

### Local Government Overview Report – Supplement – Feedback from Elected Member Workshop

Issue	No action needed	No but action in hand	Yes in place but needs improving	Yes in place and working well	Not applicable	Officer Comments/Observations	Issues/Actions (if any)
<b>Skills and expertise (paragraphs 97 to 99)</b>							
<ul style="list-style-type: none"> <li>Councillors review and update their own training needs and identify areas where they require further training.</li> </ul>			√			Each Councillor has a Personal Development Plan which is updated regularly. Councillors are offered a review meeting after 12 months however there is limited take up of this.	<p><b>Discussion</b> At the start of each term of office, each councillor has a meeting with the Organisation Development (OD) team to discuss training / development needs. Attendance at training / briefing sessions is used to update the individual training records. Councillors would welcome the opportunity for a further meeting with OD, perhaps mid-term.</p> <p><b>Action</b> Introduce annual reviews with OD which could help to identify any common themes and any issues where one-to-one training / support would be more suitable. Prepare an annual report to Scrutiny and Audit summarising development activity and reporting attendance and participation in one-to-one's.</p>
<ul style="list-style-type: none"> <li>Councillors work together with officers to ensure the council provides or arranges relevant training for them in appropriate areas, including assessing financial and service performance.</li> </ul>			√			Training, briefings and workshops have been a feature of how Members and Officers have worked in Angus. Members may nevertheless have specific training requirements which have still to be addressed.	<p><b>Discussion</b> It would be helpful if notes / slides from training / briefing sessions could be made available after the event. Committee-specific training would be useful</p> <p><b>Action</b> Officers to be reminded to provide notes/slides from training events to members, preferably electronically.</p>
<ul style="list-style-type: none"> <li>Councillors ensure they get support from officers when they identify gaps in knowledge and understanding.</li> </ul>			√			Members to advise	<p><b>Discussion</b> Officers are always helpful when approached for support / advice. Limited opportunity for vice convenors to gain experience in chairing meetings. At present, a vice-convenor can only chair a meeting if the convenor is absent. There is no opportunity for them to chair topics which are of specific interest to them.</p> <p>A huge amount of information is provided at induction training. This can be overwhelming, especially for new councillors. New councillors don't know what they don't know at the start – a mid-term review with OD would help to ensure any gaps are addressed.</p> <p>There is a role for officers in helping members to identify gaps in knowledge. Generally, training is good, but should be a regular review.</p> <p><b>Action</b> Members and officers reminded to identify training needs/opportunities and to make good use of informal briefings, etc. to explain complex issues. Annual reviews with members and OD adopted to identify training needs/knowledge gaps. Prepare an annual report to Scrutiny and Audit summarising development activity and reporting attendance and participation in one-to-one's</p>

