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Cherwell

DISTRICT COUNCIL
NORTH OXFORDSHIRE

Committee: Overview and Scrutiny Committee

Date: Tuesday 18 March 2025

Time: 6.30 pm

Venue: Bodicote House, Bodicote, Banbury, OX15 4AA

Membership

Councillor Dr Isabel Creed (Chairman)

Councillor Gordon Blakeway
Councillor Phil Chapman
Councillor Andrew Crichton
Councillor Harry Knight
Councillor Lynne Parsons

Councillor Nigel Simpson (Vice-Chairman)

Councillor John Broad
Councillor Grace Conway-Murray
Councillor Frank Ideh
Councillor Simon Lytton
Councillor Barry Wood

Substitutes Any member of the relevant political group, excluding
Executive members

AGENDA

Overview and Scrutiny Members should not normally be subject to the party whip.
Where a member is subject to a party whip they must declare this at the beginning
of the meeting and it should be recorded in the minutes.

1. Apologies for Absence and Notification of Substitute Members

2. Declarations of Interest

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

3. Minutes

To confirm as a correct record the minutes of the meeting held on 11 March 2025.

Minutes to follow due to the meeting being held after agenda publication.

4. Chairman's Announcements

To receive communications from the Chairman.

5. Urgent Business

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

6. Housing Action Plan Update

To receive a verbal update on the Housing Action Plan.

7. Everybody's Wellbeing Strategy Impact Assessment (Pages 5 - 16)

Report of the Assistant Director Wellbeing and Housing.

Purpose of report

To receive an update on the Wellbeing Strategy and agree Outcome and Evaluation measures.

Recommendations

The Overview and Scrutiny Committee resolves:

- 1.1 To request the Executive to note "Everybody's Wellbeing" Wellbeing Strategy, agree the Evaluation baseline measures and action plan measures

8. Annual Delivery Plan and Performance Outcomes Framework for 2025 - 2026 (Pages 17 - 32)

Report of the Assistant Director Customer Focus.

Purpose of report

To get feedback from the committee on the council's draft Annual Delivery Plan and Performance measures for 2025/26.

Recommendations

The Overview and Scrutiny Committee resolves:

- 1.1 To consider the draft Annual Delivery Plan for 2025/26 and accompanying performance measures.

- 1.2 To recommend changes and adaptations to the Executive prior to the committee finalising the annual delivery plan and associated measures.

9. Transformation Programme (Pages 33 - 82)

Report of the Assistant Director Customer Focus.

Purpose of report

Overview and Scrutiny have requested answers to questions relating to the council's Transformation programme. This report responds to the questions raised and answers them as they have been asked.

Recommendations

The Overview and Scrutiny Committee resolves:

- 1.1 To comment on the contents of this report and make any recommendations.

10. Scrutiny Working Groups Update (Pages 83 - 158)

An update on the Scrutiny Working Groups since the last Overview and Scrutiny Committee on 28 January 2025.

Recommendations

The Overview and Scrutiny Committee resolves:

- 1.1 To note the Scrutiny Working Groups update.
- 1.2 To consider and agree the Climate Action Scrutiny report and make any recommendations to the Executive.
- 1.3 To consider and agree the EDI Scrutiny Report and make any recommendations to the Executive.
- 1.4 To consider and agree the Food Insecurity Scrutiny Report and make any recommendations to the Executive.

11. Work Programme Update

An update on the Overview and Scrutiny Work Programme.

Work programme planning and the work programme for the 2025-2026 municipal year will be considered at the first meeting of the new municipal year, 3 June 2025.

For Information - Scrutiny Guide

The Scrutiny Guide is attached for information and reference.

Councillors are requested to collect any post from their pigeon hole in the Members Room at the end of the meeting.

Information about this Meeting

Apologies for Absence

Apologies for absence should be notified to democracy@cherwell-dc.gov.uk or 01295 221534 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.

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.

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The council is obliged, by law, to allow members of the public to take photographs, film, audio-record, and report on proceedings. The council will only seek to prevent this should it be undertaken in a disruptive or otherwise inappropriate manner.

Queries Regarding this Agenda

Please contact Michael Carr / Martyn Surfleet, Democratic and Elections
democracy@cherwell-dc.gov.uk, 01295 221534

Shiraz Sheikh
Monitoring Officer

Published on Monday 10 March 2025

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This report is public	
Everybody's Wellbeing Strategy Impact Assessment	
Committee	Overview and Scrutiny Committee
Date of Committee	18 March 2025
Portfolio Holder presenting the report	Portfolio Holder for Healthy Communities, Councillor Rob Pattenden
Date Portfolio Holder agreed report	17 February 2025
Report of	Tom Gubbins, Wellbeing Manager

Purpose of report

To receive an update on the Wellbeing Strategy and agree Outcome and Evaluation measures.

1. Recommendations

The Overview and Scrutiny Committee resolves:

- 1.1 To request the Executive to note "Everybody's Wellbeing" Wellbeing Strategy, agree the Evaluation baseline measures and action plan measures

2. Executive Summary

- 2.1 This report provides an overview of the "Everybody's Wellbeing" Strategy and baseline outcome measures planned to be collected from the annual satisfaction survey and six-monthly citizen space surveys. This feedback will be collected to assess the need and impact while also linking into the Wellbeing Service plan.
- 2.2 Working with performance team Annual Satisfaction survey questions around wellbeing will be asked and collected to produce a baseline of where residents currently see their wellbeing and how they interact with areas of the wellbeing service. This will enable the wellbeing team to establish a base and continually ask these questions on a six-month period to review progress. Action plan measures are detailed below and will be reported a quarterly basis. Both the Annual Satisfaction survey questions and action plan measures will be displayed on the updated [Story Map](#)

Implications & Impact Assessments

Implications		Commentary		
Finance		There are no direct financial implications arising from this report. All expenditure relating to the delivery of the Wellbeing Strategy is already in the existing budget. Kelly Wheeler, Finance Business Partner, 29 January 2025		
Legal		There are no legal implications as monitoring of the wellbeing strategy, and this is within the council's remit to deliver. We would note that the collection and collation of the survey responses would involve collecting data. While we understand that the data would be anonymised and would not require retaining any personal information, this should be reviewed regularly, and we would suggest that advice is taken from the Council's Information Governance team to confirm that there are no additional requirements in relation to this proposal. Denzil – John Turbervill, Head of Legal, 29/01/2025		
Risk Management		There are no risk implications arising directly from this report. The strategy mitigates the risk of falling short on our duty of care for our most vulnerable residents in time of need. Celia Prado-Teeling, Performance Team Leader, 29 January 2025		
Impact Assessments		Positive	Neutral	Negative
Equality Impact		X		
				Everybody's Wellbeing strategy was produced in line with our Equalities, Diversity and Inclusion framework aiming to improve the lives of all our residents, including those more vulnerable, within the protected characteristics groups. Celia Prado-Teeling, Performance Team Leader, 29 January 2025
A Are there any aspects of the proposed decision, including how it is delivered or accessed, that could impact on inequality?		X		
B Will the proposed decision have an impact upon the lives of people with protected characteristics, including employees and service users?		X		

Climate & Environmental Impact				N/A
ICT & Digital Impact				Story map will detail impact
Data Impact				Story map and systems to capture evidence will improve data systems
Procurement & subsidy				Not needed
Council Priorities	<p>Healthy, resilient and engaged communities</p> <p>Everybody's Wellbeing provides a framework that supports communities and residents to enhance their quality of life and promote equitable health outcomes across local communities. Evaluation will enable the service to showcase impact and any gaps in provision.</p> <p>It will assist us in evidencing progress against the shared vision of becoming a Marmot Place</p>			
Human Resources	N/A – no additional resource required			
Property	N/A – No additional needs arising from the report			
Consultation & Engagement	<p>The Wellbeing Strategy engaged and consulted with residents and stakeholders to ensure the strategy addresses the needs of the local community. This style of coproduction and benchmarking will be enabled by the surveying and consequent data collection. Consultation will be regularly carried out to gain evaluation, stories, data collection and develop impact reports.</p>			

Supporting Information

3. Background

- 3.1 Everybody's Wellbeing Strategy outlines how the Cherwell District Council can help support and improve Cherwell residents' health and quality of life. Partnering with public sector bodies, local organizations, and communities, the strategy addresses key social determinants of health and access to services.
- 3.2 Focusing on Wellbeing, the strategy promotes healthier lifestyles through initiatives such as physical activity, community engagement, and healthy eating, along with providing access to high-quality facilities encouraging participation in physical activity and community opportunities. By linking with broader frameworks like the Oxfordshire Health and Wellbeing Strategy, the strategy seeks to reduce inequalities, enhance wellbeing, and build more resilient communities across the district.

4. Details

- 4.1 Everybody's Wellbeing strategy looks at how we can influence improving the overall wellbeing of Cherwell residents through partnership and collaboration. Focusing on

the importance of healthy living, physical activity, community engagement, high quality facilities while also addressing the broader social determinants of health inequalities.

4.2 Everybody's Wellbeing has seven goals that focus the work of the Wellbeing team

Goal 1: Everyone Can Be Physically Active

Goal 2: Everyone Can Eat Well

Goal 3: Everyone Can Be A Dynamic Participant In Their Community

Goal 4: Everyone Can Connect With Nature

Goal 5: Everyone Can Connect With Culture

Goal 6: Everyone In Our Growing Community Feels Welcomed And Included

Goal 7: Cherwell District Council Adds Value To The Work Of NHS And Other Public Sector Colleagues Helping Individuals Struggling With Poor Physical Or Mental Health

4.3 Proposed Measurements and Evaluation

The Measurement and Evaluation of the strategy will demonstrate that the work being delivered and facilitated by the Wellbeing team addresses immediate needs and contributes to long-term wellbeing; sustaining local residents and our communities. Ideally this will articulate the impact being delivered alongside highlighting gaps in provision to learn and develop.

4.4 There is a need initially to build a baseline response from residents around how they regard their own wellbeing and feel about access to provision in the focus areas that are part of the strategy.

4.5 Working with the performance team questions (sample below) will be placed in the Annual Satisfaction Survey along with six monthly Citizen Space surveys to ask residents how they see their wellbeing currently and interact with areas of Everyone's Wellbeing strategy. This will initially give a baseline of results and then offer the opportunity to continually assess the progress on a six-monthly basis to demonstrate impact and identify any potential gaps in provision.

4.6 The impact will also be demonstrated in new layers within the [Story Map](#) which is being updated with the support of the Digital Innovation Team and will showcase the results of surveys, action plan outcomes and impact. Along with highlighting any gaps in provision to help target specific location and demographics.

Sample questions

1) How would you rate your wellbeing (From 1 – not good, to 5 – excellent):

a) Physical Wellbeing

1 2 3 4 5
☐ ☐ ☐ ☐ ☐

b) Mental Wellbeing

1 2 3 4 5
☐ ☐ ☐ ☐ ☐

2) **How do you interact with the below wellbeing areas within your local community? (From 1 – not at all, to 5 – constantly in):**

a) Connecting with the community and volunteering:

1 2 3 4 5
☐ ☐ ☐ ☐ ☐

b) Physical activity:

1 2 3 4 5
☐ ☐ ☐ ☐ ☐

c) Nature:

1 2 3 4 5
☐ ☐ ☐ ☐ ☐

d) Eating well:

1 2 3 4 5
☐ ☐ ☐ ☐ ☐

e) Arts & Culture:

1 2 3 4 5
☐ ☐ ☐ ☐ ☐

1) **How do you rate your involvement in the below areas? (From 1 – not at all, to 5 – committed to):**

a) Connecting with the community and volunteering:

1 2 3 4 5
☐ ☐ ☐ ☐ ☐

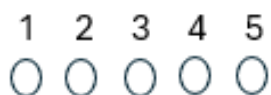
b) Physical activity:

1 2 3 4 5
☐ ☐ ☐ ☐ ☐

c) Nature and arts:

1 2 3 4 5
☐ ☐ ☐ ☐ ☐

d) Eating well:



Alongside the questions within the Annual Satisfaction survey there will be action delivery outcomes that will be collected on a quarterly basis and link into the Wellbeing service plan. Initially in most areas a base line will be established.

Evaluation information will be collated on a quarterly basis with six monthly and annual reports produced from these results coupled with annual satisfaction survey results.

Goal 1: Everyone can be physically active

- 5% increase in numbers in Leisure Centres and managed facilities
- Number of residents attending physical activity opportunities delivered and facilitated by Wellbeing Team

Goal 2: Everyone can eat well

- Number of Food related engagement programmes facilitated and delivered by Wellbeing Team
- Number of grants and support awarded to residents and community organisations by Wellbeing Team

Goal 3: Everyone can be a dynamic participant in their community

- Number of Community Voluntary events delivered and facilitated by Wellbeing Team
- Number of Neighbourhood Plans or master planning initiatives inputted towards from voluntary sector.

Goal 4: Everyone can connect with nature

- Number of residents accessing opportunities to explore nature in Cherwell through delivered and facilitated activities
- Development of Bio Diversity plan

Goal 5: Everyone can connect with culture

- Number of cultural opportunities delivered and facilitated by Wellbeing Team
- Number of Public Art consultations

Goal 6: Everyone in our growing community feels welcome and included

- Number of initiatives delivered and facilitated by Wellbeing Team within local communities focusing on targeting priority wards and demographics
- Number of Healthy Place Shaping opportunities delivered and facilitated by Wellbeing team

Goal 7: Cherwell District Council Adds Value To The Work Of NHS And Other Public Sector Colleagues Helping Individuals Struggling With Poor Physical Or Mental Health

- Number of Participants who are part of Move Together and You Move Programmes
Minimum 1,500 target

- 20% increase in mobility and mental wellbeing of participants on programme

4.7 Stakeholder and partner engagement has taken place to develop action plan measures. As we will be reliant on collecting information from stakeholders and partners. This approach will foster a sense of ownership and commitment to the strategy's success among all stakeholders.

5. Alternative Options and Reasons for Rejection

5.1 The following alternative options have been identified and rejected for the reasons as set out below.

Option 1: No evaluation process to obtain baseline data for the Everyone's Wellbeing will mean that the service will not be able to monitor progress and improve service provision going forward.

Option 2 Consider a more rigorous and intrusive data collection rejected due to limited benefit

6 Conclusion and Reasons for Recommendations

6.1 The recommended option would be for the evaluation and monitoring proposal for Everybody's Wellbeing Strategy to be approved to enable the service to more effectively monitor impact and any potential gaps. The initial questions will determine baseline which will then be repeated on a six-monthly basis to show impact and any gaps in provision.

Decision Information

Key Decision	N/A
Subject to Call in	N/A
If not, why not subject to call in	N/A
Ward(s) Affected	District Wide

Document Information

Appendices	
Appendix 1	Everybody's Wellbeing slides
Background Papers	None
Reference Papers	None

Report Author	Tom Gubbins, Wellbeing Manager
Report Author contact details	Tom.gubbins@cherwell-dc.gov.uk



Cherwell

DISTRICT COUNCIL
NORTH OXFORDSHIRE

EVERYBODY'S WELLBEING: A HAPPY HEALTHY COMMUNITY

EVERYONE
CAN CONNECT
WITH NATURE

EVERYONE CAN
BE A DYNAMIC
PARTICIPANT IN
THEIR COMMUNITY

EVERYONE CAN
EAT WELL

EVERYONE CAN BE
PHYSICALLY ACTIVE

EVERYONE
CAN CONNECT
WITH CULTURE

EVERYONE IN OUR
GROWING COMMUNITY
FEELS WELCOMED AND
INCLUDED

CHERWELL DISTRICT
COUNCIL ADDS VALUE
TO THE WORK OF NHS
AND OTHER PUBLIC
SECTOR COLLEAGUES



Wellbeing Strategy Outcomes



Proposed Measurements and Evaluation

- The Measurement and Evaluation of the strategy is important to demonstrate work being delivered and facilitated by the Wellbeing team meets immediate need, contributes to long-term wellbeing and addresses any gaps in provision.
- Baseline levels will be built up through six monthly questions in the Annual Customer Satisfaction and Citizen Space Surveys that ask about residents' involvement, interaction and perception around areas of wellbeing of areas in the strategy
- Sample of questions that will go in Annual Satisfaction Survey

Page 17

1) How would you rate your wellbeing (From 1 – not good, to 5 – excellent):

a) Physical Wellbeing

1 2 3 4 5

○ ○ ○ ○ ○

b) Mental Wellbeing

1 2 3 4 5

○ ○ ○ ○ ○

2) How do you interact with the below wellbeing areas within your local community? (From 1 – not at all, to 5 – constantly in):

a) Connecting with the community and volunteering:

1 2 3 4 5

○ ○ ○ ○ ○

b) Physical activity:

1 2 3 4 5

○ ○ ○ ○ ○

c) Nature:

1 2 3 4 5

○ ○ ○ ○ ○

d) Eating well:

1 2 3 4 5

○ ○ ○ ○ ○

e) Arts & Culture:

1 2 3 4 5

○ ○ ○ ○ ○

1) How do you rate your involvement in the below areas? (From 1 – not at all, to 5 – committed to):

a) Connecting with the community and volunteering:

1 2 3 4 5

○ ○ ○ ○ ○

b) Physical activity:

1 2 3 4 5

○ ○ ○ ○ ○

a) Nature and arts:

1 2 3 4 5

○ ○ ○ ○ ○

b) Eating well:

1 2 3 4 5

○ ○ ○ ○ ○

Wellbeing Strategy Outcomes



- Alongside the Annual Satisfaction survey baseline questions, the Wellbeing Team will collect delivery targets on a quarterly basis in each of the Seven Goals in Everyone's Wellbeing strategy

Goal 1: Everyone can be physically active

- 5% increase in numbers in Leisure Centres and managed facilities
- Number of residents attending physical activity opportunities delivered and facilitated by Wellbeing Team

Goal 2: Everyone can eat well

- Number of Food related engagement programmes facilitated and delivered by Wellbeing Team
- Number of grants and support awarded to residents and community organisations by Wellbeing Team

Goal 3: Everyone can be a dynamic participant in their community

- Number of Community Voluntary events delivered and facilitated by Wellbeing Team
- Number of Neighbourhood Plans or master planning initiatives inputted towards from voluntary sector.

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- Development of [Bio Diversity](#) plan

Goal 5: Everyone can connect with culture

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- Number of Public Art consultations

Goal 6: Everyone in our growing community feels welcome and included

- Number of initiatives delivered and facilitated by Wellbeing Team within local communities focusing on targeting priority wards and demographics
- Number of Healthy Place Shaping opportunities delivered and facilitated by Wellbeing team

Goal 7: Cherwell District Council Adds Value to The Work of NHS And Other Public Sector Colleagues Helping Individuals Struggling [With](#) Poor Physical Or Mental Health

- Number of Participants who are part of Move Together and You Move Programmes Minimum 1,500 target
- 20% increase in mobility and mental wellbeing of participants on programme

- Impact will be demonstrated through quarterly reports on all the Seven areas in "Everyones Wellbeing"
- Updated "Everyone's Wellbeing" layers will be added to the [Story Map](#) to visually show impact

This report is public	
Annual Delivery Plan and Performance Measures 2025-26	
Committee	Overview and Scrutiny
Date of Committee	18 March 2025
Portfolio Holder presenting the report	Portfolio Holder Resources - Councillor Chris Brant
Date Portfolio Holder agreed report	05 March 2025
Report of	Assistant Director Customer Focus – Shona Ware

Purpose of report

To get feedback from the committee on the council's draft Annual Delivery Plan and Performance measures for 2025/26.

1. Recommendations

The Overview and Scrutiny Committee resolves:

- 1.1 To consider the draft Annual Delivery Plan for 2025/26 and accompanying performance measures.
- 1.2 To recommend changes and adaptations to the Executive prior to the committee finalising the annual delivery plan and associated measures.

2. Executive Summary

- 2.1 In February this year, Full Council agreed to adopt a new vision for the council and four strategic priorities for achieving over the next five years, as part of its new Corporate Strategy. This overarching 5-year strategy is underpinned by Annual Delivery Plans for each year of the Corporate Plan period.
- 2.2 The Annual Delivery Plans set out the strategic actions for delivering each year towards achieving the priorities established in its Corporate Strategy.
- 2.3 The draft Annual Delivery Plan for the new financial year 2025/26 is attached in Appendix 1. The key deliverables are broken down into major milestones (where appropriate) and these will be monitored and reported to this committee and Executive on a quarterly basis.
- 2.4 The council's progress towards achieving its strategic priorities and measuring service delivery will be through a series of Key Performance Indicators (KPIs). The proposed list of KPIs for 2025/26 are attached in Appendix 2.
- 2.5 Please note these proposals are still being outlined, to ensure transparent, effective and strategic monitoring and reporting on our progress.

Implications & Impact Assessments

Implications		Commentary		
Finance		There are no financial or resources implications arising directly from this report. The financial implications of the new Council Plan were captured as part of the budget setting process and approved by Full Council on 24 February 2025. Joanne Kaye, Head of Finance, 04 March 2025		
Legal		There are no legal implications arising directly from this report. It may be that some of the targets in appendix 2 are prescribed to us, if so, they should be clearly marked as such as CDC will need to put plans in place quickly if we are falling behind in meeting these. Denzil Turbervill, Head of Legal, 5 March 2025		
Risk Management		There are no risk implications arising directly from this report. Having an establish set of objectives, activities and key performance indicators to manage and report on our progress against the Council's Strategy, mitigates several risks, such as of lack of transparency, or risk of not delivering on our commitments to our residents. Celia Prado-Teeling, Performance Team Leader, 28 February 2025		
Impact Assessments		Positive	Neutral	Negative
Equality Impact		x		
A Are there any aspects of the proposed decision, including how it is delivered or accessed, that could impact on inequality?		x		
B Will the proposed decision has an impact upon the lives of people with protected		x		

characteristics, including employees and service users?				
Climate & Environmental Impact	x			The proposed ADP actions and KPIs aim to have a positive impact from a climate and environment perspective, enabling the delivery of our strategic priority to lead on environmental stewardship and climate action. Jo Miskin, Climate Action Manager
ICT & Digital Impact				N/A
Data Impact				N/A
Procurement & subsidy				N/A
Council Priorities	All: <ul style="list-style-type: none"> • Economic Prosperity • Community Leadership • Environmental Stewardship • Quality Housing and Place Making 			
Human Resources	N/A			
Property	N/A			
Consultation & Engagement	The council sought the views of residents and businesses about the new Council vision and strategy from 22 November 2024 until 23 December 2024.			

Supporting Information

3. Background

- 3.1 The council has been working on a new corporate vision and strategy that reflect its ambitions for the future, addresses potential challenges and maximises the opportunities to provide better outcomes for its residents and key stakeholders. The plan includes a new vision for the Council, which is: **“A modern council inspiring and enabling positive, lasting change”**
- 3.2 The plan also includes the following four key priorities for the next five years (2025-2030):
- Economic Prosperity
 - Community Leadership
 - Environmental Stewardship
 - Quality Housing and Place Making
- 3.3 These priorities are underpinned by a suite of goals and aims for ensuring clarity and success, which are set out in the Annual Delivery Plan.

- 3.4 The draft proposals presented in this report are currently being finalised, as such, the Executive Committee is seeking for the Overview and Scrutiny Committee's feedback and input to be incorporated in the final proposal.

4. Details

Draft Annual Delivery Plan 2025-26

- 4.1 The proposed Annual Delivery Plan 2025-26 contains 28 actions for delivering next year across its four corporate priorities, appendix 1 provides the details for each action, including set milestones.

Draft Key Performance Indicators 2025-26

- 4.2 After a review by services, and in consultation with the relevant executive member, the following changes are being proposed to the existing list of KPIs.

- To remove or delegate the following measures to the Directorate and lead PH for monitoring. These measures were introduced to align our reports with the KPIs reported by the Office for Local Government (Oflog), which no longer exists:
 - Non-ringfenced reserves as percentage of net revenue expenditure
 - Non-ringfenced reserves as percentage of service spend
 - Total core spending power per dwelling
 - Level of band D council tax rates
 - Debt servicing as percentage of core spending power
 - Total debt as percentage of core spending power
- Following the above proposed deletion, a new set of organisational KPIs is currently being discussed and will be brought to the attention of this committee for review and approval in due course.
- One new measure has been proposed "No of enterprises in the district"
- To change the current measure for monitoring the "Number of Homeless Households living in Temporary Accommodation (TA)" to the "Number of homeless households living in **nightly charged (hotel) temporary accommodation** (TA)"

- 4.3 All Key Performance Indicators will be monitored and reported on a quarterly basis. The tables in Appendix 2 show the level of monitoring that is being proposed for each KPI. Corporate KPIs will be reported to this committee and Executive on a quarterly basis and Directorate KPIs to the relevant portfolio holder quarterly and to the committees only on an exception basis.

- 4.4 For 2025-26 of the 29 draft Key Performance Indicators, 16 are Corporate KPIs (12 quarterly, three yearly and one biannually), and 13 will be monitor at Directorate level.

5. Alternative Options and Reasons for Rejection

- 5.1 Option 1: Not to have a new annual delivery plan and performance outcomes framework, however without one, the council cannot monitor its progress towards achieving its desired outcomes and therefore agree any corrective action that might be necessary to keep them on track. This option has therefore been rejected as the council would risk being able to deliver better outcomes for its communities.

6. Conclusion and Reasons for Recommendations

- 6.1 This report sets out a suggested annual delivery plan and framework for measuring and monitoring the council's performance and progress towards achieving better outcomes for its communities. The framework will ensure there is a clear pathway to achieving success, and the committee's views are sought to ensure the Annual Delivery Plan is aligned to achieving the council's corporate vision and strategy, and for ensuing robust performance management arrangements are in place.

Decision Information

Key Decision	N/A
Subject to Call in	N/A
If not, why not subject to call in	N/A
Ward(s) Affected	All

Document Information

Appendices	
Appendix 1	Annual Delivery Plan 2025-26 Actions & Milestones DRAFT
Appendix 2	Performance Outcomes Framework 2025-26 KPIs DRAFT
Background Papers	None
Reference Papers	Budget Setting for 2025/26 and the Medium-Term Financial Strategy up to 2029/30 http://svc-sql-modg-01:9070/documents/s58425/Budget%20Corporate%20Plan%20Report%202025-26%20UPDATED.pdf
Report Author	Celia Prado-Teeling, Performance Team Leader
Report Author contact details	Celia.prado-teeling@cherwell-dc.gov.uk , 01295 221556

Corporate Director approval	Stephen Hinds – Corporate Director of Resources – 10 March 2025
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Appendix 1 - Annual Delivery Plan 2025-26 DRAFT

Please note delivery of the actions below could be affected by changes in policy, national and local circumstances, these risks are managed through each service operational risk

Council plan priority	Goals	Aims	Year 1 actions	Milestones				PH	Lead	Contributors	Comments
				Q1	Q2	Q3	Q4				
Economic prosperity	Create vibrant economic centres and thriving rural villages	To foster diverse economic centres and villages that support local businesses, attract investment, and enhance community life.	Ongoing engagement with businesses to support their investment plans. Hold annual business forum. Hold annual Economic Forum (Feb) Hold annual Business Awards (Sept)	Agree delivery timescales for Market Square, Bicester. Agree Action Plan and Prioritisation for Kidlington. Agree Action Plan and prioritisation for Banbury. Agree Action Plan and prioritisation for Bicester.	Planning for 2025/26 Economic Forum (Feb) Full area business engagement through AOGs. Agree invitation list, location and marketing plan. Plan for workshops /break outs to understand barriers/challenges to investment opportunities	High Street Report. Experience Oxfordshire economic data report. Cherwell Business - landing webpage. Details on Economic Forum. Signposting to service providers and how we assist.	Hold the 2025/26 Business Economic Forum in order to explore investment opportunities and barriers/challenges to future investment	Cllr L McLean	Robert Jolley/Julia Harrington	Julia Harrington/Tracey Thomas/Tom Darlington/Andy Bowe	Ongoing engagement with AOG's.
		To promote sustainable economic prosperity through innovation, resilience, and strategic growth.	Continue the diversification of tenancies at Council owned commercial property including key public/third sector partners	Launch targeted campaign to further attract diverse tenants	Provide input to Cherwell Business landing webpage.	Annual voids report for all Council owned property	Secure two other non-retail-based key tenants	Cllr L McLean	Mona Walsh	Julia Harrington/Andy Bowe	Working in collaboration with the AOG's
			Maximise the impact of Council-owned and other assets to further enable the regeneration of the Economic Centres	Finalise full Council asset list and agree categorisation and future plan for assets. Provide property input to Action Plan for Kidlington, Bicester and Banbury	Commence disposal/sale of agreed assets. Report on progress for PV and wind energy for Council owned property in conjunction with Climate Plan	Options appraisal for Castle Quay Bridge Street area site and agree next steps in collaboration with Banbury AOG Continue with disposal/sale of agreed assets	Finalise Council asset strategy including opportunities to realise regeneration using Council assets	Cllr L McLean	Mona Walsh	Julia Harrington/Andy Bowe	Working in collaboration with the AOG's
	Build an inclusive and green economy	To build an economy that is both inclusive and environmentally sustainable, ensuring equitable opportunities for all while minimising environmental impact.	Delivering the Year 4 programme of UK Shared Prosperity Funding, to focus on environmental pressures in our communities	Launch the 2025/26 UKSPF programme. Launch and distribute Parish and Town Council Toolkit to include flooding information	Promote the OCC flood warden scheme. Report on Oxfordshire Flood Task Force priorities. Agree flooding support	Report on area infrastructure gaps/needs (electricity, water, foul).	Complete delivery of the Year 4 programme of agreed UKSPF projects.	Cllr L McLean	Robert Jolley/Julia Harrington	Tracey Thomas	Further Milestones to be confirmed and added after Executive approval of the programme
			Support the Marmot Place Partnership for Oxfordshire.		Launch Marmot Place Programme with partners	Consult on the Deprivation Remediation Programme for 2026	Work with system partners to assess progress against Partnership Plan	Cllr L McLean	Nicola Riley		
	Community Leadership	Strengthen community collaboration and resilience	Review of our Local Strategic Partnership to be more effective in delivering co-produced solutions to community issues		Work with key partners to identify and agree key community issues for the partnership to consider in year.	Work with key partners to identify and agree community-based solutions . Review and re-launch the LSP accordingly.	Review and implement actions as appropriate from the Oxfordshire Adaptation Route map (OCC)	Cllr R Parkinson	Tim Hughes	Jo Miskin	
			Develop parish council toolkit to empower communities		Work with parish councils to identify key components required to empower communities.	Review and report on Green and Blue Corridors across Cherwell	Launch parish toolkit	Cllr C Brant	Ian Boll	Nicola Riley David Peckford	
			Transfer existing community assets to community organisations to support collaboration and resilience		Identify potential assets for transferring to community orgs		Engage relevant Community orgs to gauge interest in transferring assets	Cllr L McLean	Mona Walsh	Nicola Riley	Q4 proposed milestone "Agree the assets to be transferred and the delivery plan" to be moved to Year 2

			Strengthening community cohesion	Publish updated EDI General Duty Compliance Record, Develop and agree new Community Safety Partnership Strategy	Review EDI Inclusion Plan	Develop new EDI data dashboard	EDI Working Group Report published	Cllr C. Brant	Nicola Riley		
	Promote health and wellbeing with a focus on inequality	To enhance health, wellbeing, and social cohesion across the district and address inequalities through preventive initiatives and targeted interventions.	Improving access to sports and healthy places by making the most of the external (and developer) funding we receive, improved insight and maintenance of our leisure centres.	Meet with Parish councils where significant development is anticipated. Link with Area Oversight Groups		Gather impact data on changes to service delivery through Customer Satisfaction Survey	Confirm delivery of capital projects	Cllr R Pattenden	Nicola Riley	Julia Harrington	Improve insight by updating the StoryMap and overlaying data from LIFT to target services better
Environmental Stewardship	Safeguard the environment and promote biodiversity	To implement sustainable policies and practices, protect natural habitats, and support conservation initiatives that enhance ecosystem health and biodiversity while responding to the climate emergency.	Identify pathways for CDC to reach net zero carbon	Analyse pathways from consultants and present to CLT.	Present implications of pathways to Executive and amend if required.	Develop new strategy based on pathways	CLT/Executive/Full Council to agree new strategy	Cllr T Beckett	Ed Potter/ Jo Miskin		
			Review procurement policies to reduce Scope 3 carbon emissions	Procurement/Legal/Climate Teams to examine opportunities to amend procurement policies.	Present options for new procurement to CLT/Executive.	Consult with existing supply chain on proposed procurement changes	Adopt new procurement policies	Cllr C Brant	Ed Potter/ Jo Miskin		
			Enhance understanding of CDC's use of off-setting, particularly nature-based solutions, to achieve net zero	Examine the level of residual emissions at net zero the role of nature-based solutions	Review costs and practicality of implementation	Present findings to CLT/Executive	Devise and implement plan for implementation	Cllr T Beckett	Ed Potter/ Jo Miskin		
			Progress decarbonisation of our fleet	TBA	TBA	Implementation of HVO fuel plan		Cllr I. Middleton	Ed Potter		
	Promote the circular economy of reduce, reuse and recycle to minimise waste	To encourage sustainable consumption, optimise the use of resources, and implement efficient recycling systems that support waste reduction and re-use initiatives.	Embed the new Simpler Recycling requirements for kerbside collections and promotion of greater recycling.	Modelling service delivery options		Agree new service delivery design	Implement new service	Cllr I Middleton	Ed Potter/ Ian Upstone		Simpler Recycling needs to be in place by 31.03.26
			Continue with progress for the provision of a modern and for purpose depot facilities to support activity to minimise waste			Approval of outline business case. Submission of Planning Application.		Cllr I Middleton	Mona Walsh	Ed Potter	This is a joint project but Property act as the landlord & environmental services the tenant. MW made amends to timeline/programme. Final Business case to be added as Year 2 Q1 milestone
			Reduce waste and food insecurity through community initiatives to reuse and recycle.	Refresh promotion around district's Growing Spaces	Review delivery of Y2 actions of Food Action Plan for CDC		Establish a schools-food partnership	Cllr I Middleton	Nicola Riley		This project has a strong overlap with Simpler Recycling
	Deliver sustainable and strategic development that meets Cherwell's needs now, and in the future	To ensure the right mix of facilities, services and infrastructure for new developments, to create successful, well-designed communities.	Progress the Cherwell Local Plan 2042		Submit Local Plan for Examination			Cllr Conway	David Peckford	Chris Cherry	Further milestones depend on the timing and outcome of inspectorate examination
			Establish a new Programme for a Review of Conservation Area Appraisals	Confirm new three-year programme of Conservation Area reviews and appraisals			Complete year 1 of Conservation Area programme	Cllr Conway	David Peckford	Chris Cherry Nick Thomas	
			Monitor and manage housing land supply	Complete and implement Housing Delivery Action Plan	Implement Housing Delivery Action Plan	Implement Housing Delivery Action Plan	Implement Housing Delivery Action Plan	Cllr J Conway	David Peckford	Chris Cherry Paul Seckington Development Management Team Leaders Area Oversight Team	
			Reducing the percentage of 'major' planning application decisions overturned at appeal	Complete and implement Major Applications Action Plan	Implement Major Applications Action Plan	Implement Major Applications Action Plan	Implement Major Applications Action Plan	Cllr J Conway	David Peckford	Paul Seckington Development Management Team Leaders Internal & External Consultees	
			Streamline process for the preparation of 'section 106' legal agreements and associated land transfers which support planning permissions.	Complete internal s106 process review	Implement actions from s106 process review	Implement actions from s106 process review	Implement actions from s106 process review	Cllr J Conway	David Peckford	Shiraz Sheikh Denzil Turbervill Paul Seckington Development Management Team Leaders Internal Consultees	

Quality housing and Place Making	the future		Deliver Planning Service Improvement	Establish performance improvement indicators, targets & resource needs	Define & implement improvements	Implement improvements	Implement improvements & review progress	Cllr J Conway	Ian Boll David Peckford	Paul Seckington Chris Cherry Development Management Team Leaders Internal and External Consultees	
			Introduce national Building Safety Levy	Preparation for introduction of the Building Safety Levy	Establish systems for the introduction of the Building Safety Levy	Introduce the Building Safety Levy	Monitor and Manage the operation of the Building Safety Levy	Cllr J Conway	David Peckford	Tony Brummell Michael Furness Joanne Kaye	
			Establish and progress with Partners the Area Oversight Groups for Banbury, Bicester and Kidlington	Implementation of Area Oversight Groups for Banbury, Bicester and Kidlington	Continue Business and Community outreach Identify and report on infrastructure delivery issues (water, electricity, foul, etc).			Cllr L McLean	Robert Jolley/Julia Harrington	Andy Bowe Tom Darlington	
	Achieve more high-quality, secure, and affordable housing that caters for the diverse needs of our residents	To help all residents access safe places they can make/call their home, including housing that is affordable through direct ownership, private rental and social rent housing.	Reduce pressure on temporary accommodation capacity in the District through delivery of our Housing Strategy	Commence delivery of new LAHF schemes and S106 scheme	Review procurement of temporary accommodation and nightly charged options		Yearly review of housing strategy action plan outcomes	Cllr N Cotter	Nicola Riley		
			Host a registered providers forum to improve tenant outcomes	Tenancy satisfaction survey of CDC tenants		Establish new monitoring framework for Resident Provider activity and performance and agree objectives and line up for forum	Hold registered providers forum	Cllr N Cotter	Nicola Riley		
			Ensure Graven Hill Village Development Company submits Planning Application for Phase 2 at Graven Hill (for completion of the site)	Ensure Graven Hill Village Development Company submits Planning Application for next phase of development at Graven Hill to LPA Arrange regular meetings between shareholders, development company, Chair and NEDS, to discuss ongoing strategy.				Cllr L McLean	Stephen Hinds		In collaboration with AOG's.

