direct into the Public Service Board and Oxfordshire Partnership. Under the Local Area Agreement these countywide partnerships are responsible for delivering one or more National Indicator targets. Cherwell is currently working on a countywide basis to establish a common list of countywide significant partnerships. This cross-county partnership working will provide clarity around significant partnerships and enable resources to be focused.

### 3.3 Strengthening Governance Arrangements

There is currently a review of the structure and governance arrangements for countywide partnerships, led by Mary Harpley (Cherwell's Chief Executive) and David Neudegg (West Oxfordshire's Chief Executive). This review is proposing a number of thematic partnerships and the revised thematic partnerships structure across Oxfordshire was recently agreed by the Public Services Board. There will now be further work undertaken to consider relevant and in many cases, improved governance arrangements for this new county-wide partnership structure. This work will impact upon the Council's most significant partnerships but until it is completed, it cannot be fully taken into account in this report.

In 2008/09, we focused on strengthening governance arrangements. An internal audit concluded that there are fair governance and financial arrangements in place for Cherwell specific partnerships and some of the more established countywide partnerships. The audit also identified areas where improvements could be made. Heads of Service have been addressing the issues and as a result there have been some significant improvements achieved, in particular a number of partnerships have:

- adopted revised Terms of Reference
- improve the clarity of their objectives
- become more outcome focused
- re-considered their risks and mitigation of risks and, where not already in place, jointly record their risks.

A further internal audit is scheduled to take place this Spring, as part of the Council's Internal Audit Plan, adopted in October 2008. This audit will be based around the Use of Resources theme requirements and support the Council's assessment of its strengths and areas for further improvement in 2009/10 to be incorporated in the Council's Corporate Improvement Plan.

### 3.4 Value for Money

An assessment has been made of the value for money realised from each the Council's significant partnerships. The assessment was based on the Use of Resources inspection criteria. It aimed to establish if the investment in Member or officer time and the level of funding provided was in line with the benefits and savings being derived. The assessment established for each partnership a value for money finding and identified key areas for improvement (see Appendices 1 & 2).

All the Council's significant partnerships were found to be offering some value for money, with Oxfordshire Waste Partnership and Cherwell's Homelessness Strategy Partnership identified as high performers. The most common findings were a lack of clear, outcome focused objectives and limited information gathered on the intangible benefits of a partnership, such as building relationships, intelligence sharing, liaison and innovation.

During 2008/09, Heads of Service have focussed on the value for money improvement plans for each partnership, including assessing intangible benefits. This work has strengthened the value for money assessments for a number of significant partnerships such as the Oxfordshire Economic Partnership and Cherwell Community Planning Partnership. For the Community Planning Partnership this work has helped address the issue raised in the Council's Annual Audit Letter for 2007/08 regarding focusing on outcomes and improvements.

It is proposed that increasing the service delivery and value for money gained from existing partnerships is a key feature of the Corporate Improvement Plan for 2009/10, alongside seeking out opportunities for new partnerships. Gaining greater benefits is a key challenge for the coming year, particularly with increasing pressures on resources and funding, amplified by the economic downturn, where partnership working with the private sector, other authorities, agencies and the voluntary and community sector provides huge potential for Cherwell as it moves forward.

### 3.5 Data Quality Arrangements and Data Sharing Protocols

Data sharing is essential between partnerships and agreements clarify the process and need for data security. The Council's Partnership Protocol makes explicit the expectations of robust data quality and information sharing arrangements. The draft Data Quality Framework (on the Executive's agenda for 16 March, 2009) expands on these expectations and sets out the responsibilities and scope of any agreements.

An overarching data sharing agreement is currently being drawn up with other local authorities and partners in Oxfordshire and this expected to be signed by end March 2009. Data sharing arrangements for community safety in Oxfordshire are currently being finalised. As a priority, data sharing issues in Housing are being progressed across Oxfordshire, to involve Registered Social Landlords, and this is anticipated to be in place by 31 October 2009.

Continuing to strengthen governance arrangements around information and data sharing arrangements is a key element of the proposed 2009/10 Corporate Improvement Plan.

### 3.6 Member involvement on the Council's significant partnerships

Members act as the Council's representative on a wide range of outside bodies, some of which are on the significant partnership list. Membership requirements differ for each of the significant partnerships and some specify elected Member involvement (e.g. Oxfordshire Waste Partnership), some both officers and Members attend (e.g. Cherwell Community Planning Partnership) and some only officers currently attend (e.g. Cherwell Homelessness Strategy Partnership).

Supporting elected Members to ensure they that they are able to maximise their contribution within a partnership is an area for further development in 2009/10. This should be linked with the proposed enhancements in Member Training and Development Programme, and could be a key feature in many Members' Personal Development Plans. Further, the relationship between Executive Members and the Council's significant partnerships needs clarification and this could be addressed as part of the current review of the Constitution.

### 3.7 Scrutiny of Partnership Working

The Overview and Scrutiny Committee has an important role to play in monitoring the performance of Cherwell's partnerships. The Partnership Working Framework describes partnership reviews as being part of the remit of scrutiny committee. In preparation for this role, Resources and Performance Scrutiny Members are to be trained in approaches to the evaluation of partnerships. It is proposed that this Annual Partnerships Report be referred to Scrutiny to assist them in their evaluation of Cherwell's partnership working arrangements and consideration of partnership scrutiny in their future work programme.

### 3.8 Monitoring and Reporting Arrangements

The Council currently monitors performance through its Performance Management Framework which reports to the Executive on a quarterly basis. It is proposed to

enhance the performance reporting arrangements during 2009/10 by specifically including a quarterly report on progress and issues with significant partnerships.

**Option One** To agree the proposed way forward in developing partnership working to improve service delivery and value for money, as set out in this report, and incorporate these proposals in to the Council's Corporate Improvement Plan for 2009/10.

## Consultations

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**External** Some external members of significant partnerships have been directly involved in the preparation of this report.

**Internal** Lead officers for significant partnerships

## Implications

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(Financial, Legal and Risk and other implications e.g. Equalities, Human Resources, Data Quality and Environmental where relevant)

**Financial:** Some partnerships have significant amounts of money associated with them, such as the Oxfordshire Waste Partnership and those working with allocation of reward money such as within the Local Area Agreement. All financial governance arrangements are subject to audit.

Comments checked by Karen Curtin, Chief Accountant - Service & Management Accounts 01295 221551

**Legal:** The Council's Partnership Protocol provides the framework within which this Council operates in partnership. This spells out the requirements and pitfalls of partnership working.

Comments checked by Liz Howlett, Head of Legal and Democratic Services 01295 221686

**Risk Management:** It is important that partnership risks are properly managed as this could impact on delivery of the Council's strategic priorities. By managing partnership risks, opportunities open up may otherwise be overlooked. All significant partnerships are entered onto the Council's risk register and risks are managed and reviewed at least quarterly.

Comments checked by Rosemary Watts, Risk Management and Insurance Officer, 01295 221566

**CAA and LAA** Partnership delivery is a key element of Comprehensive Area Assessment and the Local Area Agreement. It is important to evaluate the benefits and value for money achieved using partnerships and be clear about the future contribution that partnerships will make to delivering the Council's priorities.

Comments checked by Mike Carroll, Head of Improvement 01295 227959

**Data Quality** Partnerships rely on sound information and data quality to monitor performance and make informed decisions. There are national expectations for data quality arrangements and this report identifies progress in this area. Additionally the Council



is itself strengthening its data quality arrangements and seeks to gain assurance around data supplied by partners.

Comments checked by Neil Lawrence, Project Manager, Improvement Team 01295 221801.

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**Wards Affected**

All

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**Corporate Plan Themes**

All

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**Executive Portfolio**

**Councillor Wood**  
**Portfolio Holder for Policy and Community**

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**Document Information**

<b>Appendix No</b>	<b>Title</b>
Appendix 1	Significant Partnerships - Key Achievements in 2008/09 and Actions for 2009/10
Appendix 2	Progress with Governance Arrangements
<b>Background Papers</b>	
Partnership Working Framework Partnership Protocol Internal Audit Report Value for Money Assessment Comprehensive Area Assessment and Use of Resources frameworks	
<b>Report Author</b>	Alison Davies, Improvement Team
<b>Contact Information</b>	01295 221580 Alison.davies@Cherwell-dc.gov.uk

**Significant Partnerships  
2008/09 Key Achievements and Key Actions for 2009/10**

**OXFORDSHIRE-WIDE STRATEGIC PARTNERSHIPS  
Relating to the Oxfordshire Partnership, Public Service Board and Local Area Agreement**

<b>1. Supporting People</b>	
CDC Member/Lead Officer	Lead Authority to end March 09
Cllr Gibbard Gillian Greaves	Chaired by WODC Cllr Hilary Biles (Administering Authority is OCC through Nick Welsh)
Strategic Link	Value for Money Assessment
Links to a number of Cherwell's priorities, such as <b><i>District of Opportunity and Safe &amp; Healthy</i></b>	Fair
<p><u>Key Achievements 2008/09</u></p> <ul style="list-style-type: none"> <li>• Re-commissioning of Countywide domestic violence services including refuge and outreach provision</li> <li>• Commencement of two countywide generic floating support services</li> <li>• Re-commissioning of specialist accommodation based services for people with drugs and alcohol problems.</li> </ul> <p><u>Actions for 2009/10 Helping Cherwell deliver a number of corporate targets, particularly in the District of Opportunity and Safe and Healthy Strategic Priorities</u></p> <ul style="list-style-type: none"> <li>• Countywide re-commissioning of young people services including partnerships with Oxfordshire County Council, Supporting People and Cherwell District Council</li> <li>• Re-commissioning of housing and support for people with mental health problems in partnership with Oxfordshire PCT</li> <li>• Expansion of domestic violence services to include outreach and sanctuary schemes</li> <li>• Strategic review of services for people with physical disabilities</li> <li>• Re-commissioning of housing and support for people with a history of offending</li> <li>• responsibility under the Local Area Agreement for assisting delivery of National Indicator 141 – vulnerable people achieving independence.</li> </ul>	