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<b>Financial and performance information (paragraphs 90 to 96)</b>							
<ul style="list-style-type: none"> <li>Officers are working to improve the way they report financial and performance information to councillors to make it clearer and easier to understand.</li> </ul>					√	Reporting of financial performance information is well established and covers revenue, capital and special funds and a specific outturn report is prepared at the year-end rather than relying only on the Accounts. Members views on the clarity and adequacy of current arrangements are invited	<p><b>Discussion</b> Generally working well and members receive the financial information they require to make decisions (although there are some issues of accessibility with tables in reports). When reports are produced they contain a large amount of information (including financial information) which it was felt can prove daunting for some members.</p> <p><b>Actions:</b> Presentation of some financial reports – typeface is small – could it be enlarged</p> <p>Condense information in reports to make them easier to understand, and consider producing a summary sheet for financial information.</p>
<ul style="list-style-type: none"> <li>Officers provide councillors with relevant, up to date performance data, including benchmarking the council's performance with other relevant organisations or services.</li> </ul>			√			Provided in part through Directorate Annual Reports and other publications but there is room for improvement in ensuring members have a full and rounded picture of the performance of services	<p><b>Discussion</b> There's a feeling that we don't do enough benchmarking although members were aware of some areas where this does take place e.g. through Local Government Benchmarking Framework (LGBF)</p> <p><b>Action</b> Annual report – report on exceptions, information to members about where we're not doing so well</p> <p>Provide benchmarking information for these reports which will provide information on other local authorities where performance is</p>
<ul style="list-style-type: none"> <li>Officers report performance information to the public in a way that helps them understand the council's performance.</li> </ul>				√		Angus Council has been recognised by Audit Scotland as one of the best performers for public performance reporting but further improvements are still planned	<p><b>Discussion</b> This works well and there's a range of information provided to the public</p> <p><b>Action</b> None</p>
<ul style="list-style-type: none"> <li>Officers make councillors aware of future funding gaps and provide them with information to help make decisions on how to close the gaps.</li> </ul>			√			We have a rolling 4 year Medium Term Financial Strategy which identifies future funding gaps and considers high level plans on how these might be addressed	<p><b>Discussion</b> There was discussion around a recent issue in which the members felt that financial information concerning a specific service within People directorate was presented late in the day – if it had been presented earlier different decisions could have been made e.g. one social enterprise could be established rather than the two/three proposed</p> <p><b>Action</b> There's a need to ensure relevant financial information is made available to members in good time to allow them to make better informed decisions and also provide information on the likely impact of these decisions. Financial information also to be updated for any changes which subsequently arise.</p>

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<b>Financial and performance information (paragraphs 90 to 96) continued</b>							
<ul style="list-style-type: none"> <li>Officers make councillors aware of changes to the proportion of the council's budget that will be required to repay debt.</li> </ul>				√		Covered in budget reports including the prudential indicators report and the long term capital budget affordability report	<p><b>Discussion</b> Everyone happy with this indicator – no issues identified.</p> <p><b>Action</b> None</p>
<ul style="list-style-type: none"> <li>Officers make councillors aware of the financial impact of national and local policies (eg, taxes on land and buildings transactions, waste disposal to landfill and the implications of the Smith Commission agreement).</li> </ul>			√			The impact of national developments tends to be reported through the budget process or in up-dating the medium term financial strategy. For developments of a more immediate nature a specific report would normally be produced.	<p><b>Discussion</b> Members who sat on the PBSG reported that this information was made available to them but other members less clear on this.</p> <p><b>Action</b> When this information becomes available there's a need for it to be given/explained to members as soon as possible thereafter</p>

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<b>Using local data and working with communities (paragraphs 53 to 61)</b>							
<ul style="list-style-type: none"> <li>The council uses local socio-economic data and works in close co-operation with service users to understand their needs, explore ways of meeting them, and deliver the services.</li> </ul>				√		Use of data and consultation with service users is becoming more widespread particularly in service reviews and redesigns but members may consider that more needs to be done here	<p><b>Discussion</b> Charrettes will provide good feedback (assuming good representation from communities attending). There's an opportunity to review the information gathered during these events and share with the public – we then need to ensure that the public understand that they might not get everything they asked for – managing expectations.</p> <p><b>Action</b> None</p>
<ul style="list-style-type: none"> <li>Officers make councillors aware of population trends in the area and the implications for service demand and capital budgets.</li> </ul>				√		Picked up mainly through Directorate Improvement Plans and the budget setting process	<p><b>Discussion</b> This information is provided through Directorate Improvement Plans (DIP's), committee reports (with appropriate data). Demographic info widely available for a number of key services e.g. schools services for adults etc.</p> <p><b>Action</b> None</p>

