



**Corporate Services Policy and
Performance Board**

**Tuesday, 4 September 2007 6.30 p.m.
Civic Suite, Town Hall, Runcorn**

A handwritten signature in black ink that reads 'David WR'.

Chief Executive

BOARD MEMBERSHIP

Councillor Robert Gilligan (Chairman)	Labour
Councillor Alan Lowe (Vice- Chairman)	Labour
Councillor John Bradshaw	Conservative
Councillor Bob Bryant	Liberal Democrat
Councillor Mark Dennett	Labour
Councillor Susan Edge	Labour
Councillor Christopher Inch	Liberal Democrat
Councillor Kath Loftus	Labour
Councillor Paul Nolan	Labour
Councillor Ulfar Norddahl	Liberal Democrat
Councillor Kevan Wainwright	Labour

*Please contact Gill Ferguson on 0151 471 7395 or e-mail
gill.ferguson@halton.gov.uk for further information.
The next meeting of the Board is on Tuesday, 6 November 2007*

**ITEMS TO BE DEALT WITH
IN THE PRESENCE OF THE PRESS AND PUBLIC**

Part I

Item No.	Page No.
1. MINUTES	
2. DECLARATION OF INTEREST (INCLUDING PARTY WHIP DECLARATIONS)	
Members are reminded of their responsibility to declare any personal or personal and prejudicial interest which they have in any item of business on the agenda, no later than when that item is reached and (subject to certain exceptions in the Code of Conduct for Members) to leave the meeting prior to discussion and voting on the item.	
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In accordance with the Health and Safety at Work Act the Council is required to notify those attending meetings of the fire evacuation procedures. A copy has previously been circulated to Members and instructions are located in all rooms within the Civic block.

REPORT TO: Corporate Policy and Performance Board
DATE: 4th September 2007
REPORTING OFFICER: Chief Executive
SUBJECT: Public Question Time
WARD(s): Boroughwide

1.0 PURPOSE OF REPORT

- 1.1 To consider any questions submitted by the Public in accordance with Standing Order 33 (5).
- 1.2 Details of any questions received will be circulated at the meeting.

2.0 RECOMMENDED: That any questions received be dealt with.

3.0 SUPPORTING INFORMATION

- 3.1 Standing Order 34(11) states that Public Questions shall be dealt with as follows:-
- (i) A total of 30 minutes will be allocated for members of the public who are residents of the Borough, to ask questions at meetings of the Policy and Performance Boards.
 - (ii) Members of the public can ask questions on any matter relating to the agenda.
 - (iii) Members of the public can ask questions. Written notice of questions must be submitted by 4.00 pm on the day prior to the meeting. At any meeting no person/organisation may submit more than one question.
 - (iv) One supplementary question (relating to the original question) may be asked by the questioner which may or may not be answered at the meeting.
 - (v) The Chair or proper officer may reject a question if it:-
 - Is not about a matter for which the local authority has a responsibility or which affects the Borough;
 - Is defamatory, frivolous, offensive, abusive or racist;
 - Is substantially the same as a question which has been put at a meeting of the Council in the past six months; or
 - Requires the disclosure of confidential or exempt information.

- (vi) In the interests of natural justice, public questions cannot relate to a planning or licensing application or to any matter which is not dealt with in the public part of a meeting.
- (vii) The Chairperson will ask for people to indicate that they wish to ask a question.
- (viii) **PLEASE NOTE** that the maximum amount of time each questioner will be allowed is 3 minutes.
- (ix) If you do not receive a response at the meeting, a Council Officer will ask for your name and address and make sure that you receive a written response.

Please bear in mind that public question time lasts for a maximum of 30 minutes. To help in making the most of this opportunity to speak:-

- Please keep questions as concise as possible.
- Please do not repeat or make statements on earlier questions as this reduces the time available for other issues to be raised.
- Please note that public question time is not intended for debate – issues raised will be responded to either at the meeting or in writing at a later date.

4.0 POLICY IMPLICATIONS

None.

5.0 OTHER IMPLICATIONS

None.

6.0 RISK ANALYSIS

None.

7.0 EQUALITY AND DIVERSITY ISSUES

None.

8.0 LIST OF BACKGROUND PAPERS UNDER SECTION 100D OF THE LOCAL GOVERNMENT ACT 1972

There are no background papers under the meaning of the Act.

REPORT TO: Corporate Policy and Performance Board
DATE: 4th September 2007
REPORTING OFFICER: Chief Executive
SUBJECT: Executive Board and Executive Sub Minutes
WARD(s): Boroughwide

1.0 PURPOSE OF REPORT

- 1.1 The Minutes relating to the Corporate Portfolio which have been considered by the Executive Board and Executive Sub since the last meeting of this Board are attached at Appendix 1 (link) for information.
- 1.2 The Minutes are submitted to update the Policy and Performance Board of decisions taken in their area.

2.0 RECOMMENDED: That the Minutes be noted.

3.0 POLICY IMPLICATIONS

None.

4.0 OTHER IMPLICATIONS

None.

5.0 RISK ANALYSIS

None.

6.0 EQUALITY AND DIVERSITY ISSUES

None.

7.0 LIST OF BACKGROUND PAPERS UNDER SECTION 100D OF THE LOCAL GOVERNMENT ACT 1972

There are no background papers under the meaning of the Act.

EXECUTIVE BOARD – 6TH JUNE 2007

**EXB2 AUDIT COMMISSION AUDIT AND INSPECTION PLAN FOR
HALTON BOROUGH COUNCIL 2007-08**

The Board received a presentation from Mr. J. Farmer and Ms. C. Williams on the Council's Audit and Inspection Plan 2007/2008: a copy of the Audit was included with the agenda.

In particular, the Board noted the "Initial Risk Assessment – Use of Resources" outlined at Appendix 1 of the report. This assessment gave a view of where the Council was at the moment, possible risks, mitigating action taken by the Council to minimise these risks and any subsequent actions required by the auditor. Ms Williams confirmed that a lot of mitigating action was already in place, indicating that the Council was a self-aware organisation.

In addition, the Board considered the following points:

- funding streams, which were coming to an end beyond the local authority's control;
- health inequalities and the need to take into account that, in the transition to Comprehensive Area Assessment (CAA), this was a responsibility for organisations across the area;
- fees for joint projects and how these were to be calculated, ie based on the size of the audit fee, linked to expenditure, but excluding Comprehensive Performance Assessment (CPA);
- the ability to engage nationally with the Department of Health and Government Office in order to address the issue of targets that were based on managing illness rather than prevention; and
- partnership work undertaken in Manchester, which had had demonstrable benefits for that area with the outcomes recognised nationally.

The Chairman thanked Mr. Farmer and Miss Williams for attending the meeting.

EXB3 CPA 2007 TO CAA 2009

The Board considered a report of the Strategic Director – Corporate and Policy providing a summary of the Audit Commission's Consultation on the move from the

current Comprehensive Performance Assessment regime (CPA) to the new Comprehensive Area Assessment (CAS) in 2009.

The consultation detailed the draft service assessment framework for the Environment, Housing in the Community, and the Culture Service Blocks in CPA 2007. It was apparent that a number of the Performance Indicators that were proposed for introduction or amendment for CPA 2007 would now not be included or amended.

The appendices to the report gave:

- (1) a summary of arrangements for the assessment of CPA 2007 and consultation questions;
- (2) a summary of the approach to CPA assessment for the transitional year 2008/09 and consultation questions;
- (3) a summary of principles for developing CAA to commence April 2009; and
- (4) CPA 2007 critical indicators update.

The Board was advised that the consultation closed on 14th June 2007. The Audit Commission stated that it believed CPA still had an important part to play in continuing to support improvement and the last set of CPA results would aid in making the first set of new CAA judgements in 2009/10.

RESOLVED: That the Council's response to the Audit Commission's Consultation be based on the suggestions in Annexes 1 – 3 of the report.

EXB4 FUTURE OF HALTON LEA POST OFFICE

The Board considered a report of the Strategic Director – Corporate and Policy regarding the consultation exercise being undertaken by the Post Office on the future arrangements for the provision of Post Office Services in Halton Lea Shopping Centre. The proposal was to transfer the existing Post Office Services from the existing location at 88 Forest Walk to the branch of WH Smith within Halton Lea. Attached as Appendix 1 to the report was a copy of a letter received from the National Consultation Manager from Post Office Limited which provided more details of the proposals.

The Urban Renewal Policy and Performance Board (PPB) had invited representatives from the Post Office to its next meeting on 20th June 2007 to provide more details on

the proposed changes. Unfortunately, this would be after the date set by the Post Office for the receipt of comments: the deadline was 14th June 2007.

RESOLVED: That the Council:

- (1) submits an interim objection to the new arrangements until the meeting of the Urban Renewal PPB takes place;
- (2) requests to see the proposed layout of the new facilities; and
- (3) authorises the Strategic Director – Corporate and Policy, in consultation with the Executive Board Member for Corporate Services, to make further comments after the meeting of the Urban Renewal PPB.

Strategic Director
- Corporate and
Policy

EXB5 PROPOSALS FOR FUTURE UNITARY STRUCTURES IN CHESHIRE

The Board considered a report of the Strategic Director - Corporate and Policy outlining the current consultation exercise being undertaken by the Department for Communities and Local Government (DCLG) in relation to proposals for new Unitary Structures in England.

In January 2007, the Government received 26 proposals from Councils wishing to move to a single tier of local government. All proposals were assessed against criteria that the government had set out and the Secretary of State had decided that sixteen should proceed to consultation. Two of those proposals affected the neighbouring Cheshire and the Secretary of State was consulting stakeholders on the following two structures:

- a single unitary Council based on the boundary of the existing County Council; and
- two unitary authorities made up from the existing district boundaries as follows:
 - (i) Chester, Ellesmere Port and Neston, and Vale Royal; and
 - (ii) Macclesfield, Congleton and Crewe.

Support for each of these options was outlined for the Board's consideration, as were the issues for Halton. In

particular, Members noted that the granting of Unitary Status for Halton in 1996 had had a major positive impact on the Borough. In addition, the impact of each of the proposed changes on the sub-regional and regional structures in the North West was taken into account.

RESOLVED: That

- (1) the move to Unitary Status in Cheshire be supported on the basis of the clear benefits it had brought to Halton since 1998;
- (2) the two Unitary option be supported, given that it will enhance sub-regional working arrangements in the Liverpool City Region and the North West; and
- (3) all Cheshire Local Authorities, Merseyside Local Authorities, local MPs and the DCLG be informed of this decision.

Strategic Director
- Corporate and
Policy

EXB6 LOCAL AREA AGREEMENTS

The Board considered a report of the Strategic Director – Corporate and Policy seeking formal approval to the final Local Area Agreement (LAA) document signed by Ministers, and alerting Members to some of the considerations of how Government intended to develop LAA's as a policy tool.

It was noted that a LAA was a three-year protocol that set out the priorities for a local area. This had to be agreed between central Government and the area itself, as represented by the lead local authority and other key partners through local strategic partnership.

At its meeting in December, the Executive Board had endorsed the final draft local agreement for Halton and its formal submission to Government. Following its submission, a number of comments were received from officials at Government Office North West (GONW): the LAA had been considered largely fit for purpose and the substantive comments made were outlined for the Board's consideration.

The Halton LAA, which included the changes outlined, had been signed off by Ministers the previous month and was now operational. The formal Grant Determination letter had been received setting out the special funding from Government in support of the LAA for 2007/08. This was in line with the expectations set out in the

financial table of the LAA.

Implications of the Local Government White Paper “Strong and Prosperous Communities”, and the impact on LAAs, were outlined for the Board’s information. Funding implications were also considered together with an indicative timetable for 2007/08. The Government had informed the Council that new model LAAs would need to be ready by June 2008.

RESOLVED: That

- (1) the final agreement agreed with Government be adopted; and
- (2) the emerging requirements for “new model” LAAs contained in the Local Government Bill be noted.

EXECUTIVE BOARD SUB COMMITTEE – 7TH JUNE 2007

**ES3 TREASURY MANAGEMENT 2006/07 4TH QUARTER:
JANUARY TO MARCH**

The Sub-Committee considered a report which reviewed activities in Treasury Management for 4th Quarter 2006/07.

It was noted that all policy guidelines including the prudential indicators had been complied with.

RESOLVED: That the report be noted.

ES4 CAPITAL RECEIPTS DETERMINATION

Since the introduction of the Local Government & Housing Act 1989, Local Authorities had not been able to spend 100% of their capital receipts received each year.

The legislation required that some of the receipt was set aside to be used to be transferred to central government under pooling arrangements.

The calculation for Halton for 2006/07 was detailed in the report. The minimum percentages had been set aside, as this left a maximum amount available to help finance the authority’s capital programme.

RESOLVED: That the figures outlined in the report be set aside from the capital receipts for 2006/07.

Strategic Director
– Corporate and

EXECUTIVE BOARD SUB COMMITTEE – 21 JUNE 07**CORPORATE SERVICES PORTFOLIO**

ES7 DISCRETIONARY NON-DOMESTIC RATE RELIEF

Under the provisions of Section 47 of the Local Government Finance Act 1988, the Authority was allowed to grant Discretionary Rate Relief to organisations who were either a charity or a non-profit-making organisation.

The Sub-Committee considered a report which set out details of an application for Discretionary Non-Domestic Rate Relief from Runcorn War Memorial Club Limited.

The Club was not a profit organisation but was not a registered charity and consequently did not qualify for mandatory rate relief. The application was in respect of Discretionary Rate Relief only. Runcorn Golf Club Limited have previously been granted 10% in Discretionary Rate Relief in respect of the premises at Clifton Road.

RESOLVED: That

(1) under the provisions of Section 47, Local Government Finance Act 1988, Discretionary Rate Relief be granted to the following organisation at the percentage indicated, for the period 1st April 2007 or the commencement of liability, whichever is the latter, to 31st March 2009;

Runcorn War Memorial Club Limited 10%

(2) in respect of the following organisation, it was also recommended that they should be granted Discretionary Rate Relief for the backdated element of the charge:

Runcorn War Memorial Club Limited 10%

(from 1st April 2006)

ES8 SMOKE-FREE WORKPLACE POLICY

The Sub-Committee considered a copy of the Council's revised smoking policy to comply with the smoke-free workplace legislation coming into effect on 1st July 2007.

The Council had a statutory duty to comply with the

introduction of the provisions of the Health Act 2006 by ensuring all premises were smoke-free if they were used as places of work, including vehicles, from 1st July 2007. Discussions had been taking place with the Trades Unions around the details of how such a policy should be implemented. Whilst the Trade Unions supported the long-term objectives, they had preferred a phased approach to the implementation of some of the provisions in the policy.

In view of the position, and given the key leadership role this council had taken in health issues over many years, it was recommended that the policy be brought in from 1st July 2007.

This would mean that employees would no longer be able to smoke or take smoking breaks within working hours and that smoking would not be permitted within the curtilage of Council owned buildings.

It was recognised that arrangements were being put in place to ensure that any existing smokers who wished to stop would be provided with help to do so. The PCT were providing financial support and putting arrangements in place to support cessation for the community. Employees would be signposted to these opportunities.

Arising from the discussion it was suggested that

- emphasis be placed on the policy applying to employees of the Council in their working hours only and not members of the public;
- the need to provide additional receptacles be reviewed after 1st July 2007; and
- the quality and design of no smoking signs needed to be considered.

Strategic Director
Corporate and
Policy

RESOLVED: That the policy document be approved and adopted.

ES9 2006/07 FINANCIAL OUTTURN

The Sub-Committee considered a report summarising the final revenue and capital spending position for each department for 2006/07. In overall terms, the revenue underspending of £765,000 had confirmed previous projections highlighted in the quarterly performance management reports. The Council's general balances now stood at £7,110,000.

Within the overall underspend, there had been a few

significant variances which were outlined in the report.

It was reported that the Housing Revenue Account had now been formally closed following the housing stock transfer on 5th December 2005 and the resolution of all residual issues and final subsidy claims. The remaining surplus had reverted back to the general fund and had been used to create an investor save.

Capital spending totalled £29.2m which was £1.97m below the revised capital programme. This represented over 93% delivery of the revised capital programme, with the only significant areas of slippage being on housing shared appreciation loans and the major schemes that Widnes Waterfront and 3MG which by their nature and large amount of external partner involvement were particularly difficult to manage.

In respect of school balances, these had reduced to 6.9m. This was made up from balances from individual school budgets (4.2m), standards fund (2.4m) and devolved capital (0.3m). It represented an overall reduction in school balances of 0.8m from the previous year. In addition, there were 1.7m unspent Standards Fund Grant held by Education centrally, which along with the unspent school standards fund grant, must all be spent by 31st August 2007.

Arising from the discussion it was suggested that the Corporate Services Policy and Performance Board be requested to consider developing a business plan for Halton's Markets' which could be submitted to a relevant Committee for approval.

RESOLVED: That the report be noted.

EXECUTIVE BOARD SUB COMMITTEE – 19 JULY 07

CORPORATE SERVICES PORTFOLIO

ES17 TREASURY MANAGEMENT - 1ST QUARTER

The Sub-Committee considered a report which reviewed activities and Treasury Management for the 1st quarter of 2007/08.

It was noted that all policy guidelines including the prudential indicators had been complied with.

RESOLVED: That the report be noted.

ES18 DISCRETIONARY NON-DOMESTIC RATE RELIEF

Under the provisions of Section 47 of the Local Government Finance Act, 1988, the Authority was allowed to grant Discretionary Rate Relief to organisations who were either a charity or a non-profit making organisation.

The Sub-Committee considered a report which set out details of an application for Discretionary Non-Domestic Rate Relief for CLS Care Services Limited.

RESOLVED: That:

(1) under the provisions of Section 47, Local Government Finance Act, 1988, the following application for Discretionary Rate Relief be refused:

CLS Care Services Limited	20%
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SCHEDULE 12A OF THE LOCAL GOVERNMENT ACT 1972 AND THE LOCAL GOVERNMENT (ACCESS TO INFORMATION) ACT 1985

The Committee considered:

- (1) whether Members of the press and public should be excluded from the meeting of the Committee during consideration of the following items of business in accordance with Sub-Section 4 of Section 100A of the Local Government Act 1972 because it was likely that, in view of the nature of the business to be considered, exempt information would be disclosed, being information defined in Section 100 (1) and paragraph 3 of Schedule 12A of the Local Government Act 1972; and
- (2) whether the disclosure of information was in the public interest, whether any relevant exemptions were applicable and whether, when applying the public interest test and exemptions, the public interest in maintaining the exemption outweighed that in disclosing the information.

RESOLVED: That as, in all the circumstances of the case, the public interest in maintaining the exemption outweighs the public interest in disclosing the information, members of the press and public be excluded from the meeting during consideration of the following items of

business in accordance with Sub-Section 4 of Section 100A of the Local Government Act 1972 because it is likely that, in view of the nature of the business, exempt information will be disclosed, being information defined in Section 100 (1) and paragraph 3 of Schedule 12A of the Local Government Act 1972.

CORPORATE SERVICES PORTFOLIO

ES20 DISPOSAL OF THE LEASEHOLD INTEREST IN THE HALTON BUSINESS FORUM (FORMERLY WIDNES TOWN HALL), VICTORIA SQUARE, WIDNES

The Sub-Committee considered a report which sought approval to grant a 150 year lease of the Halton Business forum, Victoria Square, Widnes to Bridge Leisure Limited. The timetable for completion of the lease was proposed by late autumn and ready for opening Summer 2008

RESOLVED:

- (1) Approval be granted to enter into single tender negotiations with Bridge Leisure Limited; and
- (2) Approval be granted to enter into a 150 year lease subject to all other terms being approved by the Strategic Director Corporate and Policy and Council Solicitor in conjunction with the appropriate portfolio holder.

REPORT TO: Corporate Services PPB

DATE: 4th September 2007

REPORTING OFFICER: Strategic Director Environment

SUBJECT: Local Authority Carbon Management Programme (LACMP)

WARDS: Borough-wide

1. PURPOSE OF THE REPORT

To outline the process for taking forward the Council's involvement in the Carbon Management Programme.

2. RECOMMENDED That:

- (1) the Carbon Management Project Plan be endorsed;**
- (2) Quarterly reports on progress be submitted**
- (3) On completion of the Action Plan annual reports on progress be issued.**

3. SUPPORTING INFORMATION

Earlier in the year, the Council applied and was accepted on to the Carbon Trust's Local Authority Carbon Management Programme (LACMP). The programme will guide the Council through

- i. a systematic analysis of its carbon footprint;
- ii. calculate the value at stake and present a case for taking action;
- iii. set opportunities to help manage carbon emissions;
- iv. develop Action Plans for realising carbon and financial savings; and
- v. embed carbon management into the authority's day to day business.

The final step in the process is the development of a Carbon Management Strategy and Implementation Plan by March 2008 to reduce energy bills and carbon emissions over the next five years.

In signing up to the programme, the Council had committed to specific terms and conditions including:

- i. to work with the Carbon Trust to develop a robust strategy to reduce and manage carbon emissions;
- ii. to use reasonable endeavours to carry out Carbon Trust recommendations compatible with operational/business constraints and budget requirements;
- iii. nominate appropriate staff to assist with the development of the Plan;
- iv. give access to premises and data to the Carbon Trust; and
- v. inform the Carbon Trust of the reasons for not implementing the recommended measures.

LACMP NEXT STEPS

The initial step in the process is for the Council to develop a Project Plan which sets out:

- what the Council wants to get out of the programme
- who needs to be involved
- what the project will cover
- activities in the 11 month programme and when these will be completed by

The Project Plan was agreed by the Executive Board and the Carbon Trust in July 2007

A copy of the Project Plan is attached which identifies the scope of the review, opportunities to be explored and the core group established to progress the programme. The Strategic Director Environment and the Executive Board Portfolio Holder Environment, Leisure & Sport and respective Officer & Member Leads for the Project will monitor progress against the planned target.

The Project Plan sets a target of reducing the Council's carbon emissions by 33% by 2012. This is an ambitious target and if it is to be achieved will likely require some financial investment over the five year period. As the programme progresses, the Project Team will identify and quantify opportunities for reducing carbon (see Section 3.3) and these opportunities will be assessed for feasibility and a cost and benefit analysis will be undertaken to assess which offer the best opportunities in terms of payback for the Council. Over the five year period of the Strategy and Implementation Plan the Council will need to encourage closer examination of its policies such as procurement, transport and renewal energy.

4. POLICY IMPLICATIONS

The development of a Carbon Management Strategy fits with the Council's commitment to Climate Change through the Nottingham Declaration and NW Charter and its commitments for sustainable development in the Corporate Plan. The programme will enable the Council to take specific actions to deliver on these commitments.

5. OTHER IMPLICATIONS

The development of the Action Plan should lead to long term cost savings for the authority.

6. IMPLICATIONS FOR THE COUNCIL'S PRIORITIES

6.1 Children and Young People in Halton

Not applicable.

6.2 Employment, Learning and Skills in Halton

Not applicable.

6.3 A Healthy Halton

Not applicable.

6.4 A Safer Halton

Not applicable.

6.5 Halton's Urban Renewal

Not applicable.

7. RISK ANALYSIS

Not applicable.

8. EQUALITY AND DIVERSITY ISSUES

Not applicable.