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Appendix 2 - Corporate Strategy KPIs 2025-26

Delivering quality housing and placemaking						
Measure Name	Corporate or Directorate monitoring	Frequency	Targeted or Monitoring Only	Target 2024-25	2025-26 Continue / Stop / New	New target for 25-26
BP1.2.01 Number of Homeless Households living in Temporary Accommodation (TA) Reworded to:- Number of homeless households living in nightly charged (hotel) temporary accommodation (TA).	Corporate	Quarterly	Targeted	45	Continue - with request to change measure	25
BP1.2.03 Homes improved through enforcement action	Corporate	Quarterly	Monitoring only	n/a	Stop	N/A
BP1.2.04 Number of affordable homes delivered	Corporate	Quarterly	Targeted	50	Continue - with request to change to monitoring only	Monitoring
BP1.2.05 % of Homelessness cases successfully prevented rather than relief/main duty being applied	Corporate	Quarterly	Targeted	60%	Continue	60%
BP1.2.06 Average time taken to process Housing Benefit New Claims and council tax reduction	Directorate	Quarterly	Targeted	18 days	Continue	18 days
BP1.2.07 Average time taken to process Housing Benefit Change Events and council tax reduction	Directorate	Quarterly	Targeted	8 days	Continue	8 days
BP1.2.08 % of Major Planning Applications determined to National Indicator	Corporate	Quarterly	Targeted	60%	Continue	60%
BP1.2.09 % of Non-Major Planning Applications determined to National Indicator	Corporate	Quarterly	Targeted	70%	Continue	70%
BP1.2.10 % of Major Applications overturned at appeal	Corporate	Quarterly	Targeted	<10%	Continue	10%
BP1.2.11 % of Non-Major Applications overturned at appeal	Corporate	Quarterly	Targeted	<10%	Continue	10%
BP1.2.12 Average time taken for new applications to be responded to within 15 working days	Directorate	Quarterly	Targeted	15 days	Continue	15 days
BP1.2.13 Net Additional Housing Completions	Corporate	Biannual September - March	Targeted	791 (half year)	Continue	1582 (total LP requirement for the year)
BP1.2.14 % of building control full plans assessed within 5 weeks (or longer with applicant's agreement)	Directorate	Quarterly	Targeted	95%	Continue	95%

Leading environmental stewardship and climate action						
Measure Name	Corporate or Directorate monitoring	Frequency	Targeted or Monitoring only	Target 2024-25	2025-26 Continue / Stop/ New	New target for 25-26
BP2.2.01 % Waste Recycled & Composted	Corporate	Quarterly	Targeted	54%	Continue	54%
BP2.2.01d Tonnes residual household waste collected	Corporate	Quarterly	Monitoring only	N/A	Continue	N/A
BP2.2.02 % Reduction in fuel consumption	Corporate	Annual	Targeted	1%	Continue	1%
BP2.2.03 % of Climate Action Plan delivering to target	Corporate	Quarterly	Targeted	66%	Continue	66%
BP2.2.04 % of missed waste containers	Directorate	Quarterly	Monitoring only	N/A	Continue	N/A
BP2.2.05 Total Greenhouse gas emissions for the year	Corporate	Annual	Targeted	3900 tonnes of CO ₂ e	Continue	3900 tonnes of CO ₂ e
BP2.2.07 % of Recycling Contamination rate	Directorate	Quarterly	Monitoring only	N/A	Continue	N/A

Driving long-term economic prosperity						
Measure Name	Corporate or Directorate monitoring	Frequency	Targeted or Monitoring only	Target 2024-25	2025-26 Continue / Stop / New	New target for 25-26
BP3.2.01 % of Council Tax collected, increase Council Tax Base	Directorate	Quarterly	Targeted	Q1 29% Q2 56.33% Q3 82% Q4 97.50%	Continue	Q1 29% Q2 56.33% Q3 82% Q4 97.50%
BP3.2.02 % of Business Rates collected, increasing NNDR Base.	Directorate	Quarterly	Targeted	Q1 31% Q2 58.50% Q3 86% Q4 98.50%	Continue	Q1 31% Q2 58.50% Q3 86% Q4 98.50%
BP3.2.03 Council Tax revenue per dwelling		Annual	Monitoring only	N/A	Stop	TBC
BP3.2.04 No. of businesses engaged through UKSPF and REPF funded programmes	Directorate	Quarterly	Monitoring only	N/A	Continue	N/A
BP3.2.05 No. of residents engaged through UKSPF and REPF funded programmes	Directorate	Quarterly	Monitoring only	N/A	Continue	N/A
New - No of enterprises in the district	Corporate	Annual	Monitoring only	N/A	New	N/A

Empowering community leadership						
Measure Name	Corporate or Directorate monitoring	Frequency	Targeted or Monitoring only	Target 2024-25	2025-26 Continue / Stop / New	New target for 25-26
BP4.2.01 Number of Visits/Usage of all Leisure Facilities within the District	Corporate	Quarterly	Monitoring	N/A	Continue	N/A
BP4.2.02 Residents who have taken part in programmes contributing to reducing health inequalities	Corporate	Quarterly	Monitoring	N/A	Continue	1.335 (year end target)
BP4.2.04 % of due food hygiene inspections of premises rated A-D completed	Directorate	Quarterly	Targeted	95%	Continue	95%
BP4.2.05 Number of Illegal Fly Tips	Directorate	Quarterly	Monitoring	N/A	Continue	N/A

Organisational						
Measure Name	Corporate or Directorate monitoring	Frequency	Targeted or Monitoring only	Target 2024-25	2025-26 Continue / Stop / New	New target for 25-26
BP5.1.01—Non-ringfenced reserves as percentage of net revenue expenditure (OFLOG)		Annual	Monitoring	N/A	Stop	N/A—monitoring only
BP5.1.02—Non-ringfenced reserves as percentage of service spend (OFLOG)		Quarterly	Monitoring	N/A	Stop	N/A—monitoring only
BP5.1.03—Total core spending power per dwelling (OFLOG)		Annual	Monitoring	N/A	Stop	N/A—monitoring only
BP5.1.04—Level of band D council tax rates (OFLOG)		Annual	Monitoring	N/A	Stop	N/A—monitoring only
BP5.1.05—Debt servicing as percentage of core spending power (OFLOG)		Annual	Monitoring	N/A	Stop	N/A—monitoring only
BP5.1.06—Total debt as percentage of core spending power (OFLOG)		Annual	Monitoring	N/A	Stop	N/A—monitoring only
BP5.1.07 – Number of upheld complaints	Directorate	Quarterly	Monitoring	N/A	Continue	N/A - monitoring only

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This report is public	
Transformation Programme	
Committee	Overview & Scrutiny Committee
Date of Committee	18 March 2025
Portfolio Holder presenting the report	Portfolio Holder for Strategic Leadership, Councillor David Hingley Leader
Date Portfolio Holder agreed report	10 March 2025
Report of	Shona Ware, Assistant Director Customer Focus

Purpose of report

Overview and Scrutiny have requested answers to questions relating to the council's Transformation programme. This report responds to the questions raised and answers them as they have been asked.

1. Recommendations

The Overview and Scrutiny Committee resolves:

- 1.1 To comment on the contents of this report and make any recommendations.

2. Executive Summary

- 2.1 This report provides an update to the Overview and Scrutiny Committee on the Council's Transformation programme, covering an introduction, next steps, strategic alignment, and implications.
- 2.2 The programme began in June last year with an external consultant supporting services to deliver a 3 phase piece of work:
 - Phase 1 – Cost Based Service Catalogue
 - Phase 2 – Demand & Effectiveness Proposals
 - Phase 3 – Service Level Options
- 2.3 Central to the process were the end-of-phase Panel sessions. The Panel's role was to confirm proposals were credible, implementation of them was achievable, the risks were appropriately assessed, and the potential benefits realistic.
- 2.4 PA Consulting were commissioned in January 2025 been to help us develop plans for achieving the transformation opportunities identified from the first three phases, specifically covering:
 - Programme Set up.
 - Agile Delivery – Process Automation

- Culture Change

This work concluded w/c 3 March, and the final report (as part of a case for change) will be considered by Executive in May.

- 2.5 The savings that have been built into next year's budget are from the £4.1m of identified effectiveness changes from the phase 2 work. These are the efficiencies that services had identified without impacting service delivery and the levels residents currently receive from us.
- 2.6 Any impact on service delivery will depend on the financial situation facing the council at the time of budget setting and as per the usual process there would be wide consultation on any proposed service level changes.

Implications & Impact Assessments

Implications		Commentary		
Finance		There are no direct financial implications arising from this report, although the costs and benefits of the transformation programme will need to be carefully monitored as part of the Council's budget and programme management practices. Joanne Kaye – Head of Finance and Deputy S.151 Officer 10/3/25		
Legal		There are no legal implications as this is an update to ONS. Shiraz Sheikh – MO / AD Law & Governance		
Risk Management		There are no direct risk management issues directly arising from this report. Celia Prado-Teeling Performance Team Leader 10/3/25		
Impact Assessments		Positive	Neutral	Negative
		Commentary		
Equality Impact				
A Are there any aspects of the proposed decision, including how it is delivered or accessed, that could impact on inequality?				
B Will the proposed decision have an impact upon the lives of people with protected characteristics, including employees and service users?				

Climate & Environmental Impact				Not applicable
ICT & Digital Impact				Not applicable
Data Impact				Not applicable
Procurement & subsidy				Not applicable
Council Priorities	The Council's transformation programme supports the four new Council Priorities.			
Human Resources	Not applicable			
Property	Not applicable			
Consultation & Engagement	Not applicable			

Supporting Information

3. Background

3.1 Overview and Scrutiny have requested the following questions be answered:

- A brief introduction to the development of the Cherwell District Council Transformation Programme, including the progress to date and next key steps.
- The next steps to developing a multi-year transformation programme.
- How the Cherwell District Council Transformation Programme aligns with the Council's digital strategy, and integration of the cross-cutting effectiveness strategies and programmes.
- The main impacts on front line Council service delivery and services to residents, including an areas of service reduction/rationalisation and any anticipated improvements.
- The anticipated financial implications including anticipated main costs and savings.
- Any significant Equalities Implications especially for particular groups or communities (cross referenced to Protected Characteristics).

4. Details

Question 1): A brief introduction to the development of the Cherwell District Council Transformation Programme, including the progress to date and next key steps.

4.1 The programme began in the summer last year with an external consultant supporting services to deliver the following:

Phase 1 (6-weeks)

- 4.2 Create a services catalogue with baseline costs to provide a clear view of current services and their delivery costs. This concluded on 20 August 2024. We will be refining and updating these baseline costings in preparation for next year's budget setting process.

Phase 2 (7-weeks).

- 4.3 Identify potential changes to the baseline cost for services to reflect:
- A) Demand Changes- decisions outside of the budget **holder's control** that could impact the baseline costs agreed in Phase 1. For example, the implementation of the building safety levy.
- B) Effectiveness Changes — efficiencies from existing ways of working and service levels **currently provided**. These included:
- Effectiveness changes that were specific to the service (e.g. HR only).
 - Common effectiveness changes – actions being delivered by **two or more** service areas commonly relating to non-staff cost reductions such **as printing**).
 - Cross-cutting effectiveness opportunities that have dependencies **with one or more** additional services. For example, how the Council deals with Freedom of Information (FOI) requests.

This work concluded on 9 October 2024 and resulted in 16 demand changes being identified and 53 effectiveness changes. The prospective effectiveness changes identified would potentially deliver savings of £4.1m over the next three financial years. Of this, £1.2m of savings were built into the 2025/26 budget.

Phase 3 (3 weeks).

- 4.4 Produce a range of potential service levels that could be provided in the future, including service improvements as well as possible reductions. This was to identify where CDC could realign current service levels if it had to respond to possible future financial challenges. These options would help members to make more informed decisions about changes to service levels should that need arise.

This work concluded on 7 November 2024. We will be refining these scenarios with services over the next few months as they are currently at a very high level. The report presented to the Executive in January 2025 is included in Appendix 1.

- 4.5 Central to the process were the end-of-phase Panel sessions. The purpose of the sessions was to review, and challenge'. The Panel's role was to confirm proposals were credible, implementation of them was achievable, the risks were appropriately assessed, and the potential benefits realistic.
- 4.6 **The Panel** consisted of:
- Stephen Hinds, Corporate Director - Resources and Transformation (**SRO and Chair**)
 - Ian Boll, Corporate Director — Communities
 - Michael Furness, Assistant Director - Finance and **Section 151**
 - Shona Ware, Assistant Director - Customer Focus (**Deputy Chair**)

- Shiraz Sheikh, Assistant Director - Law, Governance and **Monitoring Officer**
- Claire Cox, Assistant Director, Human Resources and Organisational Development (*non-scoring Panel member*).

Question 2) The next steps to developing a multi-year transformation programme.

- 4.7 The transformation team will be working with services over the next few months to develop an implementation plan for the remaining effectiveness changes. We have also commissioned PA Consulting to help us develop plans for achieving the transformation opportunities identified from the first three phases, specifically to:
- Programme Set up.
 - Agile Delivery – Process Automation
 - Culture Change

This work concluded w/c 3rd March, and the final report (as part of a case for change) will be considered by Executive in May.

Question 3) How the Cherwell District Council Transformation Programme aligns with the Council's digital strategy, and integration of the cross-cutting effectiveness strategies and programmes.

- 4.8 Digital enablement and agile service delivery are key to delivering transformation; therefore, an integral part of this work and the head of IT is heavily involved in the programme, with our digital strategy underpinning our transformation work.
- 4.9 Our approach to delivering the cross-cutting effectiveness opportunities, those that the Council had identified prior to and throughout the phase 3 work, form part of the latest piece of work Phase 4 work. These will underpin the “case for change” and initial work regarding automation with Blue Prism and OAS already underway.

Question 4) The main impacts on front line Council service delivery and services to residents, including an areas of service reduction/rationalisation and any anticipated improvements.

- 4.10 The savings we have built into next year's budget of £1.2m are from the £4.1m of identified effectiveness changes from the phase 2 work. These are the efficiencies that services had identified **without** impacting service delivery and the levels residents currently receive from us. We still have further potential effectiveness changes to consider and build into future budgets before having to consider any service level reductions. Therefore, any impact on service delivery will depend on the financial situation facing the council at the time of budget setting and as per the usual process there would be wide consultation on any proposed service level changes.

Question 5) The anticipated financial implications including anticipated main costs and savings.

- 4.11 As outlined above, upon completion, the primary 3-phase piece of work was carried out at an intense pace and is now complete, having identified an indicative £4.1m of effectiveness changes, plus additional income streams over the life of the programme whilst maintaining current service levels of circa £2.4m, thereby leaving

the council with a solid evidence base to move forward in our transformation and change journey. There were a number of cross-cutting initiatives. It should be noted that some effectiveness changes and income streams were able to be brought online for the 2025/26 financial year to assist with the coping of budget pressures, and these have been presented via the annual budget setting process. The work carried out in Panel 3 identified how the Council could, if it needed to and wanted to, select levels of service delivery, and the indicative example developed through this process showed how a potential additional £4.5m of savings could be made through changes in service levels throughout the organisation (with further work to develop these models further to allow Executive approval if and when required). Whilst a significant element of the additional income is derived from a new government funding stream, there are high level of uncertainty relating to its continuous deployment, especially taking into account future local government funding reforms.

- 4.12 As with all work, there is an element of “optimism” in those potential savings identified at this early stage. Following the government green book approach, it would be prudent to reduce our expectations of the amounts that can be delivered by 10%, thereby equating to a totality of circa £10m. As programmes are developed, these figures will be more accurately forecast in their savings delivery.

Table 1: Summary of Effectiveness Changes across the Council

2025/26 to 2027/28 (Cherwell District Council)	Saving Target Aim @ 20%	Effectiveness Saving	Income Generates
<u>Service Area</u>			
Customer Focus	551,000	-278,759	0
Digital Innovation	313,000	-84,584	0
Environment 1	2,527,000	-1,075,081	-175,000
Environment 2		-49,990	-6,400
Finance	835,000	-645,000	0
Growth & Economy	159,000	0	0
Housing & Wellbeing	1,253,000	-447,349	364,256
Human Resources	248,000	-115,738	0
Law & Governance	469,000	-40,000	0
Planning & Development	936,000	-474,385	-314,400
Property	753,000	-751,474	0
Regulatory Services	334,000	-55,039	0
	8,378,000	-4,017,400	-131,544

Table 2: Additional Income Streams

Cherwell District Council	Additional Income
<u>Service Area</u>	£'000
Customer Focus	-5
Environmental Services (1)	-1,944
Planning and Development	-443
Total	-2,392

- 4.13 With regards to future spend on implementing the transformation programme moving forwards, the work developed as part of Phase 4 (including the Case for Change) will identify the indicative costs for the programme as a whole and for each “stream” which will be supported by businesses cases for the relative elements. As

a general rule of thumb, it could be expected that one-off costs of implementation could range from 25-45% of the indicative annual saving.

Question 6) Any significant Equalities Implications especially for particular groups or communities (cross referenced to Protected Characteristics).

- 4.14 There have been none currently as we have been in the fortunate position to be able to deliver a balanced budget next year using efficiency savings. If we have to consider any service level reductions in the future to respond to financial pressures, then Equality Implications will be identified and considered during the consultation phase of the normal budget setting process.

5. Alternative Options and Reasons for Rejection

- 5.1 The following alternative options have been identified and rejected for the reasons as set out below.

Option 1: Several alternative options were considered and deemed to be less favourable. All these options were considered in the report referred to in this report and listed in the appendix 1 below.

6 Conclusion and Reasons for Recommendations

- 6.1 To comment on the contents of this report and make any recommendations.

Decision Information

Key Decision	N/A
Subject to Call in	N/A
If not, why not subject to call in	N/A
Ward(s) Affected.	N/A

Document Information

Appendices	
Appendix 1	Draft PA Consulting Report on Transformation
Background Papers	None

Reference Papers	None
Report Author	Sona Ware – Assistant Director, Customer Focus
Report Author contact details	Shona.Ware@cherwell-dc.gov.uk
Corporate Director Approval (unless Corporate Director or Statutory Officer report)	Corporate Director for Resources and Transformation

Draft Version 3



Cherwell District Council Cost Based Service Review

December 2024

Bringing Ingenuity to Life.
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Executive summary

Context

As with many councils, there are financial pressures that Cherwell District Council (“CDC”, “Cherwell”, “the Council”) needs to address, not only regarding inflation and the cost-of-living crisis, but pressures on funding as well as its desires to achieve an ambitious district improvement programme.

The Corporate Leadership Team identified a need to undertake a comprehensive review to enable the Council to address a range of pressing matters, including:

- The need to develop a compelling Vision and robust Strategy
- Exploring options around how best to transform current ways of working to improve service effectiveness and set the conditions for growth without the need to increase staffing numbers
- Uplifting capability to meet changing requirements (e.g., Zero Based Budgeting “ZBB” skills and experience)
- Developing an understanding of how the organisation’s culture can be enhanced to best enable changing requirements, as well as improving collective values-based behaviours
- Developing a clear understand of available service level options (including risks and impacts) should the Council need to reprioritise its budget allocations.

Addressing these matters directly would enable members to make far more informed choices through the MTFP, Budget and Annual Planning Process for 2025/26 and beyond. It would also enable them to understand where best to focus transformation effort in the Council to achieve improvements for the residents, communities and businesses of Cherwell.

In July 2024, CDC undertook a competitive tendering process to commission a cost-based service review, engaging PA Consulting to:

1. Facilitate a comprehensive evaluation of current services provided, costs, and efficiency options to clearly understand the risks and impact of changes in levels of funding.
2. Provide insights to inform its ongoing transformation journey.
3. Provide supporting financial data to inform the annual budget setting process.
4. Potentially provide further support to help the Council to implement the outputs of the review.

Concurrently, the Council commissioned support to develop a refreshed Vision and Strategy. This was to make sure it had the right ‘building blocks’ in place to shape the development of a target operating model and comprehensive transformation programme, after the conclusion of the cost-based service review. Both sets of outputs have been developed interdependently to ensure alignment¹.

Financial sustainability consideration

The cost-based service review is separate from the Council’s “Mid-term Financial Planning” (MTFP) and budgeting process, but its outputs provide options to inform future decisions for FY2025/26, FY2026/27 and FY2027/28².

¹ While this report refers to the Vision and Strategy, they are not a PA Consulting deliverable.

² Also referred to as Year 1, Year 2 and Year 3 respectively.

Potential effectiveness and efficiency and service level options that have been generated through this review, will be considered through the annual MTFS, budget and planning process. This will include consultation and member decision wherever it is required.

A key focus for the review was the Council's identified worst case scenario budget position for FY2026/27, which reflected a potential gap of £8.378m, and how it might be met should it materialise.

At the end of the 17-week review, the Council had identified options to meet the potential gap, totalling c. £11.1m, with material scope to increase this through further transformation work. These options were made up of c.£8.6m of realisable potential savings via improved service effectiveness and service level saving, plus, an additional £2.4m of income for FY2025/26.

1. Operational and transformational efficiency savings of c.£4.1m³ (options identified during Phase 2 of the cost-based service review).
2. Service level choices of up to c.£4.5m (options identified during Phase 3 of the cost-based service review).
3. Additional income of c.£2.4m (options identified during cost-based service review).

Noting there is high confidence that further transformational opportunities discussed during the review, will provide more options for financial savings, as they are developed during the design and implementation of transformational change. Further income opportunities will also be identified during the MTFP cycles for FY2026/27 and FY2027/28.

The Council now has a range of options to consider in meeting the £8.378m budget gap across FY2025/26 and FY2026/27 should it materialise:

	Identified Operational Effectiveness Savings (agreed during phase 2 of the cost-base service review)	Additional Income (agreed during the cost-base service review)	Service Level Choice (agreed during phase 3 of the cost-base service review)	Further Transformation Opportunities (to be determined across forthcoming design/implementation activities)
Indicative financial benefits	c.£4.1m	c.-£2.4m	c.£4.5m	It is reasonable to expect further efficiency savings (to be quantified)

Figure 1⁴: Breakdown of potential savings and income options to help meet the worst-case budgetary position of FY2026/27

Purpose of this report

This report formally documents the cost-based service review process, providing the Council with a record of decisions made.

Its purpose is to outline the approach, record staff and non-staff cost savings and document decisions made by the Panel⁵ (a select group of senior officers⁶ with delegated responsibility to oversee the end-to-end review process).

³ Each effectiveness opportunity was supported by a breakdown of relevant information (e.g., rationale, risks, assumptions, indicative staff and non-staff savings, interdependencies, enabling activities and earliest implementation date) to enable informed decision making.

⁴ Noting that this is a conservative savings forecast based on the options explored. As this is not a case for change/ business case, non-financial savings have not been considered, nor have implementation costs. Income is shown as a negative amount.

⁵ Central to the process were the end-of-phase Panel sessions (see Section 3.4). The purpose of those sessions was to review, and 'challenge'. The Panel's role was to confirm proposals were credible, implementation of them was achievable, the risks were appropriately assessed, and the potential benefits realistic.

⁶ Panel membership: Stephen Hinds (Corporate Director - Resources & Transformation), Ian Boll (Corporate Director – Communities), Michael Furness (Assistant Director - Finance & Section 151), Shona Ware (Assistant Director - Customer

Additionally, this report includes links to supporting documentation (e.g., working documents, briefing presentations, decisions, and actions) developed during the review process.

Project scope

All service areas were deemed in-scope. Due to the breadth of activities covered by Environment, a decision was taken to split it in two service areas⁷:

1. Environment ("Env")
2. Growth & Economy ("G&E")
3. Planning & Development (P&D")
4. Regulatory Services ("Reg")
5. Housing & Wellbeing ("H&W")
6. Customer Focus ("CF")
7. Digital & Innovation ("D&I")
8. Finance ("Finance")
9. Human Resources ("HR")
10. Law and Governance ("L&G")
11. Property Services ("Property")

Chosen approach

The Council wanted to undertake a process that provided a services-based breakdown of the organisation. The methodology gave panel members an evidenced understanding of how the Council delivered its services, the actual cost of 'doing business' and offered panel members valuable insights to inform decision making (including associated risks and impacts) across the three phased approach (described below):

- **Phase 1.** Created a services catalogue and costed baseline for all service areas. Quantitatively defined service outputs and outcomes, allocated staff effort and budgets to provide a clear view of current services and their delivery costs.
- **Phase 2.** Identified potential changes to the cost baselines relating to⁸:
 - Demand Changes. These related to decisions outside of the budget holder's control that will drive movement in the baseline data (agreed as part of Phase 1).
 - Effectiveness Changes – efficiencies in the way current service levels are provided. These included:
 - Service area specific effectiveness changes (e.g., HR only).
 - Common effectiveness changes (e.g., same action relating to two or more service areas commonly relating to non-staff cost reductions such as printing).
 - Cross-cutting effectiveness opportunities that have dependencies with one or more additional service areas.
- **Phase 3.** Considered a range of service levels that could be provided. Provided insights to inform where to prioritise to ensure resources are best aligned to the strategic priorities.

In addition to panel members (see Footnote 5), the many other CDC were directly involved in delivery of the process. This division of effort ensured the review was **not** 'done to' the organisation and helped foster a culture of ownership.

Focus), Shiraz Sheikh (Assistant Director - Law, Governance & Monitoring Officer), Claire Cox (Assistant Director, Human Resources & Organisational Development) (non-scoring Panel member).

⁷ Environment 1 (Waste Services, Streetscene, & Fleet Management) and Environment 2 (Landscapes & Climate Action).

⁸ The process considers the three key drivers of cost (demand, effectiveness and levels of service).

Key outputs

The key outputs of the services review were:

- Baselined cost-of-delivery and identification of common activities.**
 - Provided the Council with an agreed definition of service areas breaking down individual services, their costs and the resources each service used.
 - In addition, the Council also completed a common activity analysis exercise to better understand where colleagues prioritised time across the organisation. This analysis helped to identify areas that generated higher than expected levels of effort. It was used to help identify cross-cutting change opportunities that would enable the Council to reduce effort by addressing associated inefficiencies.
- Evidence base.** Providing the Council with a bottom-up view of the baseline for in-scope service areas that clearly shows how its cost base directly aligns to service delivery. It is expected that this information will inform the budgeting process going forward into FY2025/26 and beyond⁹.
- Identified Demand and Effectiveness Changes.** Detailed option proposals for potential changes to the cost base that can be considered through the Council budget process. As noted in the Approach section, Effectiveness Changes were split into three categories.
- Service level options.** Provided the Council with service level scenario options and to identify where CDC could realign current service levels, if it had to respond to possible future financial challenges. These options would help members to make more informed decisions about changes to service levels should that need arise.
- Implementation guidance.** Provided a high-level view as to when it is anticipated that identified efficiencies could be realised and wider implementation considerations, subject to budgeting process decisions.
- Zero Based Budgeting (“ZBB”).** The Council has successfully delivered this methodology, a variation of ZBB. It now has the tools and skills to integrate it into future transformation, business and financial planning cycles¹⁰.

Customer Journey and Front Line Administration (143.6 FTE 25.3%)											
	Handling Enquiries	Service requests & applications	Appointments	Complex Assessment	Checking Eligibility	Simple rules based assessment	Data entry and records	Invoicing & payments	General admin	Planning workload & staffing	Managing staff
FTE	15.2	14.1	11.0	28.5	10.4	10.3	14.5	12.6	8.0	8.2	10.9
% of Total	2.7%	2.5%	1.9%	5.0%	1.8%	1.8%	2.5%	2.2%	1.4%	1.4%	1.9%
Service Delivery											
	Service Delivery										
FTE	224.8										
% of Total	39.6%										
Strategic and Support (199.8 FTE 35.2%)											
	Strategy & Policy	QA, Performance Management & Improvement	Business Information & Reporting	Governance & Decision Making	Democratic & Member Support	Marketing, PR & External Communications	Partnership Management	Legal & Advisory Services	Internal Communications	IT	Programme & Project Management
FTE	25.8	9.6	7.8	10.3	15.5	4.3	3.3	11.4	1.7	17.4	12.8
% of Total	4.5%	1.7%	1.4%	1.8%	2.7%	0.8%	0.6%	2.0%	0.3%	3.1%	2.3%
	Master Data Management	Health & Safety	HR	Workforce Planning	Management & Supervision	Organisation Design & Development	Financial Management	Payroll Services	Commissioning	Procurement & Contracting	Contract Management
FTE	8.8	6.2	5.7	2.9	8.4	2.1	18.7	0.6	1.4	5.9	3.0
% of Total	1.5%	1.1%	1.0%	0.5%	1.5%	0.4%	3.3%	0.1%	0.2%	1.0%	0.5%
	General Administration	Data Entry & Records	Asset & Investment Management	Stores & Distribution	Property, Estates & Facilities Management	TOTAL					
FTE	7.6	5.1	0.8	0.0	2.9	FTE 568.2					
% of Total	1.3%	0.9%	0.1%	0.0%	0.5%						

Figure 2: Common activity analysis overview

⁹ Documented within individual service-area workbooks.

¹⁰ The Council should periodically revisit the process during future financial planning cycles. This ensures that planned changes are reflected in an updated services catalogue and baseline, supporting continuous improvement and oversight of identified changes.

Summary baseline position

The main baseline related information is:

- Baseline for all service areas totalled £87m, of which £39.2m was deemed addressable (inclusive of staff and non-staff costs).
- Demand Changes, that were accepted as valid by the Panel, will potentially increase costs by £414k (£98k in FY2025/26 and £316k in FY2026/27).
- On the assumption that all the Effectiveness Change options that were accepted by the Panel as valid, are delivered the Council will potentially be able to realise cost savings of £4.1m over a three year period¹¹ The Drawing of the Line working session (post-Panel 3) considered three potential scenarios. On guidance from Panel, a fourth scenario (titled “Scenario 3b”) was developed showing the service level provision if the Council had to rely completely on reducing operating costs to fully address the target of £8.378m, while maintaining key income generating capabilities (see Section 4.5).
- Potential new income initiatives totalling c.£2.4m have also been identified through this process for FY2025/26¹².

The cost-based service review captured the financial year in which it is expected identified changes could be realised, dependent on the Council's internal governance processes as well as consultation and member decision wherever it is required.

The charts below, show the potential phasing of the impact on the cost baseline across Years 1 to 3. This can be used as input into the Council's annual MTFS, budget and planning processes. It is expected that the Council will further develop the information relating to demand and effectiveness changes for Years 2 and 3, increasing the range of potential opportunity presented below.