<b>2. Children and Young People's Partnership</b>	
CDC Member/ Lead Officer	Lead Authority to end March 09
Cllr Dan Sames Paul Marston-Weston	Lead by Cllr Louise Chapman, OCC on Children's and Young Peoples Trust.
Strategic Link	Value for money assessment:
Links to a number of Cherwell's priorities, such as <b><i>District of Opportunity and Safe &amp; Healthy Cherwell</i></b>	Fair
<p><u>Key Achievements 2008/09</u></p> <ul style="list-style-type: none"> <li>• Re-launch of the Children and Young People's Trust</li> <li>• Agreed work programmes for the sub-groups</li> <li>• Members signed up to employability pledge</li> </ul> <p><u>Actions for 2009/10: Helping Cherwell deliver its Safe and Healthy corporate targets</u></p> <p>Priorities for the year ahead:</p> <ul style="list-style-type: none"> <li>• Breaking the cycle of deprivation</li> <li>• Children and Young People's Plan Refresh</li> </ul> <p>Improving outcomes around:</p> <ul style="list-style-type: none"> <li>• Educational achievement for all children and young people</li> </ul> <ul style="list-style-type: none"> <li>• Teenage pregnancy and sexual health</li> <li>• Substance misuse (drugs and alcohol)</li> <li>• Child and Adolescent Mental Health</li> <li>• Local areas of deprivation.</li> </ul> <p>Currently the partnership is focusing on:</p> <ul style="list-style-type: none"> <li>• Maintaining a strong focus on reducing teenage conceptions</li> <li>• Strengthening performance management against LAA2 targets with responsibility for 16 National Indicators within the Local Area Agreement covering education attainment, looked after children and obesity.</li> </ul>	

<b>3. Oxfordshire Housing Partnership</b>	
CDC Member/Lead Officer	Lead Authority to end March 09
Cllr Gibbard Gillian Greaves	Chaired by Vale of White Horse
Strategic Link	Value for Money Assessment
Links to a number of Cherwell's priorities, such as <b><i>District of Opportunity and Safe &amp; Healthy Cherwell</i></b>	Good
<p><u>Key Achievements 2008/09</u></p> <ul style="list-style-type: none"> <li>• The LAA1 Stretch Target of 256 units is on track (subject to review) and the interim 60% target was achieved</li> <li>• The reward funds associated with the 60% achievement trigger has led to outline projects being considered to meet the OHP objectives</li> <li>• A Critical Friend Review of the Oxfordshire Rural Housing Partnership was undertaken by De Montfort University, which concluded that the ORHP is innovative and good practice, and a sub-regional workshop was held in January 2009 to help use the report to inform further development of the ORHP</li> <li>• A consideration of the Affordable Housing issues regarding the proposed Eco Town at Weston Otmoor was submitted to CLG (Communities and Local Government)</li> <li>• Value for Money and Benchmarking has been developed with Cherwell District Council taking a lead in this initiative</li> <li>• Annual healthcheck of the Oxfordshire Housing Market Assessment completed.</li> </ul> <p><u>Actions for 2009/10: Helping Cherwell deliver its District of Opportunity corporate targets</u></p> <ul style="list-style-type: none"> <li>• To implement revised arrangements for the operation of the Rural Housing Enabler function as employed by the Oxfordshire Rural Communities Council (ORCC) following the funding review of Rural Housing Enablers</li> <li>• To develop Value for Money and benchmarking for strategic housing in the context of the guidance provided by the Housing Quality Network</li> <li>• To oversee the implementation of sub-regional Choice Based Lettings</li> <li>• To hold meetings of the Oxfordshire Housing Market Assessment Steering Group to ensure that the HMA and housing needs data are kept up to date and relevant</li> <li>• Responsibility for National Indicators within the Local Area Agreement covering vulnerable people living independently (NI 141), additional housing (NI 154), affordable homes (NI 155) and households in temporary accommodation (NI 156).</li> </ul>	

4. Oxfordshire Waste Partnership	
CDC Member/ Lead Officer	Lead Authority to end March 09
Cllr Reynolds Ed Potter	Chaired by Cllr John Tanner, the chairmanship is for two years so it will still sit with Oxford City and John Tanner until May 2010
Strategic Link	Value for Money Assessment
Links to <b><i>Cleaner &amp; Greener Cherwell</i></b> Strategic Priority	Good
<p><u>Key Achievements 2008/09</u></p> <ul style="list-style-type: none"> <li>• A countywide communications campaign encouraging people to reduce waste and recycle more over the Christmas period was delivered. This included outdoor advertising, newspaper advertising, website information, electronic Christmas cards and a series of 18 road shows</li> <li>• Plans for reducing the amount of commercial waste landfilled and increasing the proportion recycled by Oxfordshire councils have been developed. OWP has agreed to fund new commercial waste recycling schemes in Oxford City, West Oxfordshire and Cherwell</li> <li>• A funding proposal for the introduction of food waste collections submitted to the Public Services Board</li> <li>• “Love food hate waste” communications campaign, encouraging residents to waste less food. Launch late Feb/early March 09</li> <li>• Countywide “Big Tidy Up” voluntary litter picks. Launch Mar 09</li> <li>• Planning anti-fly-tipping communications and enforcement campaign for launch April 09</li> <li>• Award of contract for Food Waste Treatment (OCC led). Target completion mid Feb 09</li> <li>• Planning the introduction of food waste collections: commencing Jun 09 in S. Oxon</li> <li>• Securing nearly £35K of grants from OWP direct to Cherwell during 08/09: Christmas sacks, layby recycling, commuter recycling and trade waste recycling</li> <li>• Achieved the Local Area Agreement (LAA1) recycling target and waiting on the People and Places Survey findings for the cleanliness target, the key element of which is customer satisfaction level.</li> </ul> <p><u>Actions for 2009/10: <i>Helping Cherwell deliver its Cleaner, Greener corporate targets</i></u> A detailed OWP action plan is in place. Some of the main priorities within this are:</p> <ul style="list-style-type: none"> <li>• Reduce landfill through the introduction of food waste treatment facilities and food waste collections – Cherwell has secured £120K from OWP for the Waste Food Launch</li> <li>• Improving the quality of Oxfordshire’s environment through communications campaigns and enforcement measures to reduce litter and fly-tipping</li> <li>• Joint communications campaign to promote the 3Rs (reduce, reuse &amp; recycle), targeting both household and commercial waste streams</li> <li>• Responsibility for National Indicators within the Local Area Agreement covering household waste (NI 191), recycling and composting (NI 192), street cleanliness (NI 195), fly tipping (NI 196).</li> </ul>	

5. Oxfordshire Economic Partnership	
CDC Member/Lead Officer	Lead Authority to end March 09
Cllr Bolster John Hoad/David Marriott	Chairman Frank Nigriello, Unipart
Strategic Link	Value for Money Assessment
Links to Cherwell's <b><i>District of Opportunity</i></b> Strategic Priority	Fair
<p><u>Key achievements in 2008/09:</u></p> <ul style="list-style-type: none"> <li>• The Oxfordshire Learning and Skills Partnership and four sub-groups, has been established</li> <li>• Through LABGI grants the OEP has funded projects such as the Oxfordshire Film Office, the Plastic Bag Free Towns initiative, Oxfordshire Thriving Economies Initiative, the Carterton Community Café Project, a Job Ready Scheme devised by Adult Learning Service and HR, and Supporting Businesses, Tackling Discrimination (an awareness raising campaign)</li> <li>• The programme of work 'Promoting Oxfordshire' also received funds to enable the development of publication materials to attract investment into the county</li> <li>• The Business Support Task Group has supported the development of the Oxfordshire Business Mentoring Scheme</li> <li>• Financial support from SEEDA increased. A bid is being presented to SEEDA for the development of an Innovation and Growth Team in Oxfordshire</li> <li>• The OEP commissioned the Oxfordshire Employer Skills Survey which will be launched on 23 February at Egrove Park</li> <li>• The OEP has gained funding via MKELP for a Retail Job Brokerage Scheme being run by the Learning Communities Project</li> <li>• The OEP has successfully bid for £50K for the Skills for Growth project to encourage increased take up of Train to Gain among Oxfordshire businesses</li> <li>• An Economic Task Force has been established to aid Oxfordshire businesses through the recession</li> <li>• The OEP is leading on establishing the Oxfordshire Business Database to be launched in spring 2009</li> <li>• Data included as part of the Economic Strategy for Oxfordshire is being refreshed by the R&amp;I Team in the County Council's Corporate Core</li> <li>• A seminar on economic data has been organised</li> <li>• The OEP is coordinating the establishment of Job Clubs across the county, based on the successful pilot JC in Banbury. This attracted regional media attention</li> <li>• The OEP organised the successful Horizons and Futures series of lectures to stimulate thinking for the Economic Development Strategy for Oxfordshire refresh and a co-ordinated responses submitted on sub-national review of economic development</li> <li>• OEP chaired a workshop on Market Towns as part of OCC's scrutiny review and is taking the lead to put resources in place to co-ordinate activities and promote best practice across the county</li> <li>• Staffing structure established to enable direct service delivery.</li> </ul> <p><u>Actions for 2009/10: <i>Helping Cherwell deliver its District of Opportunity corporate targets</i></u></p> <ul style="list-style-type: none"> <li>• Responding to the recession and its impact on the Oxfordshire economy</li> <li>• Transform OEP's capability to drive Oxfordshire's economic priorities, providing particular support to the geographic areas of Oxfordshire Quadrant (now Science Vale UK), Oxford West End and Bicester as locations for economic growth</li> <li>• Provide clear and timely intelligence about Oxfordshire's economy and the issues and</li> </ul>	

opportunities facing it

- Ensure the World Class Economy objective within Oxfordshire's Sustainable Community Strategy reflects OEP priorities and positions OEP as the principle organisation as the facilitator of this objective for the Oxfordshire Partnership. OEP will do this by identifying the enablers and inhibitors to business growth and engaging with the responsible agencies to increase enablement and decrease the inhibition of growth
- Achieve agreement of relevant organisations on key initiatives that will generate substantial impact on the economy, specifically;
  - Establishment of place-based innovation team for Oxfordshire that will bring measurable enhancements to the county's diamond for investment and growth businesses
  - Implementation of programme for Promotion of Oxfordshire that defines and markets the county as a desirable business destination for high value inward investors; attracting global businesses in key sectors to set up in Oxfordshire
  - Delivery of Local Area Agreement (LAA) economic targets, particularly in relation to adult skills so that all targets are on course and the OEP has accountability for them
  - Implementation of programme of work to promote tourism, integrating both public and private sectors in a single coherent effort to make Oxfordshire the most attractive and easiest place to visit
  - Support to businesses (from pre-start up and start-up through to SME and large enterprises) is effective and sustainable by defining the key criteria for successful start up and ensuring that the agents to deliver service against that criteria are held accountable for their performance
  - Lead the development of Oxfordshire Learning and Skills Partnership to improve performance in secondary schools and improve the effectiveness and efficiency of workplace learning. This will include supporting a Learning Park, Retail Academy and business engagement with a focused group of critical secondary schools in Oxfordshire
- responsibility for 3 National Indicators in the local area agreement: NI 152,163,164 covering worklessness and increasing the number of adults with qualifications at Level 2 & Level 3.