9. **LIST OF BACKGROUND PAPERS UNDER SECTION 100D OF THE LOCAL GOVERNMENT ACT 1972**

Document	Place of Inspection	Contact Officer
None	None	None

KEY STEPS IN THE LACMP

Thurs 10 May	Programme Launch at the Institute of Directors, London
14 May to 8 June	Initiation Workshops – the Programme Advisors will come to you for a full day to hold a set of meetings and workshops which should really get things moving. This will involve your Project Sponsor, so worthwhile checking now which day is best during this period.
1 week after Initiation Workshop	Project Plan complete and signed off by Project Sponsor
during June	First Programme / Review Board – hold the first regular update meeting of the core CM team chaired by your Project Sponsor
during September	Opportunities Workshop – a ½ day for you to develop engagement across your organisation through a workshop to generate ideas and commitment to carbon reduction. A Programme Advisor will facilitate this session for you.
late September	First Ideas Sharing Conference - a chance for you and your Project Sponsor(s) to meet with fellow participants, hear what they are doing, share experiences and be inspired by new ideas.
October	Case for Action Presentation to your senior management / members. By this point you will be able to talk through your 'baseline' of energy usage and carbon emissions and potential financial savings and carbon reductions. Consider which is the best forum in your LA, when they meet and when you must submit papers
14 th December	Initial draft of Strategy and Implementation Plan (SIP)
mid January	Second Ideas Sharing Conference - another chance for you and your Project Sponsor(s) to meet with fellow participants.
31 st January	Mature draft of Strategy and Implementation Plan (SIP) submitted for review across the programme.
31 st March	Final day of Programme. Submit your completed SIP to the Carbon Trust and arrange for it to be endorsed by your senior management.

LACM5 - CM Milestone Chart

Milestone / Event / Activity

Key Programme Dates

- Programme Launch
- First Ideas Sharing Conference
- Second Ideas Sharing Conference
- SIP Cross Programme Review & feedback

Key Internal Dates

- Meetings of Core Team
- Meetings with Project Sponsor
- Meetings with Member Sponsor
- Reports to Management Team
- Reports to Executive Board
- Reports to PPB

Step 1 - Planning and Mobilisation

- Initiation Workshop
- Define team
- Identify stakeholders
- Communicate CM process internally
- Define Project Plan
- M1 - Project Plan signed off by Project Sponsor

Step 2 - Set Baseline, Forecast and Targets

- Understand the drivers for change
- Develop a vision and strategy (SIP section 2)
- Compile emissions baseline
- Produce emissions forecasts
- Calculate Value at Stake
- M3 - Emissions Baseline and Projections complete (SIP section 3)
- Produce Case for Action presentation

Step 3 - Identify and Quantify Options

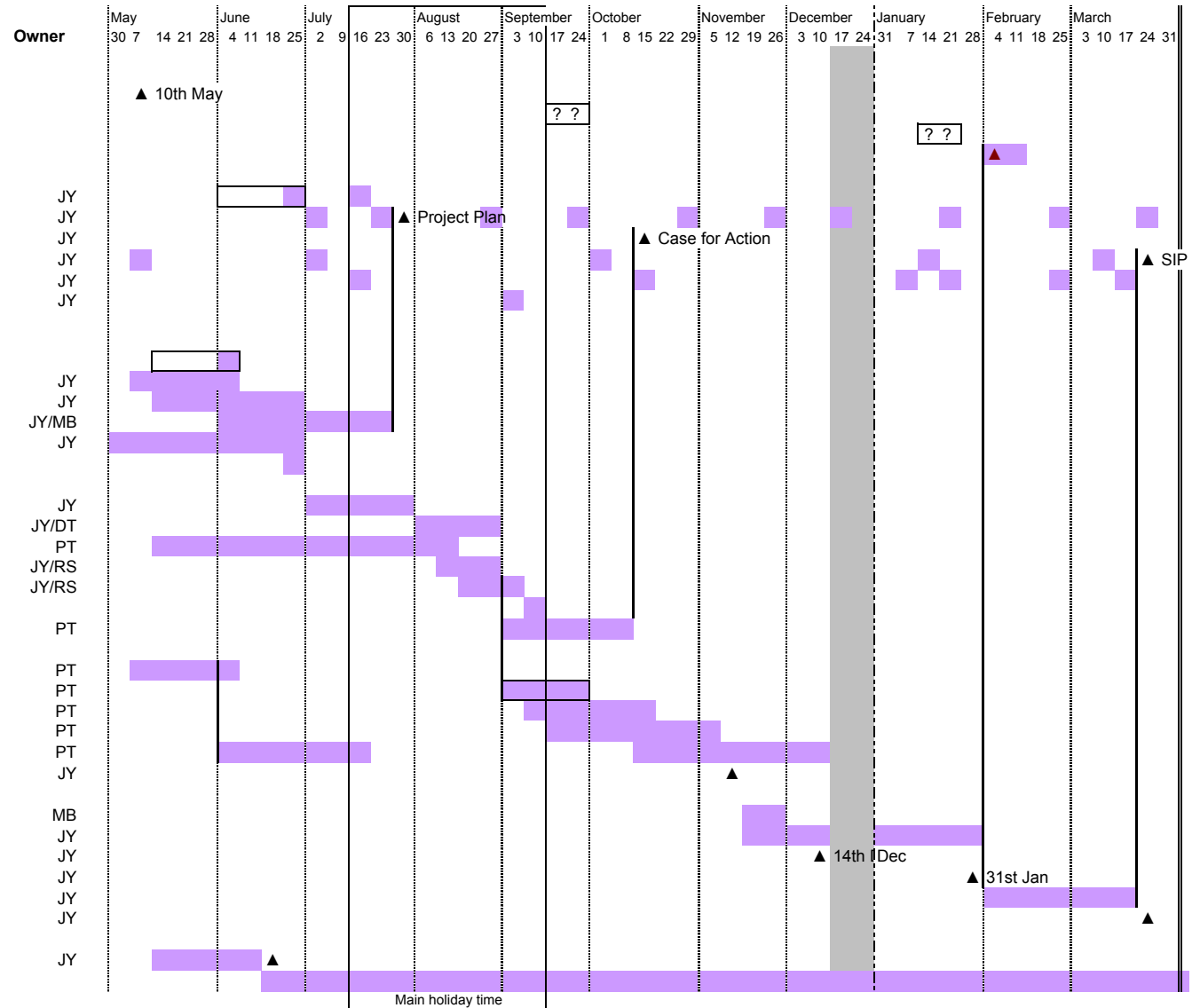
- Compile list of existing, planned and 'Top Ten' projects
- Opportunities Workshop
- Prioritise options
- Quantify costs and benefits (SIP section 5)
- Produce individual action plans (SIP Appendix A)
- M4 - Opportunities fully documented (SIP section 4)

Step 4 - Finalise strategy and Implementation Plan

- Define Communications Plan (SIP section 6)
- Refine sections of SIP and bring together as single document
- Initial Draft of SIP
- Mature draft of SIP for Cross Programme Review
- Finalise and approve SIP (all sections of SIP)
- M6 - Strategy and Implementation Plan senior management signoff

Step 5 - Implementation

- M2 - Define and approve Programme Governance (SIP section 7)
- Review Progress on projects and deliver carbon savings





working
with



Halton Borough Council Carbon Management Programme

Project Plan

Date: June 2007
Version number: 1
Owner: Jim Yates Principal Executive Officer
Approval: Dick Tregoea Project Sponsor, Cllr Harris Member Sponsor, Management Team and Executive Board

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working
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1 What you want to get out of this project

1.1 Context for the project

Although climate change is a global problem, the Council recognises that action can be taken at a local level to mitigate its effects. The Council has formalised its commitments to tackling climate change by:-

- Signing the Nottingham Declaration and the North West Regional Change Strategy
- Developing a Local Agenda 21 Strategy and Energy Strategy
- Approving Green and Staff Travel Plans
- Implementing initiatives to reduce carbon in its buildings, fleet vehicles, street lights,
- and through increased recycling rates and better procurement practices.

The above is not an exhaustive list but is indicative of the Council ongoing commitment to reduce the impact of its activities on the environment. Through the Corporate Plan the Council has committed itself to implementing the principles of sustainable development in all that it does. As part of this approach the first steps in developing a Climate Change Strategy and Action Plan for the Borough are underway. Participation in the Local Authority Carbon Management Programme (LACMP) will provide a primary focus for the Council to reduce its emissions under its control.

1.2 Outcome sought

To minimise the impact of Halton Borough Council's activities on the environment and demonstrate its commitment to carbon management to its employees and the wider community

1.3 Objectives

The Council is seeking the following benefits:-

A reduction in energy consumption of x by 2019 and x by 2012

- Raise awareness amongst staff and elected members of carbon management and involve them in carbon management actions
- Reduce the Council's carbon emissions by 33% by 2012
- Lead by example by promoting the Council's actions in the wider community
- In the longer term to lead by example and encourage community partners, business and residents to reduce their carbon emissions.

1.4 Deliverables

Key deliverables to the Carbon Trust are:-

- Project Plan by 30 June 2007
- Options Appraisal by 30th October 2007
- Carbon Management Strategy and Implementation Plan by April 2008

2 Who needs to be involved with the project

2.1 Project team

Role in Carbon Management programme	Name and position in the LA	Contact details
Sponsor	<i>Dick Tregae</i> <i>Executive Director Environment</i>	<i>Ext 3001</i> <i>dick.tregae@halton.gov.uk</i>
Councillor Sponsor	<i>Councillor Harris</i> <i>Executive Board Member</i> <i>Environment, Leisure and Sport</i>	<i>Ext 1118/1119</i> <i>phil.harris@halton.gov.uk</i>
Project Leader	<i>Jim Yates</i> <i>Principal Executive Officer</i>	<i>Ext 1178</i> <i>jim.Yates@halton.gov.uk</i>
Finance Champion	<i>Ed Dawson</i> <i>Chief Accountant</i>	<i>Ext 2220</i> <i>ed.dawson@halton.gov.uk</i>
Team members	<i>John Hughes</i> <i>Head Of Operations Property</i>	<i>Ext 2183</i> <i>john.Hughes@halton.gov.uk</i>
	<i>Michelle Baker</i> <i>Corporate marketing and</i> <i>Promotions Manager</i>	<i>Ext 1158</i> <i>michelle.baker@halton.gov.uk</i>
	<i>Gill Cook</i> <i>Press and Public Relations</i> <i>Manager</i>	<i>Ext 1157</i> <i>gill.cook@halton.gov.uk</i>
	<i>Andy Horrocks</i> <i>Waste Strategy Officer</i>	<i>Ext 5067</i> <i>andy.horrocks@halton.gov.uk</i>
	<i>Stephen Rimmer</i> <i>Divisional Manager Highways</i>	<i>Ext 3182</i> <i>stephen.rimmer@halton.gov.uk</i>
	<i>Geoff Hazelhurst</i> <i>Divisional Manager Customer</i> <i>Services</i>	<i>Ext 5017</i> <i>geoff.hazelhurst@halton.gov.uk</i>
	<i>Jean Morris</i> <i>Head of E Procurement</i>	<i>Ext 2025</i> <i>jean.morris@halton.gov.uk</i>
	<i>Phil Cornthwaite</i> <i>Group Manager Transportation</i>	<i>Ext 3005</i> <i>phil.cornthwaite@halton.gov.uk</i>
	<i>Julie Birchall</i> <i>Senior Business Analyst</i>	<i>Ext 2252</i> <i>julie.birchall@halton.gov.uk</i>
	<i>Phil Dove</i> <i>Capital Development Officer</i>	<i>Ext 3723</i> <i>phil.dove@halton.gov.uk</i>
	<i>Sandra Harris</i> <i>Divisional Manager Business</i> <i>Support</i>	<i>Ext 3518</i> sandra.harris@halton.gov.uk

	Dave Tierney Building Control and Enforcement Manager	Ext 3082 dave.Tierney@halton.gov.uk
	Richard Stevens Head of Research & Intelligence	Ext 1022 richard.stevens@halton.gov.uk

2.2 Governance structure

The Project Lead will report monthly to the Project Sponsor on progress.

The Core Team will comprise the individuals named in Section 1.5. The Core Team will meet monthly and its terms of reference are as follows:-

- Develop and agree a Project Plan for how all elements of the Carbon Management Programme will be completed
- Establish emissions baseline and produce emissions forecasts for those areas included in the Programme
- Develop a vision and targets for reducing emissions
- Identify and quantify opportunities for emissions reductions and assessing their impact on carbon emissions and on overall performance
- Develop a Strategy and Implementation Plan for reducing the Council's Carbon Emissions
- Oversee implementation and monitoring of the Plan

The Council's Corporate Management Team will provide strategic oversight and develop senior management commitment for the Project. Quarterly reports will be submitted on progress.

Executive Board and the Corporate Policy and Performance Board will provide the political leadership for the Project. Quarterly reports will be submitted on progress.

2.3 Key stakeholder groups or individuals

The following key stakeholders have been identified:-

- Chief Executive and Strategic Directors
- Executive Board and Elected Members
- Project Sponsor, Member Sponsor and Finance Sponsor
- Divisional Managers/Heads of Service – Buildings, Street Lighting, Procurement, Waste, Fleet Management, Information Technology, Communications, Transport
- All employees
- Schools – Head teachers, teachers, governors, staff and pupils
- Unions
- Local Strategic Partnership
- Residents

Summary of Communication Plan

Stakeholder Name/Group	Issues	Key Messages	Means of Communication	When	Responsibility
Officer Sponsor	Progress against Action Plan		Face to Face meetings	Monthly	Project Co-ordinator
Member Sponsor	Progress against action Plan		Face to face meetings	Monthly	Project Co-ordinator
Core Team	Progress against Action Plan		E mail, phone, meetings	Variable Monthly meetings	Project Co-coordinator
Strategic Directors	Need to maintain top-level commitment for programme.	Need to demonstrate business case for capital investment	Reports to Management Team	Quarterly	Project Co-ordinator
2 nd /3 rd tier Managers	Secure support for Programme, may not be seen as a priority, capacity and resources, lack of awareness	Issue is a Council priority, lots of small actions can collectively make a difference, Opportunity to save money to reinvest in services	Carbon Management bulletins including details of quick wins Intranet Resource Targeted briefings Pilot studies	Monthly Monthly As required As required	Communications Communications Project Co-coordinator/Communications Project Co-ordinator
All staff	Success of Programme will depend on their cooperation, need to challenge myths, ie "switching off in not worth it", may not see as their issue	Money saved may help secure jobs, success needs their involvement, Small actions can collectively make a difference	In Touch Intranet Awareness campaign Switch off Days	Monthly Continuous Launch Oct 07 Sept/Oct 07 thereafter Monthly	Communications Communications Communications Project Co-communications/Communications
Residents	Engagement key to success in wider community	The Council will lead by example and small actions collectively make a difference	Inside Halton, Internet & awareness campaign	Quarterly, Continuous TBC	Communications Communications Communications

3 What the Project will cover

3.1 Scope

The Council are keen to include a wide scope of activities in the Programme but are conscious that establishing baseline data in some areas may be more complex. Initial the Core scope will consist of the following areas but a final decision will be made as part of the options appraisal on the basis that attention will be given to those areas for the biggest potential carbon reduction.

Council Buildings

Street Lighting

Business Travel

Waste

Procurement

Fleet Transport

Schools (including building new schools)

It is intended to use 2006/07 as the baseline year.

Date and forecasting

Emission Source	Data Owner	Type	Availability	Issues/barriers
Buildings	Property Services	Electricity, Gas, Water and oil consumption and costs	Good	
Schools	As above	As above	As above	
Transport Fleet	Fleet Management	Mileage, fuel type, fuel used	Good	
Business Miles	Resources/Personnel	Mileage	Okay	Fuel type unknown
Waste	Waste Management	% of waste recycled from Council buildings, tonnage sent to landfill	Okay	
Street Lighting	Environment	Electricity consumption		
Procurement /IT	IT	No of pieces/ printers/peripherals		Lack of information on procurement
Commuting	Transport	Mileage	Okay	

3.2 Existing projects

The following are examples of existing projects to reduce carbon emissions

- Energy efficient measures installed on refurbishment projects where possible
- Master switch in Municipal Building to turn lights off

- CHP Plant in Kingsway Leisure Centre
- Pooled bikes for employees
- Car Sharing Scheme
- Switching from diesel to be changed to bio diesel for fleet vehicles
- Agresso System has eliminated the need for order forms
- Switching from CRT monitors to TFTs
- Purchase laptops with latest Intel Core Processors, which use 40% less power
- Paper recycled from Council premises
- Use renewable energy for street lighting
- Flexible working policies

3.3 Identification of opportunities

The following are initial opportunities identified by the Core Team. Other opportunities will be explored as the programme progresses. Other opportunities may arise as work on the programme progresses.

Access an Invest to Save Budget

Buildings

Investigate increasing the use of energy efficient measures in all buildings ie more efficient boilers, double glazing, efficient lighting, sensor lighting

Explore opportunity to extend master switch in Municipal Building to other areas

Extend master switch from lights to include all PCs, printers and other appliances

Investigate feasibility of switching to biomass boilers

Develop energy awareness campaign (to include schools)

Explore extending the energy efficiency measures in Council buildings as part of the Refurbishment programmes

Review office light strategy ie more use of lamps at nights rather than need to have all office on when most staff have gone home

Explore introducing a programme of energy audits

Explore opportunities of more efficient use of water in buildings including use of rainwater harvesting equipment

Explore the use of energy saving devices to switch off equipment/appliances

IT/Procurement

Explore more shared areas on the web to reduce need to send/print e mails

Explore policy for the procurement of printers ie purchase multi purposes machines networked to multiple computers as opposed to individual purchase



working
with



Review photocopier settings

Explore policy for managers to follow in terms of sustainable/green products

Explore opportunity to set up more central contracts

Explore use of hot desking/pool computers

Explore introducing energy awareness campaign pop up campaign on computers

Waste

Explore expansion of current internal recycling scheme and methods for minimising waste ie, bottle recycling on major car parks

Explore opportunity to extend the role of Recycling champions to include energy and increasing numbers across the Council

Street Lighting

Investigate use of solar power/low consumption lamps and other best practice across other authorities

Transport

Review Business miles criteria and mileage rates with view to encourage increasing in take up of environmentally friendly vehicles

Review lease cars scheme with view to encourage increasing in take up of environmentally friendly vehicles

Provide pool cars at key council sites (Based on hybrids)

Introduce 5% biofuels on all Council Fleet Vehicles. Supply biofuel at Lower House Lane. This fuel could be supplied to all Council BC employees and residents at a reduced rate to encourage take up. This is current part of an EU bid under the IEE STEER programme (to be submitted September 2007)

Promote greater use of public transport through incentives

Explore introducing staff driver training to improve fuel efficiency

Schools

Explore opportunity to pilot and create X number of eco schools

Explore energy efficiency measures are explored through the Building Schools for the Future Programme

4 When things need to be done and preparing for what might go wrong

4.1 Dependencies

Resources - bids for Invest to Save Budget by 31 July 2007.

External funding – Need to consider the funding timetables for potential external support ie Salix, Low Carbon Building Programme.

Budget Cycle – The Council's budget process for 2008/09 has already commenced. Need to link the programme to the budget process and identify what, if any resources can be allocated to the programme.

Regular progress reports to Management Team, Executive Board and PPBs. Management Team and the Executive Board meet weekly and fortnightly respectively, therefore, this should not impact/delay the programme. As PPBs meet less frequently need to develop appropriate reporting timetable.

The Council is in the process of developing a Climate Change Strategy. Need to ensure priorities and objectives of the Strategy and the Programme are closely aligned.

Contract negotiations for energy procurement

Replacement of vehicle fleet is an ongoing process – ensure linkages to Programme

Development of Waste and Recycling Strategy – ensure linkages to Programme

Success in implementation the Action Plan will depend on the continued support and Leadership over the 5 Year period of the Plan

Ensure linkages between the Carbon Programme and ongoing refurbishments of Council buildings ie Runcorn Town Hall

Ensure appropriate linkages between the Carbon Programme and the Building Schools for the Future Programme.

4.2 Risks and issues

Capacity issues for individual members of the Core Team

Managers and employees see Carbon Management Programmes as an initiative for others to implement

Lack of co-operation from managers/staff

Conflicting objectives between Council Services

Lack of Council Resources both financially and staffing allocated to the Programme

Reliability and accuracy of data and in some areas such as Procurement data may not be readily available

Ability to secure external funding for capital projects

Carbon Management/Climate Change ceases to be a key political priority local/nationally

Poor linkages between the Carbon Programme and other Council initiatives ie Waste and Recycling Strategy, Refurbishment Programmes, Building Schools for the Future

The above risks and issues are recorded in the Risks and Issues Log, together with an assessment of potential impact and probability of the risk occurring.

4.3 Main activities and milestones

List of key milestones

Milestone	Person responsible for delivery	Dates due for completion	Actual completion date
Submit Project Plan to Carbon Trust	Jim Yates	29 th June 2007	
Baseline data gathered and input into LACM toolkit	Jim Yates/Richard Stevens Project Team	3 rd September 2007	
Emissions forecasts compiled and Value at stake calculated	Jim Yates/Richard Stevens	15 th September 2007	
Draft case for action circulated for comment	Jim Yates	20 th September 2007	
Final Case for action completed	Jim Yates	30 th September 2007	
Opportunities Workshop	Jim Yates Project Team	By 30 th September 2007	
Options prioritised and shortlist compiled	Jim Yates Project Team	By 15 th October 2007	
Cost and Benefits of short listed options assessed	Jim Yates Project	By 5 th November 2007	
Initial draft Strategy and Implementation Plan	Jim Yates Project Team	By 14 th December 2007	
Final Strategy and Implementation Plan	Jim Yates Project Team	By March 2008	
Launch Strategy and Plan	Project Team Communications Team	By March 2008	

REPORT TO: Corporate Services Policy and Performance Board

DATE: 4 September 2007

REPORTING OFFICER: Strategic Director Corporate and Policy

SUBJECT: Neighbourhood Management

WARDS: Appleton, Castlefields, Halton Lea, Kingsway, Riverside, Windmill Hill

1.0 PURPOSE OF THE REPORT

1.1 To explain the background to Neighbourhood Management and report on progress in Halton

2.0 RECOMMENDATION: That

- (1) the presentation be received; and**
- (2) further progress reports be made to this Board twice yearly**

3.0 SUPPORTING INFORMATION

Neighbourhood Management arrangements are being developed in three areas of Halton funded through the Local Area Agreement. This Board is responsible for scrutiny of these arrangements. The Director of Neighbourhood Management will give a presentation on the background to Neighbourhood Management and progress to date in Halton.

4.0 POLICY IMPLICATIONS

Neighbourhood Management is intended to help the Council and its partners to deliver the objectives in the Community Strategy and Corporate Plan in relation to closing the gap between the quality of life in the most disadvantaged areas and that in the rest of Halton.

5.0 OTHER IMPLICATIONS

None

6.0 IMPLICATIONS FOR THE COUNCIL'S PRIORITIES

6.1 **Children and Young People in Halton**

6.2 Employment, Learning and Skills in Halton

6.3 A Healthy Halton

6.4 A Safer Halton

6.5 Halton's Urban Renewal

Neighbourhood Management aims to support the delivery of objectives under all of the Council's key priority areas.

7.0 RISK ANALYSIS

There are no risks associated with this presentation. More generally the risks with neighbourhood management relate to failure to deliver the desired improvements in all five priority areas, and failure to ensure sustainability after the LAA funding expires. These will be addressed through the preparation and monitoring of a delivery plan

8.0 EQUALITY AND DIVERSITY ISSUES

Neighbourhood Management aims to reduce geographical inequalities with the Borough.