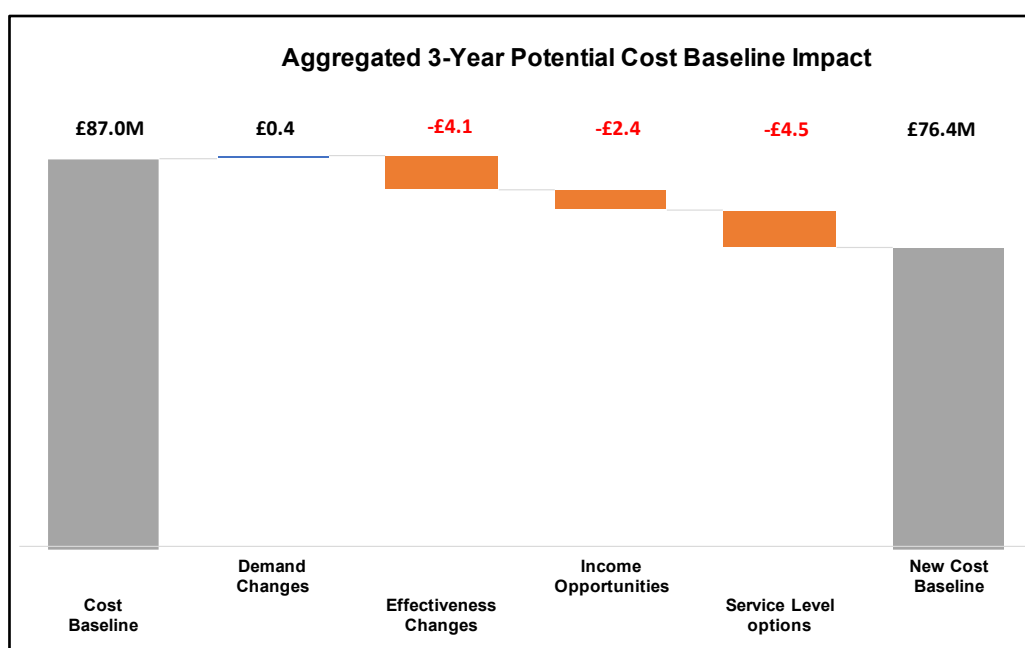


Figure 3: 3-year potential baseline impact dependent on internal governance, consultation and member decisions (as required)

¹¹ As previously stated, the indicative potential savings are deemed to be conservative. There is an expectation that the identified effectiveness changes for Years 2 and 3 will be further developed and added to over year 1 of the transformation programme that is expected to mobilise in early 2025.

¹² Again, noting that further income opportunities are expected to be identified for Years 2 and 3. Likewise, Demand Changes will be revised in forthcoming MTFP cycles.

Transformational opportunity

- **Agreeing the Council's transformation ambition.** The Council's current operational maturity was assessed to be low. This view was informed by the nature of the service descriptions and effectiveness changes being discussed and comparison with other organisations. The Council has developed a revised Vision and Strategy, it now needs to agree and commit to its transformation ambition:

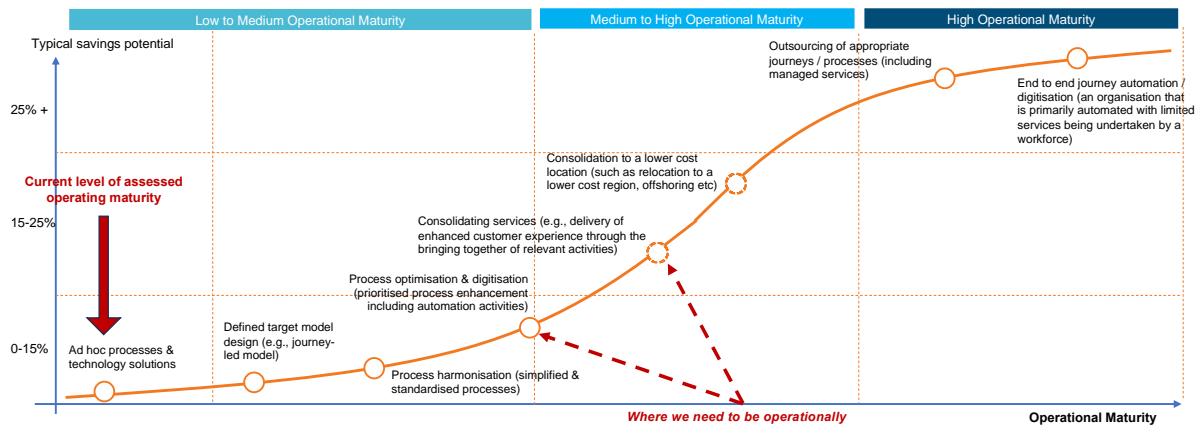


Figure 4: Operating maturity assessment and indicative transformational ambition (see Figure 14 for a larger version)

- **Presenting transformation opportunities.** Recurring themes were process inefficiencies and activity duplication (e.g., customer engagement occurring across various teams), presenting significant opportunity to deliver effectiveness gains and realise savings through the simplification and standardisation of processes (including automation) and the consolidation of duplicated effort. This is expected to be a key consideration for the target operating model development as well as the process redesign work (to include automation as required). Below are the 10 transformational themes identified during the second phase of the process:

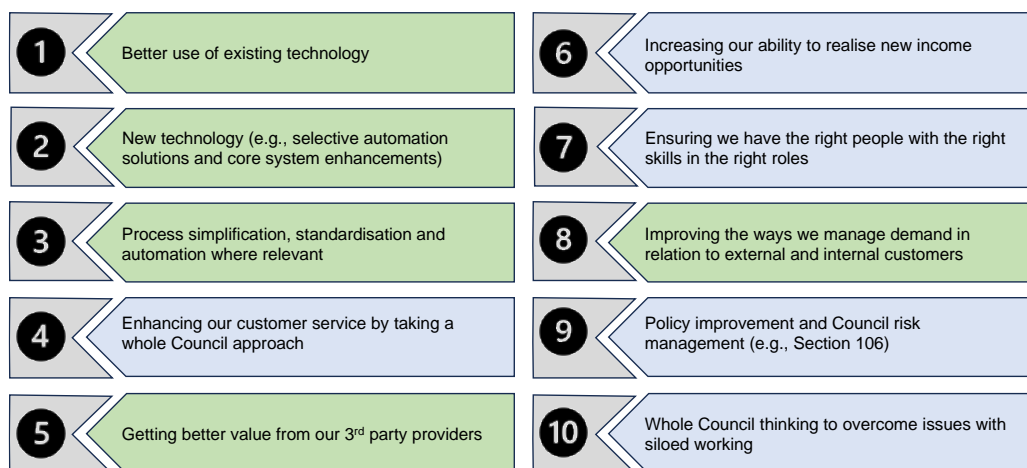


Figure 5: Presenting operational change & strategic choice themes from Panel 2¹³

¹³ Blue coloured boxes relate to strategic choice themes, and the green relate to operational change themes. See Section 3.8 for more information on presenting transformation opportunities.

1 Introduction and approach

1.1 Objectives and aims

The Council's objective for the cost-based service review was to provide a better understanding of:

1. Current service provision across the organisation, associated costs and presenting opportunities to transform and generate realisable efficiency options.
2. Viable service-level options to help shape the debate on the impact of any future changes in levels of funding.
3. A future operating model for the Council to enable delivery of the refreshed Vision and Strategy¹⁴.
4. The outputs of the review will be used to inform the FY2025/26 MTFP process and beyond.

Through the process, colleagues from across the 11 in-scope service areas were brought together to review and assess how the Council delivered services.

The Council's related aims were to:

- Provide CDC colleagues with the opportunity to put forward ideas and receive considerable skills transfer.
- Embed organisational excellence and a culture of continuous improvement.
- Make the Council more effective so it could give an overall better offer and experience to residents, businesses, and other third parties.
- Create a knowledge base to be able to replicate the approach in future years.

The Corporate Leadership Team (CLT) elected to wait until the baseline was agreed before setting efficiency targets for individual service-areas.

The CLT confirmed an overall target of c.21%, prorated for each service area dependent on budget size, against an addressable spend total of £39.2m¹⁵.

1.2 What is a services review?

The repeatable and structured method that was applied for this review is based on the principles of ZBB that shifts focus from a structural organisational view towards a focus on services delivered.

Firstly, a service catalogue and costed baseline was developed so that resources and costs could be mapped to defined services. The rationale for this was to develop detailed insights across services in terms of outputs as well as effort and cost, not just budget lines. This analysis was supplemented by the completion of a common activity analysis exercise enabling the identification of potential areas of interest in terms of effort expended across the organisation. The service catalogue information was aligned to the activity analysis enabling the Council to make informed decisions on where to prioritise focus regarding potential cross-cutting effectiveness opportunities in the next phase of the review.

Once this information was agreed, the process considered whether there are any known reasons why service demand may change (known as a "Demand Change") over the short-term, and whether efficiencies could be made in the way that services are currently being delivered (known as an "Effectiveness Change"). The process provided the Council with a greater level of insight and understanding with regards to productivity across its service

¹⁴ In parallel the Council has refreshed its vision and strategy in preparation for a council wide transformation programme of work. The outputs of this project dovetailed into this wider undertaking where appropriate.

¹⁵ The addressable spend included third party spend.

areas. This work reinforced the need to adopt an ethos of delivering 'value for money' both for the Council itself and its citizens.

The process then considered a range of service levels that could be provided, allowing the Council to be able to consider associated risks and impact should additional efficiencies be required, or investment be provided through the budgeting process. This provided options that could help to align resources to services on a prioritised basis.

The key activities were:

- Detailed descriptions of the services delivered, including who used them, for what purpose, and the value that this gives to the Council (and by extension the Council's residents).
- Clarification of the baseline budget and allocation of costs to services delivered based on activity.
- Testing hypotheses regarding cost drivers, and identification of Demand and Effectiveness Change options (including cross-cutting) without impacting service levels.
- Consideration of different service levels and their associated costs and risks.

The options developed through the review can be used to inform MTFP, budget and business planning choice involving consultation and member decisions as required.

1.3 Further supporting analysis

The Council undertook further analysis to supplement the cost-based service review as detailed below.

AI contracts review

A diagnostic review of the Council's top 20 prioritised contracts (representing c.90% of total contracted 3rd party spend) using an AI-based tool. Due to illness of key staff, it has not been possible to complete this review in time to be included in this report – so the findings will be provided to the Council separately.






Common Activity Analysis

The Council also collected quantitative data on how colleagues prioritise time across a set of pre-agreed common activities (Common Activity Framework) that underpin all the services that are delivered.

A top-down exercise was completed by Assistant Directors which involved allocating the approximate percentage of effort across relevant activities in relation to each of their service titles (see output image below).

This information helped to better understand collective work patterns across the Council and informed:

1. Phase 2 (service review) productivity and efficiency opportunities, particularly cross-service areas.
2. Future operating model choices and scale and nature of associated potential benefits.

Steps	Key activities
 Discovery & mobilisation	<ol style="list-style-type: none"> 1. Agree priority focus areas and specific contracts 2. Triage hypotheses agreed (to aid AI and human insight testing) 3. Azure environment stood up and access permissions sorted 4. In-scope contract documents uploaded 5. Triage plan agreed and signed up to by all parties
 AI insights	<ol style="list-style-type: none"> 1. AI triage analysis completed on 20 prioritised contracts 2. Follow up questions/issues flagged for further AI analysis &/ or complementary human analysis (HA) 3. Consolidated AI insights provided to PA experts for human analysis & insights
 Human insights	<ol style="list-style-type: none"> 1. PA experts complement AI analysis (including testing key issues with CDC contract &/ or business experts as appropriate)
 Report findings	<ol style="list-style-type: none"> 1. AI & HA results consolidated into a single draft report 2. Clear options set out for next steps 3. Draft report shared and iterated with CDC experts
 Review & next steps	<ol style="list-style-type: none"> 1. Review final report 2. Review meeting held between CDC & PA team to discuss findings and potential next steps

Customer Journey and Front Line Administration (143.6 FTE 25.3%)											
	Handling Enquiries	Service requests & applications	Appointments	Complex Assessment	Checking Eligibility	Simple case based assessment	Data entry and records	Invoicing & payments	General admin	Planning workload & staffing	Managing staff
FTE	15.2	14.1	11.0	28.5	10.4	10.3	14.5	12.6	8.0	8.2	10.9
% of Total	2.7%	2.5%	1.9%	5.0%	1.8%	1.8%	2.5%	2.2%	1.4%	1.4%	1.9%
Service Delivery											
	Service Delivery										
FTE	224.8										
% of Total	39.6%										
Strategic and Support (199.8 FTE 35.2%)											
	Strategy & Policy	QA, Performance Management & Improvement	Business Information & Reporting	Governance & Decision Making	Democratic & Member Support	Marketing, PR & External Communications	Partnership Management	Legal & Advisory Services	Internal Communications	IT	Programme & Project Management
FTE	25.8	9.6	7.8	10.3	15.5	4.3	3.3	11.4	1.7	17.4	12.8
% of Total	4.5%	1.7%	1.4%	1.8%	2.7%	0.8%	0.6%	2.0%	0.3%	3.1%	2.3%
	Master Data Management	Health & Safety	HR	Workforce Planning	Management & Supervision	Organisation Design & Development	Financial Management	Payroll Services	Commissioning	Procurement & Contracting	Contract Management
FTE	8.8	6.2	5.7	2.9	8.4	2.1	18.7	0.6	1.4	5.9	3.0
% of Total	1.5%	1.1%	1.0%	0.5%	1.5%	0.4%	3.3%	0.1%	0.2%	1.0%	0.5%
	General Administration	Data Entry & Records	Asset & Investment Management	Stores & Distribution	Property, Estates & Facilities Management						
FTE	7.6	5.1	0.8	0.0	2.9						
% of Total	1.3%	0.9%	0.1%	0.0%	0.5%						
											TOTAL
FTE	568.2										

1.4 Project scope

A decision was taken to split Environment into two separate areas¹⁶ for the purpose of this exercise (as detailed below). Subsequently, the 12 areas were then split into two groups of six services, Communities (1 to 6) and Resources (7 to 12) in line with the current Corporate Directorship structure:

1. Environment 1 (Env 1)
2. Environment 2 (Env 2)
3. Growth & Economy (G&E)
4. Planning & Development (P&D)
5. Regulatory Services (Reg)
6. Housing & Wellbeing (H&W)
7. Customer Focus (CF)
8. Digital & Innovation (D&I)
9. Finance (Finance)¹⁷
10. Human Resources (HR)
11. Law and Governance (L&G)
12. Property Services (Property)

1.5 Key outputs

A primary function of the review was to challenge current thinking. The proposals presented have been developed by representatives from each of the twelve service areas listed above, with senior managers¹⁸ selected to be SLs. Their role was to present outputs to the Panel at the end of each phase. The service areas were also supported by the Finance and HR teams and by members of the Panel. This ensured all opportunities for realisable efficiencies were explored and that decisions, and the resulting budgetary impact is both realistic and bought-in at all levels.

The key outputs of the process were:

1. **Baselining the cost-of-delivery.** Providing the Council with an agreed and explicit view of the services provided by the in-scope services, associated costs, and resources each service consumes.
2. **Creating an evidence base.** Providing the Council with a bottom-up view of the budget for in-scope services that will inform the MTFP process for FY2025/26 and beyond, documented within the workbooks for each service area.
3. **Identifying Demand and Effectiveness Changes.** Detailed proposals for options to change the cost base that could be considered through the Council budget process. These were developed by the SLs and provided a view of the rationale, associated costs, risks, interdependencies, and enablers of each proposal¹⁹.
4. **Providing service level options.** Providing the Council with scenario options to help members to make informed decisions about how resources are best allocated to different services.
5. **Implementation guidance.** A high-level view as to when it is anticipated the identified efficiencies could be realised and any wider implementation considerations.

¹⁶ Due to the scale, diversity and complexity of services undertaken across Environment it was decided to split Waste and Streetscene from the other services.

¹⁷ Noting that the Executive Matters budget was deemed non-addressable spend (i.e., out of scope) for this review.

¹⁸ Each service area was represented by at least one SL. Some service areas employed two or more to ensure consistency across the entire process.

¹⁹ There were three forms of Effectiveness Change. The first related to individual service area change opportunities. The second related to changes that were common across two or more service areas (typically relating to common non staff cost e.g., printing that appeared in all budgets). The third related to cross cutting opportunities affecting two or more service areas.

1.6 Purpose of this report

This report formally documents the process followed and provides a record of the outputs of each of the three phases. Its purpose is to outline the approach taken, document staff and non-staff cost efficiency opportunities and record the views of the Panel. Copies of working documents, analysis and wider themes identified during the review for exploration once the project ends, are stored in the CDC Teams site and referred to where necessary throughout this report.

1.7 Method

The repeatable method used for the review offered a structured and detailed approach to examining cost drivers and their links to services, enabling the Panel to develop a strong set of options. These can be used to inform the budgeting process and to help members better understand the risks and impacts associated with difficult decisions around service levels, if required. The process set the conditions to harness the support of key stakeholders and provided a full understanding of risks and impacts.

SLs and supporting colleagues as well as the broader leadership team were engaged throughout, leading to improved proposals and options that are both realistic and understood at all levels.

1.8 Project timeline

The review started on Monday 8 July 2024 and concluded on Friday 15 November 2024.

Key milestones were:

- **Phase 1 (6-weeks).** The first phase concluded with Panel 1 on 20 August 2024.
- **Phase 2 (7-weeks).** Beginning from the end of Phase 1 and concluding with Panel 2 on 8 and 9 October 2024. The original timetabled Phase completed on 4 October; however, the Panel took the decision to push back the Panel Session to allow more time to prepare the Demand and Effectiveness Change proposals to their fullest capability.
- **Phase 3 (4-weeks).** Beginning from the end of Phase 2 and concluding with Panel 3 on 6 and 7 November 2024.
- **Final Report.** The final report was drafted after Panel 3 and shared with the Panel on 21 November 2024.

1.9 Core delivery team

The Panel consisted of:

- Stephen Hinds, Corporate Director - Resources and Transformation (*SRO and Chair*)
- Ian Boll, Corporate Director – Communities
- Michael Furness, Assistant Director - Finance and Section 151
- Shona Ware, Assistant Director - Customer Focus (*Deputy Chair*)
- Shiraz Sheikh, Assistant Director - Law, Governance and Monitoring Officer
- Claire Cox, Assistant Director, Human Resources and Organisational Development (*non-scoring Panel member*).

1.10 The Panel process and governance

The 'Panel' was central to this methodology. Three Panel sessions were held, one at the end of each phase of the project (referred to as Panels 1, 2 and 3). The purpose of the Panels was to review and challenge proposals submitted by the SLs who were acting as representatives of the different in-scope services.

The Panel's role was to confirm proposals were credible, implementation of them was achievable, the risks were correctly assessed, and the expected benefits are realistic.

Panels 2 and 3 were chaired by Stephen Hinds. Panel 1 was chaired by Shona Ware in Stephen's absence.

The Panel sessions were open to the four review managers and Alex Robinson, providing EA support to the Chair.

Analysis and documentation for the Panel Sessions was developed collaboratively between SLs, their contributing teams, and the review Project Team. The Panel were informed and consulted throughout.

SLs presented findings relating to their areas of responsibility at Panel. As required, they answered clarification questions from the Panel members, whose primary role was to explore the evidence presented, and if appropriate, redirect effort and/ or provide support. The Panel are a key part of the review's governance framework.

The qualitative and quantitative evidence that underpinned the Panel was documented in Excel 'workbooks', alongside supporting presentations and information for evaluation.

To ensure overall governance, and delivery momentum, the process was supplemented by a weekly status report as well as a weekly Project Board, attended by Panel members and PA Consulting. The standing agenda for the Project Board covered:

- Actions from previous meetings
- Progress update
- Risks and issues
- Live lessons learnt
- Communications.

The Panel process is summarised in Figure 6 (below).

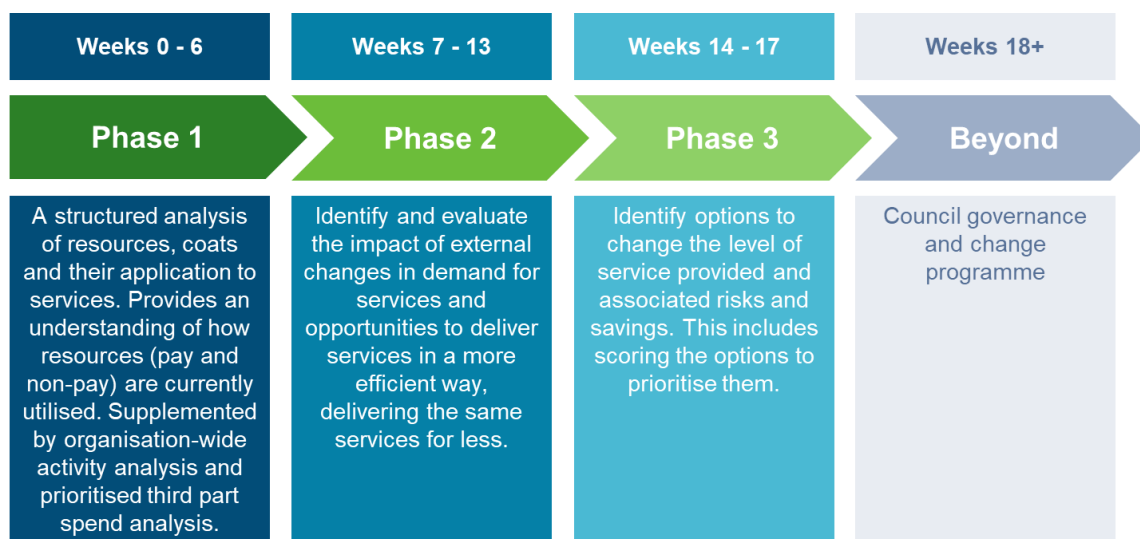


Figure 6: Overview of the Panel process

1.11 Panel 1

Panel 1 provided a description of current staff (as full-time equivalents or “FTE”) and non-staff costs; the services being delivered and a costing for each service²⁰.

Service Areas also presented initial thinking of Demand and Effectiveness changes, which the Panel provided a steer on ahead of Phase 2.

- A total of **108** indicative Demand and Effectiveness Changes were presented at Panel 1
- Of which **51** were progressed into Phase 2.

1.12 Panel 2

Using the approved baseline of services (agreed at Panel 1), proposals for Demand and Effectiveness Change options were developed by the SLs and supporting teams on the basis that they maintained current service levels.

Demand Changes were developed based on robust analysis of the drivers of current activity and the quantification of what changes will impact the Council in the future. Effectiveness Changes options were identified different ways to deliver the same level of service, at lower cost. The teams applied analysis of existing processes and data, comparing against good practice and consideration of the drivers of inefficiency. These proposals were presented at Panel 2.

- A total of **24 Demand Changes** and **82 Effectiveness Change options** were presented at Panel 2, including the 51 progressed from Phase 1.
- A total of **16 Demand Changes** and **53 Effectiveness Change options** were agreed as viable at Panel 2.

Demand and Effectiveness Changes requiring further work following Panel 2

In addition to the Demand Changes, several opportunities identified by the SLs required an uplift in resourcing but did not fit the qualification criteria (defined in Section 3.1). These were

²⁰ The baseline consisted of anonymised data that was provided from Payroll and the General Ledger. The Council was the data custodian and therefore responsible for data accuracy etc with PA Consulting performing the role of data processor. Both parties agreed a robust change process to ensure the ability to undertake reconciliation, if required over duration of the review.

not presented at Panel 2. The SLs and supporting teams were instead directed to bring these back as improved service level options at Panel 3.

There were several Effectiveness Change options that either could not be quantified at the time or were dependent on certain events or decisions taking place. These will provide the Council with further opportunity in future years.

All Demand and Effectiveness templates produced are stored on the Council SharePoint . This repository includes the templates that were agreed at Panel 2 as well as those that were not progressed at this time. Further detail on these potential changes can be found in the Panel 2 presentation slides (also on the Council SharePoint).

1.13 Panel 3

Using the viable options for Demand and Effectiveness Changes, new costs were calculated for the current service level. SLs then produced and costed up six different service levels (minimum, intermediate 1, intermediate 2, current, improved 1, and improved 2):

- Minimum was defined as the minimum level of service that fulfils legal and statutory requirements
- Intermediate service levels were step changes in service between minimum and current
- Improved service levels offer up to two levels of investment to increase levels of service above current.

Risks associated with different service levels were defined and scored using the Council's scoring matrix (see Figure 7).

At Panel 3, SLs presented the proposed service levels, with definitions of the services offered, total cost, FTE and, where applicable, income for each plus their risk profile.

Assessing probability

Scale / Level	Descriptor	Description
1 Remote		May only occur in exceptional circumstances ($P < 2\%$)
2 Unlikely		Is unlikely to occur, but could occur at some time ($2\% < P < 25\%$)
3 Possible		Fairly likely to occur at some time, or in some circumstances ($25\% < P < 50\%$)
4 Probable		Will probably occur at some time, or in most circumstances ($50\% < P < 75\%$)
5 Highly		Probable is expected to occur in most circumstances ($P > 75\%$)

Description and definition of the impact of the risk should it occur (these are a guide)

Effect - Service Delivery	Effect – Financial	Effect -Health & Safety	Effect – Environment	Effect – Reputation
5 – Catastrophic				
Catastrophic disruption. Loss of service delivery for more than seven days	Huge financial loss >£1,000,000	Loss of life. Intervention by HSE	Significant local, national and/or international environmental damage	Extensive coverage in the national press and broadsheet editorial, and/or a national TV item
4 – Major				
Major disruption. Serious damage to ability to provide service. Loss of service for more than 48 hours but less than 7 days	Major financial loss >£100,000 - <£1,000,000	Extensive / multiple injuries. Intervention by HSE	Major damage to the local environment	Coverage in national broadsheets, the press, and/or low national TV reporting
3 – Moderate				
Noticeable disruption, some customers would be affected. Loss of service no more than 48 hours	High financial loss >£25,000 - <£100,000	Violence, threat or major injury – medical treatment required. Intervention by HSE	Moderate damage to the local environment	Coverage in the national tabloid press and/or extensive front page coverage in local press/ TV
2 – Minor				
Some disruption to internal business only – no loss of customer service	Medium financial loss >£5,000 - <£25,000	Minor injury – first aid treatment only required	Minor damage to the local environment	Minimal reputation damage. Minimal coverage in the local press
1 – Insignificant				
Insignificant disruption to internal business – no loss of customer service	Low financial loss <£5,000	No injuries	No, or insignificant environmental damage	No reputational damage

	1	2	3	4	5
1	20%	30%	40%	50%	60%
2	30%	40%	50%	60%	70%
3	40%	50%	60%	70%	80%
4	50%	60%	70%	80%	90%
5	60%	70%	80%	90%	100%

Figure 7: Examples of the Council's risk approach which this process applied

2 Phase 1 – establishing the baseline

2.1 Overview and objectives

The purpose of setting the baseline during Phase 1 is to describe in detail the in-scope services delivered by the Council, and their associated costs.

The supporting 'workbook' captured the baseline that was developed comprising budgeted full staff costs, non-staff costs and income alongside actuals for FY2023/24.

The Council's Finance team provided the relevant information and SLs/ contributing team members worked with the combined project team to agree the finalised baseline for the in-scope services.

2.2 Baseline methodology and assumptions

The following principles and assumptions were agreed:

1. Cost shunting. Simply moving activities from one individual service area to another, would not constitute a saving.
2. Budget hierarchy. Data fields were added to the workbook for the cost allocation process (see Section 2.4) to be undertaken accurately.
 - a. For staff cost, the fields were agreed as:
 - i. Service area
 - ii. Team (if applicable)
 - iii. Job title
 - iv. Grade and FTE
 - b. For non-staff cost, the fields were:
 - i. Service area
 - ii. Cost Category
 - c. For income, the fields were:
 - i. Service area
 - ii. Income Category

2.3 Baseline treatments and rules

At the start of the baseline definition process several 'rules' were agreed with Finance to ensure consistency:

- Budget figures for FY2024/25 and actuals for FY2023/24 were to be used for baseline analysis meaning 1st April 2024 will be used as the 'cut-off start date' for this review, unless otherwise agreed through change control.
- Significant staff changes e.g. re-structures, that took place after the cut-off date have been built in as Demand Changes in Phase 2.
- Agency / contractor spend were to be treated as non-staff costs.
- Overtime, bonus payments, callouts were treated as non-staff costs.
- Staff costs are full on costs (i.e., NI, pension etc).
- Vacant posts are budgeted posts that are unfilled.
- Allocation of costs has been done at increments of 5% (5%, 10% ...100%).

2.4 Service definitions

'Services' in this process describe the inputs, activities, outputs, and outcomes achieved across the in-scope Council service areas. SLs agreed and described the complete range of services. Resource captured in the baseline of each service area workbook were then allocated against each of the areas' defined services to give fully costed services.

The service descriptions and allocation of costs enabled the review to gain an understanding of what is delivered for the resources used, by quantifying the volume of work, demand and performance achieved for each service. Services and their costs were developed bottom up by the SLs and supporting teams, with assistance from the combined project team. The Assistant Directors for each of the service areas were involved in the review process. The finalised service titles, descriptions and resource allocations were presented at Panel 1.

2.5 Baseline sign-off – Panel 1 and post Panel 1

Each nominated SL presented their baseline and services to the Panel. All baselines and services were agreed by Panel following discussion and clarification.

The SRO provided direction on prioritisation of areas of interest for each service area after Panel 1 which informed the focus of the Phase 2 work.

2.6 Panel 1 baselines (total cost and income)

Table 1 below shows the Council services baseline (total staff and non-staff costs combined, and income) that were agreed through Panel 1.

2025/26 Budget Baseline	FTE*	Staff costs	Non Staff Cost	Non Staff Income	Net
Service Area					
CF	60	2,613,805	263,263	-249,100	2,627,968
D&I	20	1,004,411	666,909	-60,022	1,611,298
Env 1	167	7,068,302	3,313,388	-6,064,193	4,317,497
Env 2	13	697,415	1,650,814	-958,702	1,389,527
Finance (incl Exec Matters)	60	3,252,894	43,269,887	-30,957,860	15,564,921
G&E	12	833,457	1,416,996	-1,579,000	671,453
H&W	88	3,873,802	3,957,236	-5,799,554	2,031,484
HR	11	606,644	172,209	0	778,854
L&G	26	1,507,914	675,436	-2,965	2,180,384
P&D	71	3,838,430	901,207	-2,990,039	1,749,597
Property	18	1,096,243	2,666,865	-8,400,967	-4,637,858
Reg	27	1,351,763	337,704	-558,651	1,130,816
	573	27,745,079	59,291,913	-57,621,053	29,415,939

*Includes effect of vacancies

Table 1: Overview of Council's costed services

2.7 Decisions and actions from Panel session 1

Actions from Panel 1 were reviewed by the Project Team and ratified by Panel.

3 Phase 2 – Demand and Effectiveness Changes

3.1 Overview and objectives

The purpose of Phase 2 was to identify ways to best deliver existing service levels more efficiently and/ or more effectively.

Each SL worked with their teams to identify:

- **Demand Changes.** Quantifiable external factors that were expected to have an impact on the level of demand for services over the next two years.
- **Effectiveness Changes.** Improvement ideas which enable current services to be provided at a reduced cost. Commonly the focus was on policies, process simplification, removal of duplication, analysis of roles and vacancies and increased use of, or improvements to, technology.

In addition, at Panel 2, SLs were given the opportunity to test minimum viable service levels with the Panel, who provided direction as appropriate.

3.2 Information capture

Each Demand and Effectiveness Change was supported with a completed template²¹ that presented all relevant information to allow the Panel members to be able to assess whether individual opportunities were credible in line with the qualification criteria set out in Section 3.1. The templates²² were not meant to replace the need for business cases, were appropriate (e.g., procurement of technology solutions).

3.3 Demand, Effectiveness and additional Income headlines

Figure 8 below provides an overview of potential baseline changes across the next three financial years.

²¹ The standard template structure was revised to meet the Council's MTFP information capture requirements.

²² The template structure was identical for Demand and Effectiveness Changes as well as new Income opportunities.

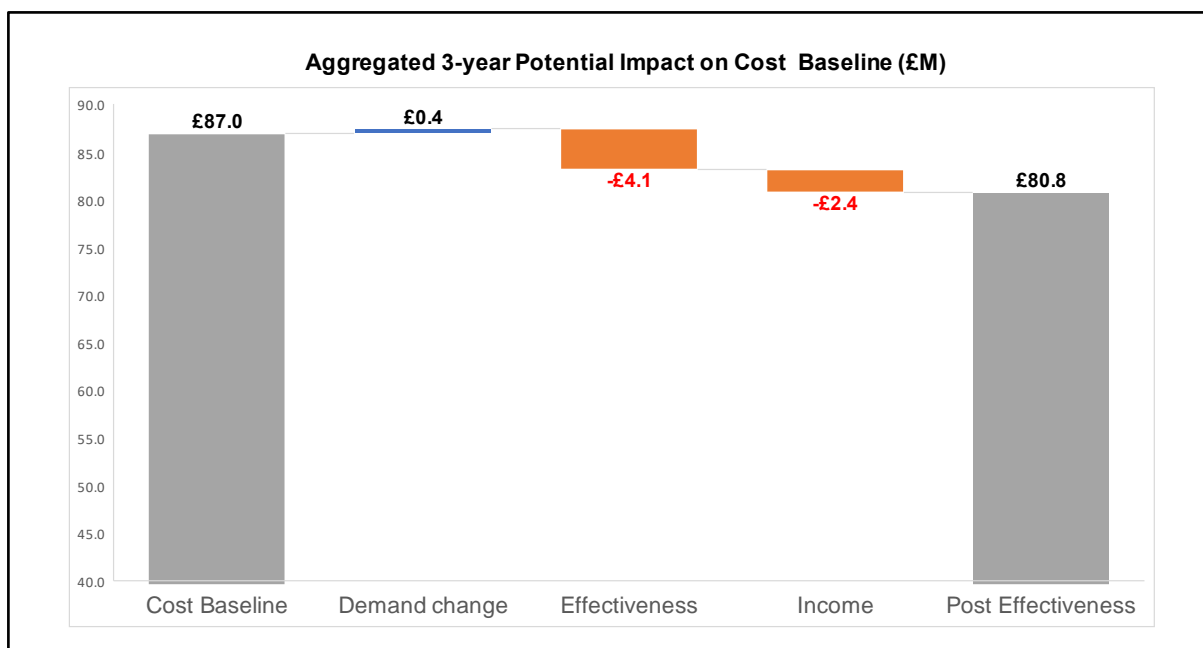


Figure 8: Breakdown of potential impact on the baseline, aggregated across each of the next 3 financial years

3.4 Demand and Effectiveness Changes breakdown against service area savings targets

Table 2 below provides a breakdown of Demand and Effectiveness Changes by service area (including associated income impacts) with performance against allocated c.21% savings targets for FY2025/26 onwards.

CLT noted this level of saving would be a real stretch for many of the service areas, particularly those that had significantly reduced costs over the recent past. There was explicit direction that service areas should return to previous analytical work that had not been progressed (e.g., the Environment report) to help address saving targets.

It should be noted that while the review prioritises transforming an organisation's cost-base, many service areas were also able to offer additional income, providing the Council with alternate options to address forthcoming budget pressures.