<b>6. Oxfordshire Safer Communities Partnership</b>	
CDC Member/ Lead Officer	Lead Authority to end March 09
No Member representative  Mary Harpley/ Grahame Helm	Chaired by Cllr Judith Heathcoat, OCC Community Safety Portfolio Holder
Strategic Link	Value for Money Assessment
Links to Cherwell's <b>Safe &amp; Healthy</b> Strategic Priority	Fair
<p><u>Key Achievements 2008/09</u></p> <ul style="list-style-type: none"> <li>• Publication of Oxfordshire Alcohol Strategy 2008 – 11</li> <li>• Coordination of bids for LAA1 reward money on behalf of the districts' crime and disorder reduction partnerships</li> <li>• Development of bids to support community safety priorities for Public Service Board consideration for unallocated top-sliced funding, through a robust and collaborative exercise involving rigorous scoring and peer scrutiny. All bids support community safety priorities in Oxfordshire 2030</li> <li>• Launch of a four-month countywide domestic abuse campaign on 25 November by Nick Ross, broadcaster and journalist, who pronounced it to be the best campaign nationally he had seen. Oxfordshire domestic abuse services have been cited as best practice nationally</li> <li>• Sign-off of the Oxfordshire Community Safety Agreement. The aim of the agreement is to consider how partners can work together more effectively to reduce crime and disorder and improve safety across the county, by identifying areas for a joint or coordinated approach and new ways of working</li> <li>• Review of Tactical Business Groups, resulting in agreement to continue with the existing joint partnership structures. The five TBG themes, which are common to all CDRPs, were selected on the basis of being the big enablers influencing crime and disorder, and as key areas for joint/coordinated working in accordance with the Police and Justice Act. They support CDRPs and are developing in line with CDRP strategies. TBGs to be reviewed again during the next 12 months, including a review of the PVE agenda.</li> </ul> <p><u>Actions for 2009/10: Helping Cherwell deliver its Safe and Healthy corporate targets</u></p> <ul style="list-style-type: none"> <li>• Provide proactive leadership in the drive to improve community safety across Oxfordshire</li> <li>• Ensure coordination of work by Crime &amp; Disorder Reduction Partnerships (CDRPs), and the strategic-level Tactical Business Groups (TBGs) which focus on alcohol, drugs, young people, domestic abuse and prolific and priority offenders</li> <li>• Deliver a quality Strategic Intelligence Assessment (joint audit of community safety activity by the police, CDRPs and TBGs and other partner agencies, to identify priorities, ensure targeting of resources where most needed and highlight key issues for attention)</li> <li>• Carry out second review of Tactical Business Groups, and include a review of the Preventing Violent Extremism agenda</li> <li>• Ensure delivery of LAA and Sustainable Community Strategy targets, and agree remedial action where needed</li> <li>• Ensure the most effective use of partnership resources, including LAA1 Reward funding.</li> </ul> <p>Key actions include:</p> <ul style="list-style-type: none"> <li>• Produce a Drugs Strategy</li> <li>• Produce a Domestic Violence Strategy</li> <li>• Produce a Persistent and Prolific Offender (PPO) Strategy</li> <li>• Responsibility for National Indicators within the Local Area Agreement covering serious</li> </ul>	



violent crime (NI 15), serious acquisitive crime (NI 16), assault crime rates (NI 20), antisocial behaviour ( NI 21), domestic violence (NI 32), drug users (NI 40), youth entrants into the youth justice scheme (NI 111).

7. *OVSDP -Oxfordshire Voluntary Sector Development Partnership	
CDC Member/Lead Officer	Lead Authority to end March 09
No Member representative Grahame Helm	Chaired by Bishop of Dorchester, Colin Fletcher
Strategic Link	Value for Money Assessment
Links to <b>all</b> Cherwell's Strategic Priorities	n/a
<p><u>Key Achievements 2008/09</u></p> <ul style="list-style-type: none"> <li>• Capacity Builders confirmed OVSDP "fit for purpose". Three years funding awarded at £27,000pa</li> <li>• Steering Group appointed researcher for mapping project</li> <li>• OVSDP will work with OREC on setting up and delivery of "Improving Reach" project</li> <li>• Forum events held with numbers attending and feedback good</li> <li>• New representatives from the voluntary sector were elected to the Oxfordshire Partnership and the Children and Young People's Trust</li> <li>• Self assessment exercise undertaken.</li> </ul> <p>Current activities:</p> <ul style="list-style-type: none"> <li>• OCVSP is still in the process of securing funding for the mapping of faith communities research. A research team has been appointed to take this forward and initial meetings will take place in the coming weeks</li> <li>• A workshop on representation will be held in the spring to support the work of the voluntary sector representatives</li> <li>• Supporting work of Compact through attending meetings of Funding Sub Group and Compact Working Group. Training events to be organised in the summer for VCS groups as a result.</li> </ul> <p><u>Actions for 2009/10: Helping Cherwell across its strategic priorities</u></p> <ul style="list-style-type: none"> <li>• OVSDP will become the Stronger Communities partnership and is discussing ways to involve elected members on the partnership for the first time</li> <li>• Faith research, writing Compact code on BME groups/equalities and updating other Compact codes for Oxfordshire. Organising programme of forum events including pilot of evening events. Working with partners to ensure BME and other groups at risk of exclusion receive the support they need</li> <li>• Mapping of faiths groups within Oxfordshire</li> <li>• Events for elected members</li> <li>• Responsibility for a National Indicator within the Local Area Agreement covering participation in regular volunteering (NI 6).</li> </ul>	

\* added to significant partnership list following refresh

8. *Health and Well Being Partnership Board	
CDC Member/ Lead Officer	Lead Authority to end March 09
Cllr Reynolds Ian Davies	Alternate Chairman Dr Stephen Richards, PCT and Cllr Jim Couchman , OCC
Strategic Link	Value for Money Assessment
Links to Cherwell's <b>Safe &amp; Healthy</b> Strategic Priority	n/a
<p><u>Key Achievements 2008/09</u></p> <ul style="list-style-type: none"> <li>Oxfordshire has achieved the highest increase in adult participation in sport out of all English counties. An additional 20,000 more adults (a 3.5% rise) are taking part in sport and active recreation in Oxfordshire since the first Active People Survey 2005/06</li> <li>A HWBP Officers Group has been established to carry out activity across all partner organisations in support of the Board's wishes.</li> <li>The HWBP has overseen the 'Adding Years to Life' project, which continues to produce successful outcomes for improving quality of life in older age</li> <li>Draft Action Plans have been prepared for all three of the Board's strategic priorities.</li> </ul> <p>Current activity includes:</p> <ul style="list-style-type: none"> <li>Refining the Action Plans, establishing baselines and devising collectible performance measures for the HWBP Board's 3 key strategic priorities</li> <li>Undertaking a review of our arrangements with Internal Audit (led by Andrew Dyson).</li> <li>Working with the Audit Commission to develop their framework for conducting health inequalities audits and assessments of effectiveness</li> <li>Working with district councils to develop local public health strategies for their district</li> <li>Bidding for LAA reward grant money to resource initiatives.</li> </ul> <p><u>Actions for 2009/10: Helping Cherwell deliver its Safe and Healthy corporate targets</u></p> <ul style="list-style-type: none"> <li>Optimising health and well-being gain for the population of Oxfordshire and reducing health inequalities; the partnership has agreed three specific priorities: <ul style="list-style-type: none"> <li>Prevention (promoting quality of life) in older age</li> <li>Promotion of mental well-being</li> <li>Reduction in obesity</li> </ul> </li> <li>In trying to get to grips with these substantial challenges in a genuinely meaningful way the HWBP feels it is pioneering, since few (if any) other areas of the country have radically changed how organisations are responding to these potentially highly problematic areas</li> <li>Responsibility for National Indicators within the Local Area Agreement covering participation in sport (NI 8), mortality rates (NI 120), delays in transfers from hospitals (NI 131) and needs assessments for carers ( NI 135)</li> </ul>	

\* added to significant partnership list following refresh

## CHERWELL SPECIFIC PARTNERSHIPS

### 1. Cherwell Community Planning Partnership

CDC Member/ Lead officer	Lead Authority(s)/Orgs
Cllr Wood  Claire Taylor	Led by CDC:Mary Harpley, Chairman

Strategic Link	Value for Money Assessment
Delivery of the Strategic Priorities and the associated Corporate Targets is Cherwell's contribution to delivering the actions in the Community Plan	Fair

#### Key achievements in 2008/09

- Challenging performance issues around disabled facilities grants (Oxfordshire County Council sent representatives)
- Developing a partnership approach to tackling climate change (signing off strategy and establishing a task group)
- Commissioning a project to fundamentally review the existing community strategy and align it more closely with the Local Development Framework
- Successfully contributing to and influencing the content of the new Local Area Agreement and Oxfordshire 2030 County Sustainable Community Strategy
- Deciding upon one priority action for each theme in the Community Plan to concentrate on during 2008/09
- Providing a training event on engaging with hard to reach groups and coordinating follow up networking meetings with West Oxfordshire Strategic Partnership
- Working with the other Local Strategic Partnerships in Oxfordshire to deliver a performance management project.

#### Key Actions for 2009/10: Cherwell's strategic priorities help deliver the Community Plan

- Completing the review of the existing community strategy and publishing a new sustainable community strategy that is closely aligned with the Local Development Framework
- Undertaking a review of governance arrangements of Cherwell Community Planning Partnership to ensure that the new sustainable community strategy will be delivered
- Monitoring the delivery of the Local Area Agreement and thematic priority targets
- Delivering a performance management training session to Cherwell Community Planning Partnership
- Working with the other Local Strategic Partnerships in Oxfordshire to deliver a communications project.