9.0 LIST OF BACKGROUND PAPERS UNDER SECTION 100D OF THE LOCAL GOVERNMENT ACT 1972

Document	Place of Inspection	Contact Officer
National Strategy for Neighbourhood Renewal	Municipal Building Widnes	Rob MacKenzie 0151 471 7416
Halton LAA		

REPORT TO: Corporate Services Policy and Performance Board

DATE: 4 September 2007

REPORTING OFFICER: Strategic Director Corporate and Policy

SUBJECT: Communications and Marketing

WARDS: Borough-wide

1.0 PURPOSE OF THE REPORT

1.1 To report on the work of the Communications and Marketing Division, and the review of the corporate Communications Strategy

2.0 RECOMMENDATION: That

- (1) the presentation on Communications and Marketing is received and noted by the Board;**
- (2) the Board comments upon the principles and aims set out in the emerging draft Communications Strategy; and**
- (3) the Operational Director Policy and Performance be requested to produce an action plan for the delivery of the revised Communications Strategy following consultation with the portfolio holder and the Council's Management Team.**

3.0 SUPPORTING INFORMATION

A presentation will be made to the Board on the work of the Communication and Marketing Division. The corporate Communications and Marketing Strategy is being reviewed, and the Board's comments are requested on the draft principles and aims set out in the Appendix to this report prior to the development of an action plan

4.0 POLICY IMPLICATIONS

Effective Communications are essential to the delivery of the Council's objectives, both with staff to ensure that the Council is working as a team towards common goals, and with the public so as to communicate information about the Council's activities, and to inform residents and businesses about the availability of services.

5.0 OTHER IMPLICATIONS

None at this stage

6.0 IMPLICATIONS FOR THE COUNCIL'S PRIORITIES

6.1 Children and Young People in Halton

6.2 Employment, Learning and Skills in Halton

6.3 A Healthy Halton

6.4 A Safer Halton

6.5 Halton's Urban Renewal

There are no implications for the individual priorities at this stage.

7.0 RISK ANALYSIS

Failure to communicate effectively with staff and the community will prevent the achievement of the Corporate objectives and will lead to reduced satisfaction with the Council. The, development of a communications strategy, and regular performance monitoring through the service plan monitoring reports will mitigate this risk.

8.0 EQUALITY AND DIVERSITY ISSUES

None at this stage.

9.0 LIST OF BACKGROUND PAPERS UNDER SECTION 100D OF THE LOCAL GOVERNMENT ACT 1972

Document	Place of Inspection	Contact Officer
None		

COMMUNICATIONS STRATEGY FIRST DRAFT

Purpose of strategy

This document outlines a strategy to help Halton Borough Council manage its communications activities.

It describes the importance of effective, honest and two-way communications in helping us to realise our corporate priorities and gain recognition for the contribution our services make in improving the quality of life within Halton.

It sets out the guiding principles, aims and objectives for our communications and considers the image and messages we want to convey. It looks at our key audiences together with the methods we should be using to talk with and listen to them.

It suggests the communications 'culture and style' direction for the whole authority. It outlines the role of the Communications and Marketing team in leading the delivery of the strategy and the commitment required by Senior Management, Members and Directorates to support this.

This is an overarching strategy supported by action plans for Press & PR, Marketing, Internal Communications and Digital Media in addition to directorate communications activities.

Finally, it sets out the methods for delivering the strategy and for monitoring the performance of our communications activities over the next three years.

INTRODUCTION

The value of effective communications

Good communication is vital for building sound relationships with our different audiences and ultimately for creating successful communities. At a basic level this means giving our residents the information they need in a format that suits them. At a higher level it is about asking, listening and responding with actions that meet the needs of our customers and residents.

Over the past few years a number of research studies have taken place into the effectiveness of local government communications resulting in the following statements:

“Communication is a fundamental component in how local residents judge the overall image of their council. Getting it right is one of the simplest and most effective ways of improving satisfaction. It’s no longer an optional extra.” **IdeA Connecting with Communities**

“Councils with the highest satisfaction ratings among their communities are the ones which best demonstrate they provide value for money in the services they deliver. How do they do that? They invest in effective communications. People who feel the council keeps them well-informed are much more likely to believe that they are getting value for money.”

Local Government Association Reputations Campaign

However, despite efforts by the LGA and others to improve the image of local authorities, views of the public remain less than positive with research for the Office of the Deputy Prime Minister (ODPM) telling us that people know little about councils or what they do:

- Nationally, only half of local residents feel their council keeps them well informed
- Nine out of ten people can't name their local councillor
- Nine out of ten people have never heard of best value in relation to local government
- One in four rated their council as the worst agency at providing information, compared to other public and private sector communicators.

This lack of awareness is compounded by a general apathy towards politics and democratic issues demonstrated by low voter turnout at both local and general elections. Accusations of spin, sleaze and 'fat cat' rewards have led to a general mistrust and cynicism of politicians, officials and business leaders making the job of communications even more difficult

While the national picture is gloomy, there is much to be positive about locally with recent results indicating that Halton Borough Council is performing well in terms of communications compared to other local authorities:

- 48% feel well informed (BVPI Survey 2006) putting us in the top quartile of performing authorities
- 52% feel informed about the standards of services (compared with 46% MORI North¹)
- 41% Halton respondents feel informed about how well the Council is performing compared with 31% MORI North
- 78.9% staff are satisfied with internal communications, up from 71.1% in 2005 and 45% in 2003
- 91% of readers stated that our quarterly newsletter Inside Halton was an excellent way of communicating Council services
- There were nearly 40,000 visitors to our website in July up 7000 in just six months
- 46% of respondents quote information received direct from the Council as their main source of information
- 77% of respondents making a non-complaining contact thought staff were helpful and overall 67% were happy with the final outcome of their contact

These results are particularly pleasing. However, there is still much work to do improve satisfaction further and also to engage with our communities enthusing them to contribute to the development of services in the future.

- The age-group 25-44 feel less informed (39%)
- 35% of respondents felt informed about whether the Council is delivering on its promises
- 34% of residents are satisfied with opportunities for local participation in decisions and just 32% feel they can influence decisions– while this compares favourably to MORI North results (24% and 31%) it still means that two thirds of our residents are dissatisfied with how we engage with them
- 47.6% of staff would welcome more internal communications updates
- Those who contacted the Council by telephone tended to be less satisfied with their response than those who made contact in person (63% vs 72%)

¹ The comparison is made against 13 Association of Greater Manchester Authorities, Warrington, Blackburn and Blackpool Councils whose BVPI surveys were also carried out by IPSOS MOR

Where do we want to be?

We currently measure performance every three years against a range of communication related indicators. This strategy is designed to improve on our already good standards and to achieve the following by the next BVPI survey in 2009:

- To increase the % of residents who feel very well or fairly well informed by the Council from 48% to 55%
- Ensure at least 55% of respondents feel informed about our standards of services
- Increase the % of respondents who feel informed about how well the Council is performing from 41% to 50%
- Ensure 50% of residents feel satisfied with their opportunities for local participation in decisions
- Improve satisfaction with feeling informed amongst the 25-44 age group from 39% to 50%
- To increase staff satisfaction with internal communications from 78.1% to 85%
- Increase the number of people who see state council information as their main source from 46% to 55%

In addition it is intended to introduce a new range of measures to help us understand the impact our communications have on 'softer' issues such as our culture and personality. These would be measured in an annual customer survey. As baseline data is not available for these areas, a survey will need to take place to provide figures to benchmark against future performance. The suggested areas are:

- The Council is friendly and approachable
- Information from the Council can be trusted (measure individual channels eg face to face, website, publications, telephone, councillors)
- I feel informed about how the Council spends its money
- The Council listens to local issues and concerns
- The information I receive from the Council is easy to understand

Priorities

To achieve these objectives, it will be necessary to focus our efforts on a number of key areas. These reflect the priorities for improvement highlighted by the best value report but also reflect the key recommendations of the LGA Reputations campaign.

1 We enhance our brand by:

- Using our corporate identity across all service areas
- Encouraging use of the strapline “It’s all happening IN HALTON” to promote a positive image of the borough
- Having clear principles for how we will communicate
- Delivering consistent standards of communications across all channels (print, web, face to face, telephone and others)
- Effectively managing and promoting our reputation through the media
- Showcasing our strengths externally through effective marketing and promotions
- Seek external validation through industry-recognised award schemes
- Celebrating our successes
- Continuing our commitment to the LGA Reputations Campaign

2 Ensure the Council is seen as providing good value for money and an effective community leader by:

- Issuing an A-Z guide of services
- Raising awareness of our corporate objectives and their role in supporting the community strategy
- Ensuring a planned and proactive approach to media relations
- Exploring further opportunities for joint working with other key partners;
- Explaining to and engaging with our customers in our budget setting and priority setting process
- Reporting regularly on our performance

3 Engage with our different audiences ensuring they are given opportunities to contribute to our policies and decisions and in this way to gain their support by:

- Integrating consultation and communication activities further
- Through the above, develop a strategy to engage target audiences including young people
- Increasing attendance at area forum meetings
- Using the opportunities provided by new technology to offer new ways to engage with the Council

4 Securing the confidence of key opinion formers by:

- Carrying out a review of present key opinion formers and analyses of their communications needs;
- Running specific communications campaigns to target groups of key opinion formers;
- Evaluating partnerships to explore opportunities to influence key opinion formers.

5 Continue to improve our efficiency and cross-departmental working by:

- Establishing lead communicators within directorates
- Develop the role of key communicators
- Increasing the frequency of meetings between corporate communications and departmental staff
- Establishing competitive central contracts for print and advertising
- Reviewing current arrangements for design services

6 Support and enable members by:

- Identifying key priorities for communications with portfolio holders
- Improving communications between members and staff
- Offering advice and guidance on communications related issues

- Providing induction training to new members

7 Continue to provide our staff with the information they need to do an excellent job by:

- Improving staff understanding and commitment to corporate objectives
- Integrating internal communications as part of departmental plans;
- Providing open, honest, timely and relevant information which is accessible to all members of staff
- Doing more to communicate with non-office based staff
- Ensuring all members of staff have the opportunity to freely discuss issues and feedback their views and questions
- Developing and maintaining the Intranet to up-to-date information and methods for feedback and sharing of opinions

8 Effectively monitoring, evaluating and developing channels of communications to meet customer and stakeholder needs by:

- Using an annual residents' opinion poll to discover the views of the public on the Council's communications and to monitor the progress of its communication strategy.
- Carrying out an annual employee opinion survey to be used to monitor progress of the communications strategy and to benchmark performance against other local authorities
- Seeking opportunities to benchmark performance against other local authorities

As the corporate lead on communications it is important that this strategy sets the standards for activities across the authority. Therefore, underpinning all communications activities we will:

Demonstrate our commitment to protecting our environment by:

- Developing an internal/external communications strategy as part of our commitment to the Local Government Carbon Management programme
- Ensuring printed materials are produced from sustainable sources and that all publications carry the Recycle for Halton logo
- Considering environmental issues as part of any procurement

Include everyone in our community

- By writing in Plain English, using an appropriate tone and style of language
- Promoting use of translation and interpreter services
- Providing information in alternative formats
- Developing new channels of communications

At any one time the Council may wish to communicate with a range of audiences. The means of communication with and influencing each of these groups is likely to be different. To make the best use of resources it is important that communications activities are targeted, based on customer needs and prioritised.

It is also important that our communications reflect the expectation levels of our different audiences. Today's 24/7 'on-demand' culture places additional pressures to be able to provide information, news and services around the clock through the Internet. Through our web strategy, we will continue to develop our website and systems to meet current and future demands.

Everything we say and do has a direct impact on our reputation and corporate image. It is therefore important that we set high standards for communications that are adhered to by staff and members across the authority. Our corporate identity is an important visual presentation of our image. It is also vital in creating an association between the Council with the excellent services we deliver, therefore increasing customer satisfaction. Our corporate identity was updated in 2004 to become more professional, modern, appealing and user-friendly. It is essential we continue to use the corporate identity across all service areas and that it continues to be developed to appeal to our range of audiences.

The Council delivers services within the community alongside, or in partnership with, a wide range of public agencies. The communications strategy takes account of the Council's need to work more effectively with key partners. It is suggested that guidelines are developed to show how Council branding should be used when working in partnership to ensure that the Council receives acknowledgement for its contribution. It is also suggested that guidelines clarify how the branding is applied when external funding contributes to delivery of a service.

Among the most influential opinion formers the Council targets is the media – our customer research shows that 35% state the media as their primary route for receiving information about the Council. Our strategy will continue to be to take a proactive approach to managing our reputation through the media. To do this, media relations will continue to be managed centrally but with heavy emphasis on departments to cooperate by supplying information to enable positive press releases

and to mitigate negative press. Coverage will be sought in professional journals, national broadcast, print media, partner publications and community based newsletters.

Understanding and commitment to the Council's objectives is fundamental to their achievement. If staff are not signed up to, are unclear, or even unaware of what the Council stands for and what it sets out to achieve, the Council is unlikely to be successful. Our internal communications will seek to inform, motivate and engage staff so that they become active advocates for the Council.

Communication is a two-way process and it is vital that our communities feel they have the opportunity, if they wish, to be involved in shaping policies, determining priorities or sharing opinions. It may not always be appropriate to aim for 'participation' - the level of engagement will always need to be tailored to the issues or services under discussion, and we must be clear about what we are trying to achieve. Do we want comments? Action? A decision? To change opinions/behaviour? Or are we simply sharing information.



Establishing performance targets for achieving the Council's communications objectives is essential. Monitoring of the targets can best be achieved by annual surveys of the opinions and our more formal customer satisfaction survey. However, other methods, such as news monitoring, web traffic and campaign evaluation will provide an ongoing measure of activities.

Finally, communication takes place across the organisation and is, ultimately, the responsibility of everyone within the organisation. Consequently, delivery of the strategy can only be accomplished through the co-operation and commitment of members and officers.

Our Audiences

At any one time we may be communicating in a number of ways with a wide and varied group of audiences. These break down to two general groups:

Primary audiences – those we have direct contact with

Secondary audiences – those who influence how we are perceived

Our primary audiences:

- Residents x 118,000 (including families, young people, senior citizens, 'hard to reach' groups such as single parents, disabled people, and members of ethnic minorities).
- Our staff (including teachers)
- Service Users
- Members
- The business community

Our secondary audiences:

- Opinion Formers (including MPs and MEPs, senior civil servants, national government, government agencies)
- Partner Agencies (those who work with us to deliver/develop services)
- The Media
- Trade Unions

Our communications and consultation values

Underpinning all our communications activities these values will ensure consistency and work to build on our reputation as an excellent local authority and community leader.

- **Accessible and approachable** - We will make sure people know how to get in touch with us, in ways that suit them and that they feel comfortable with. We will make it easier for people to tell us what they think.
- **Clear & consistent** - We will use plain language that people understand, and take account of special communications needs. We will avoid jargon and use words that people identify with. Clarity of communication will be reinforced by consistent messages, consistent tone and consistent use of our corporate branding.
- **Impartial** - We will have regard to the Code of Recommended Practice on Local Authority Publicity, and all our communication will be free of political bias.
- **Inclusive, involving, engaging** – We will make efforts to ensure that everyone within our community has an opportunity to find out about and comment on the work of the Council, and issues which affect them. This includes those individuals or groups who may be less easy to reach by usual means.

- **Open and involving** - We will communicate and share information, with regard to data protection and freedom of information guidelines. We will be honest in all our communications and consultation activities, and place as much emphasis on listening as we do on informing.
- **Honest** - We will not make promises in our communications that we cannot deliver on. If things go wrong, as inevitably, they sometimes will, we will explain our position truthfully, at the earliest opportunity, and ensure we learn from any mistakes that are made.
- **Relevant and appropriate** - We will target our communication and consultation effectively, for maximum impact. We will do this by targeting relevant information to appropriate stakeholders.
- **Respectful** – We will take care to ensure our communications our communications are respectful and sympathetic to the individuality and of our audiences. Our aim will always to be to communicate with, not to, our different audiences.

REPORT TO: Corporate Services PPB
DATE: 04th September, 2007
REPORTING OFFICER: Chief Executive
SUBJECT: Performance Management Reports for 2007/08
WARDS: Boroughwide

1. PURPOSE OF REPORT

1.1 To consider and raise any questions or points of clarification in respect of the 1st quarter performance management reports on progress against service plan objectives and performance targets, performance trends/comparisons, factors affecting the services etc. for:

- Exchequer & Customer Services
- Financial Services
- ICT Services
- Legal & Member Services
- Personnel Services
- Policy & Performance
- Property Services
- Halton Stadium

2. RECOMMENDED: That the Policy and Performance Board

- 1) Receive the 1st quarter performance management reports;**
- 2) Consider the progress and performance information and raise any questions or points for clarification; and**
- 3) Highlight any areas of interest and/or concern where further information is to be reported at a future meeting of the Policy and Performance Board.**

3. SUPPORTING INFORMATION

- 3.1 The departmental service plans provide a clear statement on what the services are planning to achieve and to show how they contribute to the Council's strategic priorities. The service plans are central to the Council's performance management arrangements and the Policy and Performance Board has a key role in monitoring performance and strengthening accountability.
- 3.2 The quarterly reports are on the Information Bulletin to reduce the amount of paperwork sent out with the agendas and to allow Members access to the reports as soon as they have become available.

It also provides Members with an opportunity to give advance notice of any questions, points or requests for further information that will be raised to ensure the appropriate Officers are available at the PPB meeting.

4. POLICY AND OTHER IMPLICATIONS

4.1 There are no policy implications associated with this report.

5. RISK ANALYSIS

5.1 Not applicable.

6. EQUALITY AND DIVERSITY ISSUES

6.1 Not applicable.

7. LIST OF BACKGROUND PAPERS UNDER SECTIONS 100D OF THE LOCAL GOVERNMENT ACT 1972

Document	Place of Inspection	Contact Officer
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QUARTERLY MONITORING REPORT

DIRECTORATE: Environment
SERVICE: Stadium & Hospitality
PERIOD: Quarter 1, 2007/08

1.0 INTRODUCTION

This quarterly monitoring report covers the Stadium & Hospitality Department first quarter period up to 30 June 2007. It describes key developments and progress against “key” objectives and performance indicators for the service.

The way in which traffic light symbols have been used to reflect progress to date is explained in Appendix 5.

2.0 KEY DEVELOPMENTS

SCHOOL MEALS

BROKERAGE

The service has recently been through the Brokerage process. A very detailed specification was produced which covered all aspects of food delivery with specific emphasis on nutritional standards. Initially five contractors expressed an interest and completed the pre qualification questionnaire, only one contractor (Supply Direct) submitted a tender.

Halton School Meals Service scored 89% on tender documentation, Supply Direct 44%. Supply Direct offered the service at 12% (20p per meal) higher than at present. This would increase the cost to the Council by around £450,000 a year if they provided the service to all schools. On presentation and interview, Halton scored 95%, as Supply Direct did not score above the required 75% they were not invited to interview.

STAFF TRAINING

All Assistant Managers, High School Catering Supervisors and Assistant Cooks attended a Customer Care training course designed to improve the quality of service in high schools and promotion of various special offers, meal deals etc., as this will form a large part of provision in coming years. All Primary Catering Supervisors attended a Customer Care training course, primarily focused on improving the meal uptake and the quality of service provided to all our customers.

A Manual Handling training course, held at The Halton Stadium to train staff to a level that is nationally recognised, allowing them to then

cascade the manual handling training to all staff.

Nutrition Courses for all Catering Supervisors have been arranged over the next few weeks.

NEW MENUS

A new summer menu was introduced at the end of April and can be viewed on the School Meals web site. It was produced after consultation with schools, pupils and catering supervisors and has been very well received. An emergency hot weather menu was also introduced after last years scorching temperatures as kitchens became unbearable and children's appetites for hot food declined. Unfortunately, it has not been required as yet this year!

NEW STARTER PACKS

New Starter packs for all new infants have recently been produced. The pack contains information on the school meals service for parents and hopefully answers any concerns they may have. A copy of the pack and the Summer Menu are to be sent to all Members under separate cover.

LOCAL AUTHORITY CATERING ASSOCIATION (LACA) REPORT

LACA have produced their annual survey on free meals, the national uptake of primary meals is 40%, down 7% compared to last year and Secondary uptake is 35%, down 17% from last year. Halton, however, is performing far better than this, for the period April 07 – June 07, primary uptake was 80.94% and Secondary uptake 51.72%. We are presently examining the report to benchmark food and labour costs.

SCORES ON THE DOORS

The Environmental Health Dept. has rolled out the scoring system linked to premises inspections. The highest rating of 3 stars (excellent) has been achieved by 51 Schools and is particularly encouraging as a number of the schools are ageing, and part of the scoring system relates directly to the condition of the fabric of the building.

THE HALTON STADIUM

MARKETING

The Stadium has recently subscribed to the UK number one web site for conference venues – WWW.conferences-uk.org.uk. The site boasts over 6 millions hits per year. We have also recently engaged a marketing company (Blackstripe) to drive forward the objectives in the Service Plan, Business Plan and Marketing Plan.

New wedding and conference brochures will be available for distribution early September. The Christmas 07 brochure will be distributed to previous users and an active marketing campaign to new clients is underway. We already have a number of bookings for Christmas and the aim this year is to completely sell-out all dates before October 31st.

DECORATION/REBRANDING

All public areas of the South Stand are to be re-painted over the next few months. Once the decoration is complete the new Stadium branding will be introduced to all signage.

FUNCTION MARQUEE

We have received three quotes for the function marquee to be situated in the West Stand. The internal drapes will be ivory with a contrasting valance altered to meet the colour requirements of the individual booking. It will be complete by early September when a three-day open event will be held to promote the improved venue to prospective wedding and conference organisers. In the stand there are no support stanchions in the main hall giving 100% clear viewing irrespective of the positioning of tables. Accommodating over 500, it will be the largest conference room in the Stadium. To promote this unique Borough venue a wedding fayre will be held in the Marquee early October. Further details and a visual can be seen at WWW.leisure-interiors.com.

EVERTON RESERVES

Following the successful return to the Stadium last year of Everton Reserves have taken up their option to extend the present three-year deal by a further two years. The new provisional fixture list can be found on the Stadium web site. The two high profile functions are Manchester United – Tuesday January 8th and Liverpool Tuesday April 1st.

STADIUM CATERING

Over 300 Liverpool golf captains attended a dinner at the Stadium, it proved a great success and the captains' captain said that if 350+ could be accommodated they would use the venue for their Annual Dinner.

The Stadium has been accredited for the Healthy Stadia Food Charter and now used as an example of good practice for healthy eating initiatives.

The Mayors Youth Ball was very well supported and good feed back was received from all the attendees. This year an interesting addition to the event was an indoor ice skating rink.

STADIUM FITNESS

Following a £90k investment by the Council a complete refurbishment of Stadium Fitness gym was undertaken. A formal opening and re-branding took place on the 4th June and in the following month the fitness membership increased by 97 full members and 30 new casual members. Reports from both staff and members has been extremely positive and morale in the suite is at a new high. This brings the total of members to:

Peak & off-peak	901
Casual	1250
H.L.C users	158

During the summer holiday period in an attempt to encourage younger members, we will be offering FREE induction and training sessions to 16 & 17 year olds.

Corporate visits have been arranged amongst local companies to include Morrisons, Asda and O2.

Stadium hair salon, Tender Touch health & beauty and the holistic therapy section are all working with Stadium Fitness to increase the offer available to members.

COUNCIL COFFEE SHOPS

VICTORIA PARK

Live music in the park playing in the band stand every two weeks or so has also proved to be a popular attraction. A number of local community groups also hold regular meetings in the Pavilion area. The coffee shop is also proving popular with visiting groups of school children.