2025/26 to 2027/28 (Cherwell District Council)	Saving Target Aim @ 20%	Demand Asks	Income Generates	Effectiveness Saving	Income Generates	Net	Shortfall to Target	% reached (before imp costs)
Service Area								
Customer Focus	551,000	32,920	0	-278,759	0	-245,839	305,161	45%
Digital Innovation	313,000	10,530	0	-84,584	0	-74,054	238,946	24%
Environment 1	2,527,000	355,490	0	-1,075,081	-175,000	-894,591	1,619,389	36%
Environment 2		43,370	0	-49,990	-6,400	-13,020		
Finance	835,000	7,600	0	-645,000	0	-637,400	197,600	76%
Growth & Economy	159,000	0	0	0	0	0	159,000	0%
Housing & Wellbeing	1,253,000	-336,778	28,472	-447,349	364,256	-391,399	861,601	31%
Human Resources	248,000	127,089	0	-115,738	0	11,351	259,351	-5%
Law & Governance	469,000	73,764	0	-40,000	0	33,764	502,764	-7%
Planning & Development	936,000	138,405	-105,000	-474,385	-314,400	-755,380	180,620	81%
Property	753,000	3,822	0	-751,474	0	-747,652	5,348	99%
Regulatory Services	334,000	34,649	0	-55,039	0	-20,390	313,610	6%
	8,378,000	490,861	-76,528	-4,017,400	-131,544	-3,734,611	4,643,389	45%

Table 2: Demand and Effectiveness Change options across FY2025/26 to FY2027/28 by service area (£k), inclusive of impacted income

3.5 Further supporting Demand Change information²³

Common Demand Changes

A common demand change was applied to all affected Services which had declared and approved uplift based increments for the FY2025/26 FTE remuneration budget.

This impacted total staff budget by c.£170k per annum (pa).

Net Demand Changes²⁴

For FY2025/26 a total of 11 Demand Changes were agreed.

The Demand Changes could result in an additional cost of £523k pa, and an anticipated increase in related income of £77k (excluding the impact of an accounting adjustment for H&W Museum of -c.£348k). No Demand Changes were identified for FY2027/28:

- £446k for FY2025/26 - this is the net position inclusive of the relevant demand related increased income.
- £316k for FY2026/27 - there was no identified demand related income impact.

3.6 Further supporting Effectiveness Change information

The Council identified, and Panel members agreed, staff and non-staff efficiency savings options of c.£4.1m across FY2025/26 to FY2027/28.

3.7 Running additional innovation working sessions to support development of a comprehensive set of Effectiveness Changes²⁵

Fifty three Effectiveness Change options were accepted at Panel 2, with a further nineteen brought back to Panel 3 due to incomplete supporting data (e.g., some had missing indicative staff and/ or non-staff cost savings).

To complement service-area specific support, several additional working sessions were held to ensure the Council could fully explore know 'pain points' that affected organisational performance.

²³ For associated indicative implementation costs for Demand and Effectiveness Changes refer to individual workbooks.

²⁴ Panel also directed that several Demand Changes were to be progressed outside of the process.

²⁵ Where SLs have provided implementation dates for Effectiveness Changes, the majority of these have a 12 to 24-month implementation horizon (savings across FY2025/26 to FY2026/27).

1. **Cross-cutting.** At the start of the second phase two working groups were held with SLs to identify and explore cross-cutting opportunities. This activity generated a total of 64 Effectiveness Changes (see Figure 9).

2. **Process automation.** Several briefings were held with SLs, Assistant Directors and Panel members to discuss process automation. The working sessions were facilitated by a joint presenting team from PA supported by an alliance partner. The sessions included art of the possible case studies to bring to life easily relatable examples so that attendees could relate that information to their own areas to consider how automation could enhance the effectiveness of their services.

Service Area	Number of allocated cross-cutting ECs
Environment 1	1
Environment 2	2
H&W	1
P&D	2
G&E	1
Regulatory	0
HR	8
L&G	11
Finance	1
Property	0
D&I	11
Customer Focus	12
All	14
Total	64

Figure 9: Potential cross cutting Effectiveness Changes

Figure 10 details some high-level recommendations from the sessions. Below are a few observations from the review:

- a. There was limited common understanding of the Council's processes.
- b. Process redesign of the Council's core processes has the potential to deliver significant return and enable the realisation of efficiencies beyond those identified in the review.
- c. While the Council is in the late stages of procuring some limited RPA capability, time spent understanding the Council's wider requirements is required if it is to get the 'best bang for its buck'.
- d. At present, there is limited insight into which technologies best fit the organisation's needs and where it should prioritise efforts.

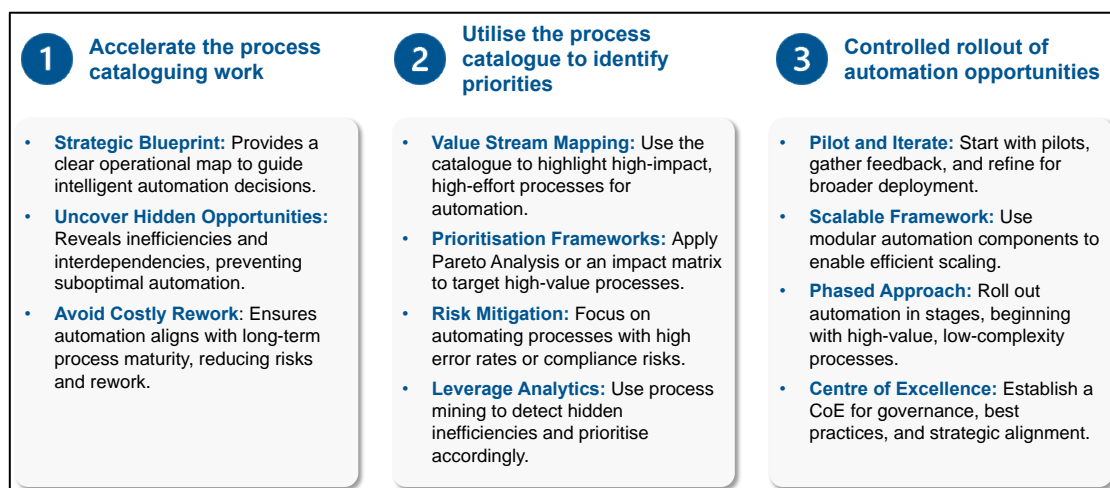


Figure 10: Potential cross cutting Effectiveness Changes

- Customer operations transformation.** A working session with the Customer Focus team highlighted a range of effectiveness and efficiency opportunities. It is anticipated that this will be a focus area for the target operating model as the scale of potential transformation is material for the Council.

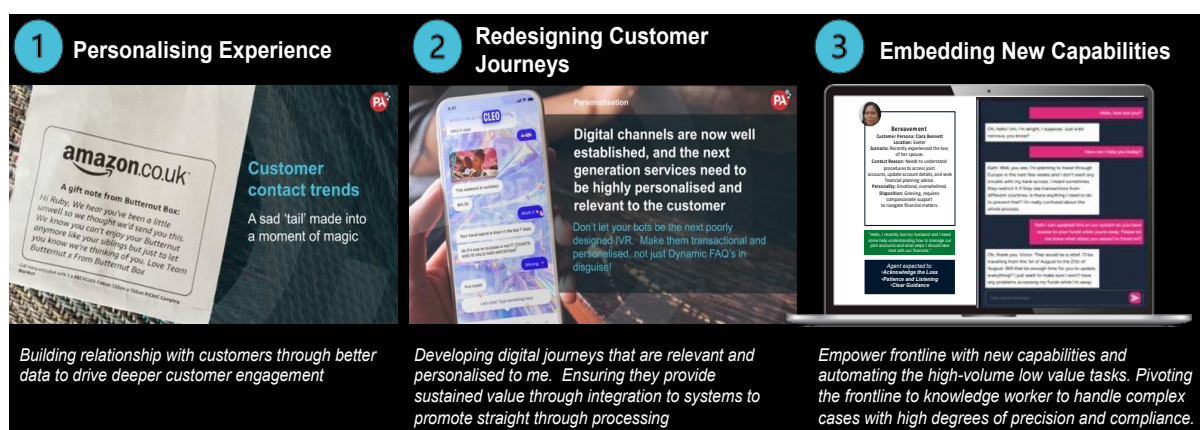


Figure 11: Customer operations – a presenting area for transformation

- Alternative service delivery model options.** The fourth additional working session considered presenting opportunities for moving services to alternative service delivery models (e.g., hubs, arm's length organisations, managed services, shared services, outsourcing etc). Overall, there was little appetite from workshop attendees to explore these options. That said, Environment 1 were supportive of moving to an arm's length organisation for the delivery of Waste services and included this as one of their Effectiveness Change options.

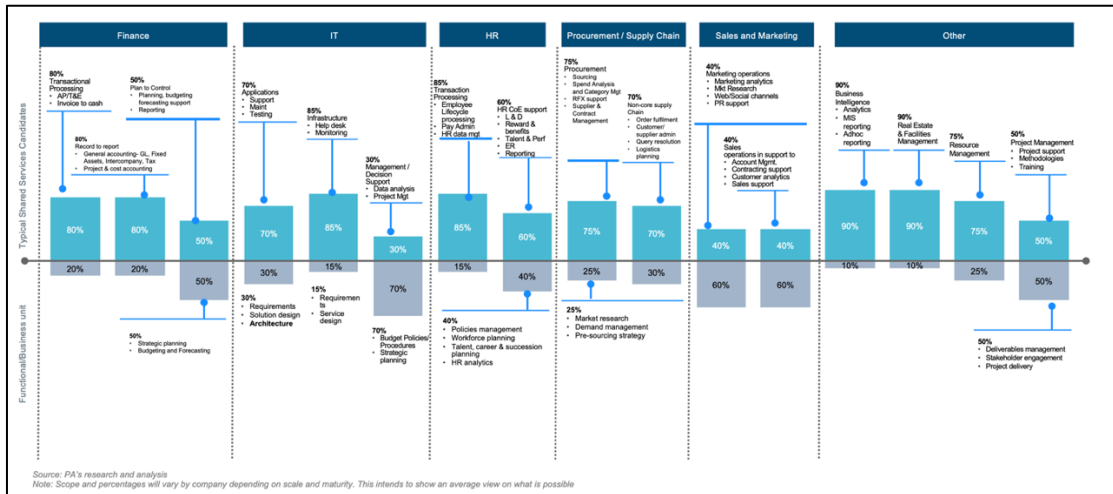


Figure 12: Example process splits within a shared services delivery model

3.8 Further transformation potential

Most of the Effectiveness Change options identified in Phase 2 offer a chance for the Council to make operational changes to enhance current ways of working (Figure 12, green shading) and further transformation potential was also discussed requiring more strategic choices (blue shading).

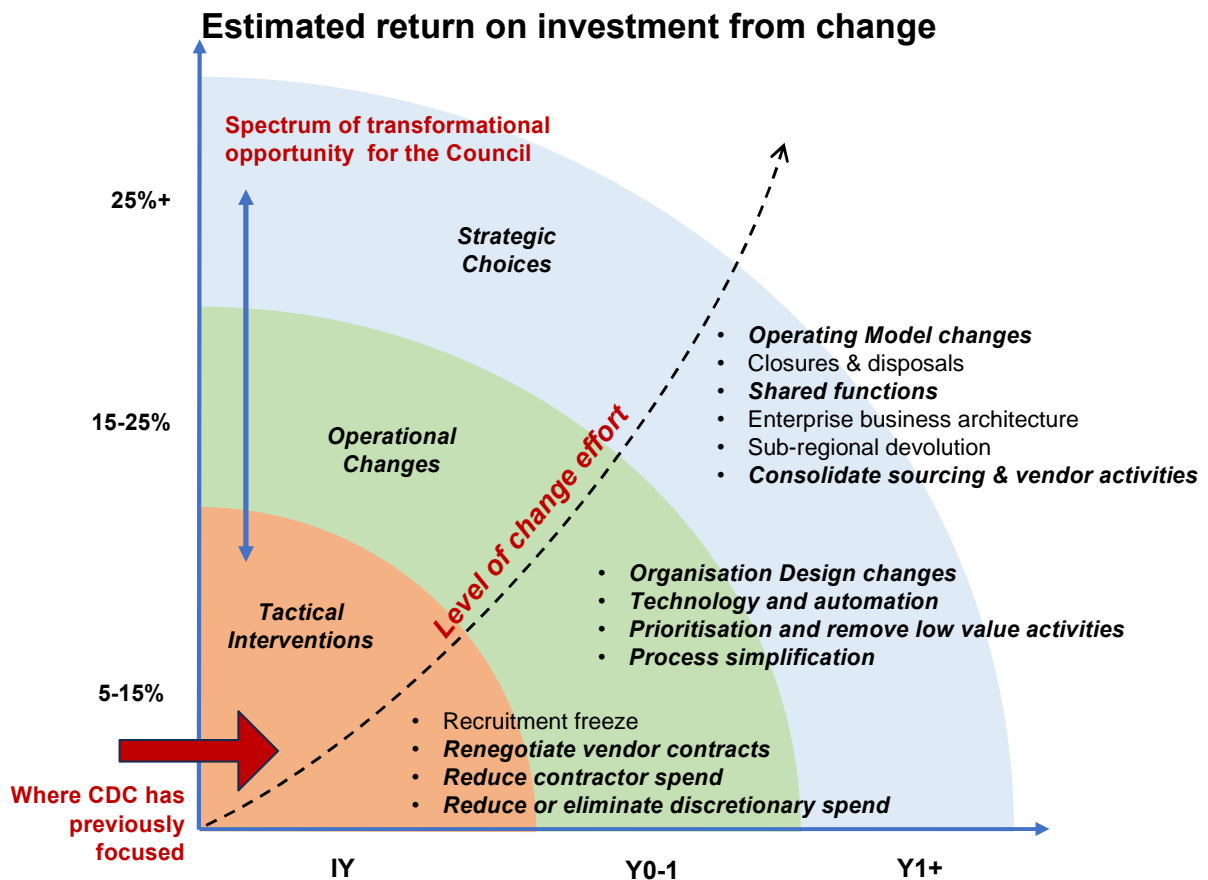


Figure 13: Spectrum of potential transformational opportunities for the Council (bold italics show the type of change CDC could undertake)

Ten key themes from the second phase coloured to reflect operational change/ strategic choice are presented below.

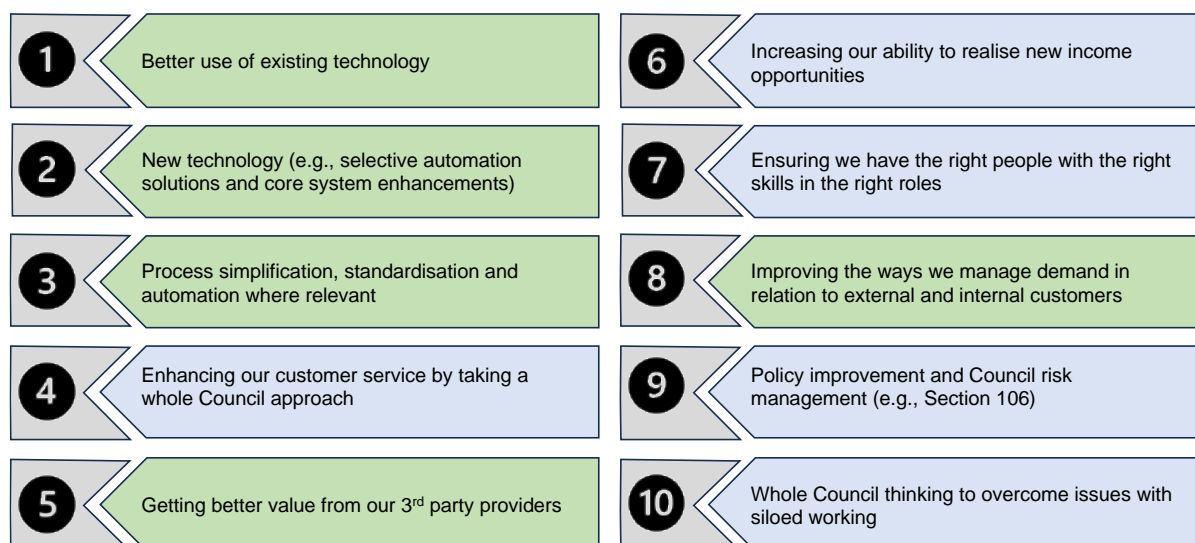


Figure 14: Potential operational change & strategic choice themes from Panel 2

Drawing on evidence presented, professional judgement and what has been seen elsewhere, the Council is assessed to be at a low level of operational maturity overall (see Figure 15 below). Hence, there is view that the efficiencies quantified through the review are conservative, and that the Council should be able to overperform against the current £4.1m aggregated potential savings figure, through further transformational activity.

3.9 Decisions and actions from Panel 2

Actions from Panel 2 were reviewed by the Project Team and ratified by the Panel.

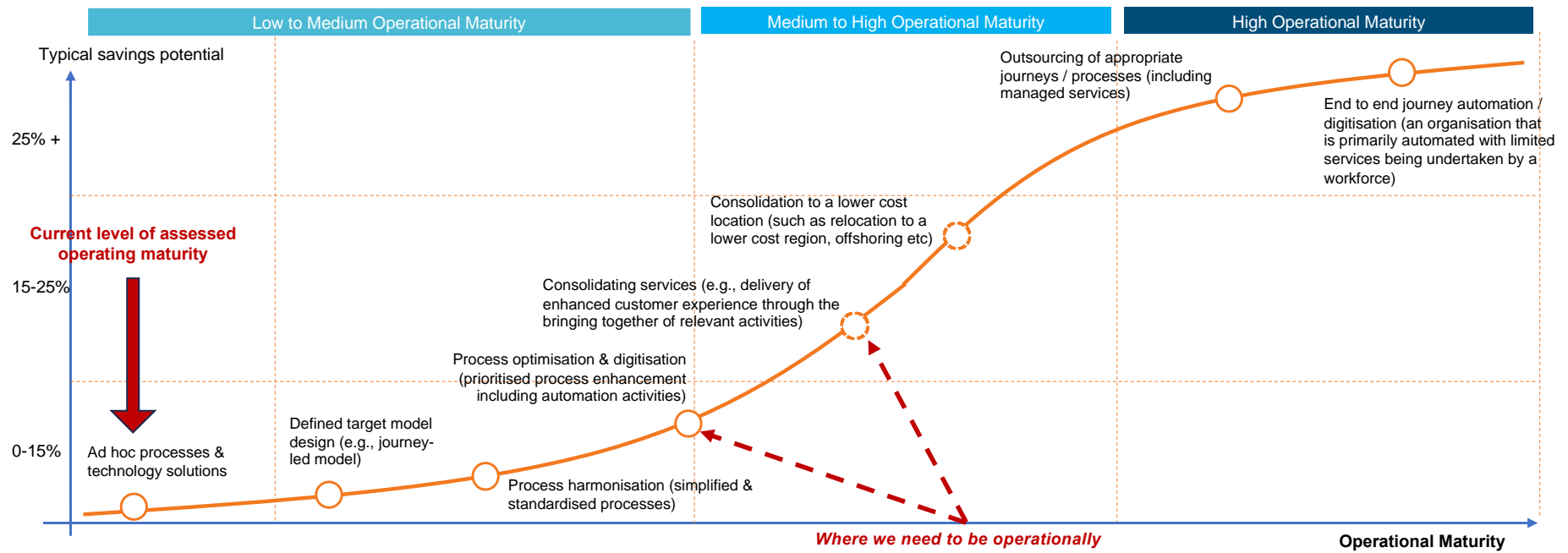


Figure 15: Operating maturity assessment and indicative transformational ambition

4 Phase 3 – Scenarios for Service level options

4.1 Overview and objectives

The primary focus of Phase 3 was the development of different service level options for the Council including associated risks, impact (FTE and cost), and interdependencies.

The service level options assumed the implementation of all Demand and Effectiveness Changes as agreed by the Panel as part of Phase 2, as a starting point.

The “Current” service level detailed at Phase 3 is the most cost-efficient version (i.e., baseline costs agreed at Panel 1 minus Demand and Effectiveness Changes agreed at Panel 2).

The presentation of these service level options at Panel 3 allowed the Panel to evaluate the different options by using a transparent, evidence-based assessment of the benefit, impact, and associated risk to the Council for each level.

The draft scenarios for SLs were directed to develop a range of six different service level options, beginning with minimum and building upwards via intermediate, to current and improved, articulating what additional service will be provided for additional cost, and how each build will mitigate risks.

4.2 Development of service levels

The purpose of identifying different levels of service provision was to offer the Panel a range of potential choices across the in-scope areas (be that investment, disinvestment or the reprioritisation of resources). SLs were encouraged to provide the Panel with as broad a range of costed service levels as possible. This involved:

- Defining the services to be provided at each level, described in Table 3 (below).
- Identifying related staff and non-staff costs, including consideration of the staffing model that would be needed to deliver services at each defined level.
- Defining risks and how they reduce in line with increasing service levels.
- Defining the implementation dates and costs of each service level option (due to time constraints this will need to be progressed outside of the process).

Costs increase from minimum through the intermediate service level builds to current and improved.

When defining the lowest possible level of service, SLs were asked to reflect what the organisation would find viable (i.e., a level of service the Council could function at, accepting the level of risk would not be at all desirable). SLs were asked to base this on the work Council does, legal requirements, statutory minimum standards and commitments that had been made (to residents, central government, etc).

Service level options were then presented at Panel 3.

4.3 Service level costs

Table 3 details the costs of the different service level options offered at Panel 3 for consideration and Figure 15 shows the aggregated cost of each service level.

Service Area	Total cumulative Cost (£m)					
	Min	Int 1	Int 2	Current	Imp 1	Imp 2
Customer Focus	0.97	2.03	2.56	2.63	2.75	2.57
Digital & Innovation	1.07	1.32	1.45	1.66	1.79	1.88
Environment 1	8.10	9.45	9.66	10.31	10.98	10.98
Environment 2	2.10	2.20	2.27	2.34	2.38	2.38
Finance	45.60	45.61	45.77	45.94	46.37	46.62
Growth & Economy	1.46	1.63	1.85	2.13	2.29	2.29
Housing & Wellbeing	3.77	6.32	7.15	7.04	7.83	7.83
HR	0.60	0.66	0.77	0.78	0.82	0.82
Law & Governance	2.10	2.17	2.20	2.28	2.64	2.69
Planning & Dev	2.75	3.69	4.49	4.54	4.27	4.27
Property	1.85	1.85	2.50	3.23	3.34	3.41
Regulatory	1.47	1.57	1.58	1.67	1.88	1.88
	71.84	78.50	82.25	84.55	87.34	87.62

Note: Finance includes Executive Matters ~£16.7M and Rent Allowances ~£25M

Table 3: costed service level options presented at Panel 3

Figure 16 below shows that the Council's services could be provided for a cost of between £71.8m to £87.6m, depending on the choices made about quality and risk. This information could be used to inform the budgeting process in future years, as required. Note that the costs presented are after all agreed Demand and Effectiveness Changes have been considered.

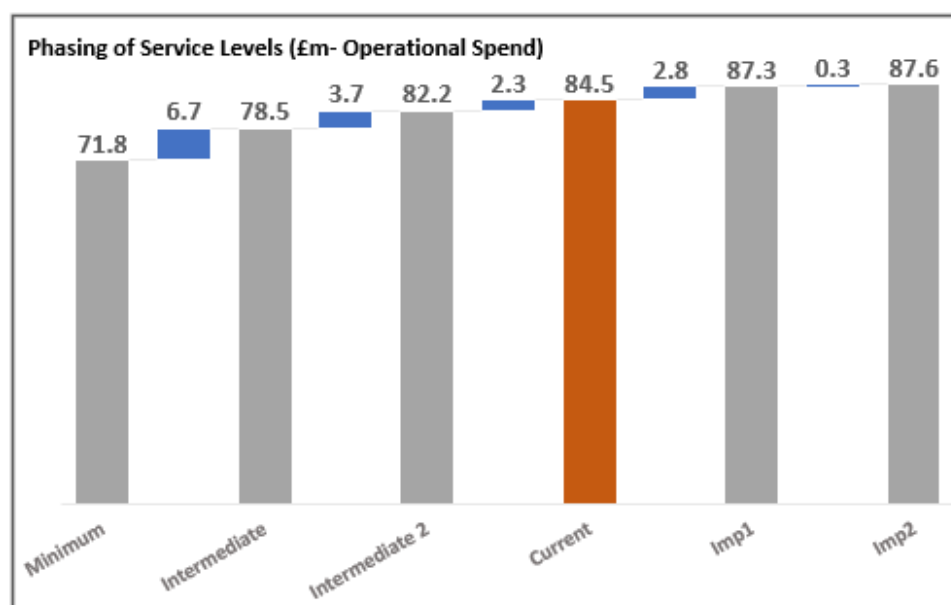


Figure 16: Aggregated cost of service level options presented at Panel 3 (£m)

4.4 Risk profile

As noted, each service level option build presented to the Panel had a series of risks relating to that level of activity. SLs, and supporting teams, defined a set of key risks for the Council, and scored them in line with the Council's risk matrix. This gave an overall risk score for each of the risks. The risk profiles were presented and discussed at Panel 3.

As the amount of resource and activity increased between the service level options, the associated level of risk decreased. The approach helped the Panel to understand what risk was either being 'bought out' by choosing a higher level of service or accepted by choosing a lower level of service.

4.5 Scoring of service levels, and decisions and actions from Panel 3

At Panel 3, Panel members were invited to score each of the presented service level options for each service area using the below scale:

Score	Description
10	Essential - unavoidable corporate or legal requirement
9	Critical – unavoidable without substantial loss or damage
8	Very attractive, important and productive level of service
7	Important - hard to see how they could be dropped
6	Significant benefits but could conceivably be dropped
5	Desirable but first to be dropped if funding curtailed
4	Marginal but first to be supported if funding available
3	Possible but only if significant increased funding available
2	Doubtful – not sufficient justification at present
1	Unlikely ever to be funded

Table 4: Criteria used by the Panel members to score individual service level options

Panel members initially scored individually, then scores were moderated (ensuring no more than 2 points separated Panel member scores) to understand explore and significant differences of opinion by members and determine a set of consensus scores.

Panel members subsequently met to discuss the application of this scoring to several scenarios, whereby the impact on budgets of including all service levels options above a particular score were considered. The following scenarios were used:

- **Scenario 1.** Keeping budgets at existing levels, but reinvesting the savings made through effectiveness changes into improved services.
- **Scenario 2.** Taking the effectiveness changes to reduce the cost baseline, keeping service levels broadly as current (with some limited rebalancing to reflect changed priorities).
- **Scenario 3a.** Taking the effectiveness changes and reducing service levels (based on the scoring above) to achieve the desired target in terms of meeting the potential budget gap.

- **Scenario 3b.** ‘Fine-tuned’ Scenario 3a to increase service levels in three service areas²⁶ that produced a positive marginal contribution (i.e. increase in income greater than increases in cost).

²⁶ Finance, Planning & Dev and Property.

5 Implementation

5.1 High-level roadmap

The proposed high-level implementation plan (Figure 16) shows the key activities that will be required to deliver the efficiencies associated with the proposed Demand and Effectiveness Change options.

Implementation dates have been taken from the information provided in phases 2 (e.g., Effectiveness Change templates) and 3. This information is reflective of the SLs' and supporting staffs' professional judgement.

Where there has been a level of uncertainty, a conservative estimate has been taken. All implementation dates will need to be tested. There will also be opportunity to accelerate some of the delivery timelines, dependent in resource prioritisation.

The levels of complexity shown below are based on an assessment made by the combined project team following Panel 2. The Council will need to firstly confirm the assessed level of complexity during the design phase of delivery. Secondly, CDC will need to consider how best to plan for and manage delivery complexity as many of the identified savings will be dependent on enabling activities/ co-dependent on other change initiatives.

The core principle which has driven the sequence of activities is that of 'save to spend' (i.e., achieving cashable savings early to fund investment). The plan also includes enabling assumptions and enabling factors such as technology, governance, and programme management (as identified in the Effectiveness Change templates). A larger version of the Demand and Effectiveness Change implementation plan can be found at Appendix 3.

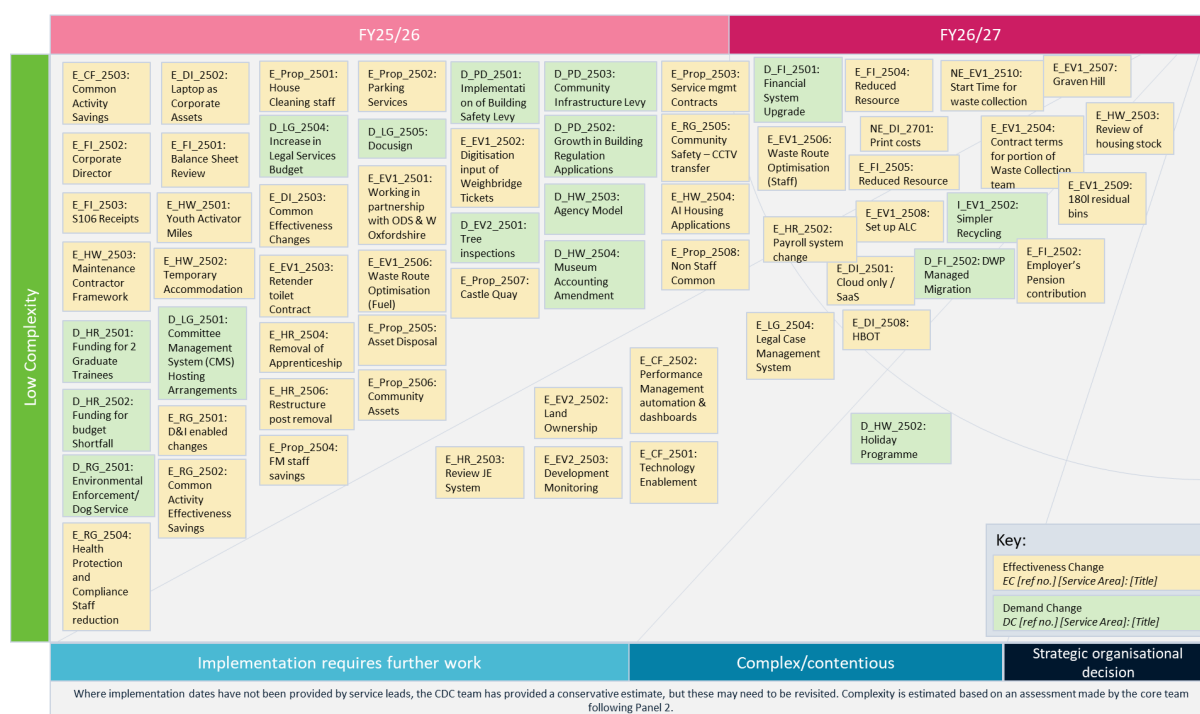


Figure 17: Indicative high-level Demand and Effectiveness Change implementation plan (see Appendix 3)

5.2 Implementing the Demand and Effectiveness Changes

Of the 106 proposals presented at Panels 2 and 3, 16x Demand and 53x Effectiveness Changes were deemed viable, with a further four²⁷ awaiting a judgement out of process.

The opportunities were deemed to be viable all have implementation dates within the next 12 to 24-months (FY2024/25 or FY2025/26) so can be actioned in the short-term.

For each Demand and Effectiveness Change a template has been completed. The templates provide supporting information such as rationale, associated costs, risks, interdependencies, and enablers.

The implementation date is the individual SL's assessment of the point at which the change to the budget will be fully realised and is underpinned by several assumptions and risks developed during the Panel process. These assumptions include:

- **Budgeting process.** It is assumed that through the budgeting process the Council will discuss the Demand Changes and Effectiveness Change options, and other associated identified investment factors, to ensure the Council has a set of services appropriately balanced to meet its needs in FY2024/25 and going forward.
- **Programme set up.**

It is assumed the implementation will be incorporated with appropriate governance, set out in Section 5.3. This will include the allocation of appropriately experienced resources to support design and implementation of the new target operating model and associated changes that have been agreed as part of this review.

 - It is also assumed that the programme will be delivered in line with a detailed delivery plan. Any changes should undergo robust change control to assess the impact on the scale and timing of both savings and investments to maintain a net cost saving over time. This point is applicable to the review and all constituent design elements of any forthcoming transformation programme.
- **Consultation and Member Decision.** It is assumed that the Council will assess (and take appropriate steps) whether there is a requirement to undertake a consultation process and/ or seek Member Decision ahead of implementing some of the proposals.
- **Alignment of post mapping and reallocation of resources.** Where relevant, it is assumed that every effort will be made to minimise staff impact and align resources of the right grade and skillset to new posts, as agreed in the budgeting process.
- **Organisation Design.** It is assumed the Council will consider how the target operating model work will incorporate the proposed changes from the review.
- **Implementation costs.** It is assumed the Council will need to:
 - Further refine the Effectiveness templates/ service level options. Developing business cases (where appropriate) to capture revised costs and benefits²⁸.
 - Fund implementation costs as part of the budgeting process for upcoming financial years.
- **Programme Delivery.** It is assumed that all accepted changes are deliverable and realisable. The majority of these can be actioned through business as usual. Where this cannot take place, the appropriate leadership team will be responsible for actioning and implementing agreed changes (either through the budgeting process outcomes or in addition to them).

²⁷ E_EV1_2501, HR Supplementary x3 (Professional subscriptions, agency costs and overtime) will be reviewed post Panel 3 at CLT. This delay is due to short timelines between Panel 2 and Panel 3 impacting the Service Leads ability to address the points raised.

²⁸ Good practice is to refine business cases (high and detailed) through the design phases ahead of implementation.

5.3 Governance

The Efficiencies and Service Level changes (if agreed through the appropriate internal governance process) will only come from successful implementation. Setting the right level of governance and control from the outset is a critical element of achieving desired outcomes.

There are two elements to this:

- Establishing an appropriate governance framework.
- Embedding the governance of this review into the wider Council portfolio of change.

The high-level implementation plan (Figure 16) has been developed post Panel Session 3 and should be considered a first version of a live document. It will need to be maintained and updated under the governance and control arrangements established to manage the budgeting process decisions.

Given the types of initiatives identified through the review the Council may wish to consider the two governance approaches outlined below that match the structure of the high-level implementation plan.

Type of initiative	Short-term initiatives contained within service area workbooks.
Governance Lead	Cost based Services Review Project Board or the Corporate Leadership Team.
Responsible Owner	Assistant Directors
Description	These are initiatives expected to be realised during FY2024/25 or FY2025/26. Typically, these initiatives are 'quick wins' and/ or can be addressed as part of business as usual. They may require an update to the FY2025/26 budget, to match the cost changes that have been realised. Budget holders are responsible for the delivery of these savings.