<b>2. Cherwell Safer Community Partnership</b>	
CDC Member/ Lead officer	Lead Authority(s)/Orgs
No Member representative Grahame Helm	Led by CDC/TVP, lead currently with CDC and with TVP from April 2009
Strategic Link	Value for Money Assessment
Strategic Priority: <b><i>Safe &amp; Healthy Cherwell</i></b>	Fair
<p><u>Key Achievements 2008/09</u></p> <ul style="list-style-type: none"> <li>• CCTV cameras in taxis</li> <li>• New 3-year strategy</li> <li>• Improved customer satisfaction (from 30% to 36%) re tackling ASB</li> <li>• Raised confidence improving the reporting of domestic abuse</li> <li>• Delivering Cherwell's contribution to Local Area Agreement 1, where 3 of the 4 stretch targets are scheduled to come in on track and the 4<sup>th</sup>, sanctions detections for domestic violence, is unlikely to be achieved.</li> </ul> <p><u>Actions for 2009/10: <i>Helping Cherwell deliver its Safe and Healthy corporate targets</i></u></p> <ul style="list-style-type: none"> <li>• CCTV digital upgrade</li> <li>• Launch of partnership website</li> <li>• Implement "Prevent and Deter" to reduce number of young people entering criminal justice system</li> <li>• Responsibility for contributing to National Indicators within the Local Area Agreement covering serious violent crime (NI 15), serious acquisitive crime (NI 16), assault crime rates (NI 20), antisocial behaviour ( NI 21).</li> </ul>	

<b>3. Homelessness Strategy Partnership</b>	
CDC Member/ Lead officer	Lead Authority(s)/Orgs
No Member representative Gillian Greaves	Led by CDC
Strategic Link	Value for Money Assessment
Corporate Priority: <b><i>District of Opportunity</i></b>	Good
<u>Key Achievements 2008/09</u>	
<ul style="list-style-type: none"> <li>• Performance against National Indicator 156 improved from 117 families in Temporary Accommodation at March 2008 down to 89 at end of January 2009</li> <li>• The development of youth homelessness prevention and related initiatives – e.g. the No Place Like Home Campaign</li> <li>• Production and distribution of the Cherwell Community Directory</li> <li>• Contributor to the Communities and Local Government designated Centre for Excellence for Young People status for Oxfordshire</li> <li>• The Cherwell Temporary Accommodation Strategy was launched and Year 1 actions were delivered</li> <li>• A 'Sanctuary Scheme' was established to help domestic violence victims</li> <li>• The Mortgage Rescue Scheme was launched in December 2008 – with the Council being one of the first 60 fast-track authorities in the country to launch this initiative.</li> </ul>	
<i>Actions for 2009/10: Helping Cherwell deliver its District of Opportunity corporate targets</i>	
<ul style="list-style-type: none"> <li>• Delivery of the Cherwell responsibility for Local Area Agreement 2 targets (National Indicator 156)</li> <li>• Delivery of new units of temporary accommodation</li> <li>• Deliver Year 3 of the Homelessness Strategy, and Year 2 of the Temporary Accommodation Strategy actions</li> <li>• Contributing to the re-commissioning of young peoples' services</li> <li>• Securing Value for Money in Temporary Accommodation</li> <li>• Continuing improving the quality of temporary accommodation</li> <li>• Developing joint working in tackling domestic violence.</li> </ul>	

4. Cherwell Registered Social Landlords Partnership	
CDC Member/ Lead officer	Lead Authority(s)/Orgs
No Member representative, however 4 CDC Councillors sit on the Charter Community Housing Board  Gillian Greaves	Led by CDC
Strategic Link	Value for Money Assessment
Strategic Priority: <b><i>District of Opportunity</i></b>	Good
<p><u>Key Achievements 2008/09</u></p> <ul style="list-style-type: none"> <li>• The Council's target of delivering 100 affordable homes is currently on track (logged 'at risk' because of the recession)</li> <li>• The LAA stretch target of delivering 119 units is currently on track (logged 'at risk' because of the recession)</li> <li>• The RSLs contributed to an affordable housing policy workshop in July 2008 to give input into the Cherwell Local Development Framework</li> <li>• The RSLs development partners provided professional advice into the Executive report of January 2009 on affordable housing and the recession</li> <li>• Sanctuary Housing Group successfully tendered for the delivery of the Acquisition Scheme to help deliver the Cherwell Temporary Accommodation Strategy.</li> </ul> <p>Actions for 2009/10: <i>Helping Cherwell deliver its District of Opportunity corporate targets</i></p> <ul style="list-style-type: none"> <li>• The Council has set a draft target* of delivering 100 affordable homes (*subject to confirmation as part of LAA2 process)</li> <li>• The Partnership will help to implement the Action Plan as part of the Affordable Housing and the Recession Report approved by Executive in January 2009, and continue to work with the Council in its role of providing leadership within a recession</li> <li>• The Partnership will support the move to sub-regional choice based lettings</li> <li>• The Partnership will abide by the RSL Development Protocol that becomes effective in April 2009</li> <li>• Each development partner will take part in quarterly reviews on development opportunities with a view to maximising grant take up from the Homes and Communities Agency's National Affordable Housing Programme 2008-11</li> <li>• GreenSquare (Oxford Citizens Housing Association) will help to deliver the Rural Housing Improvement Plan.</li> </ul>	

<b>5. Cherwell M40 Investment Partnership</b>	
CDC Member/ Lead officer	Lead Authority(s)/Orgs
No Member representative David Marriott	Led by CDC
Strategic Link	Value for Money Assessment
Strategic Priority: <b><i>District of Opportunity</i></b>	Fair
<p><u>Key Achievements 2008/09</u></p> <ul style="list-style-type: none"> <li>• Custodianship and update of CHIP branding as used for inward investment promotion</li> <li>• General private sector liaison and steer for economic development work</li> <li>• Provision of private sector economic and property market intelligence</li> <li>• Maintaining network for detailed information provision on property market and commercial property register</li> <li>• Liaison framework for inward investment cases</li> <li>• Initial ideas input for review of economic development strategy in face of recession</li> <li>• Support and ideas for update of inward investment marketing strategy and advertising campaigns</li> <li>• Editorial content for Business Moves</li> </ul> <p><u>Actions for 2009/10: <i>Helping Cherwell deliver its District of Opportunity corporate targets</i></u></p> <ul style="list-style-type: none"> <li>• Continued support and input on all above items</li> <li>• Proposed re launch of the partnership to promote and advertise district in recession period</li> <li>• Above to include updated web site and content, especially standard information for use in public and private sector enquiry responses</li> <li>• Steering and detailed input to review of economic development strategy (including report back and recommendations to CCP)</li> </ul>	



**6. Kidlington Village Centre Management Board (with Kidlington Parish Council)**

CDC Member/ Lead officer	Lead Authority(s)/Orgs
No Member representative David Marriott/Chris Rothwell	Led by Kidlington Parish Council (Cllr Chris Pack)
Strategic Link	Value for Money Assessment
Strategic Priority: District of Opportunity	Fair

Key Achievements 2008/09

- Exeter Close project, to create more of a heart to Kidlington, being progressed in four phases with the first phase covering the conversion and extension of the old playing fields pavilion and refurbishment of the tennis courts completed
- Street Furniture Renewal – following full public consultation and working with the District Council, new street furniture is being installed during March 2009
- Watts Way environmental improvement scheme completed in partnership between the Board and the District Council delivering key objectives in the Board's business plan.

Actions for 2009/10: Helping Cherwell deliver its District of Opportunity corporate targets

The Board has a number of longer term aims, with the following short term actions:

- Completion of hard and soft landscaping for civic park at Exeter Close
- Reintroduction of continental markets
- Establishment of Farmer's market
- Improved car park management
- Feasibility study for pedestrianisation project
- Encouragement to improve shop and window appearance n High Street
- Completion of new Shoppers' Guide to Kidlington as basis for maintaining and enhancing commercial vitality and viability of retail offer through difficult times
- Delineation of main elements of a long term vision for Kidlington village centre as the basis for the longer term work on an Urban Design Strategy and Area Action Plan.

<b>7. Banbury Town Centre Partnership (with Banbury Town Council)</b>	
CDC Member/ Lead officer	Lead Authority(s)/Orgs
No Member representative  David Marriott/Chris Rothwell	Led by Banbury Town Council (Cllr Kieron Mallon)
Strategic Link	Value for Money Assessment
Strategic Priority: <b><i>District of Opportunity</i></b>	Fair
<p><u>2008/9 Key Achievements:</u></p> <ul style="list-style-type: none"> <li>• Development of initial Partnership Terms of reference</li> <li>• Development of initial Town Centre Vision Statement and Banbury Town Centre Spatial Strategy</li> <li>• Consultation on Parson Street Environmental Improvements/Traffic Regulation Order</li> <li>• Providing a forum for multi agency discussions on town centre operational issues (policing/street furniture/CCTV/litter/events/Tourist info signage etc)</li> <li>• Joint working on Christmas illuminations and Switch on Events</li> <li>• Joint promotion of “In Bloom” local/regional and national competitions – joint provision of new planters throughout the town; Banbury 400 Sun motif feature at Banbury Cross</li> <li>• Joint promotion of new Christmas park and ride service</li> <li>• Promotion of “Buy Local” campaign amongst partners.</li> </ul> <p><u>Actions for 2009/10: Helping Cherwell deliver its District of Opportunity corporate targets</u></p> <ul style="list-style-type: none"> <li>• Finalising clear Partnership protocols</li> <li>• Reviewing and including key Agencies and their involvement in the Partnership</li> <li>• Establishing a Priority of objectives for the short, medium and long term</li> <li>• Tackling the impact of the current economic downturn to ensure Banbury Town centre is able to face up to the challenge and secure prompt recovery</li> <li>• Establishing opportunities for Public Art in Banbury, including public art through Section 106 contributions, Parsons Street and Banbury Cross and the maintenance/ decommissioning of existing works in the Town.</li> </ul>	

8. Bicester Vision	
CDC Member/ Lead officer	Lead Authority(s)/Orgs
Cllr Wood  David Marriott (Rachel Faulkner)	Led by business community (under specific membership related governance arrangements)
Strategic Link	Value for Money Assessment
Strategic Priority: <b><i>District of Opportunity</i></b>	n/a
<p><u>Key Achievements 2008/09</u></p> <ul style="list-style-type: none"> <li>• Formal constitution established and funding secured for 3 years</li> <li>• Well attended events held in May and November</li> <li>• Christmas marketing literature</li> <li>• Support secured from OCC to Market Square environmental improvements scheme</li> <li>• Secured funding from OCC for scheme to make Bicester plastic-bag free</li> <li>• Promotional activity around Valentine's Day and Mothering Sunday to encourage shoppers.</li> </ul> <p><u>Actions for 2009/10</u></p> <ul style="list-style-type: none"> <li>• Working with voluntary group to achieve Fairtrade status for the town</li> <li>• Keep business groups informed about future plans for the town's development</li> <li>• Work with Town Centre Action Group on cleaner, greener streets</li> <li>• Working with Town Council on introduction of more continental markets and other events</li> <li>• Working on Town Centre shoppers map</li> <li>• Liaising with landlords about town centre properties</li> <li>• Working with TVP on Neighbourhood Action Group and Cherwell Crime Partnership on business crime.</li> </ul>	

<b>9. Central Oxfordshire Steering Group (planning and transport)</b>	
CDC Member/ Lead officer	Lead Authority(s)/Orgs
Cllr Gibbard Mary Harpley/John Hoad	Currently led by Oxfordshire County Council, but under review due to proposed change of role in Countywide partnership governance arrangements
Strategic Link	Value for Money Assessment
Strategic Priority: <b><i>District of Opportunity</i></b>	Fair
<p>This partnership is currently a simple inter authority Member led liaison arrangement designed to exchange information and co ordinate actions on sub regional planning and transport issues in the Oxford area. Existing terms of reference reflect this role and the partnership has, historically, effectively assisted local input to the Regional spatial Strategy preparation process (SEERA).</p> <p>The Partnership has not met regularly in recent years and is now in transition as it is proposed that it takes on a countywide and Local Area Agreement role as part of the current countywide review of partnership structures and associated governance arrangements. This review is considering thematic partnerships and this partnership will take a new role in performance liaison for planning and transport, and possibly housing matters. It is thus likely to increase in significance.</p>	

## Significant Partnerships - Progress with Governance Arrangements

The following summarises the progress the Council in 2008/09 in strengthening its governance arrangements for significant partnerships. This reflects the requirements of the Audit Commission's Use of Resources assessment and applies the principle contained in the Council's Partnership Working Framework of a proportionate application of governance arrangements.