THE BRINDLEY

Following the success of the Victoria Park and Stadium Fitness Starbucks franchise, we are looking to extend our partnership with Starbucks by introducing the theme to the coffee shop at The Brindley. We are also looking to offer theatergoers an opportunity to have a two-course meal prior to a performance, this should start early September.

3.0 EMERGING ISSUES




School Meals

Although the level of drop off has not been as high as the National trend (Halton 5.6% as opposed to National average of around 16%) The effect has had a detrimental impact on the trading account. if the present trends continue then the service will continue to operate at a level that was not budgeted for when setting the budget for 07 – 08 and beyond.

The Stadium

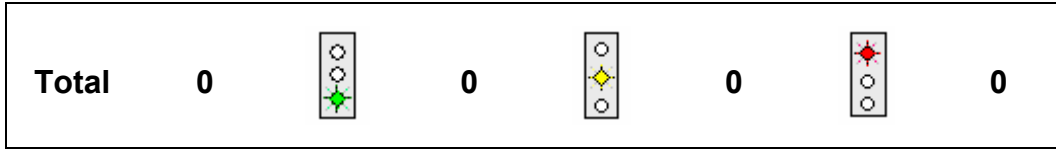
As with School Meals no budget provision has been made for the increased energy costs or Stadium Sponsorship. Both will have a negative effect on the trading account for 07/08.

4.0 PROGRESS AGAINST KEY OBJECTIVES / MILESTONES

Total	17		16		0		1
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Overall progress towards objectives is good. Further details can be found in Appendix 1.

4.1 PROGRESS AGAINST OTHER OBJECTIVES / MILESTONES

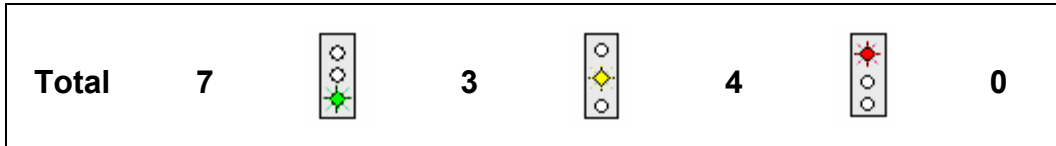


There are no "Other" objectives for this service.

5.0 SERVICE REVIEW

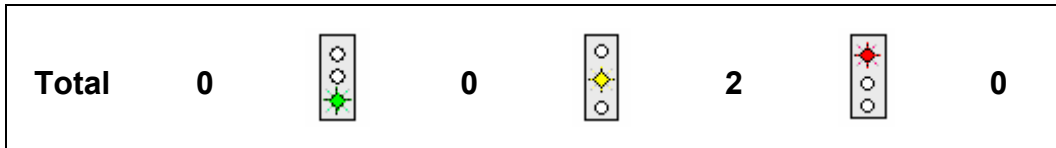
There have been no service reviews this quarter.

6.0 PROGRESS AGAINST KEY PERFORMANCE INDICATORS



There are concerns around some areas of financial performance and school meals. Further details can be found in Appendix 2.

6.1 PROGRESS AGAINST OTHER PERFORMANCE INDICATORS



Two "Other" indicators have been reported by exception, SHLI 15 & 17 - Unit cost per visit to the fitness centre & Total cost per school meal. It is unlikely that either indicator will meet their annual target. Further details can be found in Appendix 3.

7.0 PROGRESS AGAINST LPSA TARGETS

There are no LPSA targets for this service.

8.0 RISK CONTROL MEASURES

During the production of the 2007-08 Service Plan, the service was required to undertake a risk assessment of all Key Service Objectives.






Where a Key Service Objective has been assessed and found to have associated 'High' risk, progress against the application of risk treatment measures is to be monitored, and reported in the quarterly monitoring report in quarters 2 and 4.






9.0 PROGRESS AGAINST HIGH PRIORITY EQUALITY ACTIONS



During 2006/07 the service was required to undertake an Equality Impact Assessment. Progress against actions identified through that assessment, with associated High priority are to be reported in the quarterly monitoring report in quarters 2 and 4.

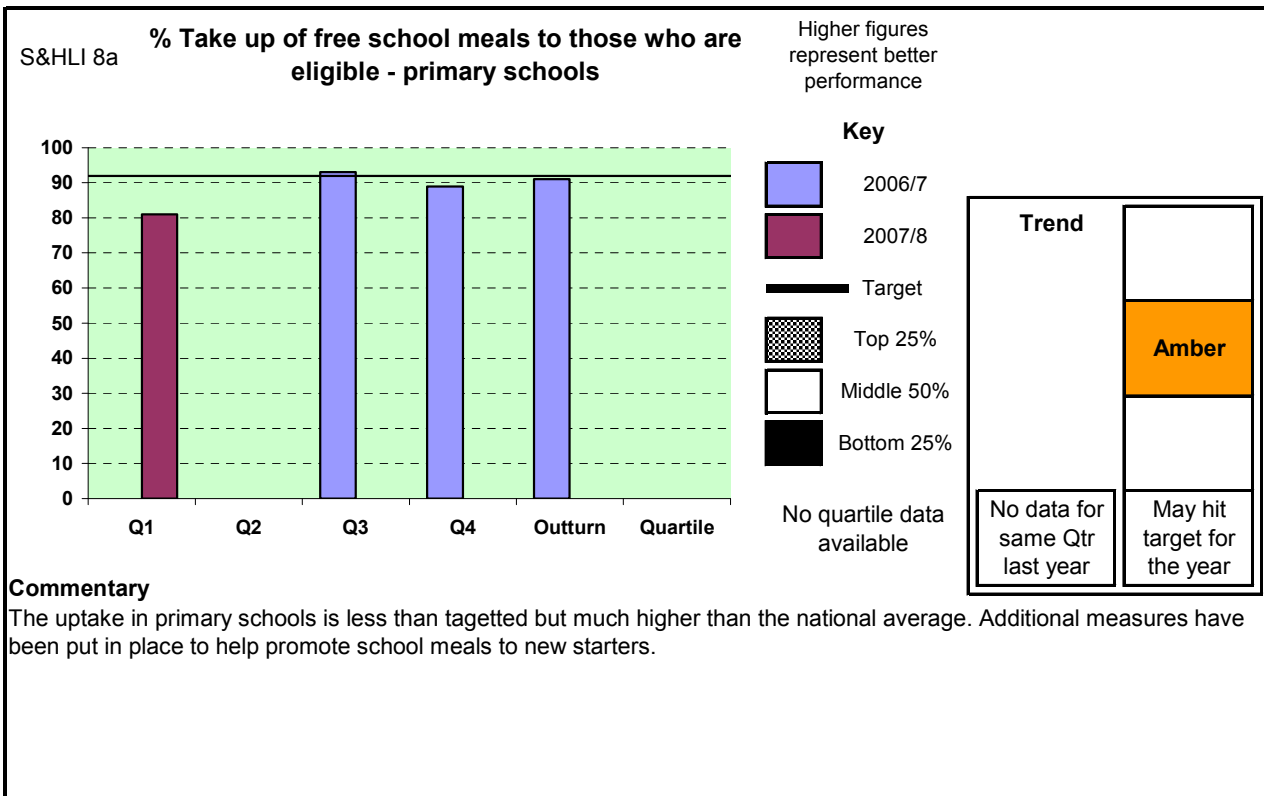
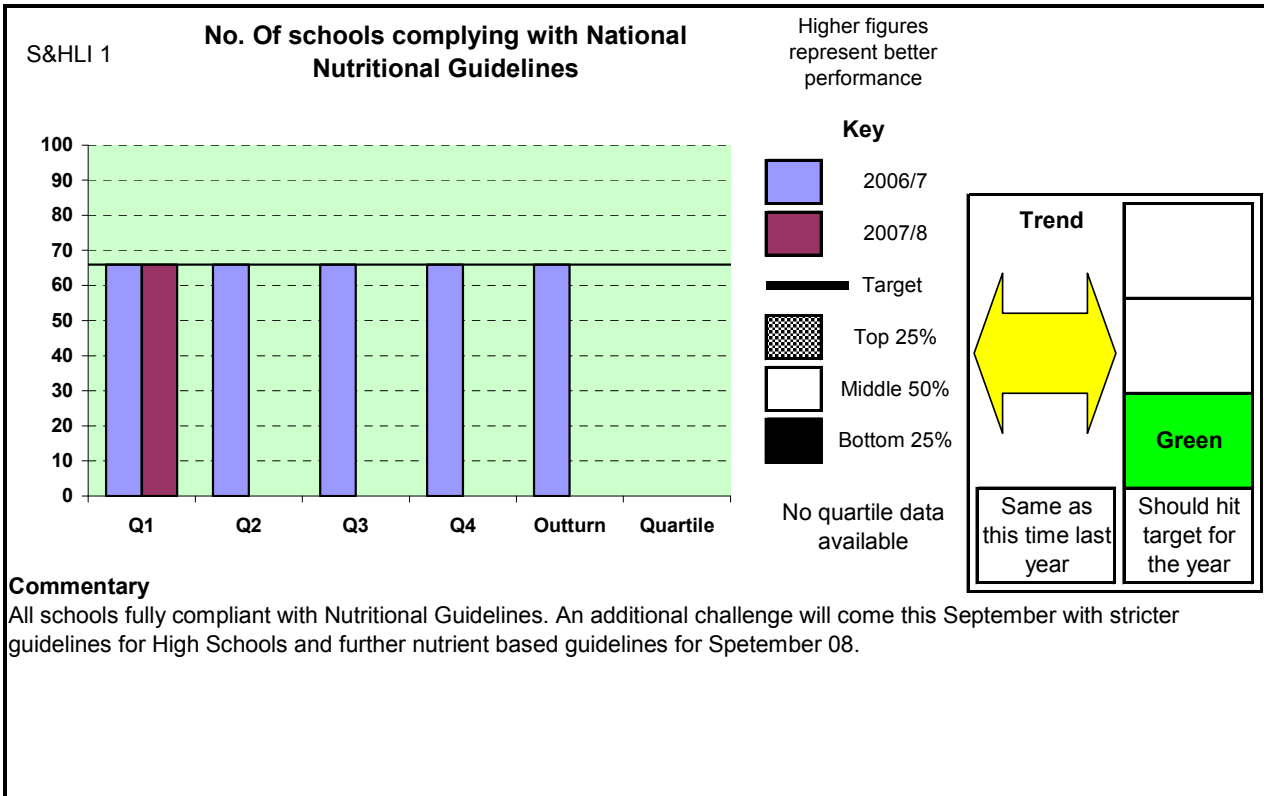
10.0 APPENDICES

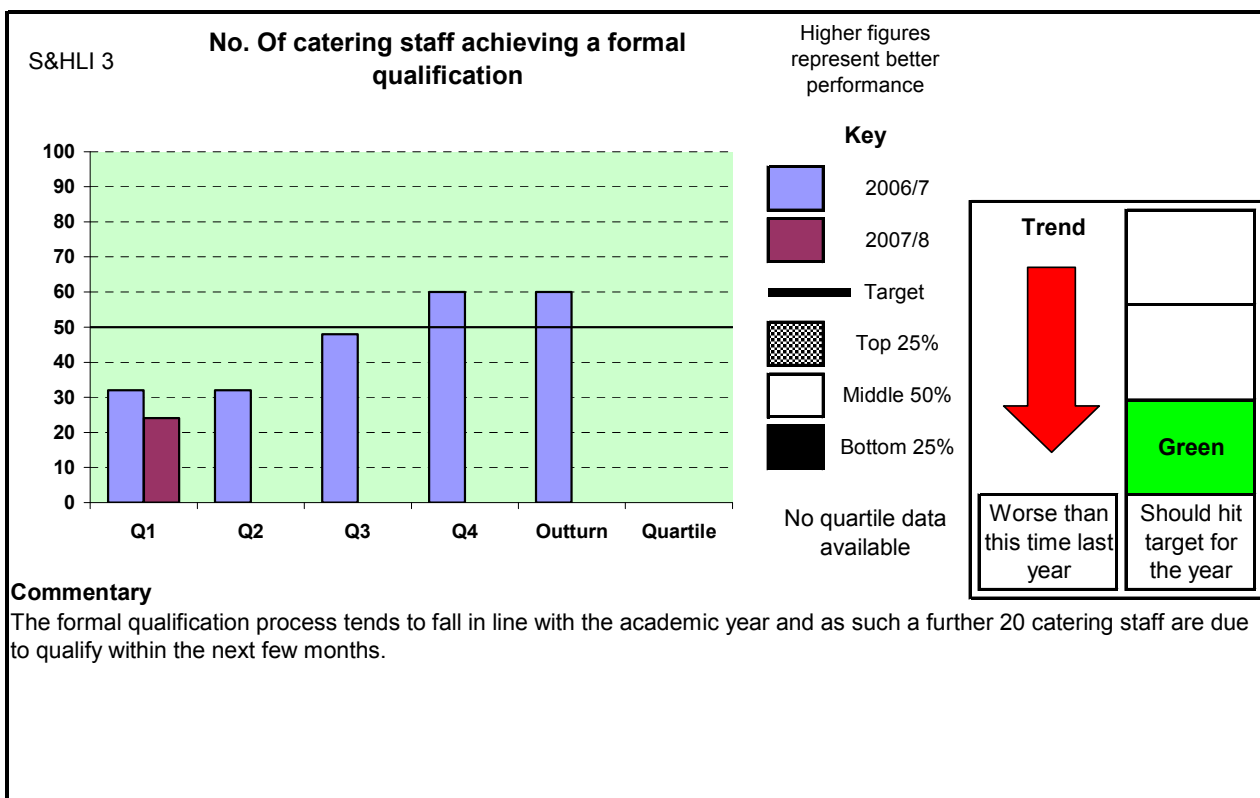
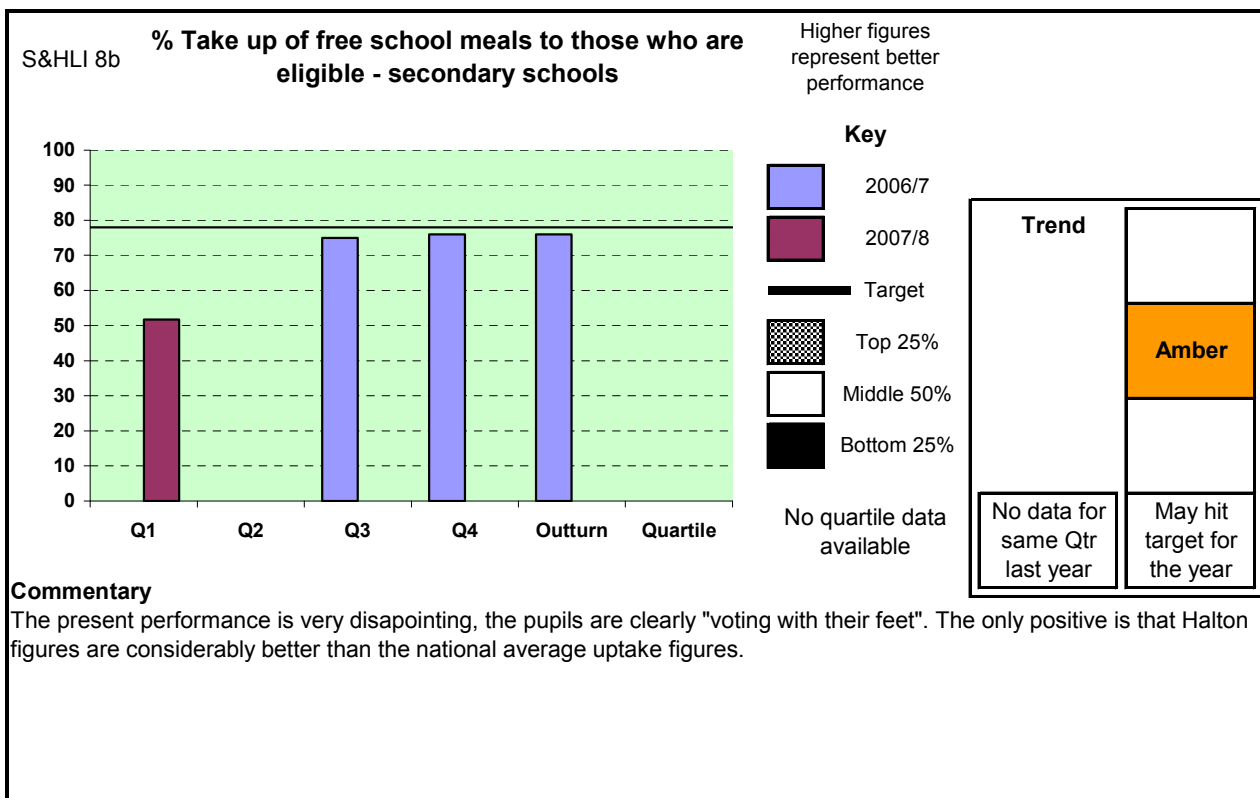
Appendix 1- Progress against Key Objectives/ Milestones
Appendix 2- Progress against Key Performance Indicators
Appendix 3- Progress against Other Performance Indicators
Appendix 4- Financial Statement
Appendix 5- Explanation of traffic light symbols

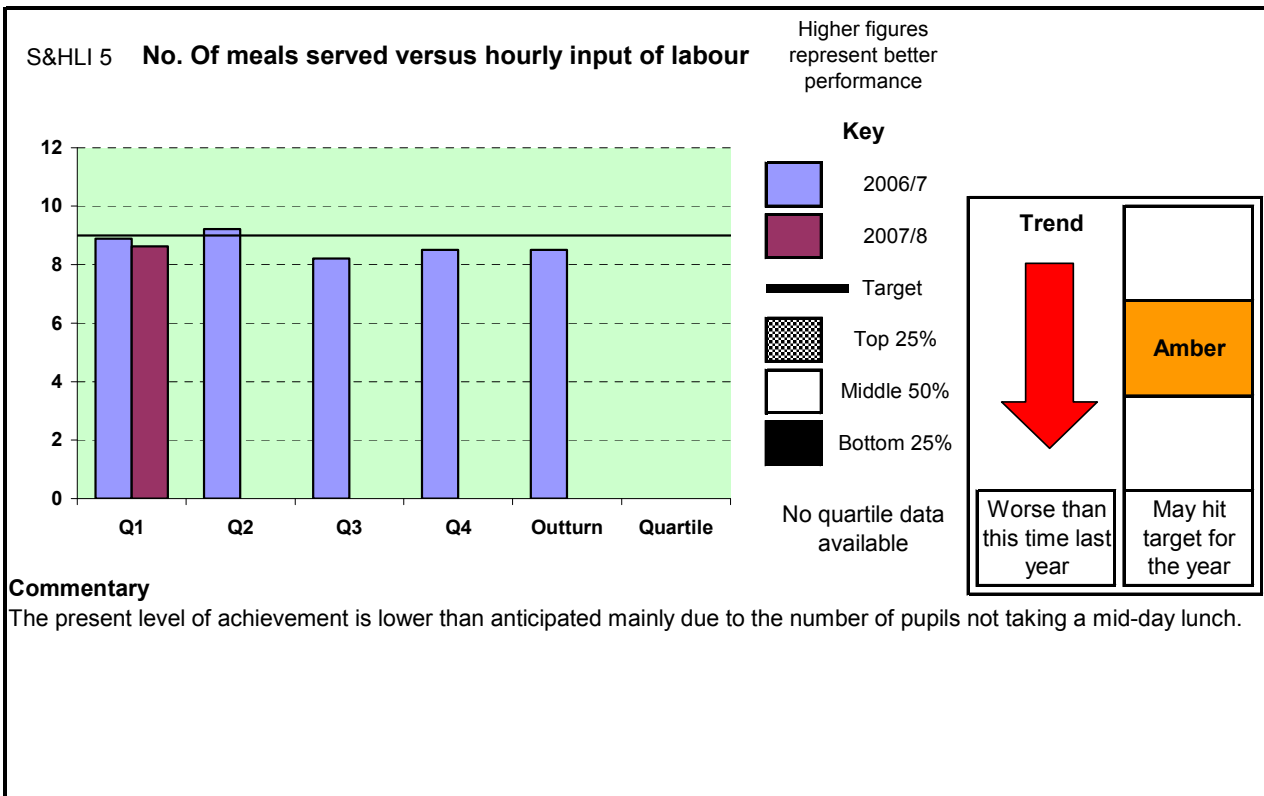
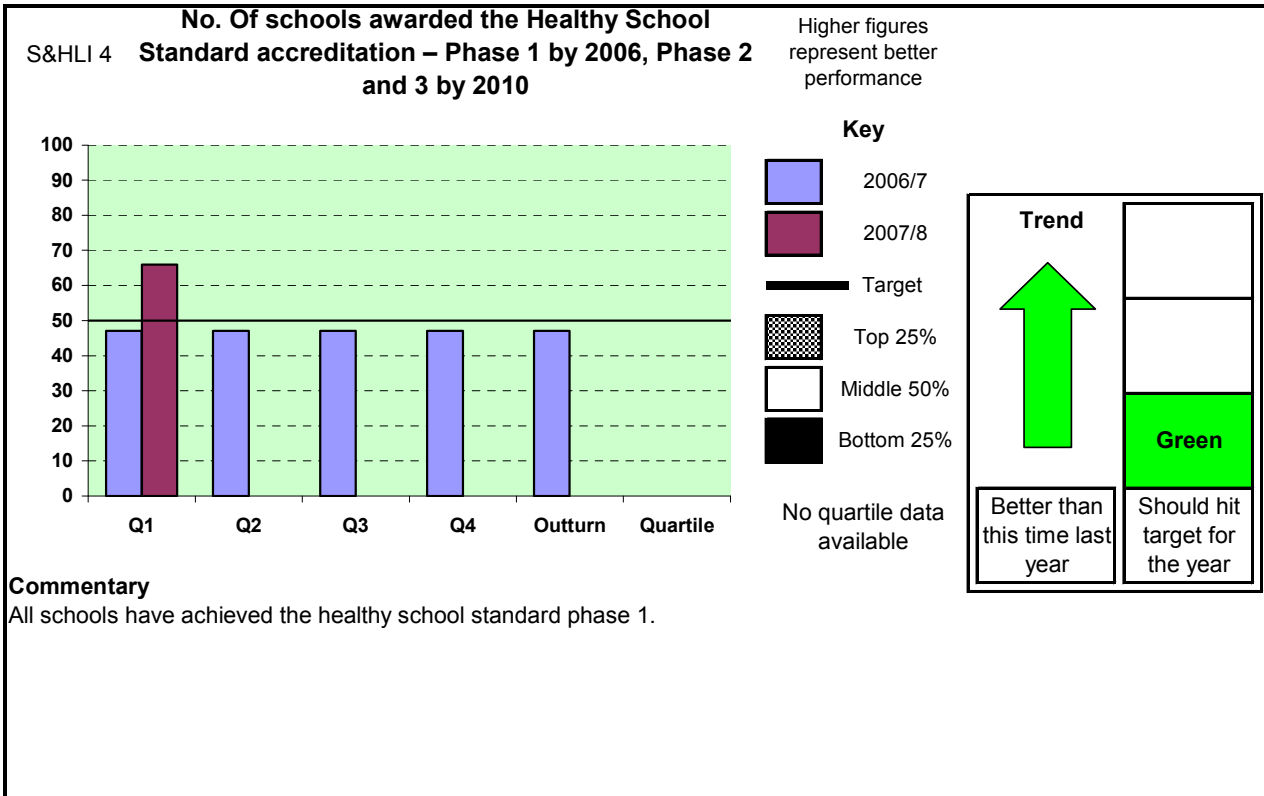
Service Plan Ref.	Objective	2007/08 Key Milestone	Progress to date	Commentary
SH 01	Increase the community usage of the stadium, encouraging healthier lifestyles and providing opportunities for learning	<p>Review and develop annual community programme - April 07</p> <p>Identify market gaps and develop annual plan for HLC scheme - April 07</p> <p>Promote monthly availability of IT suite to non corporate audiences - May 07</p> <p>Develop a list of targeted local volunteer, not for profit and public sector organisations to encourage uptake by disadvantaged groups. Develop a plan for engagement of the identified groups to promote the Stadium facilities - August 07.</p> <p>Visit Riverside College Halton and local Sixth Forms at the start of each academic year September 07 to advise and promote to students the leisure facilities at</p>	    	<p>A detailed plan developed that outlines the community Stadium user groups and what level of interaction/support the Stadium gives.</p> <p>Plan developed. Presently over 150 HLC users regularly use the gym facilities.</p> <p>A recent approach from Vikings in the Community will see around 4 – 6 pupils from the PRU using the IT Suite on a daily basis.</p> <p>Ongoing</p> <p>A programmed set of visits has been pencilled-in for September.</p>