Type of initiative	Medium to long-term initiatives and/ or those that are complex/ sensitive (e.g., organisation design changes).
Governance Lead	Cost based Services Review Project Board, a newly formed Transformation Board or the Corporate Leadership Team.
Responsible Owner	Business case owner(S) and/ or relevant corporate/ assistant directors
Description	These are initiatives that are expected to be enabled over the next 1 to 3 financial years. Service areas will be accountable for the delivery of the initiatives and the realisation of benefits. A programme board and other forums (e.g., a Design Authority) will be required and expected to fulfil a central coordination and governance role.

5.4 Roles and responsibilities

Adequately resourcing the delivery team and providing robust governance and control will be fundamental to success. It is suggested that they report to a Programme Board, who are responsible for delivering all aligned savings.

Appendices

Appendix 1 – List of viable Effectiveness Change options

Below is a breakdown of agreed Effectiveness Changes by service area.

The financial year information was provided by the respective SLs and is their estimate as to when the effectiveness savings could be realised.

Ref Number	Service Area	Description Title	Total Saving	Earliest implementation date
E_CF_2501	CF	Technology Enablement	-193,493	1yr CRM 2-3yr
E_CF_2502	CF	Performance Mgmt automation and Dashboards	-53,594	18mths/2 yrs
E_CF_2504	CF	Common Activity Savings	-31,672	Apr-25
E_DI_2502	D&I	Laptops as Corporate Assets	-9,750	Apr 25
E_DI_2503	D&I	Common Effectiveness Changes	-10,534	Apr 25
E_DI_2501	D&I	Cloud only /SaaS	-20,300	2026/27
NE_DI_2701	D&I	Controlling uncontrollable non staff costs	-12,500	2026/27
NE_DI_2701	D&I	Controlling uncontrollable non staff costs	-20,000	2027/28
NE_DI_2701	D&I	Controlling uncontrollable non staff costs	-11,500	2027/28
E_EV1_2501	Env 1	Working in Partnership with ODS & W. Oxfordshire	-45,000	01/04/2025. Additional potential savings for 2026/27 (Staff)
E_EV1_2502	Env 1	Digitisation input of Weighbridge Tickets	-21,789	Apr-25
E_EV1_2503	Env 1	Retender toilet Contract	-10,000	Apr-25
E_EV1_2504	Env 1	Contract terms for portion of Waste Collection team	-29,047	Ref Summary for 2026/27 & 2027/28
E_EV1_2506	Env 1	Waste Route Optimisation	-9,000	Apr-25
E_EV1_2501	Env 1	Working in Partnership with ODS & W. Oxfordshire	-300,000	2026/27
E_EV1_2507	Env 1	Graven Hill [Placeholder as savings commence 26/27 and not 25/26]	-80,000	2026/27

E_EV1_2507	Env 1	Graven Hill [Placeholder as savings commence 26/27 and not 25/26]	-185,000	2027/28
E_EV1_2508	Env 1	Set up ALC [Placeholder as savings commence 26/27 and not 25/26]	-30,000	2026/27
E_EV1_2508	Env 1	Set up ALC [Placeholder as savings commence 26/27 and not 25/26]	-100,000	2027/28
E_EV1_2504	Env 1	Contract terms for portion of Waste Collection team	-38,000	2026/27
E_EV1_2504	Env 1	Contract terms for portion of Waste Collection team	-48,000	2027/28
NE_EV1_2510	Env 1	Start Time for waste collection	-162,381	2026/27
NE_EV1_2510	Env 1	Start Time for waste collection	-162,381	2027/28
E_EV1_2506	Env 1	Waste Route Optimisation	-29,482	2026/27
E_EV2_2502	Env 2	Land Ownership	-49,990	3-6mths post completion 2025/26
E_EV2_2503	Env 2	Development Monitoring	-6,400	3-6mths post completion 2025/26
E_FI_2501	Finance	Balance Sheet Review	-240,000	Apr-25
E_FI_2503	Finance	Corporate Director	-140,000	Apr-25
E_FI_2504	Finance	S106 receipts	-174,000	Apr-25
E_FI_2505	Finance	Reduced Resource	-34,936	01/04/2025 with portion in 2026/27
E_FI_2505	Finance	Reduced Resource	-18,064	2026/27
E_FI_2508	Finance	HBOT [Placeholder 26/27]	-38,000	2026/27
E_HW_2501	H&W	Youth Activator Mileage	24,426	Apr-25
E_HW_2502	H&W	Temporary Accommodation - Housing	-400,000	1/4/25 & on-going
E_HW_2504	H&W	Maintenance Contractor Framework	-5,000	Apr-25
E_HW_2505	H&W	AI Housing Applications	-36,775	Jan-26
E_HW_2503	H&W	Review of Housing Stock	334,256	2026/27
E_HR_2503	HR	Review JE system	-10,000	Apr-25
E_HR_2504	HR	Removal of Apprenticeship	-25,073	Jun-25

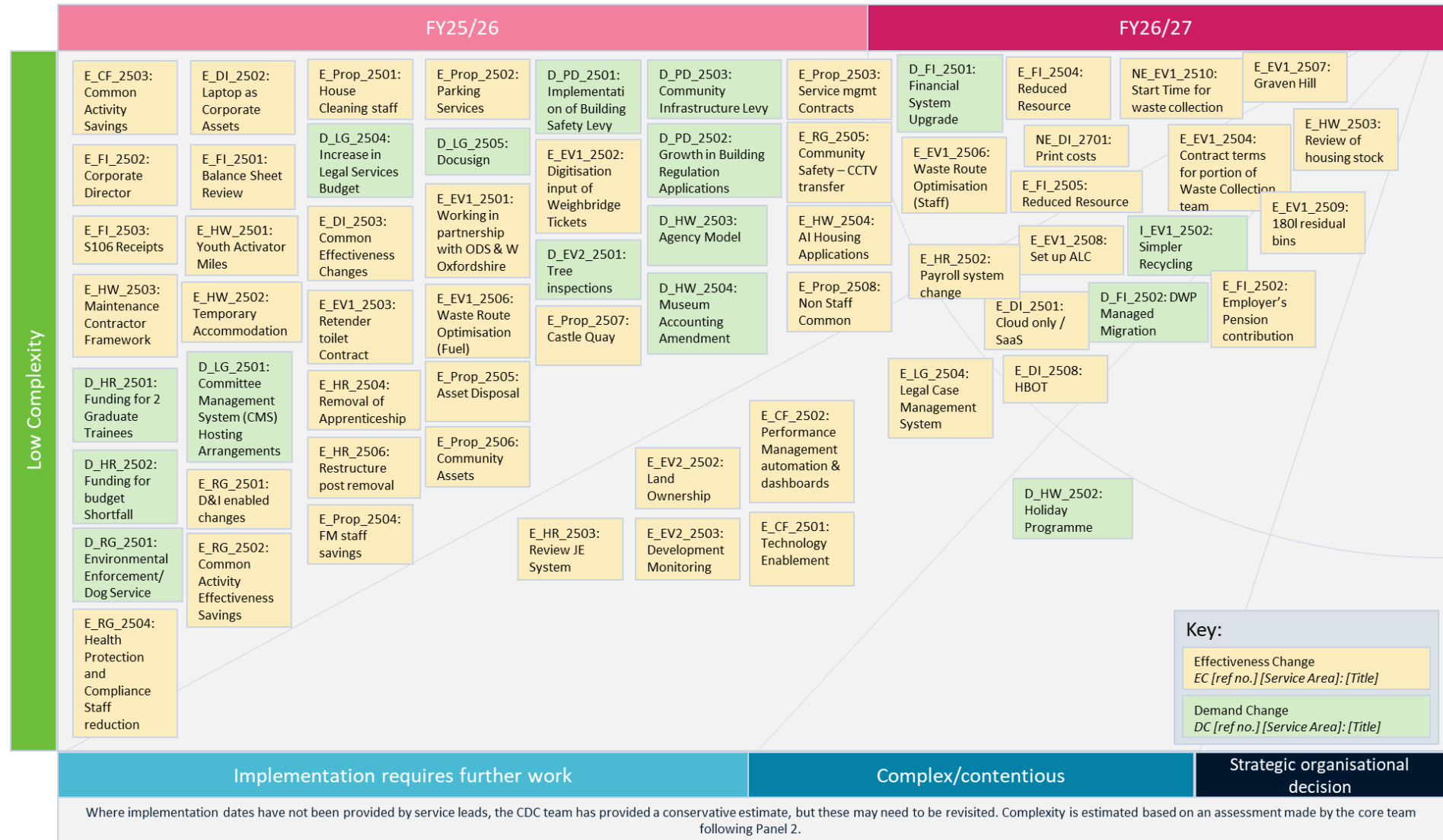
E_HR_2502	HR	HR/Payroll system change	-80,665	2026/27
E_PD_2501	P&D	Planning Application Focus	-646,930	MTFS period
E_PD_2504	P&D	Self Service	-103,728	MTFS period
E_PD_2506	P&D	Restructure post removal	-38,126	Apr-25
E_Prop_2501	Property	House Cleaning staff	-88,422	Apr-25
E_Prop_2502	Property	Parking Services	-98,000	Apr-25
E_Prop_2503	Property	Service Management Contracts	-48,165	Apr-25
E_Prop_2504	Property	FM staff savings	-18,087	Apr-25
E_Prop_2505	Property	Asset Disposal	-19,200	Apr-25
E_Prop_2506	Property	Community Assets	-5,000	Apr-25
E_Prop_2507	Property	Castle Quay	-250,000	01/04/2025 & on going
E_Prop_2508	Property	Non Staff Common	-4,600	Apr-25
E_Prop_2503	Property	Service Management Contracts	-70,000	2026/27
E_Prop_2503	Property	Service Management Contracts	-70,000	2027/28
E_Prop_2504	Property	FM staff savings	-40,000	2026/27
E_Prop_2504	Property	FM staff savings	-40,000	2027/28
E_RG_2501	Reg	D&I enabled changes [Will be held to deal with increments]	-18,509	Apr-25
E_RG_2502	Reg	Common Activity Effectiveness Savings	-700	Apr-25
E_RG_2504	Reg	Health Protection and Compliance Staff reduction	-25,830	Apr-25
E_RG_2505	Reg	Community Safety – CCTV transfer	-10,000	Apr-25

Appendix 2 – SharePoint Site Contents

Content was organised into several Teams channels within the “PA Consulting – Cherwell District Council” Teams site.

Channel	Contents	Notes
01. PAC – Cost Service Review	Ad-hoc working area for the review team	
02. PAC – Project Board	Slide packs used for Project Board Meetings Weekly Reports	Slide packs and weekly reports filed by date.
03. Panel Members	Folder for each of the Phases containing: <ul style="list-style-type: none"> • The slide pack used for each Panel meeting • Notes, actions and decisions for each Panel meeting • Detailed templates and workbooks for each service area (in separate folders) Report from PA’s Culture Insights Review (provided as a value-add)	
Service Area Channels	Main working area for each of the service area, each with folders for: <ul style="list-style-type: none"> • Service descriptions • Demand and effectiveness changes • Service levels • The final and archive versions of the underlying workbook 	

Appendix 3 – Implementation Roadmap





About PA.

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Overview and Scrutiny Committee Briefing Paper

Subject: Scrutiny Working Groups update

Climate Action Scrutiny Working Group

Membership:

Councillor Grace Conway-Murray – Chairman
Councillor John Broad – Vice Chairman
Councillor Barry Wood
Councillor Rebecca Biegel
Councillor Isabel Creed
Councillor Les Sibley

Executive Member:

Councillor Tom Becket – Portfolio Holder for Greener Communities

Service Lead Officers:

Jo Miskin - Climate Action Manager, Environmental Services
Hitesh Mahawar - Climate Change Programme Manager

Scrutiny Support Officers:

Michael Carr - Interim Principal Officer - Scrutiny and Democratic Lead
Martyn Surfleet - Democratic and Elections Officer.

Update

On 18 February on the Oxfordshire local area energy planning LAEP process and how it is critical to reaching net zero in Oxfordshire. The recording of the LAEP Seminar was also circulated to members for information. On 10 March 2025, the Working Group considered a presentation on The Draft Solar Strategy,

On 28 February 2025, the Scrutiny Working Group agreed its conclusions and recommendations to the Executive, to be presented to the Overview and Scrutiny Committee.

A draft of this report is attached for consideration and adoption by the Overview and Scrutiny Committee.

The Food Insecurity Scrutiny Working Group

Membership:

Councillor Rebecca Biegel - Chairman
Councillor Phil Chapman – Vice Chairman



Councillor Dr Isabel Creed
Councillor Gordon Blakeway
Councillor Andrew Crichton
Councillor Dr Chukwudi Okeke.

Executive Member:

Councillor Rob Pattenden –Portfolio Holder for Healthy Communities
Councillor Ian Middleton – Member Champion for Food

Service Lead Officers:

Nicola Riley - Assistant Director of Wellbeing and Housing Services
Edward Frape - Senior Healthy Place Shaping Officer
Libby Knox - Food and Wellbeing Officer

Scrutiny Support Officers:

Michael Carr - Interim Principal Officer - Scrutiny and Democratic Lead
Martyn Surfleet - Democratic and Elections Officer.

Update

On 26 February 2025, the Scrutiny Working Group received an update on the Food Action Plan update and Community Activities, including a summary of progress to date, including key aspects of the action plan:

1. Tackle food poverty and diet related ill health.
2. Build vibrant food communities with the capacity and skills to enjoy food together.

The Scrutiny Working Group also received a further update on Household Support Fund.

The Scrutiny Working Group have agreed a draft report is attached for consideration and adoption by the Overview and Scrutiny Committee.

Equality, Diversity, and Inclusion Scrutiny Working Group

Membership:

Councillor Rebecca Biegel – Chairman
Councillor Gemma Coton - Vice Chairman
Councillor Barry Wood
Councillor Lynne Parsons
Councillor Frank Ideh
Councillor Dr Chuckwudi Okeke

(This Scrutiny Working Group is made up of members of the Personnel Committee and members of the Overview and Scrutiny Committee).



Executive Member:

Councillor Chris Brant – Portfolio Holder for Corporate Services

Service Lead Officers:

Claire Cox – Assistant Director Human Resources
Nicola Riley - Assistant Director Housing and Wellbeing

Scrutiny Support Officers:

Michael Carr - Interim Principal Officer - Scrutiny and Democratic Lead
Martyn Surfleet - Democratic and Elections Officer.

Update

On 28 February 2025, the Scrutiny Working Group agreed its conclusions and recommendations to the Executive, to be presented to the Overview and Scrutiny Committee, with 10 recommendations to the Executive to be put forward.

The Scrutiny Working Group have agreed a draft report is attached for consideration and adoption by the Overview and Scrutiny Committee.

Planning Application Appeals Scrutiny Working Group

Membership:

All Members of the Overview and Scrutiny Committee.

Executive Member:

Councillor Jean Conway - Portfolio Holder for Planning and Development Management

Service Lead Officers:

David Peckford - Assistant Director - Planning and Development
Christina Cherry - Planning Policy Team Leader

Scrutiny Support Officers:

Michael Carr - Interim Principal Officer - Scrutiny and Democratic Lead
Martyn Surfleet - Democratic and Elections Officer.

Update

Members met on 25 February 2025 to consider planning application appeals, having particular regard to planning application refusals overturned at appeal (Planning Committee and delegated decisions), the reasons for cost implications and lessons learnt.



The Head of Development Management gave a presentation on Cherwell District Council's planning application appeals, with particular regard to planning application refusals overturned at appeal, the reasons for cost implications and lessons learned.

Members heard that the Council had performed well in the speed of decision making for both major and non-major applications. It had also performed well on the quality of decision making for non-major applications. However, the Council had underperformed on the quality of decision making for major applications. This was as a result of a high number of major appeals being allowed (12) against the total number of major application decisions made in the assessment period (114). This resulted in a figure of 10.53% of appeals allowed, which was over the 10% threshold set by the government.

Members heard that, as a result of this underperformance the Council could be at risk of being 'Designated as underperforming' and if designated, the Council might lose the ability to determine some applications and also lose the associated planning fee. In addition, members were advised that defending Cherwell District Council's the high number of appeals, came at a cost to the Council, as such there were financial implications if the appeal performance was not improved.

Members put questions covering various topics such as the applications process, performance, speed of applications, and costs implicated, as well as applications overturned against officer recommendation. Members agreed four recommendations to the Executive under the following key themes.

- Lessons Learnt
- Member Training
- Action Plan
- Monitoring Improvement

The recommendations from this scrutiny working group are here presented for agreement by the Overview and Scrutiny Committee, as follows: -

Lessons Learnt

- R1) That a Lessons Learnt review be carried out on the planning applications process and documented and made available to members of the planning committee and officers to improve learning and development and contribute to ongoing service improvement.

Member Training

- R2) That focused member development workshops be included in the member development programme for members of the planning committee (and substitute members), with an agenda work plan produced for these workshops, addressing known issues and risks that may arise in consideration of overturning officer recommendations to the planning committee, to include the potential loss of Section 106 monies and Considering officer recommendations and the possible implications of overturning officer recommendations should they result in being successfully contested as appeal.
- R3) That focused member development be included to address the role of planning committee specifically in consideration of planning applications against the Local Plan criteria, to help



improve the robustness of planning decisions that overturn officer recommendations and help to reduce the risk of successful appeals.

Action Plan

- R4) That the Action Plan being developed address known issues in addressing the robustness of the consideration of member proposals to reject planning applications where officer recommendations would be overturned in planning committee, so that the risk of being successfully contested at appeal may be reduced.

Information request:

That the Action Plan be brought to the overview and scrutiny committee for review.

Monitoring Improvement

- R5) That a monitoring framework be developed to oversee the implementation of the Action Plan and improvements and development to the planning applications process with a reports to a future meeting of the overview and scrutiny committee, to include key metrics (RAG rated) and implementation milestones.

Completed by: Michael Carr, Interim Principal Officer – Scrutiny & Democratic Lead
Date: 10 March 2025

Presented to Overview and Scrutiny Committee: 18 March 2025

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Climate Action

Report of the Overview and Scrutiny Committee

18 March 2025

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Executive Summary & Recommendations

The Climate Action Scrutiny Inquiry was established by the Council's Overview and Scrutiny Committee for a further year in 2024-2025 to review the implementation and development of the Council's Climate Action strategy and action plan in pursuit of the corporate net zero targets. This includes reducing the District Council's own greenhouse gas emissions, as well as reducing the area of the district greenhouse gas emissions as a whole.

Members of the Scrutiny Working Group

Councillor Grace Conway-Murray – Chairman
Councillor John Broad - Vice-Chairman
Councillor Barry Wood
Councillor Isabel Creed
Councillor Les Sibley

Aims and Objectives

- i). Examine the work of Cherwell Council's Climate Team and other teams in pursuit of the corporate net zero targets
- ii). Monitor progress on reducing Cherwell Council's greenhouse gas emissions
- iii). Monitor progress of reducing the district's greenhouse gas emissions
- iv). Provide guidance on the strategic direction of Cherwell Council's climate action.

Cherwell Council declared a climate emergency in 2019, and as part of this committed to ensure its own operations and activities are carbon net zero by 2030 do its part to support the district as a whole to become carbon net zero.

To achieve this, the Council has published a [Climate Action Framework](#) and an associated [Climate Change Action Plan 2023-2024](#).

Witnesses to the Inquiry

The Scrutiny Working Group has considered evidence from the Executive Portfolio Holder for Greener Communities, Councillor Tom Becket and the Council's lead officers for Climate Change; Jo Miskin - Climate Action Manager, Environmental Services and Hitesh Mahawar - Climate Change Programme Manager, as well as expert witnesses during its inquiry.

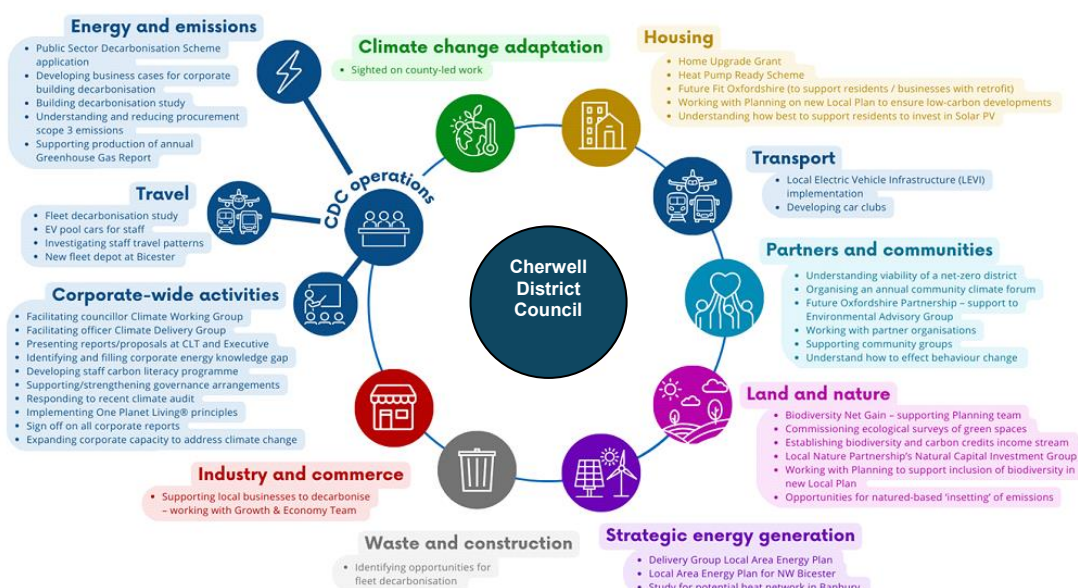
We have also received evidence from Mona Walsh Assistant Director of Property and Christina Cherry - Planning Policy, Conservation & Design Manager at Cherwell Council.

In addition, we have received evidence from external expert witnesses Dr Marco Raugei - Senior Lecturer and Senior Research Fellow in Mechanical Engineering, Oxford Brooks University and Andy Wainwright MSc CEng FIET - Whole System Manager, Scottish and Southern Electricity Networks.

In evidence the Scrutiny Working Group considered the context to the Climate Change Programme and key elements to the Climate strategy in Cherwell, including:

- Governance Arrangements
- Strategy and Action Plan
- Cherwell Council and District Emissions
- Recent Achievements
- Challenges in Reaching Net Zero
- Next Steps.

The Working Group has considered the climate impact of local plans and how they contribute to the Climate Action Plan, as well as the solar strategy for the district. Officers from the planning department discussed the climate impact of planning applications.



Cherwell Council's approach requires new relationships with its stakeholders, new expectations and engagement with its supply chain, and a review of where it is best placed to support others to take action.

The Council reports against its climate action framework in order to inform future corporate planning in the council. The Council also reports on its carbon emissions over time to help monitor, evaluate, review and communicate progress.

The Climate Action Scrutiny Working Group met throughout the 2022-2024 municipal years and reviewed progress on climate action as well as supporting the development of the Climate Change Action Plan 2023-2024.

On 15 October 2024, the Overview and Scrutiny Committee agreed that this Scrutiny Working Group continue its work through the 2024-2025 municipal

year. At the completion of its work for 2024-25, the Scrutiny Working Group agreed on eight recommendations to the Council's Executive, made through the Overview and Scrutiny Committee.

Recommendations

In recognition to Cherwell Council's 2030 Net Zero target, we recommend the following to be approved by Executive and implemented.

A New Council Climate Action Strategy

Recommendation 1

That a new Council Climate Action Strategy be prepared for agreement by the Executive and full Council, with clear strategies, ambitious yet realistic objectives to deliver year on year reductions in the Council's carbon emissions, strategies, and targets to reduce District area emissions, to be agreed by full Council in 2025.

Corporate Priorities

Climate action needs to sit as a higher corporate priority than is currently the case, given that the required progress is not being made.

Recommendation 2

That Climate Action be made a higher key corporate priority, reflected in the Council key priorities (be agreed by Council), to be reflected in the Council's Corporate Plan, service delivery plans, and its annual and quarterly Performance Monitoring Reports, with ambitious but realistic measurable targets and performance measures.

Environmental Impact Assessments

Recommendation 3

That the Council request that more detailed Environmental Impact Assessments be included in reports to the Planning Committee.

Recommendation 4

That an evaluation and feasibility assessment of interim options and measures to replace the Council fleet of vehicles with alternatives for less CO2 emissions.

Buildings Emissions

We recognise, in the light of the increase in Cherwell Council's emissions in 2023 - 2024, the need for much greater focus on reducing buildings emissions to achieve 2030 Net Zero target.

Recommendation 5

That the Council agree much greater focus, plans and targets, for reducing buildings emissions to achieve 2030 Net Zero targets, with clearly assessed deliverable measures to be put in place over the next five years, with clear objectives, milestones, and implementation dates.

Recommendation 6

That Council buildings be refurnished with space heating systems replace gas powered radiators and insulation for energy conservation.

Recommendation 7

That the feasibility of introducing air-to-air heat pumps in buildings throughout the entire Council estate.

Investment in Renewable Energy

We acknowledge that investment is needed in Cherwell Council's corporate capacity to manage and optimise renewable energy and new technologies.

Recommendation 8

That the Council agree hypothecated investment in Cherwell Council District corporate capacity to manage and optimise renewable energy and new technologies.

1 Introduction

1.1. In July 2019 Cherwell Council resolved to call on the Leader to declare a 'Climate Emergency'¹ and pledge to make Cherwell District Council carbon net zero by 2030.

1.2. The Council also asked the Leader to:

- Call on the government to provide the powers and resources to make the 2030 target possible;
- Continue to work with partners across the Cherwell and region to deliver this new goal through all relevant strategies;
- Endorse the cross party position taken by Local Government Association (LGA), in particular to call on the Government to explore supporting domestic implementation of Sustainable Development Goals through funded partnership roles within each local authority area.



Biodiversity at [Bloxham Slade Nature Reserve](#)

Since then, the Cherwell District Council has confirmed the declaration of a Climate Emergency, and committed to ensure the Council's own operations and activities are carbon net zero by 2030 and do its part to support the district to become carbon net zero. To carry this out the Council has agreed a Climate Action Framework and Climate Action Plan 2023-2024, which is now revised for November 2024 to April 2026.

1.3. The Climate Action Strategies and initiatives are managed and coordinated by the Council's Climate Team. The Council's Climate Team is made up of a Climate Action Manager, a Climate Change Programme Manager, Climate and Natural Environment Officer and Sustainable Business Development Officer.

Governance Arrangements

1.4. The Climate Strategies themselves are corporately owned and led by the full Council, the Council's Executive, the Corporate Leadership Team and Council departments.

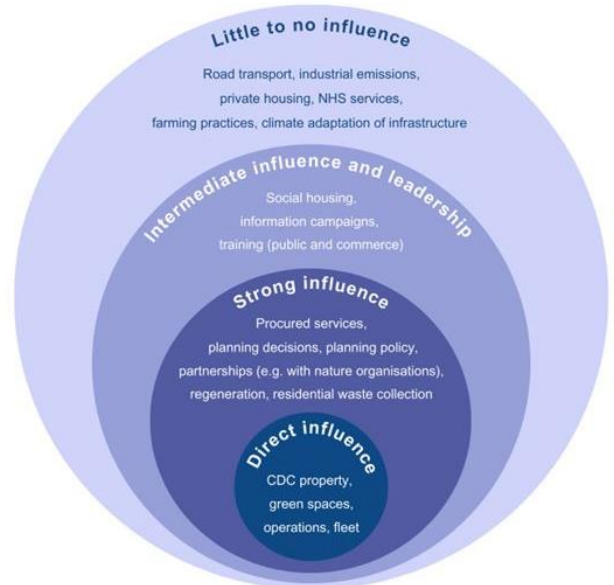
1.5. The SRO reports through the Council's Strategic Programme Board and Corporate Management Team, as well as to the Portfolio Holder for Greener Communities, the Leader and the Council Executive, with oversight from the Climate Action Scrutiny Working Group and the Council's Overview and Scrutiny Committee.

¹ <https://modgov.cherwell.gov.uk/documents/g3238/Public%20minutes%20Monday%2022-Jul-2019%2018.30%20Council.pdf?T=11>

- 1.6. All reports that go to Executive and Corporate Leadership Team to continue to include an Environmental Impact section.
- 1.7. The Climate Action Scrutiny Working Group has reviewed overall progress of Action Plan.
- 1.8. It was noted that in the Climate Action Plan it states that the Executive and officers will report twice a year to the Overview and Scrutiny Committee on climate change progress, so this is something to ensure happens in the 2025-2026 committee cycle and Scrutiny Work Programme.

Cherwell Council Spheres of Influence

- 1.9. Cherwell District Council, as a substantial organisation within the area, as a major provider of local public services and also as a local planning authority, has varying degrees of influence over climate action and carbon reduction, working with partner organisations within the area where it can on its own have less direct influence.
- 1.10. The main direct influence we have is over our own building estate, operations, and fleet of vehicles. After that, the Council can have significant influence through its Local Plan and local planning decisions, as well as over partner organisations and services that are provided by the Council. The Council also seeks to influence as a community leader through its own campaigns.



Greenhouse Gas Emissions

- 1.11. During this inquiry the Scrutiny Working Group has considered Cherwell Council's Greenhouse Gas Emissions. Cherwell District Council's emissions have gradually been reducing over time but became stagnant in the past five years and has now slightly increased in the latest 2023-2024 reporting year.

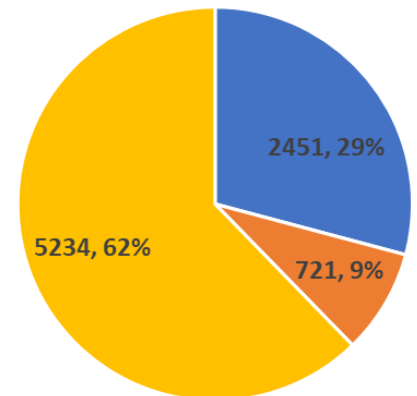
2. Climate Action Strategies and Action Plan

2.1. Of the total emissions in the District, the Council has limited control over the majority of emissions but could still do a lot more to reduce its own emissions.

2.2. The Transforming Cherwell Action Plan 2023-2024 sets out the activities needed over the 12 months until October 2024, to reduce the emissions of both the Council and the Cherwell district. Emissions are categorised into 'scopes', in particular, Scopes 1, 2 and 3.

- Scope 1 – includes direct emissions from the burning of fuels, e.g., gas/petrol/diesel
- Scope 2 – includes indirect emissions from the generation of electricity
- Scope 3 – includes indirect emissions from an organisation's supply chain.

CDC's GHG Emissions by Scope



■ Scope 1 ■ Scope 2 ■ Scope 3

2.3. The target for Cherwell Council is to be carbon net zero by 2030. This relates only to Scope 1 and Scope 2 emissions, where the Council has a strong degree of influence.

Cherwell's Climate Action Plan

2.4. Within the Action Plan there are also actions which relate to Scope 3 emissions, which need to be better understood in order to plan for reductions, (e.g., by working closely with the supply chain).

2.5. The Scrutiny Working Group reviewed the Cherwell District Council Climate Action Plan This plan was revised during the autumn of 2024, in close consultation with all services of Cherwell District Council.

2.6. This built on the previous Climate Action Plan 2023-24, which was based upon Climate Change Framework 2020, which sets the Council's ambitions for both the council and the wider district to become carbon net zero.

2.7. The plan reflects several initiatives which are taking place across the county in which Cherwell District Council is a participant, in particular the Pathways to a Zero Carbon Oxfordshire (PaZCO) report and plan, which has been endorsed by Cherwell Council.

2.8. PaZCO is overseen by the Future Oxfordshire Partnership, whose officer and councillor Environment groups have representation from Cherwell District Council.



- 2.9. The Climate Action Plan takes into account the following documents:
- Cherwell Council Climate Action Plan 2023-24
 - Cherwell Council Climate Action Framework 2020
 - Cherwell Council Carbon Management Plan 2022
 - Oxfordshire Net Zero Route Map and Action Plan
 - One Planet Living – Gap Analysis of Cherwell Council's Policies.
- 2.10. The actions on the natural environment have also been reviewed and supported by Oxfordshire's Local Nature Partnership, of which the Council is a member. Biodiversity enhancement has a significant part to play in helping us with our climate change response.
- 2.11. The Action Plan includes the activities needed to reduce the emissions of both the Council and the Cherwell district until April 2026. Over 125 actions have been identified.

A New Council Climate Action Strategy

- 2.12. During the inquiry, the Scrutiny Working Group heard that it was time to refresh and review the Council Climate Action Strategy and we have considered options and emphasis for the new strategy, taking into account the Council's current business pressures, climate action performance and current prospects and ambitions for climate action locally and nationally.
- 2.13. In view of this, we are recommending the development of a new Council Climate Action Strategy for Cherwell, with clear strategies, ambitious yet realistic objectives to deliver year on year reductions in the Council's carbon emissions, strategies, and targets to reduce District area emissions.
- 2.14. This needs to be developed in the near future and set new ambitious yet realistic targets for carbon emission reduction both for the Council and the District as whole. As the plan affects the organisations across the departments and corporately it will need to be subject to cross departmental consultation and agreed corporately but also agreed by the Executive. Such a plan should also ideally be brought to full Council for agreement and form part of the Council's Policy Framework.

Recommendation 1

That a new Council Climate Action Strategy be prepared for agreement by the Executive and full Council, with clear strategies, ambitious yet realistic objectives to deliver year on year reductions in the Council's carbon emissions, strategies, and targets to reduce District area emissions, to be agreed by full Council in 2025.

Corporate Priorities

- 2.15. The Council is ageing a new Corporate Plan and Priorities. We believe that Climate action needs to sit as a higher corporate priority than is currently the case, given that the required progress is not being made. We are therefore recommending that Climate Action be formally agreed by the Executive, the

corporate Leadership Team and by the Council as one of the key corporate priorities, reflected in the Council service delivery plans, and its annual and quarterly Performance Monitoring Reports, with ambitious but realistic measurable targets and performance measures.

- 2.16. In this way it is hoped that climate action will be better integrated into the services delivery plans and the Council's budget setting.