Key Partnership Governance Requirements*	Progress: 2007/08 to 2008/09**	Outcome
Governance arrangements formally documented (Terms of Reference or equivalent)	<p>All 15 significant partnerships have Terms of Reference or equivalent, a number of which have strengthened their governance arrangements during the 08/09 year.</p> <p>In 2007/08, 14 of the Council's 15 significant partnerships had Terms of Reference or equivalent.</p>	The Council has strengthened its governance arrangements across a number of partnerships during the year, thereby focusing partnerships on their purpose and outcomes and reducing the Council's overall risk from inadequate governance arrangements.
Clear, outcome focused objectives	<p>100% of significant partnerships are delivering to clearer, more outcome focused objectives for 09/10.</p> <p>In 2007/08, 53% (8/15) were assessed as not having as clear as set of objectives as the Council would expect.</p>	The Council is now more focused on the delivery of outcomes from its significant partnerships and therefore better placed to assess the value for money being derived. See attached appendix for a summary of the objectives and actions proposed for 09/10.
Amount of money and resource at a partnership's disposal is understood and value for money assessment of costs and outcomes undertaken	<p>For 2008/09, value for money and resources of all significant partnerships assessed. All achieving some value for money, with 4 offering more substantial value for money: OHP, OWP, Homelessness Strategy Partnership and RSL Partnership.</p> <p>Since 2007/08, 2 partnerships, Cherwell Community Planning Partnership and Oxfordshire Economic Partnership have improved their value for money assessments.</p>	The Council can be assured that it is gaining value from its significant partnerships, above what it would have been able to achieve if operating on its own.
Regular review of financial and performance monitoring of partnerships	100% compliance, where appropriate, in both 07/08 and 08/09	Financial and performance monitoring are standing agenda items for many of the significant partnerships, providing active performance management tracking costs and outcomes during the year.
Council considers the risks of its significant partnerships and partnerships also consider	100% partnerships risk assessed by the Council in 08/09 66% (10 out of 15) partnerships risk assessed by the Council in 07/08.	The Council regularly risk assesses its involvement with all its significant partnerships as part of its routine risk

Key Partnership Governance Requirements*	Progress: 2007/08 to 2008/09**	Outcome
their own risks	<p>Many partnerships also have their own risk registers (eg OWP and the CSCP), and manage risk mitigation; this area will be strengthened further in 2009/10</p>	<p>management. As a result of the improvements in governance arrangements undertaken in 08/09, the Council's overall risk associated within inadequate governance arrangements has reduced during the 2008/09 year particularly the Homeless Strategy Partnership.</p>
Sound data quality governance arrangements, based on risk, such as data sharing protocols	<p>A Community Safety "Oxfordshire Information Sharing Protocol" was finalised in Feb 2009, ready for signing during March 2009.</p> <p>During 2008/09, a draft data sharing agreement has been developed with other local authorities and partners in Oxfordshire, expected to be signed by end March 2009. As a priority, data sharing issues in Housing are being progressed across Oxfordshire, to involve Registered Social Landlords, and this is anticipated to be in place by 31 October 2009.</p>	<p>Effective data sharing is key to efficient partnership working for many of the Council's significant partnerships. Developments in this area will continue during 2009/10 to provide increasing assurance that the Council and its partners have a sound legal basis underpinning data sharing arrangements as appropriate.</p>
Effective procedures for resolving disputes	<p>100% compliance for appropriate Cherwell specific partnerships by mid March 2009. Governance of countywide partnerships is currently under review by Public Services Board which will incorporate this requirement.</p> <p>In 07/08, 3 Cherwell specific partnerships lacked dispute resolution procedures where it was appropriate and these partnerships now have proportionate arrangements in place.</p>	<p>The Council has reviewed its position during the year working with relevant partnerships. Both the Council and the relevant partnerships are now in a stronger position with appropriate procedures in place should a dispute arise.</p>

\* Requirements are a summary of the partnership questions in the Use of Resources 2009 framework

\*\*This position is across 15 significant partnerships on the Register during 2008/09. It does not refer to the 2 new partnerships that have been added to the list as a result of the early 2009 refresh; these will be audited for compliance as part of the internal audit due to complete by the end March 2009.

# Agenda Item 9

## Executive

### Value for Money Review of Land Charges

16 March 2009

### Report of Strategic Director Customer Service and Resources

#### PURPOSE OF REPORT

To consider the findings of the Land Charges Value for Money (VFM) Review report and the recommendations arising from the report

This report is public

#### Recommendations

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The Executive is recommended to:

- (1) Endorse the overall conclusion of the review that the service is high cost and has low performance in terms of its productivity, but is high quality in terms of its search turnaround times.
- (2) Agree that further improvements in value for money be sought and approve the following recommendations to achieve this;
  - a) Reduce staffing levels by 37hrs per week to eliminate surplus capacity and generate savings of £22,650. This will bring employee hours per thousand population more into line with the average authority. These savings have already been identified and accommodated in the 2009/10 budget.
  - b) Further reduce the capacity within the service by 15hrs per week in recognition of the continuing fall in demand due to the economic slowdown, but re-invest these hours in improving the council's digital records to improve future productivity by allocating them to the council's GIS team. Monitor work volumes and review this arrangement after 6 months in order to maximise possible savings (should search volumes continue to fall) and ensure continuity of the service (should search volumes increase).
  - c) Recalculate the contributions paid to other services through internal recharges so that these are based on a cost per search rather than a fixed overhead. This would produce savings of £24,865 for the service in 2009/10, although these costs would be transferred elsewhere in the council.
  - d) Ascertain the true costs of the service (in anticipation of likely legislative changes allowing cost recovery charging) by carry out a zero based

budget analysis of support costs to remove any overhead cost loading on the service. This is to take place in autumn 2009 as part of the routine budget revision process.

- e) Raise the standard search fee from £80 to £120 (around the average for other Oxfordshire authorities) to raise additional income of £55,000 per annum. This may carry a risk of further reducing demand for searches, although reduced fees have not been shown to have any demonstrable influence on demand.
- f) If legislation is introduced to allow it, raise the fee for personal searches to at least £25. This would raise additional income of around £30,000 per annum.
- g) Implement the TLC ICT system to improve the automation of electronically held information for searches
- h) Move appointments bookings and advance payments for searches to the Customer Contact centre to provide a common standard of customer service to callers and to remove unproductive administrative work from the land charges team
- i) Develop and introduce an online booking and payments system for appointments to complement the telephone service and further reduce administrative work
- j) Discontinue using Land Charges staff team to deal with personal search appointments in the mornings, transferring this work to reception staff (this has already been agreed and is being undertaken as an early outcome of this review).

## **Executive Summary**

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### **Introduction**

- 1.1 This review forms part of the Value for Money programme of reviews, which aims to cover all services within the council and improve the value of services offered to residents of Cherwell.
- 1.2 Land Charges was selected as part of this programme given the recent shift in its financial position. Previously it was a source of income for the council but is now operating at a net cost to the authority. The small size and scope of the service made it a good candidate for a short, focused review to report quickly and within the financial year.
- 1.3 The overall conclusion of the review work is that the service is high cost with low levels of performance in terms of its productivity. It is high quality in terms of quick turnaround times for the searches made.

### **Proposals**

- 1.4 To adopt the recommendations of the Review in full.



## Conclusion

- 1.5 Improvements identified from the review will combine to reduce its cost base, improve productivity and customer service, and maximise the use of ICT in delivering the service;

## Background Information

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### Overview of the Area

- 2.1 Each local authority has a duty to maintain an accurate Local Land Charges Register for its own administrative area. A principal purpose of the Register is to protect buyers of land and property and help ensure that they are not caught unawares by obligations that are enforceable against successive owners. Information is provided to these buyers through searches of the register for relevant 'charges', which are restrictions/prohibitions or financial charges on the land or property that are binding on successive owners or occupiers.
- 2.2 The environment in which Land Charges operates has shifted significantly. Cherwell has seen its volume of searches fall by 18% in 2007/08, and a further 18% in 2008/09. The proportion of personal searches undertaken has increased from 26.6% in 2006/07 to 62.4%, although these have actually reduced in number by 15%.
- 2.3 The fall in official searches (for which the council sets a fee of £80) together with the rise in personal searches (for which there is a statutory fee of £11) have impacted on the level of income. This peaked in 2006/07 at £478,000 but since then it has declined dramatically, falling by 24% in 2007/08 and predicted to fall a further 44% in 2008/09. The budgeted income for 2009/10 is £166,000; 65% lower than that received in 2006/07.
- 2.4 Whereas the service represented a net income of £105,000 for the authority in 2006/07 it now represents a net cost. The degree of this turnaround is significant – in 2007/08 the service cost the authority £161,500 more than it did in 2006/07. Despite a 25.5% reduction in expenditure in 2008/09 predictions are that the service will represent a net cost of £110,000.
- 2.5 As the economic situation in the district continues to decline, the level of housing activity - and so the demand for land charge searches – will be further affected.

### VFM Review Findings

- 2.6 Appendix 1 contains the Executive Summary of the VFM review. Key findings from the review can be summarised as follows;
  - Cherwell's service is generally more expensive than other authorities. Employee costs per head of population were 18.5% above average or 111% per head more than the least expensive authorities.
  - Cherwell's level of staffing has not reduced in line with the reductions in demand for searches, leaving it with surplus capacity. As a result,

productivity was 30% lower than average or 103% lower than the best performers

- Historic recharge arrangements have made operating costs higher than necessary. 22% of total expenditure related to overpayment of other services for search work they carry out on behalf of the Land Charges team.
- The current ICT system used by the team is not efficient and is due to be de-supported by the software company in 2009/10. The effectiveness of the new ICT system is highly dependent on the quality and amount of digitised records.
- Cherwell had a low level of income in 2007/08 in comparison to benchmark authorities. Its standard search fee is set at £80; the lowest of all benchmark authorities. The highest fee set was by Ashford at £140
- Service quality is very high; the percentage of searches returned within 5 days (96%) was the 2nd highest of the benchmark authorities.

2.7 The review identified some quick win improvements that have already been implemented;

- Temporary staffing in the service has been reduced to better reflect the level of demand for searches and reduce unnecessary expenditure as soon as possible.
- Reception staff now deal with personal search appointments and payments in the mornings as well as the afternoons.

2.8 The review has identified a number of areas where improvements in the service can be made to ensure greater value for money;

- Further reducing staff levels in the service to reflect the reducing level of demand for searches, and for a limited period re-investing some extra capacity into the council's GIS team to improve digitised records which will benefit the service and the council more widely.
- Adjusting internal recharge arrangements to ensure that they better reflect the direct costs of the service, and the actual cost of search work carried out by other services on behalf of Land Charges.
- Increasing official search fees to match those of adjacent authorities and raise additional income.