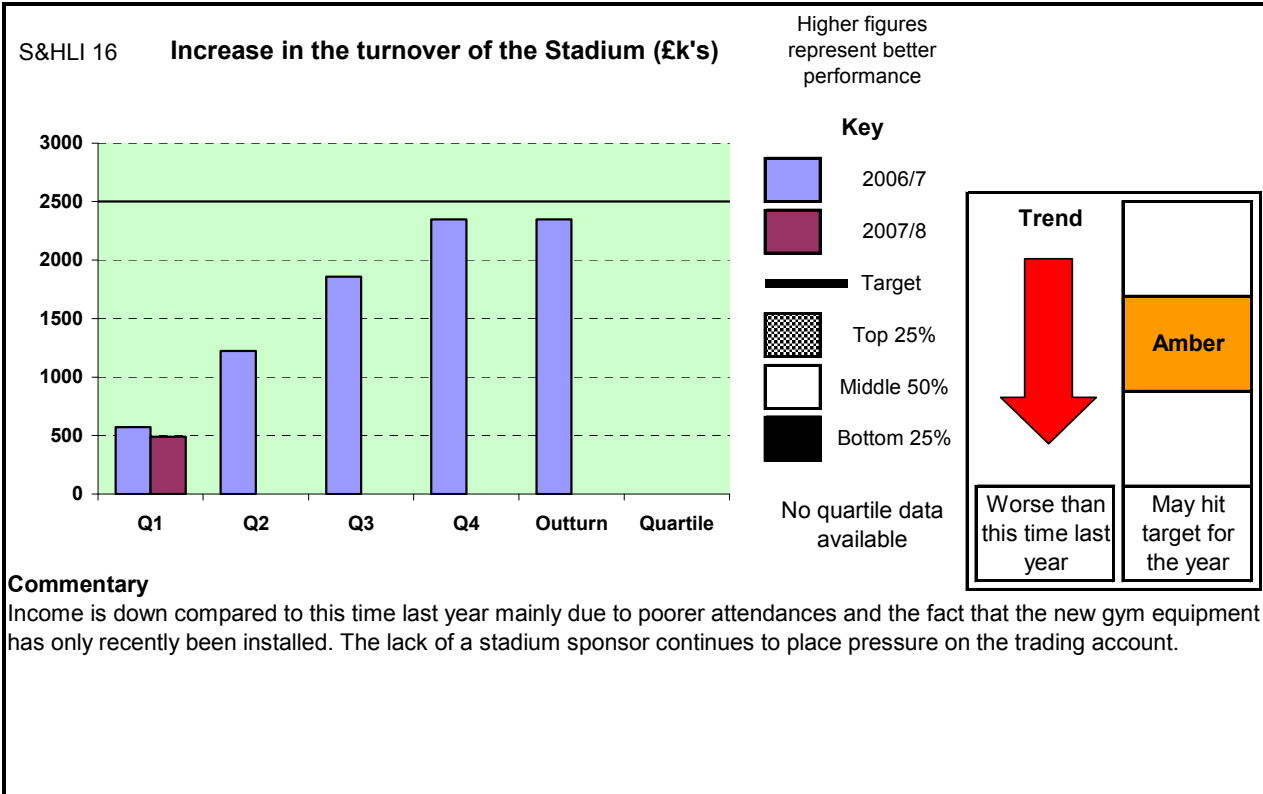
Service Plan Ref.	Objective	2007/08 Key Milestone	Progress to date	Commentary
		<p>Construct a business case - October 07, enabling the Stadium to hold a music concert</p> <p>Implement accepted recommendations of 2006 Energy Audit - March 2008</p>	 	<p>Ongoing</p> <p>Detailed meetings have recently taken place and an independent specialist has been appointed to help identify areas for savings.</p>
SH 03	<p>Increase the number of Pupils registering and regularly eating free school meals, maximising benefit entitlement to families and improving dietary intake of pupils and carers.</p>	<p>Conduct and complete a School Meal Benchmarking exercise to identify and learn better practice - July 07</p> <p>Simplify registration for free school meals by incorporating registration as part of housing benefit application - September 07</p> <p>Identify and target families with children eligible for free school meals to educate and encourage uptake for the</p>	  	<p>Detailed data has been made available from the Local Authority Caterers Association (LACA). We shall be using this data to map out our present performance against similar Authorities.</p> <p>Ongoing progress being made, likely start date is January 08.</p> <p>A number of meetings planned for early September.</p>



Service Plan Ref.	Objective	2007/08 Key Milestone	Progress to date	Commentary
		academic year starting September 07		
		Develop a bespoke Action Plan for each Secondary School following consultation with Pupils - September 07.		Ongoing
		Review, evaluate and amend plan – March 08		Ongoing









Ref	Indicator	Actual 06 / 07	Target 07 / 08	Quarter 1	Progress	Commentary
Cost & Efficiency Indicators.						
SH LI 15	Unit cost per visit to the fitness centre	£1.27	£1.20	£1.24		The removal of the VAT exemption for Full Fitness members has resulted in a significant drop in Net Revenue. The increase in full members will help negate this position in time.
SH LI 17	Total cost per school meal	£1.86	£1.75	£1.82		School meals continues to operate above budget, mainly due to number of pupils, fixed costs and higher levels of food cost.

Domestic Services Division 2007/2008.**Revenue Budget as at 30st June 2007.**

	Annual Budget	Budget To Date	Actual To Date	Variance To Date (overspend)	Actual Including Committed Items
	£'000	£'000	£'000	£'000	£'000
<u>Expenditure</u>					
Employees	2,513	629	657	(28)	657
Office Accommodation	97	0	0	0	0
Operational Buildings	18	0	0	0	0
Other Premises Costs	35	12	11	1	11
Supplies & Services	195	49	63	(14)	70
Hired & Contracted Services	15	4	4	0	4
Food Provisions	1,260	315	319	(4)	319
Transport	9	2	2	0	2
Internal Support Costs	70	0	0	0	0
Central Support Costs	177	0	0	0	0
Asset Charges	8	0	0	0	0
Total Expenditure	4,397	1,011	1,056	(45)	1,063
<u>Income</u>					
Sales - School Meals	-2,080	-479	-429	(50)	-429
Sales - Civic Catering	-162	-30	-21	(9)	-21
Support Service Income	-107	0	0	0	0
Government Grants	-122	0	0	0	0
Reimbursements & Other Grants	-95	0	0	0	0
School Meals - Free Children's Meals	-943	-314	-314	0	-314
School Meals - Catering Recharges	-293	-73	-77	4	-77
Civic Catering Recharges	-138	-35	-27	(8)	-27
Total Income	-3,940	-931	-868	(63)	-868
<u>Net Expenditure</u>	457	80	188	(108)	195

Capital Expenditure - 2007/2008**Hospitality & Stadium**




Code	Scheme	2007/2008 Allocation £'000	2007/2008 Spend £'000	2007/2008 Variance £'000
N007	Stadium Minor Works	30	21	9
N024	Stadium Fitness - Renew Equipment	70	70	0
N025	Stadium Function Marquee	30	0	30
		130	91	39

Halton Community Stadium + Café Bars 2007/2008**Revenue Budget as at 30/06/07**

	Annual Budget	Budget To Date	Actual To Date	Variance To Date (overspend)	Actual Including Committed Items
	£'000	£'000	£'000	£'000	£'000
<u>Expenditure</u>					
Employee-Operational	811	207	224	-16	224
Employee-Administration	246	62	61	1	61
Premises	488	122	132	-10	132
Supplies and Services	354	92	103	-11	103
Food Provisions	290	73	88	-16	88
Bar Provisions	258	64	71	-6	71
Vehicles	9	0	0	0	0
Capital Charges	571	143	143	0	143
Neighbourhood Overheads	107	27	27	0	27
Central Overheads	147	37	37	0	37
Total Expenditure	3,281	826	885	-59	885

<u>Income</u>					
Sales	-1,331	-320	-303	-17	-303
Fees & Charges	-484	-107	-99	-8	-99
Rents	-147	-46	-46	0	-46
Internal Billing	-70	-18	-43	25	-43
Total Income	-2,032	-492	-492	0	-492
Net Expenditure	1,250	334	394	-59	394

The traffic light symbols are used in the following manner:

	<u>Objective</u>	<u>Performance Indicator</u>
<u>Green</u>	 <p>Indicates that the <u>objective is on course to be achieved</u> within the appropriate timeframe.</p>	<p>Indicates that the <u>target is on course to be achieved</u>.</p>
<u>Amber</u>	 <p>Indicates that it is <u>unclear</u> at this stage, due to a lack of information or a key milestone date being missed, <u>whether the objective will be achieved</u> within the appropriate timeframe.</p>	<p>Indicates that it is either <u>unclear</u> at this stage or too early to state whether the target is on course to be achieved.</p>
<u>Red</u>	 <p>Indicates that it is <u>highly likely or certain that the objective will not be achieved</u> within the appropriate timeframe.</p>	<p>Indicates that the <u>target will not be achieved</u> unless there is an intervention or remedial action taken.</p>

QUARTERLY MONITORING REPORT

DIRECTORATE: Corporate and Policy Directorate

SERVICE: Exchequer and Customer Services

PERIOD: Quarter 1 to period end 30th June 2007

1.0 INTRODUCTION

This Monitoring Report covers the Exchequer and Customer Services first quarter period up to period end 30th June 2007. It describes key developments and progress against 'key' objectives and performance indicators for the service.

The way in which traffic light symbols have been used to reflect progress is explained within Appendix 6.

2.0 KEY DEVELOPMENTS

The Benefits Division have been short listed for the 2007 IRRV (Institute of Revenues, Rating & Valuation) Performance Awards in the "Benefits Team of the Year" Category. This is a significant achievement and an announcement is due shortly on whether the Team progresses to the Performance Awards final.

3.0 EMERGING ISSUES

Following a request from External Audit to report on collection of Debtor Invoices raised and collected, a new item appears in the Monitoring Report Section headed Debtor Summary Statistics . The table shows the number of invoices raised by Directorate in the first quarter, the amount collected and the debt outstanding and is included as Appendix 5.

4.0 PROGRESS AGAINST KEY OBJECTIVES / MILESTONES

Total	10		8		1		1
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Whilst the majority of objectives are on track some delay has occurred in relation to the establishment of an Emergency Duty Team monitoring system and the receipt of electronic benefit applications. Additional details for all key objectives are provided within Appendix 1.

4.1 PROGRESS AGAINST OTHER OBJECTIVES / MILESTONES

Only 2 of the remaining objectives / milestones have not progressed as planned and additional details are provided within Appendix 2.

5.0 SERVICE REVIEW

There are no issues to be reported in relation to service review for Quarter 1.

6.0 PROGRESS AGAINST KEY PERFORMANCE INDICATORS

With the exception of the payment of invoices progress in relation to key performance indicators is currently on track and additional details are provided within appendix 3.

6.1 PROGRESS AGAINST OTHER PERFORMANCE INDICATORS

Progress against the remaining indicators for the service is on track and therefore none require reporting by exception at this stage.

7.0 RISK CONTROL MEASURES

During the production of the 2007-08 Service Plan, the service was required to undertake a risk assessment of all Key Service Objectives.

Where a Key Service Objective has been assessed and found to have associated 'High' risk, progress against the application of risk treatment measures is to be monitored, and reported in the quarterly monitoring report in quarters 2 and 4.







8.0 PROGRESS AGAINST HIGH PRIORITY EQUALITY ACTIONS





During 2006/07 the service was required to undertake an Equality Impact Assessment. Progress against actions identified through that assessment, with associated High priority are to be reported in the quarterly monitoring report in quarters 2 and 4.

9.0 APPENDICES



Appendix 1 - Progress against Key Objectives/ Milestones
Appendix 2 - Progress against 'other' Objectives/ Milestones
Appendix 3 - Progress against Key Performance Indicators
Appendix 4 - Debtor Summary Statistics
Appendix 5 - Financial Statement
Appendix 6 - Use of traffic light symbols

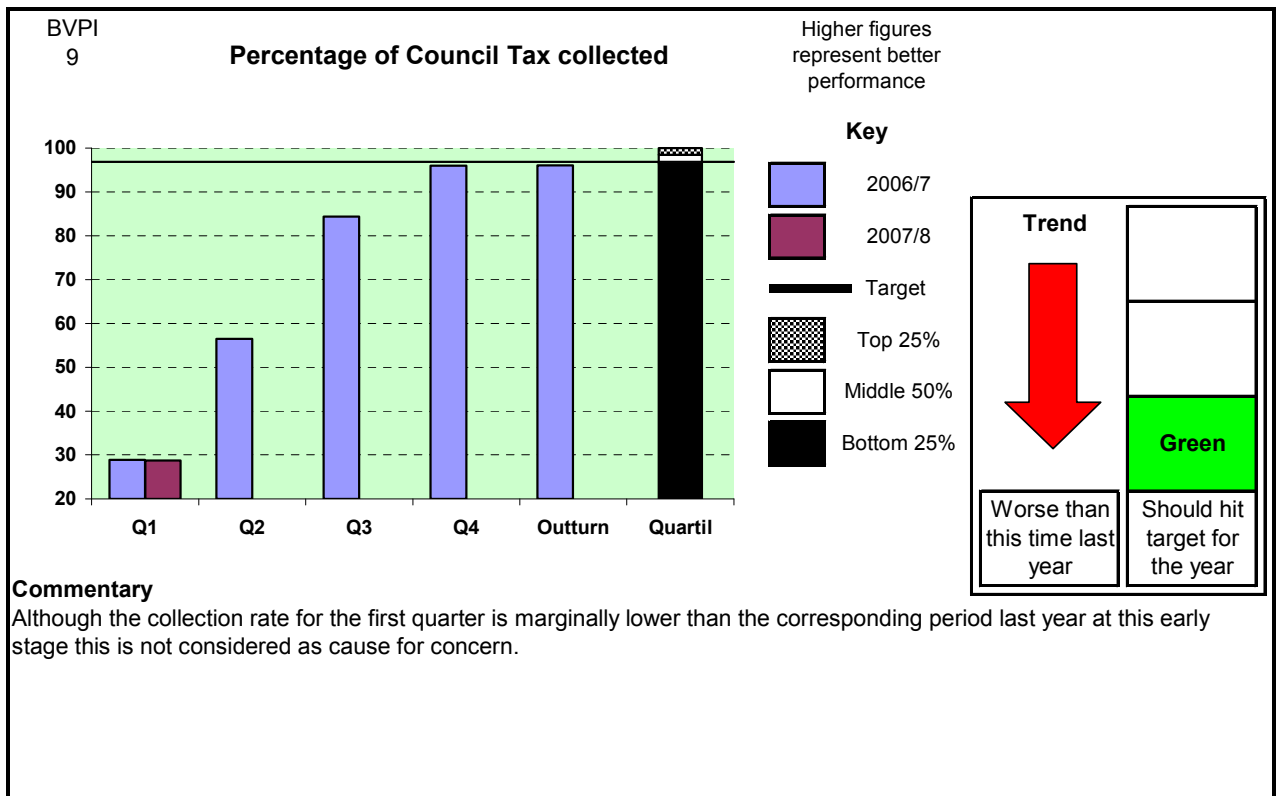
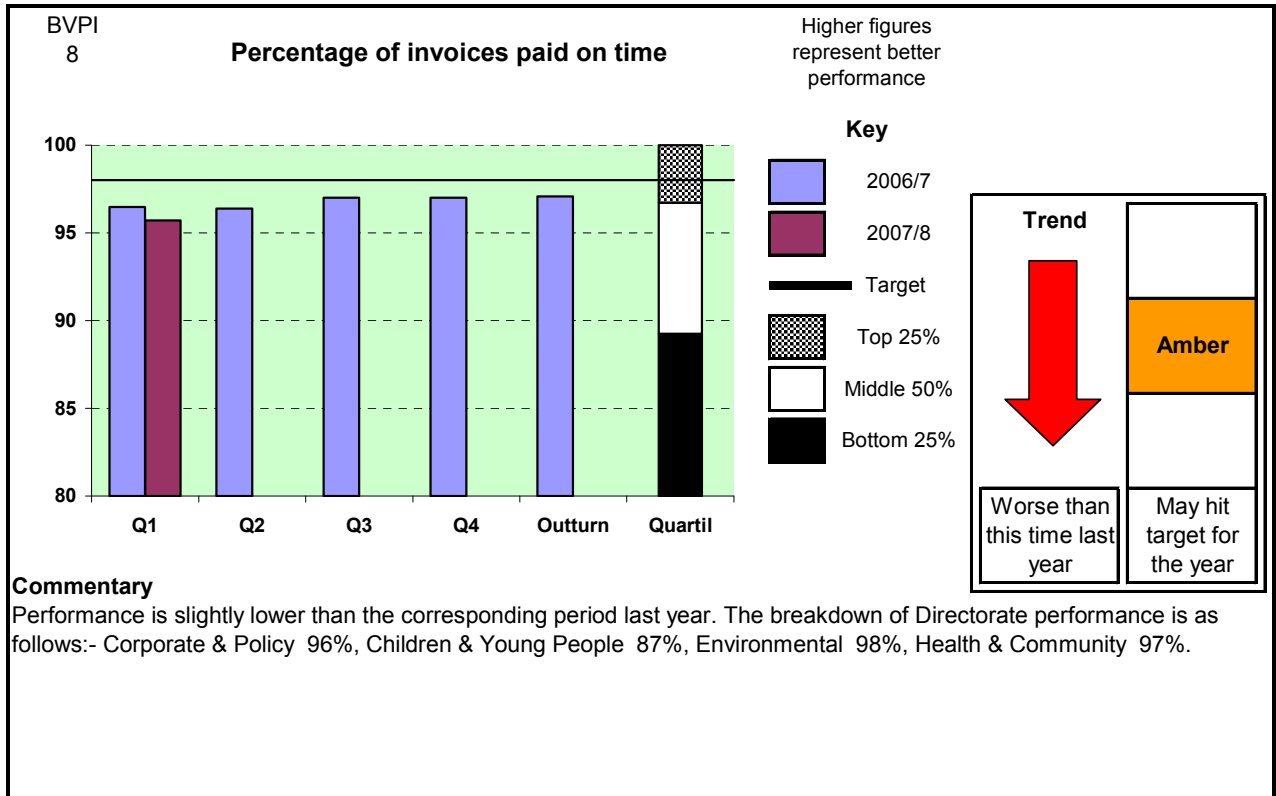
Progress against 'key' objectives