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Issue	No action needed	No but action in hand	Yes in place but needs improving	Yes in place and working well	Not applicable	Officer Comments/Observations	Issues/Actions (if any)
<b>Service delivery options (paragraphs 62 to 68)</b>							
<ul style="list-style-type: none"> <li>The council is reviewing all practical options for delivering services in new ways to help save money and improve services. It is identifying the benefits and risks of each option and monitoring the impact of the option chosen, including the risks associated with change</li> </ul>			✓			<p>Service delivery options are being reviewed across the Council either as part of the Transforming Angus Programme or as part of Directorate Service Review Programmes. Benefits, risks, etc. are identified as part of that process</p>	<p><b>Discussion</b> Doing well here but still to see all the benefits coming through. Significant governance challenges here due to many workstreams. More could be done on shared services/cross border working and not just on back office type services. Still a need to promote and explain what we are doing and why in relation to service redesigns, etc. – for public and staff</p> <p><b>Action</b> Continue promotion of budget/financial challenges through press releases, etc. connected to budget setting and service review work ongoing during the year.</p> <p>Continue with existing plans for joint working, working with partners, etc.</p>
<ul style="list-style-type: none"> <li>Councillors are aware of what actions the council has taken so far to make savings and the extent of staff reductions to date, and the impact of these on service delivery.</li> </ul>				✓		<p>Covered in budget documentation which identifies financial saving as well as staff numbers impact, etc. Savings options are evaluated for their impact on the Single Outcome Agreement, equalities and service quality Workforce Planning is an integral part of the new Workforce Strategy being developed to ensure that we have a workforce of the right size with the right skills to allow us to meet service delivery requirements for the future</p>	<p><b>Discussion</b> Development of our workforce strategy and priority based budgeting should help improve this further but no major concerns</p> <p><b>Action</b> Nothing new – already actions underway</p>
<ul style="list-style-type: none"> <li>The council is investing in preventative approaches to help manage future demand for services</li> </ul>		✓				<p>This is part of our transformation programme</p>	<p><b>Discussion</b> Limited evidence but some areas of success e.g. early years collaborative. Need to plan and influence demographics – make communities more viable and resilient. Benefits realisation important part of change programmes so we know what works or doesn't. Need to focus on planning and economic development to build strong Angus economy.</p> <p><b>Action</b> Continue with existing plans and actions in this area</p>
<ul style="list-style-type: none"> <li>The council has a comprehensive workforce strategy to help plan and manage the impact of staff reductions</li> </ul>		✓				<p>A fully updated Workforce Strategy will come before Councillors in June 2015</p>	<p><b>Discussion</b> Position noted – Strategy imminent</p> <p><b>Action</b> None</p>

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<b>Financial planning (paragraphs 69 to 73)</b>							
<ul style="list-style-type: none"> <li>The council has financial plans for the short (1-2 years), medium (3-5 years) and long term (5- 10 years).</li> </ul>			✓			<p>Our budget financial planning has a 4-5 year horizon at present but we do have a 25 year planning horizon for capital budget affordability purposes. Officers will be looking at whether the benefits of having a longer term plan for budget purposes merits the allocation of resource to produce this given the scale of uncertainty with longer term plans</p>	<p><b>Discussion</b> No need for detail beyond 5 years – too uncertain but could look at big areas beyond 5 years e.g. demographics and potential impact on schools and other services.</p> <p>Long term plans required for large projects e.g. major road schemes. Need for flexibility in our planning.</p> <p><b>Action</b> Finance Officers to consider how current medium term financial planning could be refined to take longer term view in key areas.</p>
<ul style="list-style-type: none"> <li>The strategies set out financial commitments, identify problems with affordability of services and allow members to understand whether the financial position is sustainable over an extended period.</li> </ul>			✓			<p>Covered mainly through our medium term financial strategy and planning and this has been backed up by briefings and workshops for members to help explain the position in more detail</p>	<p><b>Discussion</b> Considered ok here but need to communicate and inform the public better on our financial challenges and what the Council can realistically provide in services and capital investment. Constituents still not appreciating the extent of Council's financial challenges</p> <p>Opportunity to brief prospective Community Councillors on the Council's financial challenges to increase awareness.</p> <p><b>Action</b> Continue promotion of budget/financial challenges through press releases, etc. connected to budget setting and service review work ongoing during the year.</p> <p>Arrange briefing for Community Councillors on Angus Council financial position and outlook.</p>
<ul style="list-style-type: none"> <li>The council's budget targets resources effectively at its priorities, including shared priorities identified with partners in the Single Outcome Agreement</li> </ul>			✓			<p>This is an area which requires improvement – its challenging to demonstrate that the whole of our budget has been allocated based on our priorities. Officers are looking at how this could be improved so we have a full priority based budget approach</p>	<p><b>Discussion</b> Priority Based Budgeting will help here. Cross border working needs to be improved as does our work with partners. Need to overcome some political barriers too.</p> <p><b>Action</b> Nothing new – continue with existing plans for joint working, working with partners, etc.</p>