### **VFM Review Recommendations**

2.9 The review recommendations for improving value for money in Land Charges are contained in pages 8 and 9 of Appendix 1. The key aspects of these are;

- Reduce costs in the service by reducing available staff hours by 37 per week, producing savings of £22,650 per annum. These savings have already been identified and accommodated in the 2009/10 budget.
- Adjust internal recharges so that Land Charges are only charged for the work actually carried out by other services. This will reduce expenditure

by £24,865 per annum although has no impact on the net costs of the authority it will result in additional cost allocations elsewhere.

- Increase the standard search fee from £80 to £120 to raise additional income of £55,000 per annum with effect from 1 April 2009
- If legislation is introduced to allow it, raise the fee for personal searches to at least £25. This would raise additional income of around £30,000 per annum.
- Move appointments bookings and advance payments for searches to the Customer Contact centre to provide a common standard of customer service to callers and to remove unproductive administrative work from the land charges team. Further develop this into an online booking and payments system.

## **Implications**

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<b>Financial:</b>	<p>The review has demonstrated that Land Charges is a high cost service. Potential savings of £132,515 have been identified by the review, £22,650 of which have already been built into the budget for 2009/10</p> <p>Comments checked by Karen Curtin, Chief Accountant 01295 221551</p>
<b>Legal:</b>	<p>The council has a statutory obligation to provide this service and so must ensure that any changes are sustainable and do not inhibit the effective discharge of its duties. Providing incorrect information as part of a search of the register can leave the council open to be sued.</p> <p>Comments checked by Liz Howlett, Head of Legal and Democratic Services 01295 221686</p>
<b>Risk Management:</b>	<p>Reduced staffing levels may put the service at risk from reduced cover and maintaining a continuity of service.</p> <p>Comments checked by Rosemary Watts, Risk Management and Insurance Officer 01295 221566</p>
<b>Data Quality</b>	<p>Base financial data for comparison has been obtained through 2007/08 RO returns from comparator authorities. Data cleansing on Cherwell data has been undertaken to eliminate known anomalies (e.g. PRP buyout) and ensure better comparability. Other benchmarking data was obtained through questionnaires and discussions with comparator authorities. Data checks were carried out on any anomalous data to verify or correct.</p> <p>Comments checked by Neil Lawrence, Project Manager, Improvement 01295 221801</p>

## **Wards Affected**

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All

## Corporate Plan Themes

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**An Accessible, Value for Money Cherwell**

## Executive Portfolio

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**Councillor JJ Mcnamara  
Portfolio Holder for Resources**

## Document Information

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<b>Appendix No</b>	<b>Title</b>
Appendix 1	Value for Money Review of Land Charges: Executive Summary
<b>Background Papers</b>	
None	
<b>Report Author</b>	Neil Lawrence, Project Manager, Improvement
<b>Contact Information</b>	01295 221801 neil.lawrence@cherwell-dc.gov.uk

## Land Charges VFM Review

# Executive Summary

## Cherwell District Council

<b>Timetable</b>	<b>Papers Finalised</b>	<b>Meeting Date</b>
Use of Resources Steering Group	8 January 2009	12 January 2009
CMT (final version)	20 February 2009	25 February 2008
Circulate to UoR Steering Group		26 February 2009
Executive	4 March 2009	16 March 2009

<b>Revision History</b>		
<b>Revision Date</b>	<b>Previous Revision Date</b>	<b>Summary of Changes</b>
5 February 2009		1 <sup>st</sup> draft of Executive Summary
20 February 2009	5 February 2009	Amendments and additional information from circulated draft. Includes revised search totals for 2007/08 and amendments to benchmarking information arising from this.
23 February 2009	20 February 2009	Amendments following the final project team meeting with Project Sponsor.
25 February 2009	23 February 2009	Further amendments from Project Sponsor. Addition of benchmarking Annex.
5 March 2009	25 February 2009	Amendment to para 1.26

## 1. Value for Money Review of Land Charges - Executive Summary

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### Introduction

#### Purpose of this report

- 1.1. This report details the findings of the VFM review of Land Charges and makes recommendations for improving value for money in the service.

#### Land Charges; background

- 1.2. Each local authority has a duty to maintain an accurate Local Land Charges Register for its own administrative area. A principal purpose of the Register is to protect buyers of land and property and help ensure that they are not caught unawares by obligations that are enforceable against successive owners.
- 1.3. A Local Land Charge is a restriction/prohibition or a financial charge on the land or property that is binding on successive owners or occupiers. Local Land Charges would not normally be disclosed by an examination of the title deeds or by inspection of the land or property itself, hence the need for a register maintained by local authorities.
- 1.4. There are two types of local search commonly made of local authorities in connection with land and property transactions: Search of the Local Land Charges Register and Enquiries of Local Authorities (known collectively as the official search).
- 1.5. Charges may be made for staff carrying out official searches on behalf of others (i.e. for solicitors involved in conveyancing) or by members of the public by what are known as personal searches. The introduction of personal searches has led to personal search companies effectively undercutting local authority search charges.

#### Cherwell in context

- 1.6. Cherwell saw its volume of searches fall by 18% in 2007/08, with a further 18% fall estimated for 2008/09 – a cumulative reduction of 32% over 2 years. The proportion of personal searches undertaken has increased from 26.6% in 2006/07 to 62.4%, although the diminishing base level of searches means these have actually reduced in number by 15%.
- 1.7. The reduction in overall search volumes along with the statutory fee of £11 for personal searches (compared to £80 for an official search) can be shown to have directly contributed to the reduction in income identified in 1.14 below.
- 1.8. Benchmarking work has shown that a fall in overall search volumes and a rise in the proportion of personal searches are typical amongst local authorities. This has been attributed to the introduction of Home Information Packs, the increase in popularity of personal search companies and, more recently, the economic downturn.
- 1.9. The environment in which Land Charges operates has shifted significantly. Once seen as a lucrative income generator for local authorities the balance has shifted to a presumption of cost recovery only and, more lately, a net cost to the authority. As the economic situation in the district continues to decline the level of housing activity, and so the demand for land charge searches, will inevitably be adversely affected.

### Land Charges Function

- 1.10. The Land Charges team is located within Legal and Democratic Services, having transferred there from Business Services as part of the restructuring in 2008. The workload of the team can be broken down as follows;

Functions	% Time
Official searches, Registrations and maintenance	61%
Personal Searches	26%
Miscellaneous and Management	13%

### Staffing

- 1.11. The service has a budgeted allowance of five staff (3.72 full time equivalents) comprising the Land Charges Manager (full time) and four Land Charge Assistants (one full time and 3 part time). There is a mix of temporary and permanent staff, with a vacancy in the team at present

Post Title	Full or Part-Time	Hrs PW	FTE	Contract type
Land Charges Manager	Full	37.00	1.00	Permanent
Land Charges Assistant	Part	23.75	0.64	Permanent
Land Charges Assistant	Full	37.00	1.00	Temporary
Land Charges Assistant	Part	25.00	0.68	Temporary
Land Charges Assistant	Part	15.00	0.41	(Vacant)
		<b>137.75</b>	<b>3.72</b>	

- 1.12. The Land Charges Manager is the only permanent member of staff with significant experience, the other permanent member of staff having joined in August 2008.

### Expenditure and Income

- 1.13. Income for service has reduced dramatically since 2006/07, as has its expenditure.

	2006/07		2007/08		2008/09	2009/10
	Budget	Outturn	Budget	Outturn	Revised budget	Draft budget
<b>Expenditure</b>	£318,000	£372,592	£334,000	£419,433	£312,173	£238,000
<b>Income</b>	(£411,000)	(£478,208)	(£397,000)	(£363,457)	(£201,570)	(£166,000)
<b>Net</b>	(£93,000)	(£105,618)	(£63,000)	£55,976	£110,603	£72,000

- 1.14. The level of income peaked in 2006/07 where actual income was 16% above the level budgeted. Since then it has declined dramatically, falling by 24% in 2007/08 and predicted to fall a further 44% in 2008/09. The budgeted income for 2009/10 is 65% lower than that received in 2006/07.
- 1.15. Whereas the service represented a net income for the authority in 2006/07 it now represents a net cost. The degree of this turnaround is significant – in 2007/08 the service cost the authority £161,500 more than it did in 2006/07. Despite a 25.5% reduction in expenditure in 2008/09 predictions are that the service will represent a net cost of £110,000.



## Findings from the Review

- 1.16. 2007/08 has been used as a base year for comparison in benchmarking work. Extensive data cleansing has been carried out on the 2007/08 RO return to make it as comparable as possible. Where misleading data has been provided in these returns by other authorities (i.e. no employee expenses despite having staff) these have been excluded from key calculations.
- 1.17. Findings from the review are presented below in terms of comparison to average performance, and also to top quartile performance (i.e. the best performing, whether this is high or low values). Figures in brackets present the costed implications of this difference in performance.

## VFM Conclusion

- 1.18. The overall conclusion of the review is that the service is **high cost** and has **low performance** in terms of its productivity, but is **high quality** in terms of its search turnaround times

## Expenditure

- 1.19. Cherwell had a mixed picture for the costs of its service in 2007/08 when compared to benchmark authorities, but is generally more expensive;
- Employee costs per head of population were 18.5% above average (£21,900 total), or 111% per head more than top quartile (£73,700 total). Employee costs per hour were 3.7% below average (-£5,300 total), or 23% more than top quartile (£26,400 total)
  - Running expenses per head of population were 12.4% below average ( -£25,260 total), or 18.7% more than top quartile (+£28,190 total)
  - Expenditure per search was 6% higher than average (£18,600 total) or 19.7% more than top quartile (£52,500 total)
- 1.20. The review has found that the main drivers of this performance in 2007/08 were as follows;
- Employee costs were higher than normal in 2007/08 as additional help was given to the team on a temporary basis. This was partly due to a long term sickness in the service, and also as a result of a request for more resources to help deal with the increases in personal searches. This created greater capacity within the service at a time when the volume of searches was decreasing, resulting in lower productivity but high quality in terms of search turnaround times
  - Support service recharges made to the service were not in line with its direct operating costs. This reflects the historic income generating environment of Land Charges, where loading it with some additional overhead costs was prudent to reduce the net costs of other frontline services. In addition an error was made in 2007/08 with the service being recharged an additional £56,000, or 13% of its overall expenditure.
  - An anomaly was identified in how recharges are made for search work carried out by other services. An allocation of £108,600 was added to the costs of the service by other cost centres in Planning and Environmental Services; a long-standing arrangement which was a prudent way of supporting staff costs in other services when Land Charges generated significant income. As a flat rate this historic arrangement does not relate to the level of work undertaken by these other services, effectively subsidising them when search volumes are below those forecast. The recharge itself does not appear in the operating

budget for the Land Charges team and so was not apparent to the Land Charges Manager until this review.