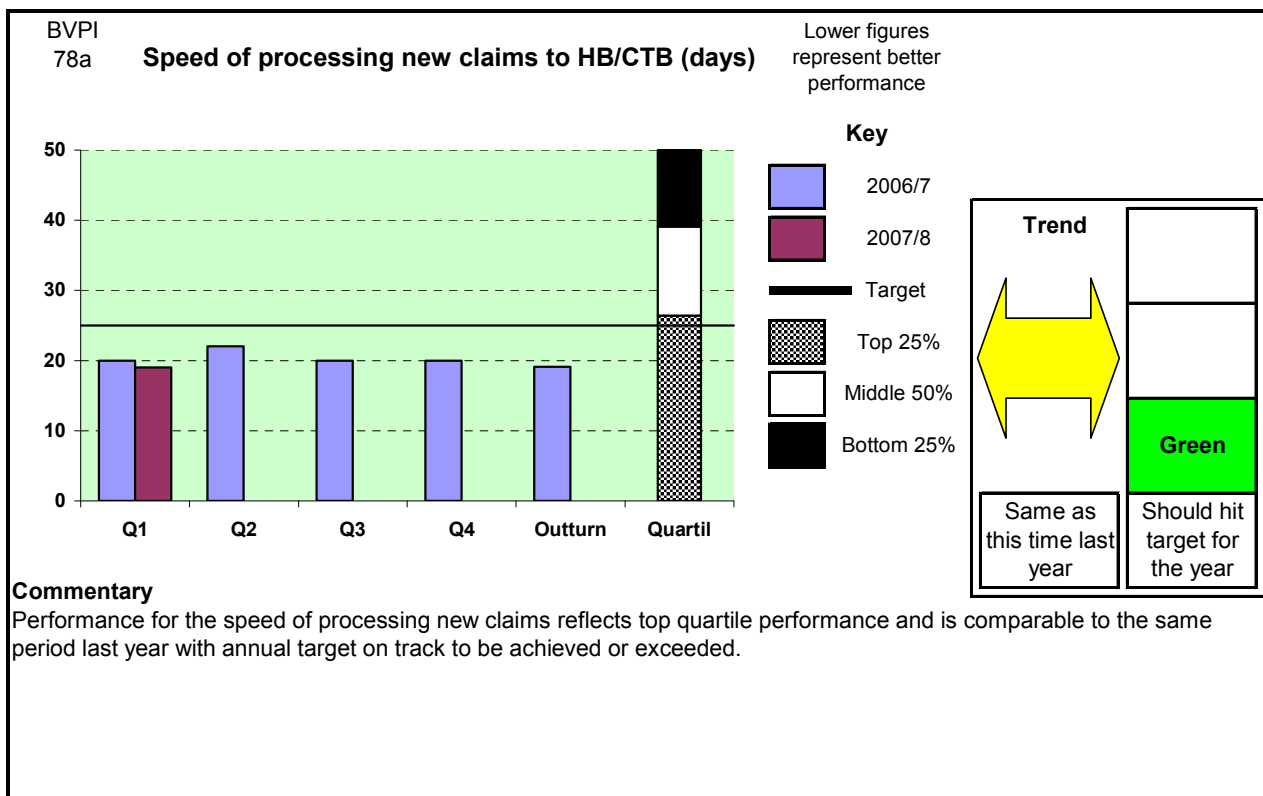
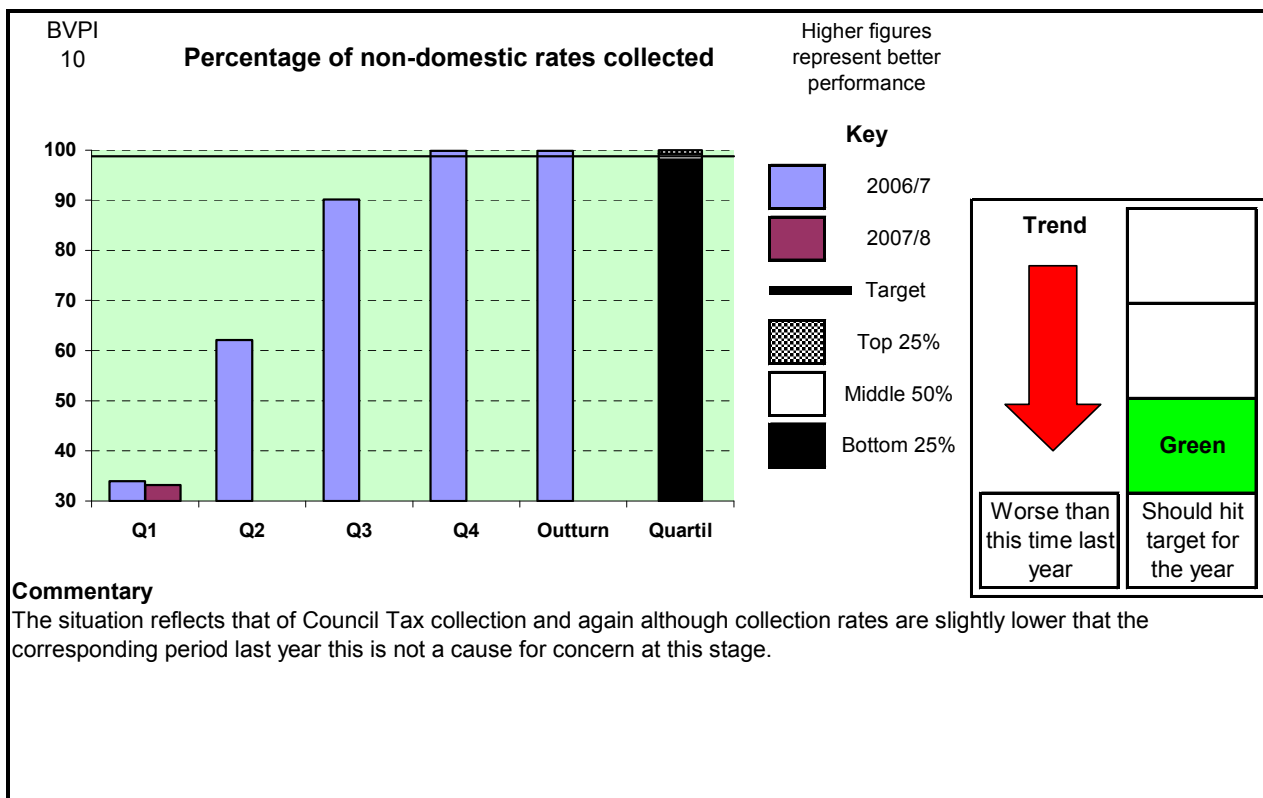
Service Plan Ref.	Objective	Key Milestone (s)	Progress Quarter 1	Commentary
ECS O1	Provide customers with open, accessible and accountable services through a single point of contact and explore and progress the opportunities to work in partnership with other agencies and bodies	<p>Implement and develop a work plan in partnership with ICT to develop the new in-house CRM system to provide Directorates with key business data. April – March 2008</p> <p>Implement the Emergency Duty Team monitoring system (HBC in partnership with St Helens) May 2007</p>	 	<p>The development of the corporate service delivery application "CSD" is continuing within ICT. Delays to the networking infrastructure upgrade have impacted on this and other projects although the implementation of the project remains on track to be complete by March 2008.</p> <p>Some delays have been encountered in the project and the partnership agreement with St Helens MBC is due for implementation in October.</p>
ECS O2	To enhance the operational performance and delivery of the Revenues and Benefits service by extending the current use of ICT capabilities.	<p>Further roll out of Home-working across the Department September 2007</p> <p>Implement new system for mobile working in Benefits and determine opportunities for using the system in Revenues June 2007</p> <p>Examine implications of adopting the DWP initiative to receive Electronic Benefit Claims from Customers and determine policy June 2007</p> <p>Investigate introducing 'Tellytalk' in HDLs/Registered Social Landlords etc. December 2007</p>	   	<p>The pilot has been very successful and plans are in hand to expand the home working in benefits by several officers in September.</p> <p>Following the introduction of the replacement Revenues & Benefits system a new mobile working platform was also required. The "Kirona" system has now been successfully implemented as planned.</p> <p>The operational issues have been examined and a decision will be taken in the next month.</p> <p>The system involves the installation of video cameras in various locations linked back to the Benefits office. Evaluation of technical issues is continuing.</p>

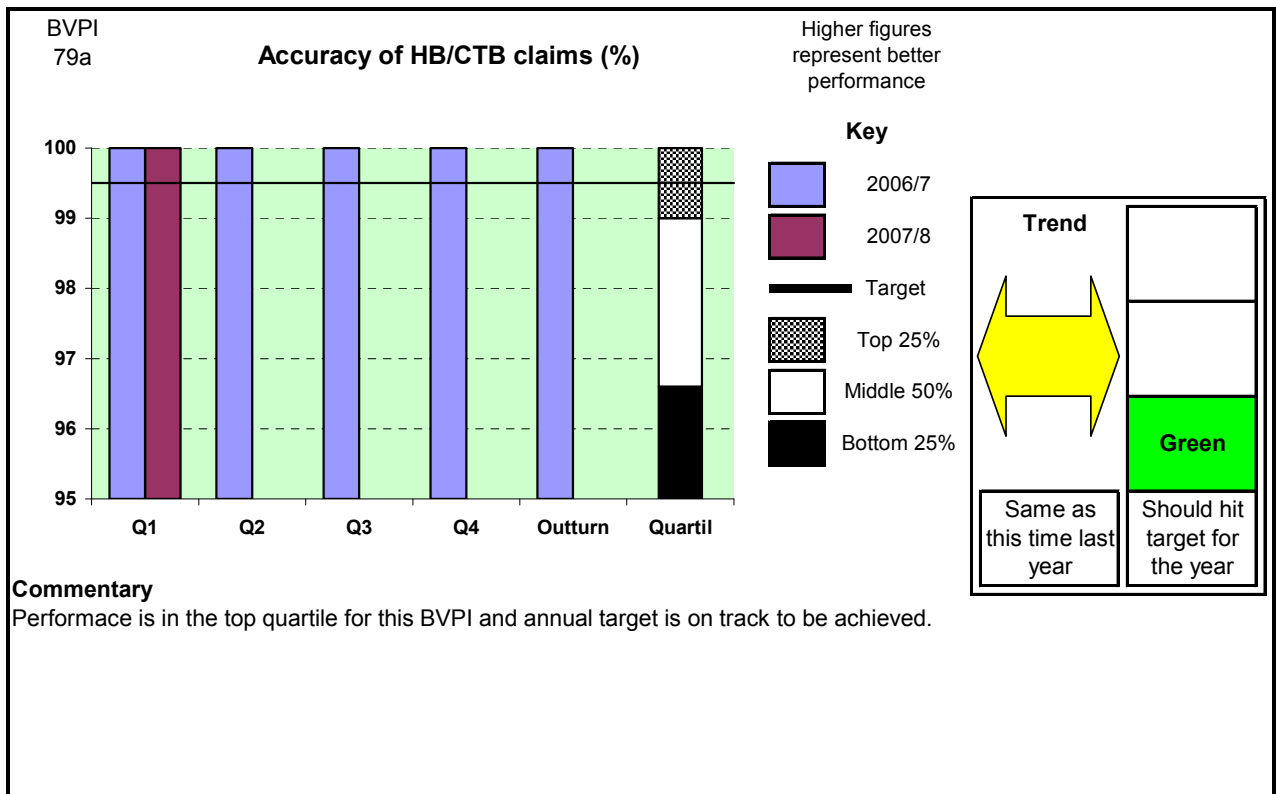
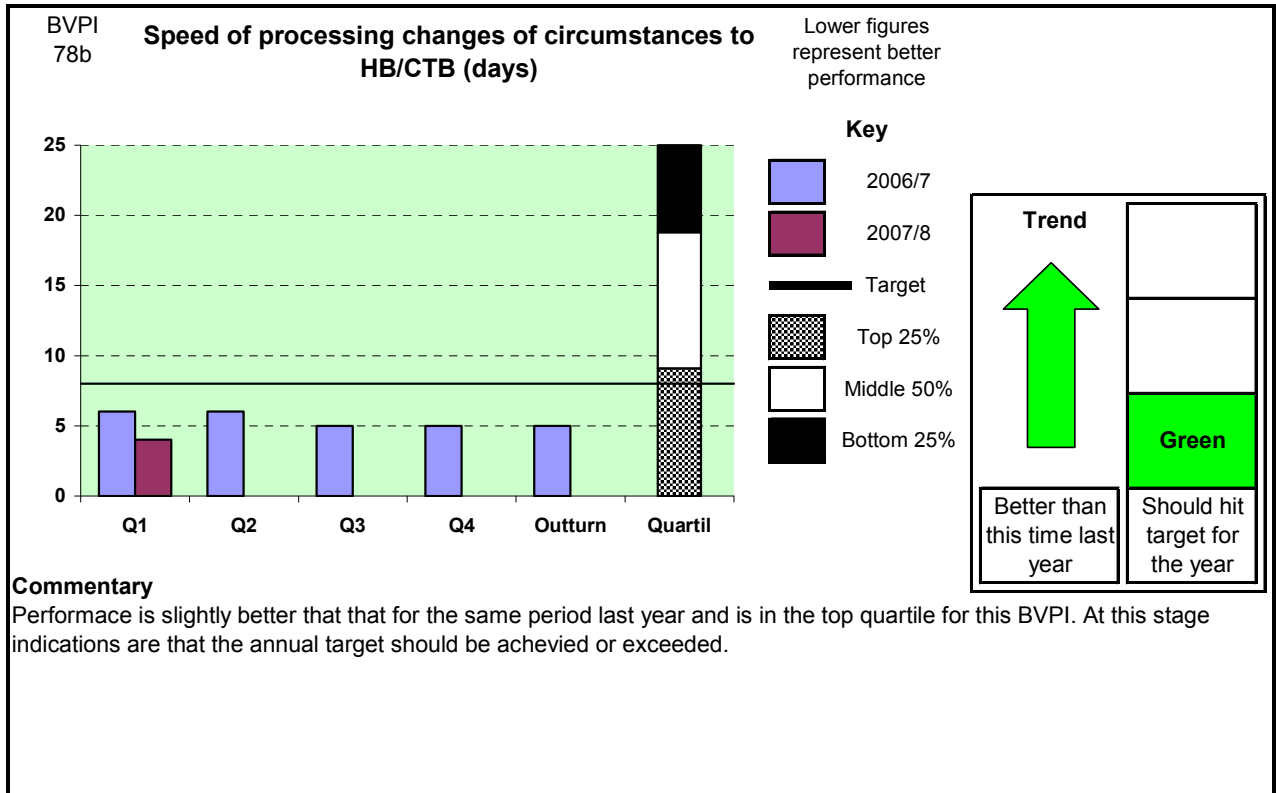
Service Plan Ref.	Objective	Key Milestone (s)	Progress Quarter 1	Commentary
ECS O3	To systematically acquire and utilise intelligence to inform the ongoing delivery of procurement related activity and through information and skills transfer increase and strengthen organisational capabilities.	<p>Develop a work programme that examines major areas of spend across the Council April 2007</p> <p>Develop and implement a Procurement Training Plan designed to improve procurement practices for those officers responsible for the procurement of goods and services September 2007</p> <p>Report findings and recommendations to Business Efficiency PPB October 2007</p> <p>Roll out the arrangements for document imaging for invoices across all directorates April - Oct 2007</p>	   	<p>Initial spend analysis was completed and has been disseminated as planned. Further work is now being undertaken to refine the classification system further to provide greater clarity as to spending patterns.</p> <p>Training plans are being further developed. To date a number of training sessions have been delivered and these will be refined as we progress.</p> <p>Analysis of Council spend has already commenced on a number of key areas to examine more effective methods of procurement. A programme is being developed and a number of workstreams will be targeted. Currently better procurement of Agency Staff is being explored and an initial report has been considered by the Business Efficiency Board.</p> <p>Currently Corporate and Policy Invoices are being scanned and matched electronically. Staff at the Contact Centre will soon assume responsibility for this work.</p> <p>Work is progressing to integrate other Directorates into this process.</p>

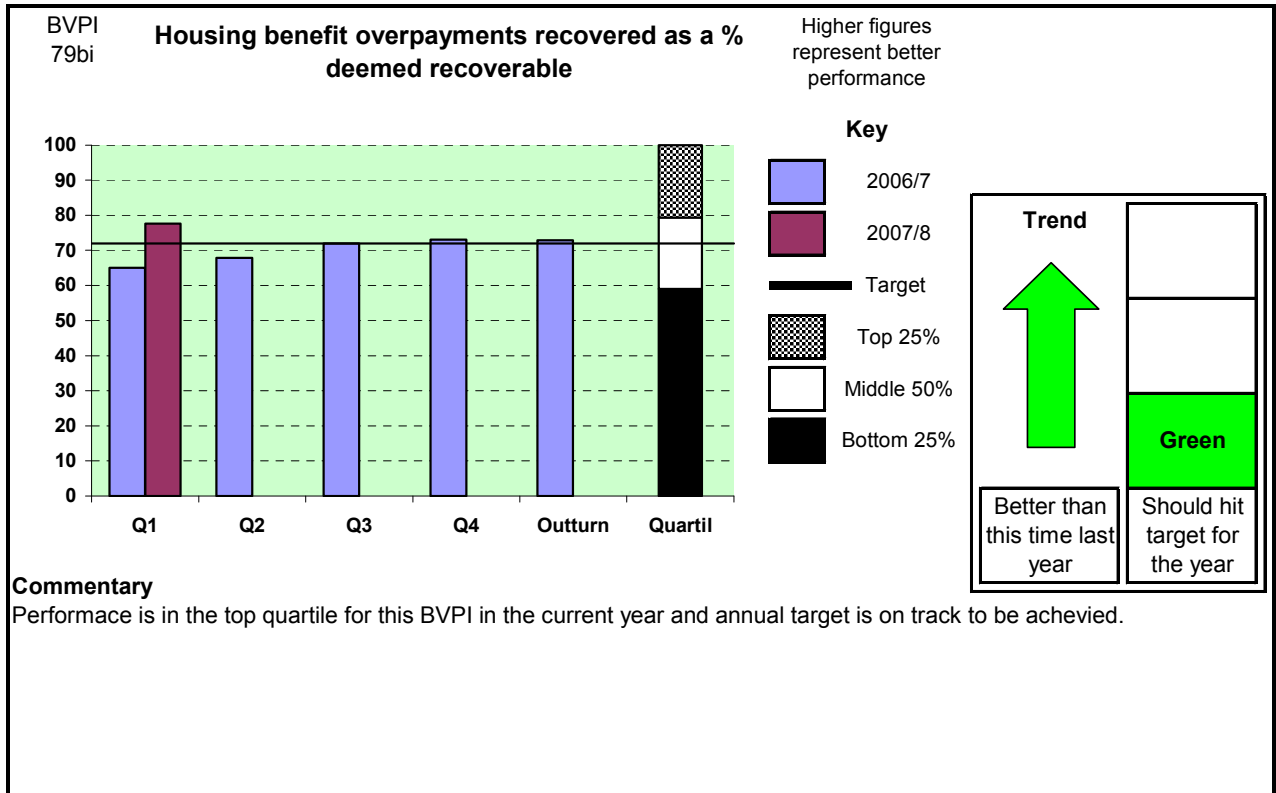
Progress against 'other' objectives

Service Plan Ref.	Objective	Key Milestone	Progress Quarter 1	Commentary
ECS O4	To further enhance customer focus and service provision by integrating ICT solutions and working with other partners and agencies	Produce Volumetric data by integrating the CRM system and linking the data with other sources will enable the Council to make better use of its resources to improve service delivery to the customer July 2007		This objective has been delayed following the decision to produce an in-house CRM system to deliver services to the customer. It is hoped that work can be completed during quarter 3 and additional information will be provided as this becomes available.
		Develop with ICT a workflow management system in order that all white mail can be dealt with through the new CRM system, this would achieve savings across the council December 2007		The development of the corporate service delivery application "CSD" is continuing within ICT. Delays to the networking infrastructure upgrade have impacted on this and other projects.









Debtor Summary Statistics – Quarter 1

Directorate	Period	Invoices Raised	Debt Raised £	Payments Received £	Total Outstanding £	% Collected
Children & Young People	Quarter 1	135	422,551	302,073	120,478	71.49%
	Quarter 2					
	Quarter 3					
	Quarter 4					
	Total					
Corporate & Policy	Quarter 1	1,211	802,946	609,490	193,456	75.91%
	Quarter 2					
	Quarter 3					
	Quarter 4					
	Total					
Environment	Quarter 1	1,428	1,087,866	854,915	232,951	78.59%
	Quarter 2					
	Quarter 3					
	Quarter 4					
	Total					
Health & Community	Quarter 1	1,445	1,637,340	1,470,030	167,310	89.78%
	Quarter 2					
	Quarter 3					
	Quarter 4					
	Total					
Totals Summary for Period	Quarter 1	4219	3,950,703	3,236,508	714,195	81.92%
	Quarter 2					
	Quarter 3					
	Quarter 4					
	Annual Total					

Financial Statement

EXCHEQUER AND CUSTOMER SERVICES

Revenue Budget as at 30th June 2007

	Annual Revised Budget	Budget To Date	Actual To Date	Variance To Date (Overspend)	Actual Including Committed Items
	£'000	£'000	£'000	£'000	£'000
<u>Expenditure</u>					
Employees	5,327	1,322	1,232	90	1,232
Premises	446	69	43	26	43
Supplies & Services	1,054	164	149	15	149
Telephone System Costs	76	19	20	(1)	20
Insurance	2,019	1,757	1,760	(3)	1,760
Transport	104	26	27	(1)	27
Charitable Relief	103	0	0	0	0
Concessionary Travel	1,485	371	315	56	315
Asset Charges	160	0	0	0	0
Support Services	4,203	0	0	0	0
Total Expenditure	14,977	3,728	3,546	182	3,546
<u>Income</u>					
Sales	-12	-3	-4	1	-4
Halton Housing Trust	-18	-	-4	0	-4
		4			
Fees & Charges	-5	0	0	0	0
Support Service Recharges	-4,662	0	0	0	0
SLA to Schools	-45	0	0	0	0
Telephone Recharges	-330	0	0	0	0
Insurance Recharges	-2,260	0	0	0	0
NNDR Administration Grant	-160	0	0	0	0
Hsg Ben Administration Grant	-1,501	-375	-371	(4)	-371
Weekly Incorrect Benefit Subsidy	-21	0	0	0	0
Liability Orders	-569	0	0	0	0
Total Income	-9,583	-382	-379	(3)	-379
Net Expenditure	5,394	3,346	3,167	179	3,167

Comments on the above figures:

In overall terms spending is currently below the budget to the end of the first quarter. With regards to expenditure, employee costs are lower than budget due to vacancies within the Housing Benefits section, and it is expected that spending will be within budget at the year-end.




EXCHEQUER AND CUSTOMER SERVICES**Local Strategic Partnership expenditure to 30th June 2007**

	Annual Budget	Budget to Date	Actual to Date	Variance to Date
	£000	£000	£000	£000
Local Strategic Partnership				
Benefits Bus	181	45	32	13
Net Expenditure	181	45	32	13

Regular monitoring reports are sent to the Local Strategic Partnership (LSP) in respect of all LSP projects and any areas of concern are dealt with throughout the year by the LSP support team and individual project managers. Some variances against the budget to date are expected, as the LSP have deliberately over-programmed in order to ensure that the full allocation of Neighbourhood Renewal Fund grant is spent during the year.

Explanation of the use of Traffic Light Symbols

The traffic light symbols are used in the following manner:

	<u>Objective</u>	<u>Performance Indicator</u>
<u>Green</u>	 <p>Indicates that the <u>objective is on course to be achieved</u> within the appropriate timeframe.</p>	Indicates that the <u>target is on course to be achieved</u> .
<u>Amber</u>	 <p>Indicates that it is <u>unclear</u> at this stage, due to a lack of information or a key milestone date being missed, <u>whether the objective will be achieved</u> within the appropriate timeframe.</p>	Indicates that it is either <u>unclear</u> at this stage or too early to state <u>whether the target is on course to be achieved</u> .
<u>Red</u>	 <p>Indicates that it is <u>highly unlikely or certain that the objective will not be achieved</u> within the appropriate timeframe.</p>	Indicates that the <u>target will not be achieved</u> unless there is an intervention or remedial action taken.

QUARTERLY MONITORING REPORT

DIRECTORATE: Corporate and Policy
SERVICE: Financial Services
PERIOD: Quarter 1 to period end 30 June 2007

1.0 INTRODUCTION

This Monitoring Report covers the Financial Services first quarter period up to period end 30 June 2007. It describes key developments and progress against 'key' objectives and performance indicators for the service.

The way in which traffic light symbols have been used to reflect progress is explained within Appendix 4.

2.0 KEY DEVELOPMENTS

The Business Efficiency Board approved the Council's draft Statement of Accounts for 2006/07 on 28th June 2007, in line with the statutory deadline. The Audit Commission are currently undertaking the year-end accounts audit and will report their findings to Executive Board on 20th September 2007.


The Annual Efficiency Statement has been submitted to the Department for Communities and Local Government, setting out the strategy and key actions to achieve efficiency gains in 2007/08.

As reported previously work continues to support the financial aspects of the partnership with Merseyside Waste Disposal Authority for the procurement of waste treatment and disposal facilities, and with the development of the Mersey Gateway.

3.0 EMERGING ISSUES

A self-assessment has been prepared and submitted for review by the Audit Commission, as part of the 2007 CPA Use of Resources assessment.

4.0 PROGRESS AGAINST KEY OBJECTIVES / MILESTONES

Total	6		6		0		0
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All six of the key objectives / milestones for the Service are on track to be achieved and additional details are provided within Appendix 1.

4.1 PROGRESS AGAINST OTHER OBJECTIVES / MILESTONES

Total	4		4		0		0
--------------	----------	---	----------	---	----------	---	----------

All four of the remaining objectives / milestones for the Service are on track to be achieved and therefore non require reporting by exception at this stage.

5.0 SERVICE REVIEW

Following the 2006 CPA Use of Resources assessment, an action plan was developed and is being used as the basis for continued advancement and improvement across the Service. This will be updated following the 2007 assessment.

6.0 PROGRESS AGAINST KEY PERFORMANCE INDICATORS

Total	2		2		0		0
--------------	----------	---	----------	---	----------	---	----------

Both of the key performance indicators for the Service are on track to be achieved and additional details are provided within Appendix 2.

6.1 PROGRESS AGAINST OTHER PERFORMANCE INDICATORS

Total	6		6		0		0
--------------	----------	---	----------	---	----------	---	----------

Five of the six of the remaining performance indicators for the Service are on track to be achieved. Although one, relating to investment returns, is marginally below target none require reporting by exception at this stage.

7.0 RISK CONTROL MEASURES

During the production of the 2007-08 Service Plan, the service was required to undertake a risk assessment of all Key Service Objectives.

Where a Key Service Objective has been assessed and found to have associated 'High' risk, progress against the application of risk treatment measures is to be monitored, and reported in the quarterly monitoring report in quarters 2 and 4.



8.0 PROGRESS AGAINST HIGH PRIORITY EQUALITY ACTIONS





During 2006/07 the service was required to undertake an Equality Impact Assessment. Progress against actions identified through that assessment, with associated High priority are to be reported in the quarterly monitoring report in quarters 2 and 4.