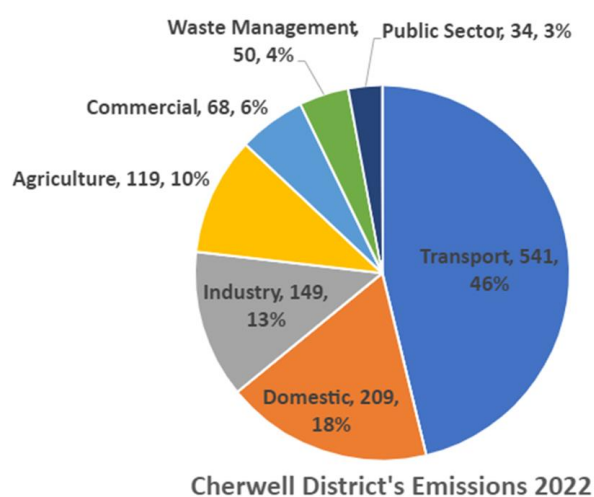
Recommendation 2

That Climate Action be made a higher key corporate priority, reflected in the Council key priorities (be agreed by Council), to be reflected in the Council's Corporate Plan, service delivery plans, and its annual and quarterly Performance Monitoring Reports, with ambitious but realistic measurable targets and performance measures.

3 Cherwell District Area

- 3.1. Looking at the sectors that contribute most to climate change proportionately provides a view on the areas that need to adapt most to meet our Districts carbon reduction objectives.

- 3.2. The Council can only Directly control a part of this and other areas it can exercise influence, especially working with in partnership with other local organisations.



- 3.3. During the inquiry we have considered the Council's influence over carbon emissions in the District area. Apart from control over its own emissions as a significant local organisation, the Council has inference over carbon emissions as the Local Planning Authority and through its Local Plan.

Cherwell's Local Plan

- 3.4. The Local Plan is a document that sets out a vision and a framework for the future development of the District area as a whole, including interrelated policies and strategies for land development use and specifications for development controls. Including issues such as housing, employment, and business and they identifies where development should take place and areas where development should be restricted.
- 3.5. It is prepared by Cherwell Council as the Local Planning Authority in consultation with the wider community and is reviewed at least every five years. Once in place, Local



Plans become part of the statutory development plan, which is the starting point for determining local planning applications.

- 3.6. Cherwell's Local Plan includes a Strategic Objective Theme "*Meeting the Challenge of Climate Change and Ensuring Sustainable Development*", which sets out the principles that underpin the local planning approach.
- 3.7. These include promoting net-zero carbon new developments, through sustainable construction standards, nature-based solutions and low embodied carbon to ensure new developments deliver the highest viable energy efficiency, including the use of decentralised energy and support a local zero-carbon energy system that reduces Cherwell's reliance on global fossil fuels and prioritises community energy.
- 3.8. The Council's Local Plan aims to deliver developments that efficiently use local natural resources that minimise and are resilient to the impacts of climate change, including extreme weather events such as flooding, drought and heatwaves and prioritising active travel and increase opportunities for public transport, high standards of connectivity and Reducing dependency on the private car as a mode of travel, facilitating the creation of a net-zero-carbon transport network.

Renewable Energy Farms

- 3.9. One of the issues that was considered is the extent to which the Council can set aside land for renewable provision, such as "wind farms" for wind electricity generation or "solar farms" for solar electricity generation. The Scrutiny Working Group heard in evidence that Cherwell's Local Plan does not allocate any land for renewable energy in the district. There are, however, several sites that have been granted planning permission, but we do not include them in the Local Plan.
- 3.10. A "wind farm" or wind power plant is a group of wind turbines in the same location used to produce electricity. Wind farms vary in size from a small number of turbines to several hundred wind turbines covering an extensive area.
- 3.11. "Solar farms" or rather *photovoltaic power stations*, are large-scale grid-connected photovoltaic power system (PV system) designed for the supply of electrical power onto the grid. They are different from most building-mounted and other decentralised solar power because they supply power at the utility level, rather than to a local user or users.

The Botley West Solar Farm

- 3.12. A significant local development application, which impinges on Cherwell area, is the proposed [Botley West photovoltaic power plant](#). Botley West is a proposed £800m solar farm, covering about 1,000 hectares (2,471 acres) of Oxfordshire countryside, with 90% of it owned by Blenheim Estates. The project is considered a Nationally Significant Infrastructure Project, meaning

the application must be considered by the government, not local councils, although as part of the planning process, relevant parties, including the local authorities in which the development sits, can submit their response to the plans.

- 3.13. The Botley West application is a National Strategic Infrastructure Project (NSIP). NSIPs include significant developments like wind farms. They are decided by the [Planning Inspectorate](#)², with Cherwell District Council as a consultee as the local authority.
- 3.14. During the scrutiny inquiry we received oral evidence from expert witness Dr Marco Raugei - Senior Lecturer and Senior Research Fellow in Mechanical Engineering, Oxford Brooks University. Dr Marco Raugei provided a brief introduction to his research on renewable energy, photovoltaics and energy transition scenarios and answered questions on the committee.
- 3.15. The Scrutiny Working Group put questions to Dr Marco Raugei on various interrelated to the Cherwell Climate Action strategy and plans and considering the technical feasibility of options and alternatives being considered. This included the feasibility of domestic solar panels, generation, and storage of solar energy, as well as network infrastructure and technology.
- 3.16. A key consideration is how to overcome constrained electrical grid capacity and difficulties in securing connections, an issue that is already posing a challenge for housing and commercial developments across Oxfordshire.
- 3.17. The Scrutiny Working Group also received oral evidence from Andy Wainwright - Scottish and Southern Electricity Networks – (SSEN). Andy Wainwright gave a presentation covering the role and work Scottish and Southern Electricity Networks (SSEN) carries out as an energy supplier within Cherwell and their goals for decarbonization and Net Zero.
- 3.18. The Scrutiny Working Group put questions to Andy Wainwright on the involvement of energy companies within Local Plan development, the infrastructure delivery plan, and the Capacity of the network versus demand brought by speculative development.
- 3.19. The Scrutiny Working Group have reviewed Cherwell's new Draft Solar Strategy and on 10 March 2025 considered a presentation from the Council's consultants, *Local Partnerships*, with an opportunity to ask questions.

² The Planning Inspectorate is an executive agency of the Ministry of Housing, Communities and Local Government with responsibility for making decisions and providing recommendations and advice on a range of land use planning-related issues across England. The Planning Inspectorate deals with planning appeals, nationally significant infrastructure projects, planning permission, examinations of Local Plans and other planning-related and specialist casework.

Environmental Impact Assessments

- 3.20. During the scrutiny inquiry we received oral evidence from Christina Cherry, the Council's Planning Policy, the Council's Conservation and Design Manager, on planning policy and Cherwell District Councils Climate goals. The Scrutiny Working Group put questions to Christina Cherry on the inclusion of climate and environmental impacts within planning applications as well as the integration of climate actions within the Local Plan, NPPF and Development Plan.
- 3.21. In considering the process of assessing local planning applications, Members felt that greater clarity might help to improve the local planning decision making, especially when the Councils climate priorities have been included in the Local Plan. It was felt that when reports come before the Planning Committee, it was not always as clear as it could be what the climate considerations might be on weighing up a planning application.
- 3.22. The Conservation and Design Manager was able to offer some advice on this, although also cautionary advice, as the planning process can be quite a technical area, and the Planning Committee is a quasi-judicial process that can only consider planning applications against criteria allowed legally and within the agreed Local Plan specifications and policies.
- 3.23. Members felt that greater detail in the reports might help identify relevant considerations on climate considerations allowed and in view of that the Scrutiny Working Group is recommending that the Executive and Council consider requesting that more detailed Environmental Impact Assessments be included in reports to the Planning Committee.

Recommendation 3
That the Council request that more detailed Environmental Impact Assessments be included in reports to the Planning Committee.

Oxfordshire LEAP

- 3.24. The Local Area Energy Plans are important for identifying the local activities and projects needed to manage the transition to cleaner energy in a fair and equal way.
- 3.25. Oxfordshire County Council, Oxford City Council and West Oxfordshire, Cherwell, South Oxfordshire and Vale of White Horse district councils have joined together, under the Future Oxfordshire Partnership, to deliver pioneering local area energy plans (LAEPs) for Oxfordshire, to address climate change and secure cleaner, more affordable energy for the county. The six Oxfordshire councils are working together to develop Local Area Energy Plans (LAEPs) for Oxfordshire. Ove Arup & Partners have been appointed as experienced lead consultants in the development of the Local Area Energy Plans.

- 3.26. On 18 February 2025 Members of the Scrutiny Working Group attended an Oxfordshire Local Area Energy Planning (LEAP) online briefing for members and senior officers from all Oxfordshire local authorities. (You can read more about this Partnership [here](#).)
- 3.27. This was an opportunity to learn about the Oxfordshire local area energy planning process and how it is critical to reaching net zero in Oxfordshire, and to hear about how and when you will be able to input into the work, as well as the local area energy planning process in Oxfordshire, including the reasons for doing it, what the process is, the role of the councils and what the outputs and next steps will be.

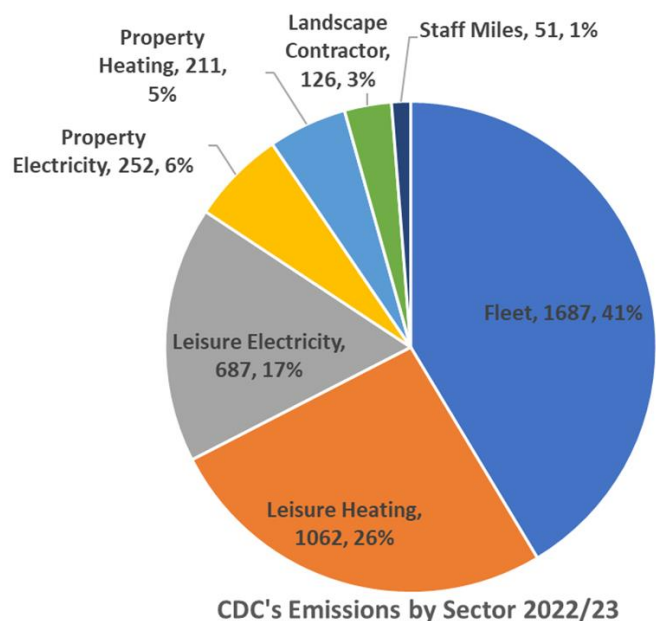
4. Cherwell's Council Emissions

- 4.1. We have reviewed Cherwell Council's own Greenhouse gas emission and looked at this broken down by category. Considering emissions by sector, it can be seen that the majority of the Council's carbon emissions are from buildings (54% if we include Property and Leisure) the fleet (41%).

- 4.2. Since 2008-2009, Cherwell Council's greenhouse gas emissions have reduced by 40%.

- 4.3. In 2022/23 Cherwell Council's annual emissions were down 3% from the previous year to 4077 tonnes of CO₂, with:

- 42.9% from leisure centres' electricity and heating
- 41.4% from the fleet
- 11.4% from corporate buildings electricity and heating
- 3 per cent from landscape maintenance
- 1.3 per cent from business mileage.³



- 4.4. The Council's [greenhouse gas report](#) show how the Council is reducing the carbon emissions of its estate and operations⁴, however it should be noted that the rate of progress is slower than that required to reach 2030.

³ 2020 Climate Action Framework "Transforming Cherwell", Cherwell District Council.

⁴ <https://www.cherwell.gov.uk/info/69/pollution/942/greenhouse-gas-report>

Cherwell Council's Offsetting

- 4.5. During the inquiry we also considered carbon offsetting as part of the Council's strategy for achieving net zero. Carbon offsetting is a carbon trading mechanism that enables entities to compensate for offset greenhouse gas emissions by investing in projects that reduce, avoid, or remove emissions elsewhere.
- 4.6. When carbon dioxide is released into the atmosphere, its climate impact can be cancelled out by absorbing equal amounts of carbon from the atmosphere. Organisations and individuals can thus compensate for the climate impact of their greenhouse gas emissions by supporting projects that reduce or store carbon emissions.

The Council's Fleet

- 4.7. During the inquiry we have also considered the options for the renewal of the Council's fleet of vehicles to less carbon intensive technologies, including the financial impact versus the environmental impact. officers advised that a study into electric vehicles was in progress. It was noted that recommendations from the CAWG could feed into that report to be presented in the 2025/26 municipal year.
- 4.8. The Council's fleet of vehicles is a significant contributor to the Council's own carbon emissions. This includes the Council's fleet of refuse collection vehicles. We have heard, however, that the cost of replacing the Council's fleet is currently prohibitive, with estimates of £500,000 per vehicle. This will likely make replacing these vehicles a longer-term ambition.
- 4.9. In consideration of the fact that these vehicles are a significant contributor to the Council's carbon emissions, we are however, recommending that the Executive carry out an evaluation and feasibility assessment of interim options and measures to replace the Council fleet of vehicles with alternatives for less CO2 emissions.



A Cherwell District Council Electric Van with Kevin Busby - Fleet Supervisor, behind the wheel

Recommendation 4

That an evaluation and feasibility assessment of interim options and measures to replace the Council fleet of vehicles with alternatives for less CO2 emissions.

Buildings Emissions

- 4.10. During the inquiry the Scrutiny Working Group considered the carbon emission from the Council's own estate, including leisure centres and Council buildings. During this the Council is just now planning a move of its main offices from Bodicote House in Bodicote to Castle Quay in Banbury. This is an opportunity to reduce the Council's own carbon emission on its estate, as the new building is likely to be much more energy efficient.
- 4.11. Overall, however, reducing the Council's own carbon emissions to reach its targets remains challenging and recent data has shown a recent increase in emissions. We recognise, in the light of the increase in Cherwell Council's emissions in 2023 - 2024, the need for much greater focus on reducing buildings emissions to achieve 2030 Net Zero target. In view of this, we are recommending that the Council agree much greater focus for reducing buildings emissions to achieve 2030 Net Zero targets, with clearly assessed deliverable measures to be put in place over the next five years.

Buildings Emissions Targets

- 4.12. The Council does not currently have any KPIs for decarbonisation of its own estate and given that this should be a priority issue for the Council, as we have recommended, these need to be developed.
- 4.13. The new KPIs should be carefully considered so that they effectively measure implementation of these priorities, with careful consideration across several settings/situations and reflecting the varying degrees of control that the Council has.

Recommendation 5

That the Council agree much greater focus, plans and targets, for reducing buildings emissions to achieve 2030 Net Zero targets, with clearly assessed deliverable measures to be put in place over the next five years, with clear objectives, milestones, and implementation dates.
--

- 4.14. Cherwell Council only has direct responsibility and control of some buildings and others are leased to third parties and they as tenants have responsibility for the day to day operation of the buildings. The Council's targets and KPIs will have to reflect this, and we will need to work with third parties to achieving shared objectives.

Castle Quay

- 4.15. The new Council main offices at Castle Quay centre have not been assessed or audited for carbon footprints, although the Council has already concluded this move. Furthermore, there is no date at present for when this will happen, or result be available.
- 4.16. Specific data on carbon emissions for move to Castle Quay offices is therefore not yet available. The working assumption, as confirmed in the business case for the move, is that the smaller floor area and more efficient systems will use less energy. The new offices will have an EPC B rating whereas Bodicote House is an EPC E rating.
- 4.17. Although we expect that the new Council offices would likely be an improvement in energy efficiency and carbon emissions, as they are a more modern build, we would assume that such an assessment should be included in the near future. This would need to be procured.

Decarbonising the Future

- 4.18. We have considered what further specific measures could be put in place to take decarbonisation of Cherwell Council's buildings forward in the future. One of the main ways we can do this is by Reducing heat loss from Cherwell Council building stock by improving fabric of the buildings, both thermal and airtightness, to minimise heat loss/energy use. This may however be costly and require staff and resources.
- 4.19. It should also be possible change lights fittings in building to LED and introduce controls that minimise the time that the lights are on. This is, potentially, much less costly and a "quick easy win".
- 4.20. The Council could also Improve ventilation with heat recovery where possible and provide controls that manage ventilation rates according to occupancy numbers (CO2 sensors) variable speed control on fans. This may, however, also be costly and require staff and resources.
- 4.21. During the scrutiny inquiry the Scrutiny Working Group was able to receive evidence and put questions to Assistant Director of Property on measures is the Council putting in place de-carbonisation of Cherwell Council's buildings.
- 4.22. We asked the Assistant Director of Property what measures the Council is putting in place decarbonisation of Cherwell Council's buildings. She told us that Salix grant applications for heat pump installation and solar panel



A Solar Car Port at Bicester Leisure Centre

installations have been undertaken at some leisure centres and community buildings, although outputs are still to be verified and recorded due to problems in commissioning and operation of the equipment.

- 4.23. A photovoltaic study on Cherwell Council's properties for potential photovoltaic installation and possible outputs with economic was undertaken in 2023/24. Photovoltaic installations are currently being considered on eight Cherwell Council buildings, contingent on viability and feasibility assessment that are currently being carried out.
- 4.24. The Scrutiny Working Group heard in evidence that several completed schemes are not delivering the expected benefits because installed systems were not properly understood, training and maintenance regimes not understood or implemented. This is an important area for learning to improve future developments.
- 4.25. We also heard that the Resources and Transformation (Property) department do not always have capacity or capability in regard to the installation and ongoing maintenance. Work must be planned and scheduled without the assumption that Property department has all resources required.

Heating Our Buildings

- 4.26. One of the more technical options and alternatives we have considered during the inquiry is the way in which the Council buildings are heated, with leisure centres using more advanced systems, such as air to air heating systems. Other alternatives are space heating systems, which are more efficient in heating particular areas as needed with less heat wasted. A "Space Heater" is a heater used to warm the air in an enclosed area, such as a room or office. We discussed this with the departmental officers and with our expert witness.
- 4.27. We are commending that the Executive consider making Council buildings refurnished with space heating systems replace gas powered radiators and insulation for energy conservation.

Recommendation 6
That Council buildings be refurnished with space heating systems replace gas powered radiators and insulation for energy conservation.

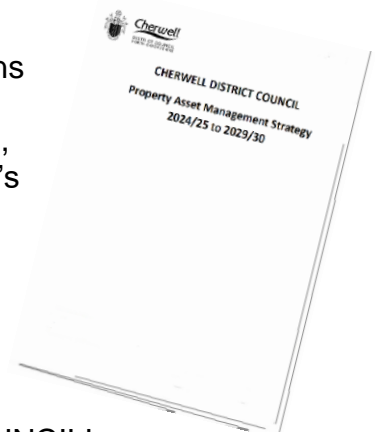
- 4.28. An air source heat pump (ASHP) is a heat pump that can absorb heat from air outside a building and release it inside. It uses a similar process as an air conditioner, but in the opposite direction. ASHPs are the most common type of heat pump usually tend to be used to heat individual houses or flats rather than blocks, districts or industrial processes.
- 4.29. We are recommending that the Executive consider the feasibility of introducing air-to-air heat pumps in buildings throughout the entire Council estate.

Recommendation 7

That the feasibility of introducing air-to-air heat pumps in buildings throughout the entire Council estate.

Assessment and Feasibility

- 4.30. It is essential that options and decisions about decarbonising the Council's estate are properly assessed and considered. Full and proper early engagement and coordination with the Council's Property (Resources and Transformation) department is necessary.
- 4.31. As a minimum this should include:
- the scheme design,
 - the appropriateness of scheme, legal implications, (including procurement etc).
 - the budget implications and allocations for installation and ongoing maintenance,
 - value for money assessments,
 - the Council's capacity to deliver and capacity to manage post installation.
- 4.32. Meeting the challenge of reducing the Council's carbon emissions on its own estate necessarily requires corporate leadership and coordination between departments across the Council, including, crucially Environmental Services, which coordinates the Council's Climate Action Strategies and Resources and Transformation, which manage the Council's estate and property portfolio assets, in line with the Council's [Asset Management Plan](#).



Investment in Renewable Energy

- 4.33. We acknowledge that investment is needed in CHERWELL COUNCIL's corporate capacity to manage and optimise renewable energy and new technologies.

Recommendation 8

That the Council agree hypothecated investment in Cherwell District Council corporate capacity to manage and optimise renewable energy and new technologies.

5 Conclusions

- 5.1. During this scrutiny inquiry we have considered some of the main issues facing the Council in its ambitions to, both as a community leader and local planning authority. Weve considered the two main strategic dimensions; the strategy for reducing carbon emissions for the District and the strategy and

objectives for reducing carbon emissions for the Council estate and housing the Council can control.

5.2. Across the inquiry we have considered six main themes: -

1. Decarbonisation of Cherwell Council's buildings (Property)
2. Decarbonisation of Cherwell Council's fleet (Environmental Services)
3. Offsetting of residual emissions (Environmental Services)
4. Finance/funding for climate projects (Financial Services and Environmental Services)
5. Council's performance on reducing emissions (Environmental Services)
6. Energy Infrastructure - Planning and Land allocation (Planning Policy).

Recent Achievements

5.3. The Scrutiny Working Group noted the following key achievements:

- £6 million invested in Cherwell District Council buildings
- Over 10% of the fleet is electric
- Further energy efficiency actions in our buildings
- EV pool car
- £20k for Solar PV at our Leisure Centres.

Challenges to Reaching Net Zero

5.4. The Scrutiny Working Group also noted the following Challenges in Reaching Net Zero:

- Cost
- Technology
- Behaviour change
- Impacts on our communities
- Internal collaboration
- Resources
- Scale of Issues and Influence

Key Observations

5.5. In addition to the scrutiny recommendations and observations made throughout this scrutiny report, Member of the Scrutiny Working Group made the following key observations:

- The hold ups are not technical although new technology is appearing rapidly and needs to be incorporated when practical.
- The difficulties are financial and require innovative methods to allow residents and businesses to take advantage of low carbon systems

- as in all cases doing so does reduce the running costs for everyone whilst also reducing the carbon being produced.
- There is a danger that large low carbon electricity systems such as solar PV power stations on hectares of countryside are approved but do little or nothing to help residents and businesses in the Cherwell District with reducing their costs or carbon production every day.
- Invest today and make huge savings in future as energy costs increase from the grid or invest in solar “farms” for the country but live with the massive rises in the costs of energy for each resident and business.

Next Steps for Cherwell

- 5.6. We have considered the next steps for Cherwell Council, which will form part of the development of the future strategy. This includes, the completion of new climate Studies Public Sector Decarbonisation Scheme (PSDS) applications (Government funding through the Public Sector Decarbonisation Scheme, for sustainable, low-carbon adaptation), Financing Cherwell Council’s decarbonisation plans, improving organisational knowledge of Scope 3 carbon emissions and reducing them) and LAEP, LEVI, Adaptation, Natural Capital, Business Emissions

Lessons Learnt

- 5.7. With regards to the development of the Council’s own carbon reduction initiatives, such as fitting a retrofitting sustainable energy systems, we believe it is vital to consider lessons learnt before proceeding with future projects.
- 5.8. It is essential that options and decisions about decarbonising the Council’s estate are properly assessed and considered. Full and proper early engagement and coordination with the Council’s Property (Resources and Transformation) department is necessary.
- 5.9. Some key observations for lessons learnt include:
- a) Several completed schemes are not delivering the expected benefits because installed systems were not properly understood, training and maintenance regimes not understood or implemented.
 - b) Property do not always have capacity or capability in regard to the installation and ongoing maintenance. Work must be planned and scheduled without the assumption that Property has all resources required. The service comprises a small team and is working at high capacity.
 - c) Options and decisions should be aligned with the Asset Management Strategy (Property Strategy).

- d) An adequate budget for “whole” project needs to be built in, with feasibility, consultants/advisors, fees, additional works needed to install kit and/or adapt for installation.
- e) Ongoing maintenance and integration into existing systems etc – needs to be built in
- f) Need for a robust project plan and Business Case
- g) Occupier engagement/consent is needed – as Cherwell Council do not actively manage all sites.
- h) There is a need to check all sites are suitable for the installations proposed structural, location, setting.
- i) Full advance consideration of integrated procurement issues is important.
- j) Benefits to Cherwell Council – over and above carbon/net zero – should also be quantified and built into the project scheme.
- k) Budget, whether grant, in house or a combination must be sufficient to cover pre, during and post installation. Property do not have resources to take on management of additional work/kit without adequate resources.

The Scrutiny Process and Next Steps

- 5.10. The EDI Scrutiny Working Group was established to carry out this inquiry and report back to the Overview and Scrutiny Committee, which it is hoped will adopt the report and recommendations. Once the Overview and Scrutiny Committee have agreed the Scrutiny Report and Recommendations, these will be referred to the Executive for consideration and an Executive Response.
- 5.11. There is a two month period within which the Executive should agree its response to the scrutiny report and recommendations. The Executive may agree, reject or amend the scrutiny recommendations made.
- 5.12. The agreed scrutiny recommendations (Executive decisions) made can then be implemented by the Resources and Transformation department and other Council departments as necessary.
- 5.13. After a suitable period of time, the Overview and Scrutiny should request an update on the progress of implementing the Executive Response and decisions made. This is likely to be around one year from when the scrutiny report was agreed, (or whenever might be an appropriate time to review if sooner).

- 5.14. We hope that this scrutiny inquiry has been able to make some constructive contribution to the oversight and development of the Council's challenge to tackle climate change.

Acknowledgements

We would like to say thank you to all of those members and officers who have contributed evidence to the Scrutiny Working Group Inquiry, with particular thanks the expert witnesses who have given their time to contribute their valued expertise.

Thank you to our Portfolio Holder for Greener Communities Councillor Tom Becket and to our lead Climate Change officers; - Jo Miskin - Climate Action Manager, Environmental Services and Hitesh Mahawar - Climate Change Programme Manager for supporting the scrutiny inquiry throughout this year.

Thank you also to the Council officers that have attending and answer technical questions for us, particularly Mona Walsh Assistant Director of Property and Christina Cherry - Planning Policy, Conservation & Design Manager.

Thank you to Marco Raugei - Senior Lecturer and Senior Research Fellow in Mechanical Engineering, Oxford Brooks University and Andy Wainwright MSc CEng FIET - Whole System Manager, Scottish and Southern Electricity Networks for attending and presenting evidence.

The Overview and Scrutiny Committee

The Overview and Scrutiny Committee is appointed by Cherwell District Council to carry out the local authority scrutiny functions.

Membership of the Overview and Scrutiny Committee

Councillor Dr Isabel Creed (Chairman)
Councillor Nigel Simpson (Vice-Chairman)
Councillor Gordon Blakeway
Councillor John Broad
Councillor Phil Chapman
Councillor Grace Conway-Murray
Councillor Andrew Crichton
Councillor Frank Ideh
Councillor Harry Knight
Councillor Simon Lytton
Councillor Lynne Parsons
Councillor Barry Wood

Formal Minutes

Minutes of proceedings are available to view or download from the Council website at <https://modgov.cherwell.gov.uk/mgCommitteeDetails.aspx?ID=116>

Committee Staff

The current staff of the committee are:
Michael Carr - Interim Principal Officer - Scrutiny and Democratic Lead
Martyn Surfleet - Democratic and Elections Officer.

Contacts

Email: democracy@cherwell-dc.gov.uk

Cherwell District Council

March 2025

www.cherwell.gov.uk

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Equality Diversity and Inclusion

***A scrutiny review of the Cherwell District Council
Equality Diversity and Inclusion Strategies and Delivery.***

Report of the Overview and Scrutiny Committee

18 March 2025

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Executive Summary & Recommendations

The Scrutiny Inquiry was established to review the Council's Equality, Diversity and Inclusion strategies, including, principally, the *Including Everyone* framework. This included reviewing the implementation of the Council's *Including Everyone* framework, reviewing the performance against the Council's Equality, Diversity and Inclusion objectives, review the development of the Council's new Equality, Diversity and Inclusion objectives for 2025-2026 and reviewing the arrangements for engagement and feedback with groups with 'protected characteristics' to help inform policy and approach.

The Overview and Scrutiny Committee re-established this Scrutiny Working Group and membership on 15 October 2024 and agreed the Terms of Reference and Objectives at its meeting on 26 November 2024.

Members of the Scrutiny Working Group

This Scrutiny Working Group is made up of members of the Personnel Committee and members of the Overview and Scrutiny Committee.

The Members of the Scrutiny Working Group for 2024-2025 were: -

Councillor Rebecca Biegel - Chairman
Councillor Gemma Coton – Vice Chairman
Councillor Barry Wood
Councillor Lynne Parsons
Councillor Frank Ideh
Councillor Dr Chuckwudi Okeke.

Aims and Objectives

Aim:

To review the implementation of the Council's Equality, Diversity and Inclusion strategies (the Including Everyone Framework).

Objectives:

- i). To review the implementation of the Council's Including Everyone Framework.
- ii). To review the performance against the Council's Equality, Diversity and Inclusion objectives.
- iii). To review the development of the Council's new Equality, Diversity and Inclusion objectives for 2025-2026.
- iv). To review the arrangements for engagement and feedback with groups with 'protected characteristics' to help inform policy and approach.

This inquiry has focused on Equality Diversity and Inclusion policies and strategy and performance (i.e. relevant to the public sector equalities duties

provided in the Equality Act 2010) and not broader community engagement issues.

The Council's *Including Everyone Framework* outlines the Council's approach to equalities, diversity and inclusion and sets out its vision to providing inclusive services, workplaces and communities, equitable access to services and equality of opportunity.



Cherwell District Council's Equalities, Diversity and Inclusion strategies are set out on the Council's website here: <https://www.cherwell.gov.uk/info/5/your-council/1109/equalities-diversity-and-inclusion>

The goals and commitments of Cherwell District Council's *Including Everyone Framework* are set every four years. Sitting beneath this Framework are three annual action plans, that reflect the different ways in which Cherwell Council is working to make its organisation services and communities more inclusive.

The action plans have indicators to help measure progress against the goals. Implementation is being overseen by the Equalities, Diversity and Inclusion Member working group and reporting should align with quarterly business plan monitoring.

Framework Action Plans

Cherwell Council has three inter-connected strands that help organise its Equalities Diversity and Inclusion (EDI) work and has set goals and commitments against each of these strands. These are tracked and measured in a set of annual action plans, which sit underneath this framework.

Cherwell Council's quarterly performance reports detail progress made to date against the following objectives and measures for each strand:

- Inclusive communities
- Inclusive services
- Inclusive workplace.

It is against the law to discriminate against someone because of a protected characteristic. The nine protected characteristics are:

- age
- disability
- gender reassignment
- marriage and civil partnership
- pregnancy and maternity
- race
- religion or belief
- sex

- sexual orientation.

This encompasses how the Council plans to eliminate unlawful discrimination, harassment and victimisation, advance equality of opportunity and foster good relations between different “protected characteristics” groups.

Key Lines of Enquiry

The Key Lines of Enquiry used to guide this scrutiny inquiry were:

- Q1) *What are the Council’s statutory duties, including the Equality Act 2010 and the Public Sector Equality Duty.*
- Q2) *What are the Council’s strategies and key objectives delivery of EDI strategies and responsibilities?*
- Q3) *What are the arrangements for EDI in Procurement and Commissioning and the Council’s legal responsibilities for services by our partners and contractors?*
- Q4) *To what extent and how is the Council working towards achieving a diverse workforce and offering equality of opportunity in employment, recruitment selection, training, and development?*
- Q5) *To what extent and how is the Council ensuring that the workplace is free from discrimination, victimisation, or harassment of any kind where staff are treated with respect?*
- Q6) *To what extent do the Council policies provide clear guidance to all employees about what is expected of them and what they can expect from us as an employer?*
- Q7) *To what extent and how is the Council pro-active in promoting and supporting equality in the workforce?*
- Q8) *What Equality training is provided for staff to ensure they are made aware of their rights and responsibilities?*
- Q9) *What are the consultation and engagement arrangements relevant to delivery of the Council’s EDI strategies and responsibilities?*
- Q10) *How does the Council measure EDI progress and informs the public and our staff about progress on EDI.*

Witnesses to the Inquiry

The Scrutiny Working Group heard evidence from the following witnesses during 2024-2025:

- Councillor Chris Brant – Portfolio Holder for Corporate Services (attending two of the meetings)
- Nicola Riley, Assistant Director Wellbeing & Housing
- Claire Cox, Assistant Director Human Resources
- Shona Ware - Assistant Director of Customer Focus
- Celia Prado-Teeling - Performance Team Leader

- David Cruchley - Senior Youth Partnerships Manager, Oxfordshire Youth.

Recommendations

Equality and Service Delivery

Recommendation 1

That a refreshed Council Equality Diversity and Inclusion (EDI) strategy and framework be developed and agreed by the Executive for ratification by full Council in 2025, with refreshed EDI objectives Key Performance Indicators (KPIs) to ensure that they link directly and cross reference to the Council's EDI strategy framework, with KPIs clearly referenced against the delivery of each EDI strand.

Recommendation 2

That the Council's Equality Diversity and Inclusion (EDI) strategy focus and cross reference directly and specifically to the delivery of the key statutory responsibilities from the Public Sector Equality Duty.

Recommendation 3

That Equality Diversity and Inclusion (EDI) audits of public facing services be undertaken to ensure maximum accessibility and inclusion.

Recommendation 4

That the Council review all policies plans and projects to make sure that they have up to date EIA assessments in place.

Equality in Employment

Recommendation 5

That the Council further explore opportunities to achieve further accreditation and better publicise the accreditation that the Council already has.

Recommendation 6

That the Council's recruitment process be reviewed to make it more inclusive and remove irrelevant barriers to recruitment.

Recommendation 7

That the Council should actively facilitate the creation of staff diversity networks and embed this approach.

Equalities Communications and Engagement

Recommendation 8

That the Cherwell District Council Consultation and Engagement Strategy 2025 – 2029 include strategies and actions for monitoring response rates among individuals from each of the Protected Characteristics. This should involve incorporating diversity monitoring questions in all consultation and engagement surveys, providing essential evidence for decision-making across all areas of Council policy and service delivery.

Recommendation 9

That a full Equality Diversity and Inclusion (EDI) audit of the Council website and communications be undertaken to ensure that the Council web communications effectively engage with all sections of the community.

Measuring Progress

Recommendation 10

That the Council Equality Diversity and Inclusion (EDI) objectives / KPIs reflect meaningful outcomes to be delivered for each key strand, as well as measurable outputs and outcomes (metrics) with milestones and implementation dates.