- As a result of the above, the Land Charges Manager had negotiated separate arrangements with Heads of Service to reimburse them for search work carried out on behalf of Land Charges using a cost-per-search rate. This arrangement resulted in costs of £93,224 in 2007/08 - effectively paying other services twice for the same work – accounting for 22% of its overall expenditure.
- There is a £12,000 payment per year made to the County Council of which £10,000 relates to information provision for highway records and £2,000 for common land and village green registration. Negotiations are in hand to make this payment part of a formal agreement, as per procurement best practice.

### **Staffing structure and productivity**

1.21. Cherwell had a higher level of staffing for its service in 2007/08 than benchmark authorities;

- Cherwell has the third highest number of person hours available per thousand of population of the benchmark authorities, 27.5% higher than average or 77% higher than top quartile
- Productivity (in terms of searches per hour) was 30% lower than average or 103% lower than top quartile; the third lowest of the benchmark authorities.

1.22. The review has found that the main drivers for this performance were as follows;

- Cherwell's level of staffing has not reduced in line with the reductions in demand for searches, leaving it with extra capacity. This has been addressed in part by retaining staff on a temporary basis, or leaving vacant posts unfilled. The service is currently operating on 122 hours per week (compared to the 138 hours used for comparisons in 2007/08) through operating with an unfilled vacancy of 15 hours. The 2009/10 budget for the service includes a 37 hours per week reduction.
- Cherwell has a labour-intensive search process which requires a high degree of checking to ensure that accurate search results are achieved. A process mapping exercise carried out with the team on the personal search process identified that the incomplete digitisation of records requires manual checking to ensure all land charges are correctly identified on search returns. As with other authorities, errors made by personal search companies when booking appointments also account for additional checking to locate the correct search location.
- The current ICT system used by the team is not efficient and is due to be de-supported by the software company in 2009/10. A more efficient system which is in use in seven of the benchmark authorities (TLC), is to be installed as part of the agreed capital programme. However, this is no guarantee of productivity; Oxford City is the only benchmark authority to have a completely automated search process but has a marginally higher productivity than Cherwell.
- The effectiveness of any new ICT system is highly dependent on the quality and amount of digitised records. Although all 35,000 planning files have been scanned back to 1974 there are estimated to be 41,000 relevant records yet to be digitised back to 1948, with an estimated 10,000 digitised records that require labour-intensive error checking. There is a high volume of other records that are not scheduled for scanning/digitisation which has not been fully evaluated. Limited resources in the GIS team to address these issues prevent the council from realising the full benefits of the TLC system when installed.
- Discussions with land charges teams in other authorities have confirmed that a similar scope of work is carried out in the benchmark authorities. However, direct comparisons

are difficult because of the varying degrees of automation across authorities, and the level to which they use other services to assist in search activity.

- Cherwell has been using staff time to take payments and deal with personal search visits to Bodicote House for morning appointments, whereas reception staff deal with this work in the afternoons.

### **Income**

1.23. Cherwell had a low level of income in 2007/08 in comparison to benchmark authorities.

- Cherwell has the 5<sup>th</sup> lowest level of income for standard searches; 9.1% below average and 40.1% below top quartile
- Cherwell has 6<sup>th</sup> lowest level of income for all searches (6.9% below average, 47.7% below top quartile)
- Total income per head of population was 8.1% below average (-£31,850 total) or 45.7% below top quartile (-£306,000 total)
- Income per search was £5.30 below average (-£26,900 total) or £65.12 below top quartile (-£330,900 total)

1.24. The review has found that the main drivers for this performance were as follows;

- Cherwell's standard search fee is set at £80; the lowest of all benchmark authorities. The highest fee set was by Ashford at £140.
- There is an apparent inelasticity of demand in fees for official searches. Cherwell's fee was reduced from £102 to £99 in 2006/07 in an attempt to stimulate demand and prevent a loss of business to personal search companies. It was reduced again to its current level in 2007/08 in light of cost recovery guidance. However, the service does not currently recover its costs in full.

### **Service Quality**

1.25. Cherwell had a high level of performance in 2007/08 in comparison to benchmark authorities.

- The percentage of searches returned within 5 days (96%) was the 2<sup>nd</sup> highest of the benchmark authorities
- The time taken to turn around searches was the 4<sup>th</sup> highest (4 days) of the benchmark authorities

1.26. As identified in 1.20 above, extra capacity in the team during 2007/08 enabled this high level of performance to be maintained. It is acknowledged that quality embraces more than turnaround times but with there being no other comparative data available this is the best measure available.

### **Best Practice**

1.27. A range of best practice examples were looked into as part of identifying improvements for the service.

- Shared Services were not in operation for any Land Charges team contacted through the LLCI, although Harborough were looking into this option with other Leicestershire authorities. Other authorities felt that a shared service option may be pursued in future, but only as part of a wider shared service initiative.

- Three authorities used their contact centres to take search appointment bookings. This option was explored with Customer Services & Information Systems staff as a follow-up to process mapping work. Such a transfer could be achieved quickly and easily, although there is no clear process gain from the move, and that the current manual system operates effectively. Benefits from such an introduction would be around the consistency of customer service across the council.
- A large number of authorities accept payment for search appointments over the telephone. Currently payment is made in person on the day of the search in Cherwell.
- An online booking and payment system for personal searches was also explored. An online form and appointments system could be introduced as part of current ICT plans. A major improvement in productivity would only be realised if the responsibility for accurately identifying the search location rested entirely with the applicant at the time of application through using an online map. Currently there is no way to capture the relevant search area online unless an expensive bespoke solution is developed.

### **Recommendations for Improvement**

- 1.28. Improvements identified from the review will combine to reduce its cost base, improve productivity and customer service, and maximise the use of ICT in delivering the service;

#### **Reduce Costs**

- Reduce staffing levels by 37hrs per week to eliminate surplus capacity and generate savings of £22,650. This will bring employee hours per thousand population more into line with the average authority. These savings have already been identified and accommodated in the 2009/10 budget.
- Further reduce the capacity within the service by 15hrs per week in recognition of the continuing fall in demand due to the economic slowdown, but re-invest these hours in improving the council's digital records to improve future productivity by allocating them to the council's GIS team. Monitor work volumes and review this arrangement after 6 months in order to maximise possible savings (should search volumes continue to fall) and ensure continuity of the service (should search volumes increase).
- Recalculate the contributions paid to other services through internal recharges so that these are based on a cost per search rather than a fixed overhead. This would produce savings of £24,865 for the service in 2009/10, although these costs would be transferred elsewhere in the council.
- Ascertain the true costs of the service (in anticipation of likely legislative changes allowing cost recovery charging) by carry out a zero based budget analysis of support costs to remove any overhead cost loading on the service. This is to take place in autumn 2009 as part of the routine budget revision process.

#### **Increase income**

- Raise the standard search fee from £80 to £120 (around the average for other Oxfordshire authorities) to raise additional income of £55,000 per annum. This may carry a risk of further reducing demand for searches, although reduced fees have not been shown to have any demonstrable influence on demand.
- If legislation is introduced to allow it, raise the fee for personal searches to at least £25. This would raise additional income of around £30,000 per annum.

#### **Improve productivity**

- Implement the TLC ICT system to improve the automation of electronically held information for searches

- Move appointments bookings and advance payments for searches to the Customer Contact centre to provide a common standard of customer service to callers and to remove unproductive administrative work from the land charges team
- Develop and introduce an online booking and payments system for appointments to complement the telephone service and further reduce administrative work
- Discontinue using Land Charges staff team to deal with personal search appointments in the mornings, transferring this work to reception staff (this has already been agreed and is being undertaken as an early outcome of this review).