9.0 APPENDICES



Appendix 1 - Progress against Key Objectives/ Milestones
Appendix 2 - Progress against Key Performance Indicators
Appendix 3 - Financial Statement
Appendix 4 - Use of Traffic Light symbols

Progress against 'key' objectives

Service Plan Ref.	Objective	Key Milestone	Progress Quarter 1	Commentary
FS O1	Setting the Revenue Budget, Capital Programme and recommend Council Tax	<p>Report Medium Term Financial Forecast to Executive Board November 2007</p> <p>Report to Council in March 2008</p>		On track to report to Executive Board in November 2007.
FS O2	To take steps to maximise the Council's share of the Formula Grant (RSG)	<p>Join with Merseyside authorities and SIGOMA to lobby for appropriate methodology changes September 07</p> <p>Check with relevant data to Dept of Communities and Local Govt. September 2007</p> <p>Analyse provisional settlement November 2007</p> <p>Lobby MP's and DCLG following provisional settlement December 2007</p>		Consultation began on changes to Formula Grant on 17 th July. On target to respond before consultation ends on 10th October.

Service Plan Ref.	Objective	Key Milestone	Progress Quarter 1	Commentary
FS 03	To effect financial prudence by assisting managers to control their budgets by monitoring spending and providing financial reports.	<p>Provide monthly financial reports to budget holders within 8 working days of month end.</p> <p>Provide quarterly financial monitoring reports to Operational Directors for inclusion in Departmental Service Plan Monitoring Reports.</p> <p>Provide quarterly monitoring reports on the overall budget to the Exec Board sub committee.</p>		<p>Reports issued on schedule to date.</p> <p>Quarter 1 reports provided on schedule to Operational Directors.</p> <p>The 2006/07 outturn was reported to Executive Board Sub Committee on 21st June 2007, showing an overall underspend.</p>
FS 04	To summarise and report the efficiency gains in response to the 'Gershon Review'	<p>Submit the 07/08 Annual Efficiency Statement (backward look) by June 2007 and report to the Business Efficiency Board.</p> <p>Submit the 07/08 Annual Efficiency Statement (forward look) by July 2007 and report to the Business Efficiency Board.</p> <p>Submit the Half Year Review by November 2007 and report to the Business Efficiency Board.</p>	  	<p>The Annual Efficiency Statements for 2006/07 has been submitted to the Dept for Communities and Local Government and will be reported to the Business Efficiency Board on 5th September 2007.</p> <p>The Annual Efficiency Statement for 2007/08 has been submitted to the Dept for Communities and Local Government and was reported to the Business Efficiency Board on 28th June 2007.</p> <p>The half-year review will be reported to the Business Efficiency Board in November 2007.</p>

Progress against 'key' Performance Indicators

Ref	Indicator	Actual 06 / 07	Target 07 / 08	Quarter 1	Progress	Commentary
FSLI 5	Receive an unqualified Audit opinion on the accounts	Yes	Yes	Yes		The external audit of the 2006/07 final accounts is well underway and an unqualified audit opinion is anticipated, by 30 th September 2007.
FSLI 7	Complete at least 90% of the Annual Audit Plan	91%	90 %	21%		Internal Audit became fully staffed in May 2007 and is on course to achieve 90% of the Audit Plan.

FINANCIAL SERVICES

Revenue Budget as at 30th June 2007




	Annual Revised Budget	Budget To Date	Actual To Date	Variance To Date (overspend)	Actual Including Committed Item
	£'000	£'000	£'000	£'000	£'000
<u>Expenditure</u>					
Employees	1,454	357	331	26	332
Premises	82	0	0	0	0
Supplies & Services	95	23	15	8	15
Transport	51	13	12	1	12
Support Services	222	0	0	0	0
Total Expenditure	1,904	393	358	35	359
Income					
S.L.A. to Schools	-140	0	0	0	0
Support Service Recharges	-1,764	0	0	0	0
Total Income	-1,904	0	0	0	0
Net Expenditure	0	393	358	35	359

Comments on the above figures:

In overall terms, spending is below the budget profile at the end of the first quarter. This is mainly due to a number of staff vacancies within both Internal Audit and Accountancy. Spending is expected to be in line with budget by the end of the financial year.

Explanation of the use of Traffic Light symbols

The traffic light symbols are used in the following manner:

	<u>Objective</u>	<u>Performance Indicator</u>
<u>Green</u>	 <p>Indicates that the <u>objective is on course to be achieved</u> within the appropriate timeframe.</p>	Indicates that the <u>target is on course to be achieved</u> .
<u>Amber</u>	 <p>Indicates that it is <u>unclear</u> at this stage, due to a lack of information or a key milestone date being missed, <u>whether the objective will be achieved</u> within the appropriate timeframe.</p>	Indicates that it is either <u>unclear</u> at this stage or too early to state <u>whether the target is on course to be achieved</u> .
<u>Red</u>	 <p>Indicates that it is <u>highly unlikely or certain that the objective will not be achieved</u> within the appropriate timeframe.</p>	Indicates that the <u>target will not be achieved</u> unless there is an intervention or remedial action taken.

QUARTERLY MONITORING REPORT

DIRECTORATE: Corporate and Policy
SERVICE: I.C.T. Services
PERIOD: Quarter 1 to period end 30th June 2007

1.0 INTRODUCTION

This Monitoring Report covers the I.C.T. Services first quarter period up to period end 30th June 2007. It describes key developments and progress against 'key' objectives and performance indicators for the service.

The way in which traffic light symbols have been used to reflect progress is explained within Appendix 5.

2.0 KEY DEVELOPMENTS

The 1st quarter of the year again has seen a number of very positive outputs and projects complete, allowing the development of new project areas.

A protracted negotiation period has resulted in major set back within the technical infrastructure programme surrounding network deliveries and improvements. This is not to say that a considerable amount of work has been undertaken in this area with considerable improvements and deliveries made; but strategic delays in changes to the education networks and internet solutions has delayed this programme by approximately 10 months as the final delivery of the full programme should have been completed at the end of 2006 rather than towards the end of the 2nd quarter 2007.

The impact of this delay has had a severe impact upon a number of key deliveries limiting the ability of projects to complete and others to start as the network is the essential element within almost all of the infrastructure projects.

The 2nd and 3rd quarter of the 2007/08 programme will see a large number of major deliveries start such as the PC replacement programme, Active Directory Services and major changes to the Internet and Network provision.

3.0 EMERGING ISSUES

Large external contracts for Microsoft Licensing, Printing, Disaster Recovery provision and PC/Laptop provision within the authority will be developed defining new and innovative solutions for the future development of the ICT desktop solutions.

The PC/Laptop tender in particular will look at standardising the provision of a single device strategy for the authority linked to a 5 year warranty reducing environmental impact, improving flexible working opportunities and supporting key areas such as business continuity. The objective of this programme will be to provide each ICT user with a laptop and docking station rather than the fixed and restrictive PC alternative of old.

The current network programme will compliment this strategy allowing a solution known as DHCP that allows the secure connection of any HBC computing device inclusive of large scale printing devices to be connected at any location within the corporate network.

Wireless solutions within the main meeting rooms will also go ahead upon completion of the network V-Lan activities.

The new internet programme will provide ultimately a 4 node connection to the internet utilising large scaleable independent connections, capable of providing the high speed resilient growth now required for the development of the corporate, public access and primary secondary schools connectivity.

The development of the corporate service delivery application "CSD" will continue with a large development within Planning, Children and Young People and HDL looking into a document and information management solution leading to further corporate opportunity.

Large scale directorate programmes of work such as the replacement of the Care-First application within the Social Care environment will be a considerable undertaking for the department as this will involve the full replacement of this application together with the vast array of linkages and hardware solutions associated with this software solution.

Finally closely linked to the major project will be the prioritisation of the 200 + additional directorate ICT based projects presented for delivery this year.

4.0 PROGRESS AGAINST KEY OBJECTIVES / MILESTONES



Although the majority of key objectives are showing 'red' this is due to the fact that are all interdependent and reliant upon a basic network foundation being in place. Additional commentary for all key objectives / milestones is provided within Appendix 1.

4.1 PROGRESS AGAINST OTHER OBJECTIVES / MILESTONES



All of the remaining objectives for the service are presently progressing as planned and therefore none require reporting by exception at this time..

5.0 SERVICE REVIEW

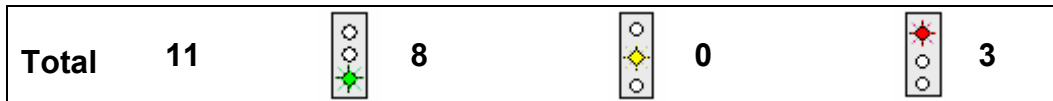
There are no issues relating to service review to report at present.

6.0 PROGRESS AGAINST KEY PERFORMANCE INDICATORS



All key performance indicators for the service are progressing as planned and additional details are provided within Appendix 2.

6.1 PROGRESS AGAINST OTHER PERFORMANCE INDICATORS



With the exception of installations of new equipment, for which additional commentary is provided within Appendix 2, all remaining indicators for the service are progressing as planned.

7.0 RISK CONTROL MEASURES

During the production of the 2007-08 Service Plan, the service was required to undertake a risk assessment of all Key Service Objectives.

Where a Key Service Objective has been assessed and found to have associated 'High' risk, progress against the application of risk treatment measures is to be monitored, and reported in the quarterly monitoring report in quarters 2 and 4.






8.0 PROGRESS AGAINST HIGH PRIORITY EQUALITY ACTIONS

During 2006/07 the service was required to undertake an Equality Impact Assessment. Progress against actions identified through that assessment, with associated High priority are to be reported in the quarterly monitoring report in quarters 2 and 4.









9.0 APPENDICES

Appendix 1 - Progress against Key Objectives/ Milestones
Appendix 2 - Progress against Key / Other Performance Indicators
Appendix 3 - Financial Statement
Appendix 4 - Use of traffic light symbols

Progress against 'key' objectives





Service Plan Ref.	Objective	Key Milestone	Progress Quarter 1	Commentary
ICT 01	Constantly evaluate and improve the usability, resilience, control and flexibility of the Council's Data Communications Network Infrastructure	Full segmentation (V-Lan) of the corporate, libraries and schools networks July 2007		As discussed above major delays in gaining agreement and revenue funding from the Schools as a whole has set this programme back. Major upgrades by ICT services to the schools networks need to happen before any of the main network changes can be fully implemented. Agreement in principle has now been gained which in early September if formally completed will allow work to start and the issues we currently have dealt with quickly.
		Increase network capacity utilising dark fibre, and standardise using CISCO networking equipment throughout the corporate and Schools networks. September 2007.		As above, all equipment is in stock and awaiting approval for install.
		Corporate, Schools and Public access Internet upgrade July 2007		The decision was taken to order the new internet connections now for 3 of the nodes; Rutland/Grosvenor, RTH and Municipal due to the 90 day install times and will be in place Mid October, with the 4 th node Catalyst installed 3 rd quarter.
		Switch over to fibre link for Grosvenor House May 2007		Switch over completed as planned
		Switch Internet providers from tier 3 to tier 1 developing a scaleable 3 node approach. May 2007		This is linked to the purchase of the new internet connections from NTL. The achievement of this milestone is dependent upon the internet upgrade as described previously.

APPENDIX ONE – PROGRESS AGAINST 'KEY' OBJECTIVES/ MILESTONES (ICT Services)




Service Plan Ref.	Objective	Key Milestone	Progress Quarter 1	Commentary
ICT 01 Cont'd	Constantly evaluate and improve the usability, resilience, control and flexibility of the Council's Data Communications Network Infrastructure	<p>Decommissioning of PDC and BDC's July 2007</p> <p>Introduce network resilience September 2007</p> <p>Implement quality of service provision December 2007</p> <p>Implement secure wireless to corporate network within council meeting rooms December 2007</p>	   	<p>Completed as planned</p> <p>Completed ahead of schedule.</p> <p>Progress against this milestone is unable to start until the network V-Lan project is completed, and the schools allow the upgrades to their networks.</p> <p>As above.</p>
ICT 02	Satisfy the business needs of the Council's Corporate and Directorate requirement by providing a scaleable and robust hardware infrastructure	<p>Complete exchange server upgrades (e-mail facility) September 2007</p> <p>Introduce data encryption to all laptop and tablet devices September 2007</p> <p>Complete annual technology replacement programme (Elected Members) December 2007</p> <p>Complete annual PC / laptop replacement programme (377 devices) March 2008</p>	   	<p>Complete, but due to network delays the benefit is not as yet apparent.</p> <p>Delayed to rollout together with the PC/Laptop tender, the technology is in place and tested, yet to be deployed.</p> <p>4 test devices are to used by the working party after which a rollout programme linked to the new tender will be put in place.</p> <p>Tender in place, programme in place for the immediate replacement of Windows 95/98 PC's due to operational reasons.</p>

Service Plan Ref.	Objective	Key Milestone	Progress Quarter 1	Commentary
ICT 02 Cont'd	Satisfy the business needs of the Council's Corporate and Directorate requirement by providing a scaleable and robust hardware infrastructure	Complete planned upgrades to CITRIX software systems March 2008		On target, but due to network delays the benefit is not as yet apparent.
ICT 03	Satisfy the business needs of the Council's Corporate and Directorate requirement by providing a scaleable and robust software platform	Rollout of Microsoft Windows XP and decommissioning of Windows 95 / 98 September 2007		As above the project is underway
		Implement Corporate web reporting tools September 2008		A new software solution is in place, exceeding the target delivery with additional packages being evaluated.
		Complete provision of intranet services to all secondary and primary schools March 2008		Complete within the admin teams, further advances will require the network upgrades to be completed.
		Implementation of corporate spyware for servers and PC's September 2007		Server programme underway, with delays within the desktop development due to competing priorities.
		Complete planned operating system upgrades March 2008		Planned and within the current infrastructure programme.
ICT 04	The implementation of a range of new corporate wide facilities including Web services, records & document management, business process workflow, corporate desktop portal	Implementation of document imaging supporting adoption records March 2008		Project in progress linking the CSD application with this solution.
		Planning and Building Control document imaging October 2007		Project in progress linking the CSD application with this solution.


APPENDIX ONE – PROGRESS AGAINST ‘KEY’ OBJECTIVES/ MILESTONES (ICT Services)

Service Plan Ref.	Objective	Key Milestone	Progress Quarter 1	Commentary
ICT 04 Cont'd	The implementation of a range of new corporate wide facilities including Web services, records & document management, business process workflow, corporate desktop portal	<p>Pilot workflow, internal ICT processes November 2007</p> <p>EDT delivery through HDL- in partnership between H & C CYP and St Helens MBC September 2007</p> <p>Staff Harassment system- corporate wide system meeting legislative requirements April 2007</p> <p>Mayrise Highways and Streetworks integration into HDL September 2007</p>	   	<p>Project in progress linking the CSD application with this solution.</p> <p>Project in progress and in line with estimated delivery date</p> <p>Project completed.</p> <p>Project completed</p>

Progress against Key Performance Indicators

Ref	Indicator	Actual 06 / 07	Target 07 / 08	Quarter 1 Outturn	Progress	Commentary
ITCLI 4	Member Support: % of calls responded to within 1 working day.	87	80	100		Improved
ITCLI 10	Average availability of the Council's operational servers (%).	99.59	99	99.65		Improved, with one exception with a failure to a print server in July.
ITCLI 11	Average availability of the Councils WAN infrastructure (%).	99.27	99	99.67		Improved, but again availability does not cover some of the current issues addressed in this report.

Progress against 'other' Performance Indicators

Ref	Indicator	Actual 06 / 07	Target 07 / 08	Quarter 1 Outturn	Progress	Commentary
ITCLI 2	% Of all responsive repairs completed within 2 working days.	87	80	79		All of these indicators have been adversely affected by staff availability. In order to address the problem two additional agency staff have been recruited and further consideration will be given to determining the most appropriate longer-term arrangements.
ITCL1 6	Average working days from order to completion of a new PC	17	10	30		
ITCL1 7	Average working days from delivery to completion of a new PC	6	5	10		
ITCL1 8	Average working days from order to completion of a thin client device	6	7	14		

Financial Statement

Revenue Budget as at 30th June 2007

	Annual Revised Budget	Budget To Date	Actual To Date	Variance To Date (Overspend)	Actual Including Committed Items
	£'000	£'000	£'000	£'000	£'000
<u>Expenditure</u>					
Employees	2,326	565	472	93	472
Premises	117	0	0	0	0
Supplies & Services	167	39	16	23	18
Computer Repairs & Software	118	30	21	9	21
Communications Costs	121	30	32	(2)	32
Transport	49	12	12	0	12
Asset Charges	964	0	0	0	0
Support Services	202	0	0	0	0
Total Expenditure	4,064	676	553	123	555
<u>Income</u>					
Support Service Recharges	-4,030	0	0	0	0
SLA to Schools	-85	0	0	0	0
Total Income	-4,115	0	0	0	0
Net Expenditure	-51	676	553	123	555

Comments on the above figures

In overall terms spending is currently below the budget to the end of the first quarter.

With regards to expenditure, employee's costs are lower than budget due to the effects of a major staff restructuring across the Department, with a number of posts having only recently being filled. As a result the overall departmental spending will be within budget at the year-end.

Capital Projects as at 30th June 2007




Capital Expenditure	Actual to Date	Allocation 07/08	Allocation 08/09	Allocation 09/10
	£000	£000	£000	£000
IT Rolling Programme	305	1,552	1,100	1,100
Net Expenditure	305	1,552	1,100	1,100

Comments on the above figures.

It is expected that the full allocation will be spent by the financial year-end.

Explanation of the use of Traffic Light Symbols

The traffic light symbols are used in the following manner:

	<u>Objective</u>	<u>Performance Indicator</u>
<u>Green</u>	 <p>Indicates that the <u>objective is on course to be achieved</u> within the appropriate timeframe.</p>	<p>Indicates that the <u>target is on course to be achieved</u>.</p>
<u>Amber</u>	 <p>Indicates that it is <u>unclear</u> at this stage, due to a lack of information or a key milestone date being missed, <u>whether the objective will be achieved</u> within the appropriate timeframe.</p>	<p>Indicates that it is either <u>unclear</u> at this stage or too early to state <u>whether the target is on course to be achieved</u>.</p>
<u>Red</u>	 <p>Indicates that it is <u>highly unlikely or certain that the objective will not be achieved</u> within the appropriate timeframe.</p>	<p>Indicates that the <u>target will not be achieved</u> unless there is an intervention or remedial action taken.</p>

QUARTERLY MONITORING REPORT

DIRECTORATE: Corporate & Policy
SERVICE: Legal and Member Services
PERIOD: Quarter 1 to period end 30th June 2007

1.0 INTRODUCTION

This Monitoring Report covers the Legal and Member Services first quarter period up to period end 30th June 2007. It describes key developments and progress against 'key' objectives and performance indicators for the service.

The way in which traffic light symbols have been used to reflect progress is explained within Appendix 5.

2.0 KEY DEVELOPMENTS

Whilst the arrival of the new Operational Director for the legal and personnel functions starts in mid September the service has continued to run under an Interim Manager and stability has been maintained.

The new Code of Conduct for Members has been adopted and training provided.

A tender submission was made to maintain the delivery of legal services to schools in the Borough as part of the brokerage machinery.

3.0 EMERGING ISSUES

A significant number of equal pay claims have been received and these are being handled conjointly with external Solicitors.

Significant work is on the horizon in connection with a number of imminent compulsory purchase orders and in respect of the Building Schools For The Future Project.

The impact of the gradual introduction of Home Information Packs will need to be monitored to maintain the required turn round time for local searches and in the context of demands for more personal search appointments.

The statutory Orders to create new Parish Councils at Halebank and Sandymoor are awaited imminently, after which the decisions to be taken by the Council in connection with them can be addressed.

4.0 PROGRESS AGAINST KEY OBJECTIVES / MILESTONES

Total	5		5		0		0
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Achievement of the five key objectives for the service remains on track and additional details are provided within Appendix 1.

4.1 PROGRESS AGAINST OTHER OBJECTIVES / MILESTONES




Total	3		2		1		0
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Of the remaining objectives for the service only one, in relation to the implementation of a case management system, is not progressing as planned and additional details are provided within Appendix 1.

5.0 SERVICE REVIEW

There are no issues relating to service review to be reported at this stage.

6.0 PROGRESS AGAINST KEY PERFORMANCE INDICATORS

Total	4		2		2		0
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At this early stage in the year it is not possible to report meaningfully on two of these indicators and this is reflected in the Amber notation. Additional details regarding progress for key performance indicators are provided within Appendix 2.

6.1 PROGRESS AGAINST OTHER PERFORMANCE INDICATORS

Total	13		10		3		0
--------------	-----------	---	-----------	---	----------	---	----------

Of the remaining indicators for the service only 3 are presently showing any cause for concern and additional details are provided within Appendix 2.

7.0 RISK CONTROL MEASURES

During the production of the 2007-08 Service Plan, the service was required to undertake a risk assessment of all Key Service Objectives.

Where a Key Service Objective has been assessed and found to have associated 'High' risk, progress against the application of risk treatment measures is to be monitored, and reported in the quarterly monitoring report in quarters 2 and 4.






8.0 PROGRESS AGAINST HIGH PRIORITY EQUALITY ACTIONS

During 2006/07 the service was required to undertake an Equality Impact Assessment. Progress against actions identified through that assessment, with associated High priority are to be reported in the quarterly monitoring report in quarters 2 and 4.


9.0 APPENDICES

Appendix 1 - Progress against Key Objectives/ Milestones
Appendix 2 - Progress against Other Objectives/ Milestones
Appendix 3 - Progress against Key Performance Indicators
Appendix 4 - Progress against Other Performance Indicators
Appendix 5 - Financial Statement
Appendix 6 - Explanation of Traffic Light Symbols





Progress against 'key' objectives

Service Plan Ref.	Objective	Key Milestone	Progress Quarter 1	Commentary
LMS 01	To provide a high quality legal service to the Council and its departments to ensure that the Council is able to deliver its services effectively and is not deflected from the achievement of its objectives and priorities.	Secure renewal of Lexcel & ISO Accreditation December 2007		On course for renewal by target date
LMS 02	Ensuring that we are properly structured organised and fit for purpose and that decision makers are supported through the provision of timely and accurate advice and information.	Review Constitution May 2007		Constitution has been reviewed as planned.
LMS 03	To provide efficient and effective Democratic Support Services that give the members, as key decision makers, the information and support necessary to ensure that the authority is properly managed so as to achieve the council's objectives and priorities.	Introduce Revised Member Code of Conduct May 2007 Ensure all members have received training on the New Code September 2007 Train standards Committee in relation to the switch to a local regime for complaints March 2008	  	Revised Member Code of Conduct has been introduced as planned. Training has been provided and further sessions will be planned if required Training to be delivered once relevant legislation is introduced and guidance received from the Standards Board For England




Progress against 'other' objectives

Service Plan Ref.	Objective	Key Milestone	Progress Quarter 1	Commentary
LMS 04	To continue to provide innovative and effective members development and support services to enable the elected members to fulfil their key role in the management and governance of the authority	Implement Case Management System December 2007		The achievement of this objective is dependent on a review of available IT systems and then the availability of budget provision. Additional information will be provided as this becomes available.