1 Introduction

- 1.1. The Equality Act 2010 came into force in October 2010 and legally protects people from discrimination in the workplace and in wider society. It replaced previous anti-discrimination laws with a single Act, making the law easier to understand and strengthening protection in some situations. The Act covers nine protected characteristics, and these are the grounds upon which discrimination is unlawful. The characteristics are:
- Age
 - Disability
 - Gender Reassignment¹
 - Marriage Or Civil Partnership (In Employment Only)
 - Pregnancy And Maternity
 - Race
 - Religion Or Belief
 - Sex
 - Sexual Orientation
- 1.2. The Equality Act 2010 introduced the Public Sector Equality Duty (PSED), which requires that all public bodies, such as the Council, consider all individuals when conducting their day-to-day work, shaping their policies, and delivering services. The Act also outlines the 'protected characteristics' – the specific aspects of identity protected from discrimination.
- 1.3. As an organisation providing services to a diverse community, it is vital for the Council to consider the protected characteristics in all that we do.
- 1.4. The Public Sector Equality Duty requires public bodies, in the exercise of their functions, to have due regard to:
- Eliminate unlawful discrimination, harassment, victimisation, and other conduct prohibited by the Act.
 - Advance equality of opportunity between people who share a protected characteristic and those who do not.
 - Foster good relations between people who share a protected characteristic and those who do not.
- 1.5. In addition to these 'general' duties, there is also a 'specific' duty. This includes a requirement for public sector bodies to prepare and publish one or more equality objectives at least every four years.
- 1.6. As an employer and deliverer of services, Cherwell Council is committed to eliminate unlawful discrimination, promoting equal opportunities and fostering good relations between people from all communities.

¹ Before, during and after transition. This wording is the terminology used in the Equality Act; transgender (or Trans) is now the accepted terminology. The Council understands there are many different identities which fall under the Trans umbrella, including identities outside of the gender binary.

Including Everyone

- 1.7. The Council's Including Everyone framework sets out its commitment for progressing equality. The Strategy and Action Plan outlines its equality objectives, describes how it will fulfil its moral, social and legal obligations and what we will do to make Cherwell a place where people get along with each other and treat each other with dignity and respect.
- 1.8. The Strategy covers inequality in terms of age, disability, gender reassignment (transgender/trans), marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex and sexual orientation and is aimed at those who live, work in and visit the district, as well as elected Councillors and employees of the Council.

Why is Equality Important?

- 1.9. As a public service provider, we believe that it is important that the Council recognises that our residents and customers come from different backgrounds; this enables the Council to design and deliver services that meet the needs of the communities we serve. By understanding these differences and encouraging others to do the same, we can improve the quality of life for everyone by ensuring people who live, work, or visit our district are treated fairly, with respect and are given the same chances and opportunities by taking into consideration their different needs.
- 1.10. As an employer, we believe that it is in the Council's interests and in the interests of all who work for the Council that we ensure that every possible step should be taken to ensure that individuals are treated equally and fairly and that decisions in recruitment and selection, training, promotion, and career management are based solely on objective and job-related criteria and that reasonable adjustments are made where feasible.

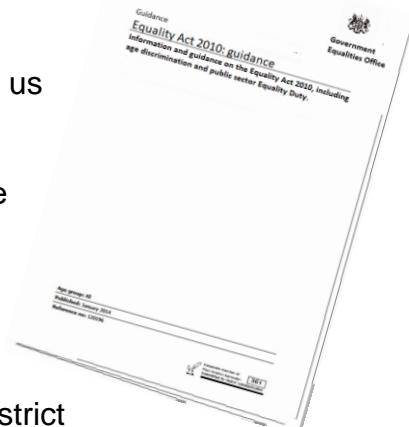
Public Sector Equality Duty

- 1.11. As part of the Equality Act 2010, public authorities must comply with the Public Sector Equality Duty. The equality duty replaced the previous race, disability and gender equality duties and was developed to extend across all the protected characteristics.
- 1.12. It consists of a general equality duty, supported by specific duties and requires public authorities to consider or think about how their policies or decisions affect people who are protected under the Equality Act. Private organisations and individuals don't have to comply with the duty.
- 1.13. The general duty requires public bodies to have due regard to the need to:
 - Eliminate unlawful discrimination, harassment and victimisation and other conduct prohibited by the Act
 - Advance equality of opportunity between people who share a protected characteristic and those who do not

- Foster good relations between people who share a protected characteristic and those who do not
- In addition, public authorities also have specific duties and must do the following:
- Publish equality information at least once a year to show how they've complied with the equality duty
- Prepare and publish equality objectives at least every four years.

1.14. The publication of a new Equality Strategy will support the Council in meeting the general and specific duties placed on us as part of the Equality Act.

1.15. Having reviewed the Council's strategy and performance, we believe that the Council generally meets the Public Sector Equality Duty (PSED), but its policies tend to be more "non-discriminatory" than proactively anti-discriminatory. We have also suggested that the new strategy could be more clearly aligned to the main statutory requirements of the Equality Act to show how these are delivered by Cherwell District Council.



Equality Act 2010: guidance

Information and guidance on the Equality Act 2010, including age discrimination and public sector Equality Duty.

<https://www.gov.uk/guidance/equality-act-2010-guidance>

2 Equality and Service Delivery

- 2.1. The Scrutiny Working Group reviewed the Council's equalities diversity and inclusion strategy; - the *Including Everyone Framework* throughout the scrutiny inquiry. This strategic framework outlines and directs how the Council delivers its statutory and organisational priorities for Equality Diversity and Inclusion into practice. The framework has not been updated in four years and is due to be updated, which provided an opportunity for the Scrutiny inquiry to feed into the development of the new framework informally, as well as through the formal report and recommendations to the Executive.
- 2.2. During the scrutiny inquiry the Working Group also reviewed the Council's current Diversity and Inclusion Action plan and the Public Sector Equality Duty (PSED), with presentations and questions and answers from the Assistant Director Human Resources.
- 2.3. A recent organisational restructure has resulted in internal EDI policies being managed by Human Resources, while external EDI policies are overseen by the Housing and Wellbeing department. Nevertheless, the accessibility of

specific services remains the responsibility of the relevant departmental service providers.

EDI Strategies and Approaches

- 2.4. During this review, the Scrutiny Working Group has researched and considered examples of other equalities diversity and inclusion strategies of other local authorities, to help consider the direction of Cherwell's new strategy. These have included:

- Equality Framework for Local Government, published by the Local Government Association (LGA).
- Kirklees Council Inclusion and Diversity Strategy.
- South Oxfordshire District Council Diversity and Inclusion Strategy.
- Vale of White Horse District Council Diversity and Inclusion Strategy.
- Oxford City Oxford Equality, Diversity and Inclusion (EDI) Strategy.



- 2.5. The current *Including Everyone Framework* was established during a shared service partnership with Oxfordshire County Council, reflecting the organisation's priorities at that time. Since separating from Oxfordshire County Council, the strategic direction of the two organisations has diverged significantly.

A New Strategy for Cherwell

- 2.6. Having carried out this review of Council's EDI strategy, we are recommending that a refreshed Council EDI strategy and framework be developed to bring it up to date and tailored more specifically to Cherwell and with refreshed EDI objectives that they link directly to the Council's EDI strategy framework.

Recommendation 1

That a refreshed Council Equality Diversity and Inclusion (EDI) strategy and framework be developed and agreed by the Executive for ratification by full Council in 2025, with refreshed EDI objectives Key Performance Indicators (KPIs) to ensure that they link directly and cross reference to the Council's EDI strategy framework, with KPIs clearly referenced against the delivery of each EDI strand.

- 2.7. We have found the current EDI strategy is still generally effective and fit for purpose. Developing a new, tailored EDI strategy specifically for Cherwell should ensure the following:
- The EDI strategy is up to date with legislation
 - The strategy is relevant and tailored to the district, with potential for it to be coproduced by service-users

- The strategy is coproduced by Cherwell staff to represent Cherwell District Council needs and values
- A new strategy would build upon a culture of EDI across the Council and in its service delivery, embedding a culture of EDI across the Council and its service delivery.

2.8. We heard in evidence that the Council generally meets the Public Sector Equality Duty (PSED), but its policies tend to be more “non-discriminatory” than proactively “anti-discriminatory” and that further work was needed to make this developmental step forward.

A Golden Thread

- 2.9. Having revised other local authority EDI strategies and performance frameworks we have found that many of them are more clearly linked to meeting the specific duties in the Equality Act and the Protected Characteristics, which can make the framework clearer to follow it its delivery of those statutory duties.
- 2.10. The Council's EDI strategy should also focus and cross reference directly and specifically to the delivery of the key statutory responsibilities from the Equalities Act 2010 Public Sector Equality Duty. This should include, specifically, how the Council will ensure equality, inclusion and foster good relations between all and each of the protected characteristics groups, for its own staff and for its service uses and in the wider community (community, services workplace).

Recommendation 2

That the Council's Equality Diversity and Inclusion (EDI) strategy focus and cross reference directly and specifically to the delivery of the key statutory responsibilities from the Public Sector Equality Duty.

- 2.11. The Public Sector Equality Duty (PSED) requires public authorities to have due regard to how their functions will affect people with different protected characteristics. These functions include their policies, programmes, and services.
- 2.12. Cross referencing to the specific duties of the Equalities Act Protected Characteristics will make it clearer how the Council is delivering and going beyond the Equalities Act 2010 to identify any gaps, through the way it is setting clear objectives and monitoring progress against these.

EDI Audits

- 2.13. The revised framework, along with specific diversity and inclusion goals, also needs to be agreed in conjunction with the Council’s new Corporate Plan in 2025. As corporate priorities and services are aligned to the new Corporate Plan and the refreshed EDI strategy, we are also recommending that EDI audits should be undertaken for all services, in line with the refreshed EDI performance framework.

Recommendation 3

That Equality Diversity and Inclusion (EDI) audits of public facing services be undertaken to ensure maximum accessibility and inclusion.
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Equality Impacts

- 2.14. Although there is not a specific legal requirement for the Council to undertake an equality impact assessment, we are legally required to demonstrate that we have given 'due regard' to eliminate unlawful discrimination, harassment, and victimisation; advance equality of opportunity and foster good relations. In practice this means that equality considerations still need to be evidenced in our decision-making processes and policies.
- 2.15. Any potential impact on equality should be considered before any key decisions are made and should be integrated into day-to-day policymaking, business planning and other decision-making arrangements. This is particularly relevant when making difficult financial decisions; if we are proposing to stop, reduce or change a service then we must have relevant equalities evidence to justify this.
- 2.16. Reports presented to Council committees and the Corporate Leadership Team include a section on 'Equality Implications.' However, these sections lack explicit Public Sector Equality Duty compliance and do not outline necessary mitigating actions.

Equality Impact Assessments

- 2.17. The Scrutiny Working Group considered the Council's Equalities Impact Assessments Process. The Council carries out Equality Impact Assessments (EIAs) to assess the effects of all new policies and proposals. The Scrutiny Working Group found that whilst the EIA template mostly aligns with the Public Sector Equality Duty, it does not do so explicitly.
- 2.18. We have found that the current application of EIAs is sufficient in understanding the equalities impact for major changes, as this has been undertaken for the previous five years. There are, however, policies plans and services more than five year old that have not been EIA assessed. We are therefore recommending that the Executive agree that all policies plans and projects to make sure that they have up to date EIA assessments in place.

Recommendation 4

That the Council review all policies plans and projects to make sure that they have up to date EIA assessments in place.

- 2.19. Reviewing the current EIA template should also ensure it remains fit for purpose.

EDI Events

- 2.20. Council events could also be more effectively used in support of its EDI engagement, and we believe that the Council should also commit to supporting and delegating the creation and design of events to relevant officers with an EIA process.
- 2.21. ***We believe that the Council should commit to supporting and delegating the creation and design of events to relevant officers with an EIA process.***

Procurement and Commissioning

- 2.22. During the scrutiny inquiry we considered how equality diversity and inclusion is delivered through the Council's procurement and commissioning arrangements. The Council provides a wide range of services to residents and businesses in the district. In some cases, these are provided directly by the Council, in other cases, by our partners and contractors.
- 2.23. When a supplier provides goods, services or works on behalf of the Council, the ultimate legal responsibility for meeting the requirements of the Equality Act and Public Sector Equality Duty remain with the Council. We believe that it is therefore important to ensure that the Council's equality obligations are part of the terms of a contract so that we know they will monitor the impact on service users and those they employ.
- 2.24. Specifically, we believe that the Council should:
- Communicate its equality diversity and inclusion principles and strategies to all potential contractors and service providers,
 - Ensure contractors and service providers have policies, procedures and practices that do not discriminate and deliver goods, facilities and services that are appropriate and accessible,
 - Provide opportunities for all to be able to bid and be awarded Council contracts from an equal basis; and
 - Monitor the contracts and service arrangements to ensure they are meeting their equality commitments.

EDI Accreditation

- 2.25. We believe that the Council should explore opportunities to achieve accreditation and better publicise the accreditation that it already has. This could include, for example, neuro-diversity, to ensure that we are meeting high standards of inclusion for people with neurodiverse conditions and making use of their talents.

Recommendation 5

That the Council further explore opportunities to achieve further accreditation and better publicise the accreditation that the Council already has.

- 2.26. Achieving accreditation will help the Council's image as an inclusive, and thus attractive, employer.
- 2.27. In achieving accreditation, a stronger EDI culture can be fostered as current staff will feel more supported and bought-in to the EDI mission and prospective staff and candidates will not feel excluded.

3 Equality in Employment

- 3.1. The Council's *Including Everyone* framework pulls together the Council's commitment to equality within the workplace. As part of supporting the delivery of this strategy there are additional guidance documents, focusing on specific elements of equality. These can be added to, as required, through the life of this strategy.
- 3.2. We believe that the Council's HR policies should be clear and pro-active in promoting and supporting equality in the workforce. This includes eliminating bullying and harassment, addressing discrimination, ensuring equality in pay and creating a flexible work-life balance.

Equal Opportunities

- 3.3. The Cherwell Council's [Equal Opportunities policies](#) meets its Public Sector Equality Duty requirements by ensuring fair treatment in hiring and promotions. Key points it should include are:
- Commitment to fair recruitment based solely on merit.
 - Proactive outreach to diverse applicant pools at job fairs.
 - Flexible working arrangements to support candidates with additional needs.
 - Reasonable adjustments for disabled employees, including alternative application formats and workplace accommodations.
 - Accessibility measures in the new Property Strategy to ensure all buildings are accessible.
 - Ongoing training and monitoring of employment practices to prevent discrimination.

A Diverse Workforce

- 3.4. In evidence to the scrutiny inquiry we heard that the Council is continuing to work towards achieving a diverse workforce and offering equality of opportunity in employment, recruitment selection, training, and development. The Council aims to ensure that the workplace is free from discrimination, victimisation, or harassment of any kind where staff are treated with respect.
- 3.5. We have heard in evidence that the Council already reviews the proportion of staff for each category of Protected Characteristics, and this is reported to Personnel Committee on a quarterly basis. The Council consults staff on key

aspects of accessibility and inclusion and the Council has an Inclusion Champion network.

- 3.6. During the scrutiny inquiry we have considered the range of policies in place for its staff and prospective employees, but also, specifically the [Bullying, Harassment and Discrimination Policy](#) in place to support Public Sector Equality Duty compliance, the Members Code of Conduct, which also outlines expectations regarding anti-bullying, discrimination, and harassment for all Councillors and also Workforce Profile Statistics in reports to demonstrate adherence to Public Sector Equality Duty data requirements.
- 3.7. These policies should support its staff and provide clear guidance to all employees about what is expected of them and what they can expect from the Council as an employer. To achieve this, we are recommending that the Council's recruitment process be reviewed to make it more inclusive and remove irrelevant barriers to recruitment.

Recommendation 6
That the Council's recruitment process be reviewed to make it more inclusive and remove irrelevant barriers to recruitment.

- 3.8. Reviewing and streamlining the applications and interview process to better respond to applicants' needs, reduce barriers to recruitment and widen the candidate pool.

Equality Training

- 3.9. Equality training is provided for staff to ensure they are made aware of their rights and responsibilities. In particular, all managers should be trained on a regular basis in equalities matters concerning employment. Similarly, there is an expectation that all Members will attend Equality training. Equality issues are an integral part of the Council's training and development programmes, regardless of whether the Council uses internal or external trainers. In addition to the generic equality training, tailored equality training to reflect the needs of specific services will be encouraged, particularly for services engaging with external customers and / or where there is a significant engagement with protected group(s).
- 3.10. We believe that it is important that the Council makes a strong commitment to training and development for all staff. All staff should have equal access to training and development and take positive action where appropriate for those who are underrepresented in our workforce.
- 3.11. The Councils EDI training programme includes Equalities Diversity and Inclusion training for managers and Equalities diversity and inclusion training for all staff and for councillors.
- 3.12. One particular area we have identified that may be of particular focus for incorporation into the Council's training programme is training on neuro-

diversity and this was a full council motion on 21 October 2024. The full motion agreed by Council can be found here:

[Motion on Neurodiversity Meeting of Council, Monday 21 October 2024 \(Item 37.\) https://modgov.cherwell.gov.uk/mgAi.aspx?ID=27375](https://modgov.cherwell.gov.uk/mgAi.aspx?ID=27375)

- 3.13. ***We believe that the Council should introduce training for staff and members on neurodiversity.***
- 3.14. Ideally the Council's EDI training suite should also be complemented with face-to-face training and investigation of EDI topics determined by managers concerns, to include statutory responsibilities and the Council's EDI strategies and policies and objectives.
- 3.15. In addition, we believe that the Council should actively facilitate the creation of staff diversity networks. In our research we have found that staff networks are a key part of the EDI culture at other councils. They facilitate and improve coproduction and keep councils ahead of the curve relating to EDI due to the EDI culture they foster.

Recommendation 7
That the Council should actively facilitate the creation of staff diversity networks and embed this approach.

- 3.16. The Equal Opportunities in Employment Policy satisfies the Public Sector Equality Duty but could do more to support equity in applying to jobs at the organisation. In reviewing the organisation's approach to employment and recruitment, the organisation could attract a more diverse pool of applicants, and successful applicants. Attracting diversity means that all vacancies can be filled by applicants best suited to the role.

An Anti-discriminatory Strategy

- 3.17. Cherwell Council is moving from "non-discriminatory" to an "anti-discriminatory" strategy and we support this ambition. At the moment, however, we have found that the Council does very little to show an anti-discriminatory stance. In the future, the Council should for example, consider creating a diversity and inclusion calendar. A diversity and inclusion calendar is a tool that lists various cultural, religious, and social events, holidays, and awareness days from different groups. Whilst this may seem like a 'token gesture' to begin with, it could spark momentum for more EDI involvement from staff and service-users.

4 Equalities Communications and Engagement

- 4.1. In evidence the scrutiny inquiry has heard that the Council wants to ensure that anyone who accesses Council services either as a resident, visitor, customer, or employee feels well informed about local issues; can get involved, influence local decision making and gets the opportunity to tell the Council what they think about its policies, procedures, service delivery and work with partner organisations.
- 4.2. The Scrutiny Working Group considered the accessibility of Council communications across different services. In the longer term, or as new policies and services are introduced and refreshed, it may be good to review and develop the systems for accessible communications used to engage with residents with reference to the Council's EDI and EIA objectives, as necessary.
- 4.3. It may also be useful for services to reflect upon the way they engage with local residents and service users against these Equality objectives and take opportunities where they arise to think about different sections of our community. Diversity days, workshops or socials are a suitable way of fostering EDI culture by allowing those from protected characteristics to speak with others with shared characteristics.
- 4.4. ***We believe that the Council should commit to supporting and delegating the creation and design of events to relevant officers with an EIA process.***

Engaging with Young People

- 4.5. One particular group that the Council wishes to engage with more is young people. One of the Council's Equalities KPIs is to "Collaborate with partner organisations to involve young people in volunteering activities and engage with them to undertake active participation in their local communities (KPI EDI1.05.01).
- 4.6. At Quarter 2 we heard that this was behind schedule and that initial discussions with some partners had highlighted the costs and challenges associated with young people undertaking volunteer activity.
- 4.7. In evidence we heard from David Cruchley - Senior Youth Partnerships Manager, Oxfordshire Youth, who provided an overview of the ongoing work carried out by staff and volunteers, as well as the complex growing needs of young people today.



David Cruchley - Senior Youth Partnerships Manager, Oxfordshire Youth, providing evidence to the Scrutiny Working Group.

- 4.8. In evidence from Mr Cruchley the Working Group explored three key themes:
- Youth Leadership
 - Youth Voice / Participation
 - Young People Supported Accommodation Service.
- 4.9. He also introduced us to the [Lundy Model of Child Participation](#), a nationally recognised and adopted model of operation through four key concepts:
- Space
 - Voice
 - Audience
 - Influence.
- 4.10. Members posed a range of questions surrounding youth work and organisations within the district and how the Council can help in improving and enriching youth work within Cherwell. It was suggested and agreed that officers look to incorporate the principles of the Lundy model as well as other wellbeing frameworks within the Councils emerging updated Including Everyone Framework.

Principles of Engagement

- 4.11. In consideration of the evidence, we have considered overall, we believe that the following principles should inform how the Council will make sure that its engagement activities are flexible, focused, and appropriate for the diverse needs of the communities:
- Plan and co-ordinate consultation and engagement on policy making activities and decision making, the use of resources and, where possible, work collaboratively.
 - Actively encourage involvement from all communities, including those from traditionally under-represented groups/areas.
 - Be open and creative to the most appropriate methods to consult and engage making the experience interesting, relevant, and worthwhile for participants.
 - Be transparent and build trust by communicating results and ensure that the outcomes are used to inform the Council's policies and decision-making processes.
 - Use the information from its engagement activities, alongside other evidence, to inform the design and delivery of effective and efficient services, within our current financial constraints.
 - Build relationships with communities so sustained engagement can be established.

- 4.12. We believe that it is important to highlight and communicate the Council's equalities diversity and inclusion strategies and initiatives to the public and our staff and celebrate achievements. The Council should communicate about progress through:
- An Annual Equality Report
 - Our information and advice services
 - The Council website
 - Media (including social media) for advertising and press releases
 - Through our community network.

The Community Engagement Strategy

- 4.13. To ensure consistency, the Council has a separate [Community Engagement Strategy](#), that outlines the principles for consultation and engagement for the Council and provides the Council with a consistent, corporate and agreed approach to how we consult and use the results to inform our policies, strategies and service delivery.
- 4.14. As part of the evidence hearings, we spoke with Shona Ware – Assistant Director of Customer Focus and Celia Prado-Teeling -Performance Team Leader (Customer Focus) on the Council's Cherwell District Council Consultation and Engagement Strategy and its interrelationship with equality diversity and inclusion.
- 4.15. In consideration of engaging with our communities and service users and the way in which this overlaps with delivery of the Council's EDI strategies and engaging with all sections of the population, the Scrutiny Working Group considered the refresh of the Council's Consultation and Engagement Strategy.
- 4.16. We believe that Cherwell District Council's Consultation and Engagement Strategy 2025 – 29 should include strategies and actions for monitoring response rates among individuals from each protected characteristic. This will involve incorporating diversity monitoring questions in all consultation and engagement surveys, providing essential evidence for decision-making across all areas of council policy and service delivery.

Recommendation 8

That the Cherwell District Council Consultation and Engagement Strategy 2025 – 2029 include strategies and actions for monitoring response rates among individuals from each of the Protected Characteristics. This should involve incorporating diversity monitoring questions in all consultation and engagement surveys, providing essential evidence for decision-making across all areas of Council policy and service delivery.

Web Accessibility

- 4.17. During the scrutiny inquiry we also considered the Council's website and web accessibility. In modern times the internet has become one of the main ways in which service users and people in general interact and communicate with public services and with each other.
- 4.18. The Council's website, Customer Services, Housing and Revenue and Benefits (among others) already provide different ways for service-users to interact, e.g. documents in large print, interpreters/translations. However, this is only done on a case-by-case basis and is not built into the system. Being proactive, rather than reactive, will make the Council more accessible and more 'anti-discriminatory'.
- 4.19. We heard in evidence that the Council's website meets 88.4% of the Level AA Web Content Accessibility Guidelines (WCAG) and 92.5% of Level A criteria. Plans for the 2024/25 EDI Action Plan include conducting an EIA on the website's accessibility and updating its accessibility section.
- 4.20. The Council website sits below the national local council median for accessibility according to the WCAG AA Success Criteria (around the 43rd percentile). According to the legislation, the Council website is not compliant as it is not fully Level AA.
- 4.21. There is currently no automated system in place to assess staff intranet accessibility against WCAG standards².
- 4.22. We are therefore recommending that a full EDI audit of the Council website and communications be undertaken to ensure that the Council web communications effectively engage with all sections of the community.

Recommendation 9

That a full Equality Diversity and Inclusion (EDI) audit of the Council website and communications be undertaken to ensure that the Council web communications effectively engage with all sections of the community.

² Understanding WCAG 2.2 <https://www.gov.uk/service-manual/helping-people-to-use-your-service/understanding-wcag>

- 4.23. In the future, the Communications department could consider whether dedicated training is needed for staff who publish web content. In developing a system where staff who publish web content attend mandatory training relating to web content accessibility, the content of the website will, in future, remain ahead of the curve according to guidelines.

5 Measuring Progress

- 5.1. The Council measures its progress in delivering its equalities diversity and inclusion strategies and priorities through its *Including Everyone* key performance indicators. The goals and commitments of Cherwell District Council's *Including Everyone Framework* are set every four years.

EDI Action Plans

- 5.2. Sitting beneath this Framework are three annual action plans that reflect the different ways in which Cherwell Council is working to make its organisation services and communities more inclusive. The action plans have indicators to help measure progress against the goals.
- 5.3. Implementation is overseen by the Equalities, Diversity and Inclusion Member Working Group and reporting should align with quarterly business plan monitoring.
- 5.4. During the Scrutiny Inquiry the Scrutiny Working Group has scrutinised the performance the EDI performance indicators, by reviewing quarterly performance reports with questions to the Portfolio Holder and officers. The Scrutiny Working Group has also reviewed the framework itself and considered to what extent the current performance KPIs and outturn information are effectively measuring the implementation of the Council's Including Everyone Framework EDI priorities.
- 5.5. Cherwell Council has three inter-connected strands that help organise its Equalities Diversity and Inclusion work and has set goals and commitments against each of these strands. These goals are tracked and measured in a set of annual action plans, which sit underneath this framework.
- 5.6. Cherwell Council's quarterly performance reports detail progress made to date against the following objectives and measures for each strand:
- Inclusive communities
 - Inclusive services
 - Inclusive workplace.

Equality Monitoring

- 5.7. The Council has a requirement to publish equality information at least once a year to show how we have complied with the equality duty. This also makes good business sense as it can help local people assess the Council's performance on equality, the impact our policies and practices have had, tell us who is and isn't using our services; understand why our services may not meet their needs and help us to improve the delivery of our services by identify any data gaps and address any issues. Any monitoring undertaken must be proportionate and relevant and of a benefit to our communities.
- 5.8. The Council monitors its Public Sector Equality Duty compliance through metrics on workforce composition by gender, race, disability, age, and grade, comparing these statistics with local demographics.
- 5.9. The Scrutiny Working Group heard in evidence that the Council is currently reviewing its process for gathering equality data to ensure an accurate understanding of underrepresented communities and identify gaps.
- 5.10. The Scrutiny Working Group has reviewed the Council's Equalities Diversity and Inclusion Performance each quarter, with detailed questions to the Performance Team Leader, Assistant Director of Wellbeing and Housing Services and Assistant Director of HR and maintained an overview of progress, and scrutiny of key indicators that were behind schedule.
- 5.11. During our review it was noted the KPI EDI1.03.01 "Work with partners to promote an ethnically diverse representation at our voluntary sector forum" was listed as "slightly behind schedule". It was also noted the KPI EDI1.05.01 "Collaborate with partner organisations to involve young people in volunteering activities and engage with them to undertake active participation in their local communities" was highlighted "red" and "Behind schedule" in the report.
- 5.12. The report commented that the forum was held on the 4 September and despite increasing the circulation list and invitations, there was little take up from the expanded group and said that more work needed to be done to improve diversity of attendance at next year's forum.
- 5.13. It was suggested that other youth organisations could be involved in seeking out and engaging with young people who may be interested in volunteering. It was noted that Oxfordshire Youth may be invited as an expert witness on this.
- 5.14. The KPI EDI1.05.02 "Raise awareness of the role of a councillor from an EDI perspective within political leaders" was considered and it was asked what the role of a councillor from an EDI perspective was. Members also discussed the implementation of Inclusion Champions and noted that their involvement with the red and amber indicators within the performance report would be beneficial to the progression of EDI goals within the Council.

Review of the EDI Performance Framework

- 5.15. In reviewing the Council's EDI Performance Framework itself, the Scrutiny Working Group considered if the metrics and indicators used in the performance report were the right ones to measure the implementation and impact of the Council's EDI strategies.
- 5.16. It was noted that the KPIs had no timeframe or delivery target date / review date. One progress description was "Delivering to plan" and it was queried what this meant, and it was felt this wasn't clear enough. It was noted that indicators were listed as 'green' despite not being completed. Officers explained in evidence that the green indicators marked the progress of the actions against where the Council was expected to be operating against the agreed timeframe, rather than fully implemented, but recognised that this may be misleading, especially as there was no implementation timetable. It was agreed that the presentation of information within the performance report as well as the content and targets within the report could be reviewed.
- 5.17. It was also noted that KPIs should be "SMART" (Specific Measurable Achievable and Realistic) and measurable and that the inclusion of milestones with implementation dates and outputs would be useful to help measure and evaluate implementation progress. KPIs that also measure outcomes for the organization or residents may also be more useful to measure impact.

Meaningful Outcomes

- 5.18. We have recommended that the Council's EDI objectives (KPIs) be refreshed to ensure that they link directly and cross reference to the Council's EDI strategy framework, with KPIs clearly referenced against the delivery of each EDI strand. We are also recommending that the Council's EDI objectives / KPIs reflect meaningful *outcomes* to be delivered for each key strand, as well as measurable outputs and outcomes (metrics) with milestones and implementation dates.

Recommendation 10

That the Council Equality Diversity and Inclusion (EDI) objectives / KPIs reflect meaningful outcomes to be delivered for each key strand, as well as measurable outputs and outcomes (metrics) with milestones and implementation dates.

- 5.19. ***We believe that the Council should revise the current data that is captured and consider more effective metrics.***
- 5.20. As it stands, the Council captures a lot of first-order data, e.g. diversity workforce statistics. However, understanding how policies make an impact would be useful in understanding where 'true deficiencies' lie. We suggest that it may be useful if the Executive were to commit to reviewing how data is gathered and what the barriers to gathering effective EDI data are. We believe that the Council should also review how EDI is monitored and what EDI data is captured to ensure it remains fit for purpose.

Oversight of EDI

- 5.21. We believe that the Council should design and implement an EDI oversight structure (such as EDI Champions), who are able to influence and scrutinise policies, projects and initiatives and support the organisation on its EDI journey at service level.
- 5.22. As with staff networks, having an EDI oversight structure is integral to the EDI culture of many other councils. They keep EDI at the heart of policy decisions and maintain a strong EDI culture within the workforce.
- 5.23. As part of the Scrutiny Working Group's review of community engagement it was agreed officers would reach out to councillors for suggestions of community groups that may be unknown to the Council to enable officers to engage better. It was also suggested that officers could liaise with members to investigate if it may be possible and appropriate to widen representation at the Community Safety Partnership.
- 5.24. In addition to these overall monitoring arrangements, we believe that the Council should aim to produce an annual report to outline progress and seek feedback on how others see and experience progress.
- 5.25. ***It is also requested that each of the scrutiny recommendations agreed by the Executive constitute an objective within the refreshed EDI Action Plan.***

6 Conclusion

- 6.1. The Scrutiny Working Group has completed its review of the Council's EDI strategies, which was the culmination of work carried out previously, but with the inquiry focusing in 2024-2025 not just on oversight of performance but contributing to the review of the EDI strategy for the future.
- 6.2. This review has engaged with some of the key Council officers involved in coordinating the EDI policy framework and performance, as well as the Portfolio Holder for Corporate Services, but has also considered perspective outside of the Council, with evidence from one of the Council's delivery partners engaging with young people, and a review of other Council's EDI strategies and national guidance.
- 6.3. We recognise also though that we were not able to speak to all Council leaders and staff and to all relevant community stakeholders, this being a limited review of a substantial topic. Work will go on to develop the strategies and carry out further engagement further to our scrutiny inquiry. We recognise that EDI is a concern across the Council and across our community and it is for all Council leaders to adopt and implement the strategy to make it work effectively.

- 6.4. Having reviewed the Council's current Equality and Diversity Framework and performance, it has agreed ten recommendations to the Executive. It is hoped that this report and the recommendations will be found to be a useful and constructive contribution to building a refreshed strategy and enhanced EDI framework for the Council, not only as employer but as a community leader.
- 6.5. Many of these recommendations may compliment or go beyond the minimum necessary to fulfil legal duties of local councils relating to EDI. It is envisaged that these recommendations will help shift the Council from 'non-discriminatory' to 'anti-discriminatory' and would help foster an EDI culture that would allow easier implementation of more robust EDI initiatives.
- 6.6. In addition to the main scrutiny recommendations, the report also makes some suggestions, which may be a useful point of reference for taking EDI forward.
- 6.7. The scrutiny recommendations are summarised throughout the report under the main chapter headers and themes addressed in the report:
- Equality and Service Delivery
 - Equality in Employment
 - Equalities Communications and Engagement
 - Measuring Progress.

The Scrutiny Process and Next Steps

- 6.8. The EDI Scrutiny Working Group was established to carry out this inquiry and report back to the Overview and Scrutiny Committee, which it is hoped will adopt the report and recommendations. Once the Overview and Scrutiny Committee have agreed the Scrutiny Report and Recommendations, these will be referred to the Executive for consideration and an Executive Response.
- 6.9. There is a two month period within which the Executive should agree its response to the scrutiny report and recommendations. The Executive may agree, reject or amend the scrutiny recommendations made.
- 6.10. The agreed scrutiny recommendations (Executive decisions) made can then be implemented by the Resources and Transformation department and other Council departments as necessary.
- 6.11. After a suitable period of time, the Overview and Scrutiny should request an update on the progress of implementing the Executive Response and decisions made. This is likely to be around one year from when the scrutiny report was agreed, (or whenever might be an appropriate time to review if sooner).
- 6.12. We hope that through this inquiry we will be able to have played a part in helping the Council carry forward its EDI priorities and make a constructive

impact recognising and respecting the differences that make us strong both throughout the Council and throughout our community.

Acknowledgements

We would like to thank the councillors, members and external stakeholders who have taken the time and effort to attend our meetings and present evidence.

In particular we would like to thank Mr David Cruchley - Senior Youth Partnerships Manager, Oxfordshire Youth, who provided valuable insights into community engagement methodologies, which we have learnt from, and which have also contributed to Council learning.

The Overview and Scrutiny Committee

The Overview and Scrutiny Committee is appointed by Cherwell District Council to carry out the local authority scrutiny functions.