Value for Money Review of Land Charges

5 March 2009

Annex 1

	Ashford	Aylesbury Vale	Basingstoke & Deane	Chalmersford	Cherwell	Colchester	Eastleigh	Hunts	Oxford City	South Oxfordshire	Test Valley	Tonbridge & Malling	Vale of White Horse	West Wiltshire	Average	Top quartile	Cherwell Difference to average	Percentage difference	Implication	Cherwell difference to top quartile	Percentage difference	Implication
<b>Values per head</b>																						
Employees	£1.46	£0.48	£0.00	£0.37	£1.02	£0.60	£0.64	£0.00	£0.48	£0.99	£0.81	£1.80	£0.43	£1.23	£0.86	£0.48	£0.16	18.5%	£21,876.22	£0.54	111.2%	£73,708.84
Running Exp	£0.84	£2.21	£1.99	£1.87	£1.30	£2.51	£1.36	£1.75	£1.02	£1.27	£1.04	£1.65	£0.62	£1.36	£1.48	£1.10	£-0.18	-12.4%	£-25,261.34	£0.20	18.7%	£28,189.54
<b>Total Exp</b>	<b>£2.30</b>	<b>£2.68</b>	<b>£1.99</b>	<b>£2.24</b>	<b>£2.32</b>	<b>£3.12</b>	<b>£2.00</b>	<b>£1.75</b>	<b>£1.50</b>	<b>£2.26</b>	<b>£1.85</b>	<b>£3.45</b>	<b>£1.04</b>	<b>£2.59</b>	<b>£2.22</b>	<b>£1.88</b>	<b>£0.10</b>	<b>4.4%</b>	<b>£13,489.71</b>	<b>£0.43</b>	<b>23.0%</b>	<b>£59,713.29</b>
Sales/Fees	£4.34	£3.44	£2.25	£2.53	£2.13	£2.64	£2.72	£2.27	£1.70	£2.57	£1.99	£3.60	£2.09	£3.57	£2.70	£4.34	£-0.57	-21.2%	£-78,985.65	£-2.21	-50.9%	£-303,878.22
Other income	£0.52	£0.00	£0.00	£0.06	£0.51	£0.76	£0.02	£0.00	£0.00	£0.05	£0.00	£0.00	£0.00	£0.41	£0.17	£0.76	£0.34	206.1%	£47,132.86	£-0.25	-33.4%	£-35,062.11
<b>Total income</b>	<b>£4.86</b>	<b>£3.44</b>	<b>£2.25</b>	<b>£2.59</b>	<b>£2.64</b>	<b>£3.41</b>	<b>£2.74</b>	<b>£2.27</b>	<b>£1.70</b>	<b>£2.62</b>	<b>£1.99</b>	<b>£3.60</b>	<b>£2.09</b>	<b>£3.98</b>	<b>£2.87</b>	<b>£4.86</b>	<b>£-0.23</b>	<b>-8.1%</b>	<b>£-31,852.78</b>	<b>£-2.22</b>	<b>-45.7%</b>	<b>£-306,041.78</b>
Net Current	£-2.56	£-0.76	£-0.26	£-0.35	£-0.32	£-0.29	£-0.74	£-0.52	£-0.19	£-0.36	£-0.14	£-0.16	£-1.05	£-1.39	£-0.65	£-0.75	£0.33	-50.8%	£45,342.49	£0.43	-57.6%	£59,736.78
Capital Charges	£0.08	£0.00	£0.00	£0.00	£0.00	£0.00	£0.36	£0.21	£0.00	£0.00	£0.00	£0.19	£0.14	£0.00	£0.07	£0.00	£-0.07	-100.0%	£-9,569.49	£0.00		£0.00
<b>Net total cost</b>	<b>£-2.48</b>	<b>£-0.76</b>	<b>£-0.26</b>	<b>£-0.35</b>	<b>£-0.32</b>	<b>£-0.29</b>	<b>£-0.38</b>	<b>£-0.31</b>	<b>£-0.19</b>	<b>£-0.36</b>	<b>£-0.14</b>	<b>£0.03</b>	<b>£-0.91</b>	<b>£-1.39</b>	<b>£-0.58</b>	<b>£-0.66</b>	<b>£0.26</b>	<b>-44.8%</b>	<b>£35,773.00</b>	<b>£0.34</b>	<b>-51.9%</b>	<b>£47,420.37</b>
<b>Employee Costs per hour</b>	<b>£21.68</b>	<b>£17.93</b>	<b>£0.00</b>	<b>£13.72</b>	<b>£19.54</b>	<b>£15.30</b>	<b>£20.01</b>	<b>£0.00</b>	<b>£12.65</b>	<b>£16.05</b>	<b>£18.07</b>	<b>£44.94</b>	<b>£16.87</b>	<b>£26.68</b>	<b>£20.29</b>	<b>£15.86</b>	<b>£-0.74</b>	<b>-3.7%</b>	<b>£-5,314.67</b>	<b>£3.68</b>	<b>23.2%</b>	<b>£26,387.90</b>
<b>Employee Costs as % total exp</b>	<b>63.3%</b>	<b>17.8%</b>	<b>0.0%</b>	<b>16.6%</b>	<b>43.9%</b>	<b>19.4%</b>	<b>32.1%</b>	<b>0.0%</b>	<b>32.2%</b>	<b>43.8%</b>	<b>43.9%</b>	<b>52.1%</b>	<b>41.0%</b>	<b>47.4%</b>	<b>32.38%</b>	<b>18.17%</b>	<b>11.51%</b>		<b>25.71%</b>			
<b>Employee hours per 000 pop</b>	<b>67.3</b>	<b>26.6</b>	<b>42.5</b>	<b>27.0</b>	<b>52.1</b>	<b>39.5</b>	<b>32.0</b>	<b>28.5</b>	<b>38.2</b>	<b>61.6</b>	<b>44.9</b>	<b>40.0</b>	<b>25.3</b>	<b>45.9</b>	<b>40.82</b>	<b>29.41</b>	<b>11.24</b>	<b>27.5%</b>		<b>22.65</b>	<b>77.0%</b>	
<b>Expenditure per search (all)</b>	<b>£64.65</b>	<b>£72.85</b>	<b>£47.81</b>	<b>£60.16</b>	<b>£62.77</b>	<b>£75.56</b>	<b>£52.12</b>	<b>£35.20</b>	<b>£53.39</b>	<b>£58.64</b>	<b>£55.44</b>	<b>£89.68</b>	<b>£32.90</b>	<b>£66.22</b>	<b>£59.10</b>	<b>£52.43</b>	<b>£3.67</b>	<b>6.2%</b>	<b>£18,652.49</b>	<b>£10.34</b>	<b>19.7%</b>	<b>£52,527.32</b>
<b>Employee exp per search (all)</b>	<b>£40.94</b>	<b>£12.95</b>	<b>£0.00</b>	<b>£9.97</b>	<b>£27.55</b>	<b>£14.64</b>	<b>£16.72</b>	<b>£0.00</b>	<b>£17.17</b>	<b>£25.66</b>	<b>£24.32</b>	<b>£46.75</b>	<b>£13.48</b>	<b>£31.38</b>	<b>£20.11</b>	<b>£13.08</b>	<b>£7.44</b>	<b>37.0%</b>	<b>£37,804.53</b>	<b>£14.47</b>	<b>110.6%</b>	<b>£73,514.85</b>
All searches per 000 pop	35.6	36.8	41.7	37.2	36.9	41.2	38.3	49.6	28.2	38.6	33.3	38.5	31.7	39.0	37.62	35.91	-0.7	-1.8%	-94.5	1.02	2.8%	140.6
Personal searches per 000 pop	15.3	17.1	22.2	17.3	15.6	18.6	17.0	17.6	13.0	17.5	16.6	16.1	15.2	13.2	16.58	15.36	-1.0	-5.9%	-133.8	0.25	1.6%	34.3
Searches per 000 households	82.2	91.5	97.7	86.9	90.8	98.5	89.5	118.7	73.9	88.4	79.7	91.4	74.2	87.9	89.38	83.38	1.4	1.5%	189.2	7.37	8.8%	1,014.0
Searches per total hours available	0.53	1.39	0.98	1.38	0.71	1.05	1.20	1.74	0.74	0.63	0.74	0.96	1.25	0.85	1.01	1.74		-30.0%			-103.03%	
Income per search (all)	£136.55	£93.45	£54.11	£69.64	£71.43	£82.61	£71.44	£45.66	£60.21	£67.88	£59.62	£93.73	£66.07	£101.87	£76.73	£136.55	£-5.30	-6.9%	£-26,958.17	£-65.12	-47.7%	£-330,922.62
Income for standard searches	£528,311	£566,693	£322,324	£394,969	£339,405	£563,064	£306,802	£347,781	£234,759	£311,338	£207,276	£396,826	£225,409	£481,828	£373,342	£566,693.00	£-33,937	-9.1%	£-172,466,745	£227,288.00	-40.1%	£-1,155,077.616
Income per search (standard)	£229	£163	£102	£120	£116	£139	£119	£64	£101	£115	£107	£152	£117	£148	£127.93	£229.00	£-12.37	-9.7%	£-36,324.66	£-113.44	-49.5%	£-293,473.60
Ratio of income to expenditure	2.11	1.28	1.13	1.16	1.14	1.09	1.37	1.30	1.13	1.16	1.08	1.05	2.01	1.54	1.32		-0.2	-14.1%	£-67,526.70	1.14		£413,068.97
Income per hour worked	£72.30	£129.43	£52.99	£95.82	£50.68	£86.34	£85.50	£79.43	£44.35	£42.45	£44.29	£90.10	£82.66	£86.63	£74.50		£-23.82	-32.0%	£-170,625.29	£50.68		£363,000.00
<b>Proportion of searches that are personal searches</b>																						
2006/07	26.2%	27.5%	30.1%	30.4%	26.6%	26.9%	48.1%	20.6%	27.2%	25.8%	27.4%	25.9%	0.0%	25.3%	26.28%		0.30%	1.1%				
2007/08	42.4%	45.8%	52.7%	46.1%	42.2%	43.9%	43.8%	35.2%	45.4%	45.3%	49.3%	41.2%	48.0%	33.7%	43.93%		-1.72%	-3.9%				
2008/09	58.3%	58.4%	61.4%	58.2%	62.4%	45.2%	58.1%	40.8%	64.6%	62.9%	56.7%	60.2%	73.5%	59.3%	58.57%		3.83%	6.5%				
Income for personal searches	£18,689	£32,307	£38,676	£31,031	£23,595	£34,936	£22,198	£32,219	£21,241	£24,662	£20,724	£20,174	£19,591	£18,172								
Proportion of income from personal searches (07/08)	3.5%	5.7%	12.0%	7.9%	7.0%	6.2%	7.2%	9.3%	9.0%	7.9%	10.0%	5.1%	8.7%	3.8%	7.38%		-0.42%	-5.8%		£0.07		
Expenditure on personal searches (07/08)	£109,845.48	£213,974.88	£168,106.12	£169,711.95	£134,642.86	£239,987.84	£105,172.64	£103,111.50	£103,089.60	£131,470.88	£104,447.70	£164,478.76	£58,598.17	£109,392.83						£134,642.86		
Cost recovery fee for personal searches	£64.65	£72.85	£47.81	£60.16	£62.77	£75.56	£52.12	£35.20	£53.39	£58.64	£55.44	£89.68	£32.90	£66.22						£62.77		
08/09 searches as propn of 07/08	79.0%	76.3%	70.4%	74.1%	76.3%	56.9%	71.6%	72.8%	83.0%	76.2%	68.0%	74.2%	102.5%	61.2%	74.45%		1.81%	2.4%		£0.00		£0.76

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# Agenda Item 10

## Executive

### The Future of Markets in Cherwell

16 March 2009

### Report of the Overview and Scrutiny Committee

#### PURPOSE OF REPORT

To consider the report of the Task and Finish Group scrutiny review into the future of markets in Cherwell and the supporting recommendations from the Overview and Scrutiny Committee.

This report is public

#### Recommendations

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The Executive is recommended to:

- (1) note the work of the Task and Finish Group scrutiny review into the future of markets in Cherwell as detailed in Appendix 1;
- (2) agree the Overview and Scrutiny Committee recommendations regarding the markets in Cherwell as detailed in the report from the Task and Finish Group (Appendix 1).

#### Executive Summary

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##### Introduction

- 1.1 The Task and Finish Group into the future of markets in Cherwell will report its findings to the Overview and Scrutiny Committee on 10 March 2009.
- 1.2 The Overview and Scrutiny Committee will consider the report and agree a series of recommendations for the Executive. The recommendations and report will be circulated to the Executive on 11 March 2009.

#### Key Issues for Consideration/Reasons for Decision and Options

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- 2.1 The following options have been identified. The approach in the recommendations is believed to be the best way forward

**Option One** To accept some or all of the overview and scrutiny recommendations.

**Option Two** To reject some or all of the overview and scrutiny recommendations.

## **Consultations**

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See Appendix 1 for details

## **Implications**

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(Financial, Legal and Risk and other implications e.g. Equalities, Human Resources, Data Quality and Environmental where relevant)

**Financial:** There are no financial implications arising directly from this report.

Comments checked by Denise Westlake, Service Accountant 01295 221559

**Legal:** There are no legal implications arising directly from this report.

**Risk Management:** There are no risk implications arising directly from this report.

Comments checked by Rosemary Watts, Risk Management and Insurance Officer, 01295 221566

## **Wards Affected**

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**All Banbury, Bicester and Kidlington wards**

## **Corporate Plan Themes**

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**A District of Opportunity  
An Accessible, Value for Money Council**

## **Executive Portfolio**

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**Councillor Morris  
Portfolio Holder for Urban and Rural Services**

## **Document Information**

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<b>Appendix No</b>	<b>Title</b>
Appendix 1	The Future of Markets in Cherwell (to follow)
<b>Background Papers</b>	
<b>Report Author</b>	Catherine Phythian, Scrutiny Officer
<b>Contact Information</b>	01295 221587 Catherine.phythian@Cherwell-dc.gov.uk



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