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<b>Governance arrangements (paragraphs 74 to 89)</b>							
<ul style="list-style-type: none"> <li>The council reviews governance arrangements following significant changes in staff, management or political structures.</li> </ul>				✓		Governance issues were given specific attention as an area of risk in the 2012 Senior Management Restructure	<p><b>Discussion</b> It's important that there is a review after any significant change. This is accepted practice in Angus. Recent examples include the review of the current committee structure and the TA Scrutiny Panel review – both due to be reported later this month.</p> <p><b>Action</b> None</p>
<ul style="list-style-type: none"> <li>The council's senior management team has the skills and capacity to provide effective leadership and management of finances, services and improvement programmes.</li> </ul>				✓		The Senior Management Restructure was intended to deliver this. This is also subject to a separate scrutiny review	<p><b>Discussion</b> The council has a strong leadership team Scrutiny Panel review to be reported later this month</p> <p><b>Action</b> None</p>
<ul style="list-style-type: none"> <li>Councillors understand the role and statutory responsibilities of the S95 officer, the monitoring officer and the chief social work officer.</li> </ul>			✓			This was covered in part through member induction after the last election but members may wish further clarification here	<p><b>Discussion</b> Statutory Officer roles were covered at the induction training, but Members felt that an update or a briefing note would be useful.</p> <p>Perhaps information could be available on the intranet for reference.</p> <p><b>Action</b> Officers to consider how best to improve and maintain awareness of the role of statutory officers among members and senior officers</p>
<ul style="list-style-type: none"> <li>The scrutiny or audit committee has:               <ul style="list-style-type: none"> <li>a chair who is not a member of the political administration</li> <li>clear terms of reference</li> <li>adequate support and access to independent advice</li> <li>members who have the necessary skills and training.</li> </ul> </li> </ul>			✓			The Angus Council Scrutiny & Audit Committee is considered to comply with this best practice but members may feel further training or support is needed in specific areas	<p><b>Discussion</b> The change to the remit of the S&amp;A committee to add scrutiny panels was seen as a positive move. Scrutiny panels have been a learning experience for both members and officers</p> <p>Both Members and Officers who had been involved in Scrutiny Panels felt that this was a positive experience. The dynamic of a scrutiny panel is very different from other MOGs. Both convenor and vice are non-administration members</p> <p>There is good support for members of S&amp;A and training is available. Any individual training needs could be discussed at a mid-term review if necessary (see Skills &amp; Expertise feedback)</p> <p><b>Action</b> There needs to be a formal review / update of actions taken as a result of scrutiny panel work. The plan is to submit update reports to S&amp;A in August / Sept.</p>

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**Other Issues Raised at Workshop**

Through discussion members attending the workshop also raised a number of other points in relation to financial information as follows:-

- Different levels of understanding exist for members depending on which Committees they sit on. Some financial reports are difficult to grasp if members don't have regular dealings in that area.
- Suggestion that simple financial handbook be prepared along with a financial reporting calendar to help members understand how the various reports they get during the year fit together into an overall big picture.
- Suggestion that more detailed/complex financial reports include a summary of key points to assist members understanding and allow them to focus on the main issues
- Need for greater attention to customer care – Scrutiny & Audit Panel review area
- Need to consider models of service delivery – too much burgh focus - some gaps in rural areas