Membership of the Overview and Scrutiny Committee

Councillor Dr Isabel Creed (Chairman)
Councillor Nigel Simpson (Vice-Chairman)
Councillor Gordon Blakeway
Councillor John Broad
Councillor Phil Chapman
Councillor Grace Conway-Murray
Councillor Andrew Crichton
Councillor Frank Ideh
Councillor Harry Knight
Councillor Simon Lytton
Councillor Lynne Parsons
Councillor Barry Wood

Formal Minutes

Minutes of proceedings are available to view or download from the Council website at <https://modgov.cherwell.gov.uk/mgCommitteeDetails.aspx?ID=116>

Committee Staff

The current staff of the committee are:
Michael Carr - Interim Principal Officer - Scrutiny and Democratic Lead
Martyn Surfleet - Democratic and Elections Officer.

Contacts

Email: democracy@cherwell-dc.gov.uk

Cherwell District Council

March 2025

www.cherwell.gov.uk



Food Insecurity

Report of the Overview and Scrutiny Committee

March 2025

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Executive Summary

This Food Insecurity Scrutiny Working Group was originally established in 2022 and was continued in 2023-24 and re-established again in 2024-25. The Food Insecurity Scrutiny Working Group was set up to provide oversight and assurance and contributions from elected members, through the review progress of the implementation of the Cherwell Food Action Plan and make recommendations and suggestions for consideration by the Executive Member for Wellbeing and Housing Services department.

The Scrutiny Working Group was originally established following the adoption of a Council motion which declared a food poverty emergency a commitment to the following actions:

- Designating a Food Champion
- Establishing & reporting to O&S the scale of the food poverty crisis in Cherwell
- Drawing up a Cherwell Food Action Plan to support local communities
- Developing a promotional campaign relating to underclaimed Health Start Food vouchers
- Supporting local communities to reduce food waste.

Prior to the food poverty emergency being declared, in June 2022 the Executive had endorsed and committed to the Oxfordshire Food Strategy.

The Oxfordshire Food Strategy sets out a vision where everyone in Oxfordshire can enjoy the healthy and sustainable food they need every day. A critical part of implementing the Oxfordshire Food Strategy has been the development of local Food Action Plans for each district, to ensure that the Food Strategy reflects local priorities and reflects the unique nature of the City and each of the Districts. These have been led by representatives from across the food system, through the Food Action Working Groups (FAWGs -are the multistakeholder groups who helped devise the plan). The Food Action Plan for Cherwell district is a multi-stakeholder plan, with a range of organisations taking responsibility for action.

The Cherwell Food Action Plan identifies initial actions spanning 2024 – 2027. Throughout this period, the Scrutiny Working Group is reviewing progress against targets and metrics and refine the actions, providing oversight and assurance and also provide contributions from the Working Group through the review progress of the implementation of the Cherwell Food Action Plan.

This report outlines the Scrutiny Working Group's assessment of the Cherwell Food Action Plan, focusing on its key priority areas. At each meeting, actions within the identified priority areas were reviewed, with a particular emphasis on tackling food poverty and diet-related ill health, as well as building vibrant food communities.



Members of the Scrutiny Working Group

The following Members were appointed by the Overview and Scrutiny Committee for the 2024-2205 municipal year:

Councillor Rebecca Biegel - Chair
Councillor Phil Chapman – Vice Chair
Councillor Dr Isabel Creed
Councillor Gordon Blakeway
Councillor Andrew Crichton
Councillor Dr Chukwudi Okeke.

Aims and Objectives

The Aims and Objectives for the Scrutiny Working Group agreed by the Overview and Scrutiny Committee are:

To review implementation of the Cherwell Food Action Plan and any associated issues and make recommendations and suggestions for consideration by the Executive Member and Wellbeing and Housing Services department.

The Scrutiny Working Group focused on Food Insecurity in Cherwell and on implementation and development of the Cherwell Food Action Plan but avoided drifting into other interrelated Wellbeing strategies and services.

Witnesses to the Inquiry

The Scrutiny Working Group has spoken with both internal and external expert witnesses during its inquiry, including Councillor Rob Pattenden - Portfolio Holder for Healthy Communities, Councillor Ian Middleton – Executive Portfolio Holder for Neighbourhood Services, who is also the Council's appointed "Food Champion, they have been involved with the Scrutiny Working Group throughout 2024-2025.

The Scrutiny Working Group has also worked with Departmental Officers Nicola Riley, Assistant Director of Wellbeing and Housing Services, Edward Frape, Senior Healthy Place Shaping Officer and Libby Knox, Food and Wellbeing Officer, who have provided support, briefing reports and answered questions at each of our meetings.

The Scrutiny Working Group also received oral evidence from expert witness Alison Drake from the [Bicester Foodbank](#).



Councillor Phil Chapman at the Scrutiny Working Group visit the Banbury Larder

During the inquiry members of the committee have visited the [Banbury Larder](#) and seen first-hand the work going on there to support the community.

1. Tackling Food Poverty

- 1.1. The Food Insecurity Scrutiny Working Group has met throughout 2024-2025 in continuation of its work from previous years to oversee the delivery of Food Insecurity activities in Cherwell. This report outlines the Scrutiny Working Group's assessment of the Cherwell Food Action Plan from its work during this year, which has included tackling food poverty and diet-related ill health, as well as building vibrant food communities.

Priority Area 1: Tackling Food Poverty and Diet-Related Ill Health

Presentation of Deprivation Data

- 1.2. The Food and Wellbeing Officer presented deprivation data through the [Priority Places for Food](#) platform. This data examined alongside our existing knowledge of the areas of deprivation allowed us to identify those most in need. Using statistical data and feedback from local partners assisting residents in need helped ensure our efforts were best directed. The Working Group utilised this data to provide a steer to the Portfolio Holder and departmental officers with targeted suggestions to support these initiatives.

Support for Schools in High Deprivation Areas

- 1.3. In April 2024, letters were sent to all schools in targeted areas with higher deprivation levels, offering support to enhance their curriculum through free school food and nutrition programmes, facilitated by the CDC Food and Wellbeing Officer.

Rural Support Initiatives

- 1.4. For rural areas, the Food and Wellbeing Officer provided advisory and logistical support and in Hook Norton this led to the establishment of the Hooky Neighbours Pantry, which then enabled the group to successfully apply for funding, through the programme of Cherwell District Council Food Grants.

Household Support and Community Food Grant Funding

- 1.5. Officers presented evaluations on Household Support Funding (HSF) and Community Food Grant funding. Following consideration of this, the Scrutiny Working Group suggested establishing a new community food grant to further the Cherwell Food Action Plan objectives through HSF6 grant funding. A specific suggestion was made by the working group to ensure targeted support for diverse cultural groups, particularly the Afro-Caribbean community. This resulted in the Redeemed Christian Church of God, in collaboration with the Nigerians in Banbury group, receiving grant aid for their work in the

community as part of the HSF standard grant-making process.

Expansion of Food Voucher Distribution

- 1.6. Officers presented data on food voucher distributions across three main providers in Cherwell:
 - North Oxfordshire Community Foodbank (Kidlington)
 - Bicester Trussell Foodbank
 - Banbury Trussell Foodbank
- 1.7. The Scrutiny Working Group identified a lack of vouchers being issued in Banbury, despite its high deprivation levels. Officers were instructed to investigate the distribution process and expand access. Consequently, three additional partners were included in the voucher distribution scheme:
 - Home-Start (Banbury, Bicester and villages)
 - The Sunshine Centre (Banbury)
 - Sunrise Multicultural Project (Banbury).

Site Visits and Presentations

- 1.8. Throughout the year the Scrutiny Working Group received regular updates from Cherwell Council officers and was able to scrutinise the progress of implementing the Food Action Plan, developed by Good Food Oxfordshire and Cherwell-based organisations, including the District Council. It has also received evidence from external organisations and undertaken site visits to gain insights into how projects are working on the ground.
- 1.9. In December 2024 members of the Scrutiny Working Group visited [The Banbury Larder](#) and reviewed the impactful work of volunteers in redistributing surplus food.
- 1.10. In January 2025 the Scrutiny Working Group received oral evidence and a presentation from Alison Drake, the Manager of Bicester Foodbank, which is a Trussell Trust supported food bank. She provided a presentation on the organisation's work in combating poverty and hunger. Key highlights included the provision of on-site hot meals, food education initiatives, cooking classes, and efforts to ensure a balanced selection of fresh and staple foods.



Members of the Food Insecurity Scrutiny Working Group visiting the Banbury Larder Food Bank in Banbury.

2. Building Vibrant Food Communities

Priority Area 2: Building Vibrant Food Communities with the Capacity and Skills to Enjoy Food Together

Distribution of Support Service Information

- 2.1. Officers presented updated support service leaflets for review. The Scrutiny Working Group provided feedback on distribution strategies, ensuring that signposting information was made available through the following channels:

- Cherwell District Council website
- Public libraries
- GP surgeries
- Warm Welcome network (community centres, faith groups, etc.).

- 2.2. Regular updates were shared with the Scrutiny Working Group for ongoing feedback and improvements. These are all available online too:

<https://www.cherwell.gov.uk/info/118/communities/977/cost-of-living-support>

Community Food Grant Applications

- 2.3. The Scrutiny Working Group reviewed 19 successful applications for community food grants, funded through Household Support Funds received from Oxfordshire County Council. The Working Group applied scoring and funding criteria to ensure alignment with the Cherwell Food Action Plan's objectives and the £28,000 allocated HSF funding.
- 2.4. The Group supported an initiative to improve the spread of funding. They agreed it was fair to allocate every worthwhile application some funding. The Executive Portfolio Holder approved a range of funding that allowed a percentage of a grant to be allocated. The range of allocations were 100% or 50% or 25% depending on the applications score against the grant criteria.

Community Cooking Initiatives

- 2.5. New grant applications included funding for community cooking projects aimed at building capacity and skills for shared food experiences. These initiatives promote social cohesion and enhance food literacy within local communities.

Food support services



Contact information for food support services across Cherwell

Supporting those in need as well as reducing community food waste and surplus



3. Conclusion

- 3.1. The Scrutiny Working Group has provided a strong steer and key suggestions to improve the reach and effectiveness of the Cherwell Food Action Plan.
- The expansion of food support services
 - Targeted funding for underrepresented communities
 - Enhancing community engagement initiatives.
- 3.2. Continued monitoring and evaluation will ensure that these actions contribute effectively to reducing food insecurity and fostering resilient food communities in Cherwell as part of the standard performance monitoring framework.
- 3.3. The Overview and Scrutiny Committee agrees the programme of Scrutiny work carried out each year at its first meeting in June, after having been established by full Council in May. This includes the work of the Scrutiny Working Groups. The Food Insecurity Scrutiny Working Group was established by the Overview and Scrutiny Committee in 2023, in response to the cost of living crisis.
- 3.4. During 2023 to 2025 the Food Insecurity Scrutiny Working Group has provided oversight and a steer to the Executive Portfolio Holder and the Council's Food Champion, on the implementation of the Council's Food Insecurity Action Plan by officers. Members and officers have felt this to be a valuable way to engage non-executive Members and officers together in this important area of work.
- 3.5. The Scrutiny Working Group has helped the Executive build upon existing initiatives, strengthen partnerships with community organisations, and implement sustainable solutions that address the root causes of food insecurity. Additionally, ongoing data collection and assessment will ensure that interventions remain effective and responsive to evolving needs. Disbanding the group may prematurely risk losing momentum and leaving vulnerable populations without essential support, making continued action essential for long-term impact.
- 3.6. It is therefore felt that the Overview and Scrutiny Committee should give consideration to re-establishing the Food Insecurity Working Group for another year into 2025-2026, in consideration of the fact that food insecurity remains a persistent issue that requires long-term, sustained efforts to create meaningful change.



Bicester Food Bank display

Acknowledgements

Thank you to Councillor Rob Pattenden - Portfolio Holder for Healthy Communities, Councillor Ian Middleton – Executive Portfolio Holder for Neighbourhood Services, who is our Council's "Food Champion", for their support and involvement throughout this year.

Thank you in particular to the Council officers Nicola Riley, Assistant Director of Wellbeing and Housing Services, Edward Frape, Senior Healthy Place Shaping Officer and Libby Knox, Food and Wellbeing Officer, who have provided support, briefing reports and answered questions at each of our meetings.

Thank you to Bicester Food Bank for proving evidence to our scrutiny inquiry. Thank you to Alison Drake from the for taking the time to attend our meeting to tell us about all of the excellent work at the Bicester Foodbank and sharing her insights and best practice.

Thanks also to the Banbury Larder who welcomed us to their vibrant community networking community restaurant and foodbank. Thanks to Taraji Ogunnubi and the team of helpers and volunteers who welcomed the Scrutiny Working Group to the Banbury Larder, where we attended a festive party at Marlborough Road Methodist Church in December. Members were able to tour the Community larder but also see the fantastic joined up community provision with a 'warm space', free kitchen for tea and biscuits, a monthly lunch club, the job club and Citizens Advice Information Point (CHIP).

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Councillor Simon Lytton
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Councillor Barry Wood

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Committee Staff

The current staff of the committee are:
Michael Carr - Interim Principal Officer - Scrutiny and Democratic Lead
Martyn Surfleet - Democratic and Elections Officer.

Contacts

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Cherwell District Council

March 2025

www.cherwell.gov.uk

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Cherwell District Council Overview and Scrutiny Support Guide.

This document is designed to be used as a support guide alongside the detailed section of the Constitution Part 4a.

What is Overview and Scrutiny? (OSC)

The purpose of scrutiny is to ensure that decision-making in local government is efficient, transparent, and accountable and that all decisions are taken in the interests of the residents of Cherwell. Scrutiny has the power to look at any issue which “affects the area or the area’s inhabitants” and this gives it a unique legitimacy to examine those cross-cutting issues in a way that no other individual or organisation could.

Cherwell District Council operates an Executive/Cabinet and scrutiny system, based on the central government model. Scrutiny is independent and it holds the Executive to account by acting as a critical friend.

What are the aims of scrutiny?

The aims of scrutiny are:

- **Challenge** the Council’s performance so that we can improve and raise standards.
- **Undertake scrutiny** on matters of concern.
- **Make recommendations** for action and change.

Scrutiny meets these aims by carrying out independent and in-depth reviews of topics and services. These are carried out either as a full Committee or by a small group of Members in a time-limited group.

What are the benefits of scrutiny?

The benefits include:

- Gives non-Executive Members the opportunity to hold the Executive to account.
- Provides non-Executive Members with an opportunity to examine the Council’s current services, review issues of member or public concern and drive improvements to the services the public receives from the Council.
- Enables members to assess the performance of other providers.
- Gives officers an external and independent view of their service, its strengths, and weaknesses. It is a ‘critical friend.’

How does scrutiny work at Cherwell?

Structure

Every local authority is required to put in place arrangements for overview and scrutiny; however, the detail is for individual authorities to decide. In Cherwell, scrutiny undertakes the majority of its investigations via a combination of working groups and one-off reports to the formal OSC prior to Executive consideration (pre-decision scrutiny).

Scrutiny in Cherwell

- The Committee is politically proportionate and meets roughly six times a year. The remit for the Committee is: Decisions made by and on behalf of the Council or its Executive.
- Any operational or policy aspect of the Council's business

Scrutiny is outcome focused and concentrates on the impact for residents. This includes services provided by, or on behalf of the Council; or by external agencies.

Regulatory decisions, i.e., those relating to planning or licensing applications, are not within the remit of OSC.

Section 5 of the OSC Constitution gives more detail on the specific functions of Committee.

How do I 'call in' a decision?

The Local Government Act 2000 allows non-Executive members of the Council to ask that a key decision which has been taken by the Executive or a key decision made by officers, but not yet implemented, be reviewed.

Unless it meets exemption criteria (detailed in paragraph 13.1 of Part 4a the Constitution), any Executive or key officer decision can be called by noon within 4 working days of publication of a key decision made by the Executive or by an officer (Executive decisions will be published as soon as practicable after the Executive meeting. A key decision can be called in for scrutiny by five non-executive members specifying the reason or reasons for the proposed call in.

A meeting of OSC will be held within 10 working days. Implementation of the decisions will be delayed while OSC meets and considers the decision.

One of the councillors who submitted the call-in notice would be expected to address the committee and, for key decisions made by Executive, the relevant Executive Member will respond on behalf of the Executive.

Having considered the decision, OSC can

- (a) Determine that it has no objection to the called-in decision being implemented.
- (b) Determine that the called-in decision should be referred back to the Executive or officer (as the case may be) for re-consideration.
- (c) Determine that the called-in decision is one which is contrary to the policy framework or to the budget; in this instance the called-in decision will be referred to Full Council for consideration. Decisions referred for further consideration remain suspended until redetermined.

Call-in should not be used on a subject that has previously been considered by OSC.

Sections 13 to 17 of the OSC Constitution give more detailed information and guidance on the call-in process at Cherwell.

1. Process of appointing Chairman and Vice-Chairman

A separate meeting of the Overview and Scrutiny Committee will be scheduled as soon as possible after annual council, when Committee appointments have been approved, to allow Committee members to make their case for being appointed Chairman and vice-Chairman.

Prior to the meeting, those wishing to stand for Chairman/vice-Chairman will have an opportunity address fellow committee members, explaining their reasoning for being considered for the role(s). The expectation is that an informal session will take place shortly before the formal Committee meeting to facilitate discussions between members who wish to be considered for the role of Chair and vice chair.

The Chairman of OSC has a responsibility for establishing the profile of the committee, its influence across the council and its ways of working, as well as ensuring that the scrutiny process is managed in a fair and balanced environment, is free from political point scoring and allows for effective scrutiny of all issues presented for consideration. Members putting themselves forward for the role may wish to use these points as guidance for the basis of their discussions with the committee.

Committee members will have the opportunity to ask questions of the prospective chairs and vice-chairs before the formal meeting.

The appointment of Chairman will take place at the formal meeting in the usual way.

The Monitoring Officer or his representative will call for nominations to the position of Chairman of the Committee, with seconders as appropriate. Voting will take place for each nominated candidate, via a show of hands, in line with section 4, paragraph.

4.24 of the Constitution, with steps repeated as necessary until one candidate is successful.

The newly appointed Chairman will then take the chair, and preside over the appointment of the vice-Chairman, which will follow the same process.

Once the vice-Chairman has been appointed, the meeting will be brought to a close.

Note – those wishing to stand as Chairman/vice-Chairman will be expected to attend in person. If a prospective Chairman or vice-Chairman is unable to attend the meeting, the Monitoring Officer may use their discretion to determine whether or not a nomination can be made in the members' absence on their behalf.

2. Allocation of resources/committee time

The Chairman and Vice-Chairman of the Committee will be responsible for allocating the Committee's time to each work programme item, to ensure the best approach to each subject.

There are six formal committee meetings scheduled throughout the year. In addition, OSC can appoint working groups to carry out detailed research and enquiries on behalf of the formal Committee (as detailed in Constitution section 4a).

Initial subjects for consideration will be taken from the Committee via a work programme planning session, with committee members given the opportunity to request subjects for inclusion on the annual work programme.

An important document the Committee may wish to refer to during the planning session is the Executive Forward Plan (also known as the Executive work programme), the statutory document that is published on a monthly basis covering a rolling four-month period. More detailed information on the requirements of the Forward Plan can be found in section 6 of the Constitution, paragraph 6.1.

OSC may find it useful to refer to the latest version of the Forward Plan during the work programme planning session, to consider upcoming items for the Executive and whether they would benefit from detailed discussion by OSC.

After the planning session, the Chairman and vice-Chairman will meet with officers from the Democratic and Elections Team to propose which subjects will be taken forward for the formal work programme and what style of scrutiny (from the options below) would best suit each subject. The proposed work programme will be presented to OSC at the next meeting, for discussion and approval.

As well as being responsible for scrutinising services provided or commissioned by the Council, and external agencies it reviews the overall work programme ensuring that work is timely, adds value and does not duplicate activity already underway or undertaken by external regulators. The working group scoping document ensures that the key questions that members want to address are listed.

How do Committees choose what to scrutinise?

Scrutiny is a member led process, and topics are usually identified by members acting in their capacity as democratic representatives of the community. Additionally,

suggestions can be made by officers, partner organisations or the public. Effective scrutiny requires a balanced work programme, which examines the most important challenges facing the district and responds to the concerns of residents.

It is important to remember that scrutiny is a member-led process, and it is the responsibility of the chairman and their committee to determine what is scrutinised and when.

Appendix A explains some of the key factors in determining whether an issue should be scrutinised.

Here are a few key points to remember when choosing subjects to scrutinise:

- It is not possible to scrutinise everything that might be suggested by other councillors, officers, or the community. Therefore, a rigorous approach is taken to choosing which topics are scrutinised.
- Increasingly, OSC is thinking about the work of commissioned organisations and the monitoring other public bodies, and how its activities will engage partner organisations.
- The Committees have to be realistic about what can effectively be scrutinised and needs to be prepared to say 'No' to some suggestions and be able to explain why they will not be scrutinised.
- It is also important to consider what the best method to deal with any given scrutiny topic is. The choice may depend on the nature of the activity and the capacity of members and Officers to conduct further topic groups within the suggested timeframe.

Further items can be added to the work programme during the year, with additional meetings between the Chairman, vice-Chairman and officers being scheduled, as necessary.

What methods are there to conducting scrutiny?

Effective scrutiny is creative. It uses a range of approaches depending on the issue being scrutinised. An important part of the work planning process is deciding on how a topic will be examined. Using the full range of methods open to it, scrutiny will be able to mix in-depth and searching inquiries with concise and effective reviews.

Here are some examples of different methods open to committee, some of which are discussed in more detail below:

- Whole committee scrutiny working groups.
- Single issue meetings
- Calling witnesses or experts to provide specific information to members at committee Site visits / observations
- Seminar
- Bulletins

Options regarding scrutiny reviews

Working Groups

Working groups involve a small number of councillors looking at an issue in great detail, in some cases over a day. This process is more time-consuming for councillors and officers than other scrutiny activities. Consequently, issues for topic groups are carefully prioritised. In order to make sure that the review is as effective as possible, it is vital that the scope of the review is well-defined.

For this reason, each review starts with the completion of a scoping template (see appendix B) which outlines the key questions, outcomes and constraints, time-scale, key sources of information and principal witnesses.

At its meeting, the working group will hear from a range of witnesses and the lead officer. Depending on the topic this may include expert witnesses and stakeholders, service users, managers and the relevant executive member/s. Councillor questioning skills are a significant element of the scrutiny and the quality of the questions is instrumental to achieving clear outcomes and strong recommendations. A short report containing the recommendations and the evidence to substantiate those recommendations is made publicly available. The relevant Executive member is required to respond to the report and its recommendations within two months. Six months following the scrutiny, the OSC will monitor implementation of the recommendations.

Single item on a committee agenda

This may offer limited opportunity for effective scrutiny but may be appropriate for some issues or where the committee wants to maintain a formal watching brief over a given issue.

At a single meeting - 'scrutiny day' or 'challenge panel'

Either a formal committee meeting or an informal working group or briefing session. This could provide an opportunity to have a single public meeting about a given subject, or to have a meeting at which evidence is taken from a number of appropriate officers or subject matter experts.

At a task and finish review of two or three meetings - 'light touch' review

A shorter scrutiny review may be most effective even for complex subjects. Properly planned and focused, they allow members to swiftly reach conclusions and make recommendations, over a short time period such as a couple of months.

Via a longer-term task and finish review - 'full length' review

The 'traditional' task and finish model, with multiple meetings spread over a number of months, is appropriate when scrutiny needs to dig into a complex topic in

significant detail. This may be suited to the most complex subjects, due to the length of time and wider resource implications for a long review.

By establishing a ‘standing panel’

If Committee feel they need to keep a watching brief over a particular issue, meeting regularly to carry out detailed oversight, this may be the best approach.

What is the best way to make sure our recommendations are implemented?

A scrutiny will conclude by making recommendations to decision-making bodies, such as the Council’s Executive.

The following tips can help ensure that scrutiny recommendations are implemented:

- Recommendations that are short, achievable and few in number
- Recommendations exert most influence if they are based on logical argument drawing on evidence gathered over the course of a review.
- Ensure those responsible for implementing recommendations are aware of what the topic group is proposing and can suggest modifications to wording if that is going to make it more likely that the recommendation will be implemented.
- Recommendations will be written and presented clearly by the working group as part of its final report. Executive, via the appropriate Executive member, will provide a response to all recommendations explaining the reasons for accepting or not accepting any of the recommendations.
- Implementation of recommendations will then be monitored.

How are recommendations monitored?

Six months after a review has made recommendations, progress on the implementation of those recommendations will be reported to OSC. The format of the monitoring may differ from subject to subject, but may include:

- A table listing each recommendation with a ‘progress’ column.
- A written report from relevant Executive member/officer
- A presentation

OSC may wish to evaluate and assess the impact of their previous recommendations, referring back to the initial scoping document and compiling a brief evaluation summary for publication.

3. Co-opting of external people to assist with specific reviews

The constitution allows co-option of external people to assist with specific scrutiny reviews (section 4a, paragraph 6.9). Such co-options can be made to the formal OSC; however, it is more likely that committee will want to appoint short term co-optees to informal task and finish groups that are established for specific reviews.

Once a task and finish group has decided to co-opt members, the following steps should be followed.

Advertisement of the co-option opportunity, summarising:

- the subject under review
- an indicative timeframe for the whole review
- an estimate as to the number of meetings that the co-optees will be expected to attend.
- The format and anticipated location of the meetings, i.e., online via MS Teams, in person at Council offices, or a hybrid approach
- How interested parties should make their application, i.e., via a CV and covering letter, email, or application form.
- The deadline for applications/expressions of interest

Members of the task and finish group will consider expressions of interest received, creating a short list for interview. Shortlisted candidates will be invited to attend a meeting, and the task and finish group will decide who to appoint.

The task and finish group will reserve the right to not appoint any co-optees following interview.

Any appointments made will be for a specified time period, likely to coincide with the estimated timeframe for the full review.

Once the recruitment process has completed, meetings of the task and finish group will take place in line with the process detailed at paragraph 6.6 of the Constitution.

4. Role Profiles

The role profiles shown below highlight the key elements of each role within OSC, to inform members ahead of their involvement with the Committee. They are not exhaustive or prescriptive and are for guidance only.

OSC Chairman

The OSC Chairman (or vice-Chairman in their absence) may be required to:

- Chair the formal Committee meetings.
- Provide leadership and direction to the Committee.
- Lead the committee in prioritising its work so as to ensure effective scrutiny.
- Encourage all members of the Committee to engage with the scrutiny process.
- Develop a constructive relationship with Executive.
- Develop a constructive relationship with the Corporate Leadership Team
- Meet with officers as required to receive agenda briefings, plan scrutiny reviews (as detailed in section 2 above) and to discuss possible future additions to the work programme, i.e. from the Executive Forward Plan.
- Where the Committee has been asked to provide comments or feedback to a decision maker, i.e., Executive or Full Council, the Chairman will be expected.

to attend the relevant meeting to provide feedback on behalf of the Committee.

- Be prepared to brief their wider political party or group on the business to be considered by the Committee.

OSC Vice-Chairman

The OSC Vice-Chairman will be expected to deputise for the Chairman should they be absent or unavailable. The vice-Chairman is to mirror the chair and act as advisor and second set of eyes over the Chairman role.

The Vice-Chairman can chair in full or parts of a committee meeting as determined by the Chairman.

Where officer meetings/agenda briefings are arranged, the Vice-Chairman will be invited as a matter of course.

The Vice-Chairman should ensure they are familiar with the Chairman role profile above.

OSC Committee member

OSC Committee members are encouraged to:

- Assist with the development of an effective work programme during work programme planning sessions.
- Engage with all stages of the scrutiny process.
- Participate in scrutiny in an impartial manner.
- Analyse and if necessary, challenge information presented to the Committee.
- Read agendas in advance of formal Committee and submit questions to officers in advance, to assist them with their pre-meeting preparation.
- Make recommendations based on the Committee's deliberations.
- Conduct independent research/reading outside formal committee meetings if required.
- Brief their wider political party or group on the business to be considered by the Committee.
- Act as a point of contact for members of the public, external organisations, and other members.

Working Group members

If OSC decide to establish a working group to review a particular subject, any member from across the council can be appointed to sit on that group.

Executive Members are not allowed to sit on OSC or take part in formulating recommendations, however they can contribute to reviews in their capacity as Portfolio Holders and provide useful background information.

If appointed to a working group, members may be required to:

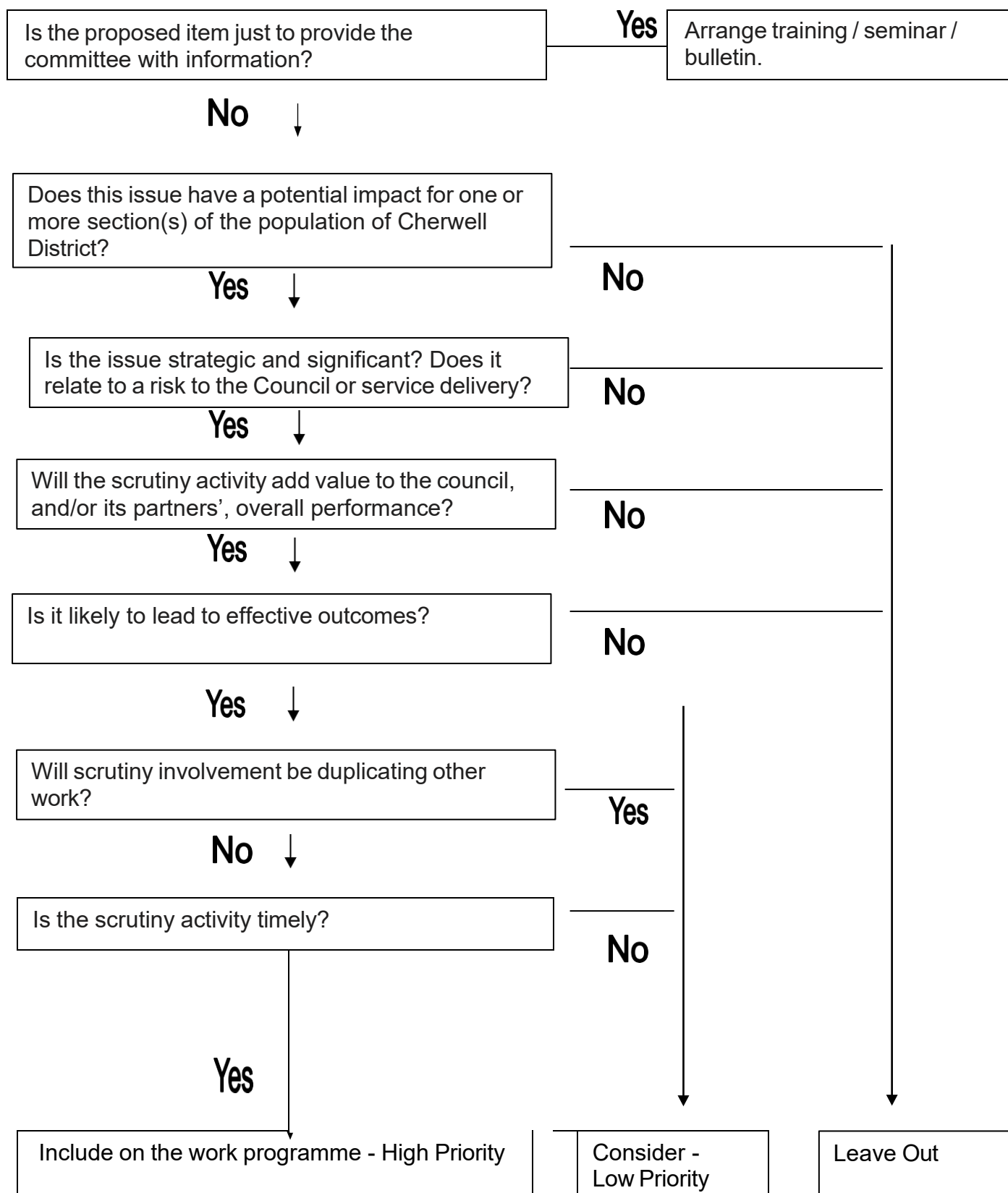
- Contribute to the scoping stage of a review, to help determine the best approach to the subject under review.
- Attend additional meetings to progress work in relation to the review (timetable to be determined by each working group).
Take responsibility for one or more areas of the agreed scope of the review, conducting independent research/reading/visits/discussions, as necessary.
- Contribute to the end of review report and recommendations and support the presentation to the full Committee at the conclusion of the review.

5. Further resources and reviewing and updating of this guide.

The Monitoring Officer and Democratic and Elections Team will periodically review this guide with the Chair and Vice Chair, gathering feedback from OSC as required, to ensure it remains up-to-date and appropriate.

In addition to this guide and the formal CDC Constitution, OSC members may wish to consult further resources, such as the LGA's Councillor Workbook on Scrutiny - <https://www.local.gov.uk/publications/councillors-workbook-scrutiny> (updated September 2023) which gives more detailed information about possible approaches to Scrutiny.

Criteria for selecting scrutiny topics.





TOPIC Review Group Scoping Document

This scoping template is designed to assist councillors and officers in establishing the focus of a scrutiny review group. It emphasises the need for scrutiny review groups to have a clear purpose, rationale and focus for their work, and to make the best use of the resources available within a given time frame.

This document will act as a reference guide throughout the review process to ensure the does not deviate from its intended purpose.

Review Group Overview & Scrutiny Committee Member Lead	<i>The name of the Member(s) suggesting the subject.</i>
Membership	<i>This would be the working group working on the review – not necessary at initial suggestion stage.</i>
Officer Support	<i>Anticipated officer involvement, e.g., departments with knowledge of the subject</i>
Background	<i>What has led to the subject being suggested for review</i>
Rationale	<i>What is the justification for the subject being suggested for review</i>
Indicators of Success	<i>Potential outcome of the review, e.g., a new policy being drafted, a new process being adopted etc.</i>
Out of Scope	<i>What will not be considered during the review</i>
Method / Approach	<i>A brief outline of how the review would be completed</i>
Guest speakers / Witnesses / Experts	<i>Brief outline of any specialists or experts who may be invited to take part in the review</i>
Evidence required and documents	<i>Brief outline of information</i>
Site Visits	<i>Subject to covid restrictions if any visits are anticipated.</i>
Risks	<i>Availability of councillors and officers to progress the work</i>

Projected Start Date		Draft Report Deadline	
Meeting Frequency		Projected Completion Date	

Approved by Overview & Scrutiny Committee	Date:
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Draft Outline of meetings

(Review Group members are reminded that they will be required to undertake evidence gathering and work outside of the meetings detailed below to ensure that the Review completion date is met)

Meeting 1 –
Meeting 2 –
Meeting 3 –
Meeting 4 –
Meeting 5 –

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