Progress Against Key Performance Indicators

Ref	Indicator	Actual 06 / 07	Target 07 / 08	Quarter 1	Progress	Commentary
BVPI 2a	The level of Equality standard for Local Government to which the authority conforms	2	3	2		It is too early at this stage to report on progress against this indicator.
BVPI 2b	The duty to report Race Equality (Does the authority have a Race Equality scheme in place (%))	63	68	63		It is too early at this stage to report on progress against this indicator.
LMLI 9	No. Of Members with Personal Development Plans	42	50	44		Although the targeted level of performance for the year has been increased early indications are that this will be achieved.
LMLI 12	Payments received on debts with Legal as a proportion of debts referred to Legal	93 %	70%	54%		Performance is slightly ahead of the same period last year with annual target on track to be achieved.

Progress Against Other Performance Indicators

Ref	Indicator	Actual 06 / 07	Target 07 / 08	Quarter 1	Progress	Commentary
LMLI 4	Average Time Taken to Complete Conveyancing Transactions	265	200	227		Quarter 1 performance has seen a significant improvement over the same period last year (332 days) and every effort will be made to meet the target
LMLI 5	Average Time Taken to Complete Child Care Cases (calendar days) ^{NB}	191	210	272		This compares with 235 in the same quarter last year. Child care cases are complex and lengthy and resultant timescales are not always within the control of the legal staff involved.
LMLI 11	Value of Debt with Legal for Recovery (£ m)	1.313	N/A	1.448		Although the total debt has increased, the number of debts has fallen, with the average value increasing

Financial Statement

LEGAL, ORGANISATIONAL DEVELOPMENT AND HUMAN RESOURCES

Revenue Budget as at 30th June 2007




	Annual Revised Budget £'000	Budget To Date £'000	Actual To Date £'000	Variance To Date (Overspend) £'000	Actual Including Committed Items £'000
<u>Expenditure</u>					
Employees	3,132	804	829	(25)	829
Members Expenses	712	178	174	4	174
Premises	610	85	89	(4)	89
Supplies & Services	914	232	179	53	226
Training Costs	237	20	6	14	19
Civic Catering & Functions	82	20	8	12	8
Legal Expenses	92	23	67	(44)	67
Transport	72	18	15	3	16
Asset Charges	8	0	0	0	0
Agency Related	216	3	3	0	0
Support Services	1,313	0	0	0	0
Total Expenditure	7,388	1,383	1,370	13	1,428
<u>Income</u>					
Land Charges	-475	-119	-88	(31)	-88
Printing Recharges	-303	-51	-44	(7)	-44
SLA to Schools	-216	0	0	0	0
Licence Income	-205	-51	-69	18	-69
Other Income	-33	-8	-53	45	-53
Grants	-516	-20	-20	0	-20
Support Service Recharges	-4,407	0	0	0	0
Total Income	-6,155	-249	-274	25	-274
Net Expenditure	1,233	1,134	1,096	38	1,154

Comments on the above figures:

In overall terms spending appears to be slightly below budget, however, within this overall position income from Land Charges will show a significant shortfall against budget by year end, due to increased competition from Personal Search agents. This is partly offset by additional income from Licensing.

Application of Traffic Light Symbols

The traffic light symbols are used in the following manner:

	<u>Objective</u>	<u>Performance Indicator</u>
<u>Green</u>	 <p>Indicates that the <u>objective is on course to be achieved</u> within the appropriate timeframe.</p>	Indicates that the <u>target is on course to be achieved.</u>
<u>Amber</u>	 <p>Indicates that it is <u>unclear</u> at this stage, due to a lack of information or a key milestone date being missed, <u>whether the objective will be achieved</u> within the appropriate timeframe.</p>	Indicates that it is either <u>unclear</u> at this stage or too early to state <u>whether the target is on course to be achieved.</u>
<u>Red</u>	 <p>Indicates that it is <u>highly unlikely or certain that the objective will not be achieved</u> within the appropriate timeframe.</p>	Indicates that the <u>target will not be achieved</u> unless there is an intervention or remedial action taken.

QUARTERLY MONITORING REPORT

DIRECTORATE: Corporate & Policy

SERVICE: Personnel Services

PERIOD: Quarter 1 to period end 30th June 2007

1.0 INTRODUCTION

This Monitoring Report covers the Personnel Services first quarter period up to period end 30th June 2007. It describes key developments and progress against 'key' objectives and performance indicators for the service.

The way in which traffic light symbols have been used to reflect progress is explained within Appendix 5.

2.0 KEY DEVELOPMENTS

The implementation date of the Council's Pay and Grading Review has, by necessity, been moved slightly to accommodate the views of Regional and National unions, pre ballot stage. All job evaluations were completed by the end of March 2007 as required. Details of an Appeals Process, a Pay to Points line and protection arrangements were agreed with local unions and this, along with the outcomes of the evaluations have been initially with Regional unions and now with National unions. Once they are satisfied with the proposed course of action, local unions will be in a position to ballot their members regarding the adoption of the scheme. It is hoped that letters informing staff of the outcomes of the review can then be issued in September 2007.

The implementation of the Trent HR/Payroll IT system has continued and remains on schedule. Other modules of the system e.g. sickness, Training, and Health and Safety will be implemented over the next few months.

Following the early retirement of both the Operational Director OD/HR, and the subsequent creation of the new post covering HR and Legal & Member Services, and the ill health retirement of the Training Manager an opportunity has arisen to restructure the OD/HR function to accommodate new ways of working. The Payroll team have merged with the Recruitment and Contracts team following the successful introduction of Trent system and the increased work as a result of job evaluation. Additional work is now to be undertaken to examine wider implications of HR related work within the rest of the Council as previously considered by the Corporate Services PPB.

With the introduction of the national smoking ban on 1st July 2007, a new policy was negotiated and introduced in the first quarter to ensure that the Council is fully compliant with the legislation.

The Appointment Panel interviewed candidates for the new post of Operational Director of Legal & Member Services, OD/HR and Monitoring Officer. Mark Reaney, who currently works for Wirral MBC, was offered and accepted the position and will commence on the 10th September 2007.

3.0 EMERGING ISSUES

National negotiators from both employer's and Trade Unions have been unable to reach agreement on the 2007/08 Pay Award. Failure to reach agreement in the next quarter is likely to lead to national industrial action in the Autumn and additional information will be provided as this becomes available.




The Building Schools for the Future proposals in Halton have many human resource implications. A post of Senior Personnel Officer has been created in the BSF Project Team to deal with such issues and an internal candidate has been successful in being appointed to this position.

4.0 PROGRESS AGAINST KEY OBJECTIVES / MILESTONES

Total	5		4		1		0
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All key objectives for the service are presently progressing as planned although the implementation of the Pay & Grading Review has been delayed due to the requirement for Unions to ballot members. Additional details are provided within Appendix 1.

4.1 PROGRESS AGAINST OTHER OBJECTIVES / MILESTONES



Total	3		3		0		0
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As all of the remaining objectives for the service are progressing as planned none are being reported by exception at this time.

5.0 SERVICE REVIEW

An examination is taking place to determine the feasibility of bringing together certain HR related functions that are currently being undertaken within various Directorates.

6.0 PROGRESS AGAINST KEY PERFORMANCE INDICATORS

Total	-		-		-		-
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Actual figures for Quarter 1 are presently unavailable as explained within Appendix 2.

6.1 PROGRESS AGAINST OTHER PERFORMANCE INDICATORS

Total	4		4		0		0
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Performance against all other indicators for the service remain on track and are therefore not being reported at this time

7.0 RISK CONTROL MEASURES

During the production of the 2007-08 Service Plan, the service was required to undertake a risk assessment of all Key Service Objectives.

Where a Key Service Objective has been assessed and found to have associated 'High' risk, progress against the application of risk treatment measures is to be monitored, and reported in the quarterly monitoring report in quarters 2 and 4.





8.0 PROGRESS AGAINST HIGH PRIORITY EQUALITY ACTIONS

During 2006/07 the service was required to undertake an Equality Impact Assessment. Progress against actions identified through that assessment, with associated High priority are to be reported in the quarterly monitoring report in quarters 2 and 4.


9.0 APPENDICES

Appendix 1 - Progress against Key Objectives/ Milestones
 Appendix 2 - Progress against Key Performance Indicators
 Appendix 3 - Financial Statement
 Appendix 4 - Use of traffic light symbols

Progress against 'key' objectives

Service Plan Ref.	Objective	Key Milestone	Progress Quarter 1	Commentary
PS01	To ensure the Council's strategic approach to the management of Human Resources is reviewed and is consistent with best practice and reflects a modern, excellent authority.	Implement Priority Actions identified within the new Human Resources Strategy by March 2008		Due to the departure of the Operational Director OD/HR in May 2007 capacity within the department has been reduced pending the start of a new Operational Director. However although the Strategy has yet to be finalised it is likely that implementation will occur as planned.
PS 02	To ensure that the Council rewards staff in accordance with legislation through a modern pay and grading system	Implement the outcomes of the completed Pay and Grading Review and undertake any appeal hearings that may arise by March 2008		As stated in the Key developments, there has been an unavoidable delay on progressing this objective. As progress is dependant upon organisations outside the Council, at this stage it is not possible to say with certainty how long the appeals process may take. However on the balance of probability, and if balloting issues can be resolved in the short-term, the completion of appeals could occur by year-end.
PS 03	To ensure that the Council has a modern and effective Human Resource management IT system to improve the relevance, availability and use of HR information	Implement a full merger of the existing payroll and personnel functions September 2007 Implement remaining modules of the Trent IT system. December 2007		In continuing consultation with staff the merger has commenced and is progressing as planned. Implementation has progressed satisfactorily during Quarter 1.
PS 04	Ensure that School Governors, Heads and teachers are fully equipped and competent to undertake their roles, and as required by legislation, in relation to performance management of schools	In partnership with colleagues from the Children's and Young Peoples Directorate, devise, develop and deliver an appropriate training programme. March 2008.		As planned, a number of training programmes will be delivered throughout the year and additional programmes are being arranged to pick up on emerging issues as a result of the BSF agenda.

APPENDIX ONE – PROGRESS AGAINST KEY OBJECTIVES/ MILESTONES (Personnel Services)

Service Plan Ref.	Objective	Key Milestone	Progress Quarter 1	Commentary
PS 05	Ensure that Managers are equipped with the skills to manage projects competently and in an effective and efficient manner	Develop and introduce an on-line support tool to augment the Council's in-house project management training and encourage and facilitate consistent organisational good practice. December 2007		Actions have been taken to progress this indicator and an online tool is currently under development.

Progress against Key Performance Indicators

Ref	Indicator	Actual 06 / 07	Target 07 / 08	Quarter 1	Progress	Commentary
BVPI 11	The percentage of top 5% of earners that are: - Women From black and ethnic minority communities Have a disability	38.39 1.00 3.13	39.00 1.50 3.20	N/A	N/A	At the present time, and due to the merger of the payroll and personnel functions, and the introduction and embedding of the new Trent system it is not possible to provide exact figures for these indicators at Quarter 1. It is anticipated that information will become available during quarter two.
BVPI 12	The number of working days / shifts lost due to sickness	11.76	11.50			
BVPI 14	Early retirements (excluding ill-health) as a percentage of the total workforce.	0.24	0.22			
BVPI 15	% Of employees retiring on grounds of ill-health as a percentage of total workforce	0.13	0.11			
BVPI 16a	No of staff declaring that they meet the Disability Discrimination Act as a % of the total workforce	1.29	1.20			
BVPI 17a	Minority Ethnic community staff as % of total workforce	0.60	0.70			

Financial Statement

Please note that whilst this report is reflective of activity within the area of Personnel and Organisational Development the following integrated budget statement is reflective of revised structural arrangements.

LEGAL, ORGANISATION DEVELOPMENT AND HUMAN RESOURCES

Revenue Budget as at 30th June 2007




	Annual Revised Budget	Budget To Date	Actual To Date	Variance To Date (Overspend)	Actual Including Committed Items
	£'000	£'000	£'000	£'000	£'000
<u>Expenditure</u>					
Employees	3,132	804	829	(25)	829
Members Expenses	712	178	174	4	174
Premises	610	85	89	(4)	89
Supplies & Services	914	232	179	53	226
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Civic Catering & Functions	82	20	8	12	8
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Transport	72	18	15	3	16
Asset Charges	8	0	0	0	0
Agency Related	216	3	3	0	0
Support Services	1,313	0	0	0	0
Total Expenditure	7,388	1,383	1,370	13	1,428
<u>Income</u>					
Land Charges	-475	-119	-88	(31)	-88
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Total Income	-6,155	-249	-274	25	-274
Net Expenditure	1,233	1,134	1,096	38	1,154

Comments on the above figures:

In overall terms spending appears to be slightly below budget, however, within this overall position income from Land Charges will show a significant shortfall against budget by year end, due to increased competition from Personal Search agents. This is partly offset by additional income from Licencing.

Explanation of the use of Traffic Light Symbols

The traffic light symbols are used in the following manner:

	<u>Objective</u>	<u>Performance Indicator</u>
<u>Green</u>	 <p>Indicates that the <u>objective is on course to be achieved</u> within the appropriate timeframe.</p>	<p>Indicates that the <u>target is on course to be achieved</u>.</p>
<u>Amber</u>	 <p>Indicates that it is <u>unclear</u> at this stage, due to a lack of information or a key milestone date being missed, <u>whether the objective will be achieved</u> within the appropriate timeframe.</p>	<p>Indicates that it is either <u>unclear</u> at this stage or too early to state <u>whether the target is on course to be achieved</u>.</p>
<u>Red</u>	 <p>Indicates that it is <u>highly unlikely or certain that the objective will not be achieved</u> within the appropriate timeframe.</p>	<p>Indicates that the <u>target will not be achieved</u> unless there is an intervention or remedial action taken.</p>

QUARTERLY MONITORING REPORT

DIRECTORATE: Corporate and Policy

SERVICE: Policy and Performance

PERIOD: Quarter 1 to period end 30th June 2007.

1.0 INTRODUCTION

This monitoring report covers the Policy and Performance Department first quarter period up to 30th June 2007. It describes key developments and progress against 'key' objectives and performance indicators for the service.

The way in which traffic lights symbols have been used to reflect progress to date is explained within Appendix 5

2.0 KEY DEVELOPMENTS

The Halton Data Observatory was launched with events for Councillors, officers and partners. The Observatory brings together in one place a wealth of statistical information about Halton, where possible down to ward level or below which extends the opportunity to access relevant information to aid decision-making processes.

The Halton Strategic Partnership published a review of performance against the community strategy targets at an event in May, and the Council's progress on the national Best Value Performance Indicators for 2006/07 was published in June in our annual Performance Plan.

The Audit Commission has confirmed the CPA arrangements for 2007, which are largely unchanged and will have a limited impact upon existing arrangements.

3.0 EMERGING ISSUES

The Council's Flooding Response Plan has now been reviewed in light of recent weather conditions and action has been taken to ensure appropriate mitigation measures are in place.

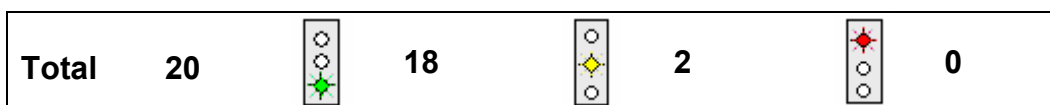
Government departments have been consulting on elements of the new national indicator set, which is to be introduced in part in April 2008 that will replace all existing Best Value and other performance indicators. Government has indicated that by the end of summer 2007 they will have a number of definite indicators, some new indicators that will require further work before being finalised, and a number that will flow from agreed government objectives. This work will be completed as soon as possible following the outcome of the Comprehensive Spending Review. The first version of the new set of indicators to be rolled out from April 2008 and the full suite from April 2009.

There has also been consultation about the principles of the Comprehensive Area Assessment (CAA), which will replace CPA in 2009, and the transitional CPA arrangements for 2008.

Decisions on key funding streams, such as NRF, are expected to be announced as a part of the government's Comprehensive Spending Review in the autumn. This will have significant implications for the Strategic partnership, and for the funding of the partnership support team and additional information will be provided as this becomes available.

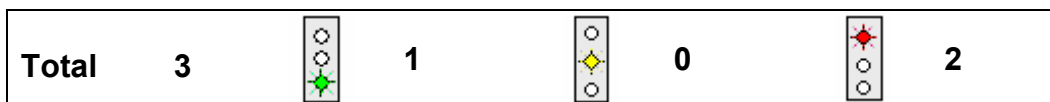
A national focus on the risks from occupational driving by the health & Safety Executive has prompted a review of the Council's Occupational Road Risk Policy.

4.0 PROGRESS AGAINST KEY OBJECTIVES / MILESTONES



Almost all of the key objectives / milestones for the service, with the exception of a review of performance management arrangements and the establishment of virtual neighbourhood management teams, have progressed as planned. Additional information for all key objectives is provided within Appendix 1.

4.1 PROGRESS AGAINST OTHER OBJECTIVES / MILESTONES



Two of the remaining objectives for the service are slightly behind schedule and these related to the development and completion of PPB work programmes. Additional information is provided within Appendix 2.

5.0 SERVICE REVIEW




A survey of satisfaction with internal communications has now been completed with shows a significant increase over time. Overall satisfaction has increased year on year from 45% in 2003, 71% in 2005 to 79% in 2007.

6.0 PROGRESS AGAINST KEY PERFORMANCE INDICATORS

Total	3		3		0		0
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None of the key performance indicators for the service are presently showing any cause for concern and additional commentary is provided within Appendix 3.

6.1 PROGRESS AGAINST OTHER PERFORMANCE INDICATORS

Total	3		3		0		0
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All of the remaining performance indicators for the service are presently on track and therefore none require reporting by exception at this time.

7.0 RISK CONTROL MEASURES

During the production of the 2007-08 Service Plan, the service was required to undertake a risk assessment of all Key Service Objectives.

Where a Key Service Objective has been assessed and found to have associated 'High' risk, progress against the application of risk treatment measures is to be monitored, and reported in the quarterly monitoring report in quarters 2 and 4.






8.0 PROGRESS AGAINST HIGH PRIORITY EQUALITY ACTIONS







During 2006/07 the service was required to undertake an Equality Impact Assessment. Progress against actions identified through that assessment, with associated High priority are to be reported in the quarterly monitoring report in quarters 2 and 4.

9.0 APPENDICES







Appendix 1 – Progress against Key Objectives/ Milestones
 Appendix 2 – Progress against Other Objectives/ Milestones
 Appendix 3 – Progress against Key Performance Indicators
 Appendix 4 – Financial Statement
 Appendix 5 – Explanation of traffic light symbols.

Progress against 'key' objectives




Service Plan Ref.	Objective	Key Milestone	Progress Quarter 1	Commentary
PP O1	Improve the effectiveness of the support, intelligence and advice provided to the Council and its partners to review policy, resource planning, service delivery and performance.	Review the format of the 2007/08 quarterly monitoring reports to ensure the performance data is in a form that meets the requirements of the primary audience by 30 April 2007		Following consultation, when a variety of sometimes conflicting views were presented, no change has been made to the reporting format for the current financial year. However further consideration will be given to this issue as a part of the planned review of performance management and reporting arrangements later in the year.
		Coordinate the implementation of the action plan recommended by the Audit Commission in its report on Halton's management arrangements for securing data quality by 30 September 2007		Management Team received a report in the first quarter and work is now underway to implement the recommendations from the Audit Commission Report.
		Undertake a fundamental review of the service planning process and the performance reporting arrangements and make recommendations for improvement by 30 September 2007		Project Plan agreed and preliminary work has now commenced. However given existing constraints completion has been scheduled for January 2008.
		Monitor performance against Community Strategy targets and review plans June 2007		All SLAs actioned by 31 May deadline, and action plans adopted by LSP for all five priorities. Annual performance review published in April 2007.
		Review Community Engagement Strategy and agree Annual Action Plan March 2008		Practitioners group operational and has adopted action plan. Review of audit plan for engagement took place in June 2007.

Service Plan Ref.	Objective	Key Milestone	Progress Quarter 1	Commentary
PP O1 Cont'd	Improve the effectiveness of the support, intelligence and advice provided to the Council and its partners to review policy, resource planning, service delivery and performance.	<p>Monitor and review Local Area Agreement progress with partners March 2008</p> <p>3 Neighbourhood Management Boards established June 2007</p> <p>Establish virtual neighbourhood teams June 2007</p> <p>Prepare Neighbourhood Action Delivery Plan July 2007</p> <p>Monitor performance against targets and review plans March 2008</p>	   	<p>Training on LAA PMF taken place with partners. Attended GONW training session on monitoring procedures in advance of mid-year review</p> <p>All three boards have been formed with wide representation and have met on several occasions</p> <p>Two of the neighbourhood partnerships have formed thematic sub-groups which bring together the members of the virtual teams (now to be called the wider team) with the third partnership team following on.</p> <p>The Neighbourhood Management delivery Plan was adopted on 27 July 2007. It sets a target of September 2007 for the production of the 3 action plans, and progress is on track for this.</p>
PP O2	Improve the quality and effectiveness of the Council's external communication at a local, regional and national level and internal communication with staff	<p>Review and re-tender for Inside Halton September 2007</p> <p>Implement phases 2 and 3 of intranet site upgrade by September 2007</p>	 	<p>Tendering in progress. Will be completed and contract awarded by the beginning of Oct.</p> <p>Work is presently progressing as planned and Intranet improvements are ongoing. Web improvement groups are in the process of being established as part of wider web strategy to identify and implement future intranet requirements.</p>



APPENDIX ONE – PROGRESS AGAINST KEY OBJECTIVES/ MILESTONES (Policy and Performance)

Service Plan Ref.	Objective	Key Milestone	Progress Quarter 1	Commentary
PP O2 Cont'd	Improve the quality and effectiveness of the Council's external communication at a local, regional and national level and internal communication with staff	<p>Conduct review of website and produce strategy and action plan January 2008</p> <p>Investigate establishment of Neighbourhood newsletters and community website for 3 pilot areas September 2007</p> <p>Complete resident satisfaction surveys October 2007</p> <p>Produce partner 'NM Update' at least bi-monthly; consult partners & review by December 2007</p> <p>Produce NM communications & marketing strategy and action plan January 2008</p>	    	<p>Draft strategy to be submitted to Management Team for comment in September 2007</p> <p>Newsletters have been investigated with residents. In Castlefields/Windmill Hill a working group of residents has been established and a mock up newsletter prepared. In Halton Lea, a different approach is being taken with the proposed production of a DVD</p> <p>MORI report of 2006 Best Value Survey results for Neighbourhood Management Areas received. Resident satisfaction to be included in Strategic partnership survey planned for October with enhanced sample in NM areas.</p> <p>NM Management newsletters have been circulated</p> <p>A communications strategy was adopted by the Neighbourhood Management Board on 27 April 2007</p>
PP O3	Improve the effectiveness of the service improvement, and overview and scrutiny corporate framework for the Council to deliver efficient, effective and high quality services through a programme of continuous improvement.	Implement the annual service / business review and efficiency improvement programme by 31 March 2008		Progress is being made with the Efficiency Strategy workstreams approved by the Business Efficiency Board (e.g. Accommodation Strategy, review of deployment of agency staff, procurement issues etc). to date the bulk of this work has been undertaken by other departments of the Council.




APPENDIX ONE – PROGRESS AGAINST KEY OBJECTIVES/ MILESTONES (Policy and Performance)

Service Plan Ref.	Objective	Key Milestone	Progress Quarter 1	Commentary
PP O3 Cont'd	Improve the effectiveness of the service improvement, and overview and scrutiny corporate framework for the Council to deliver efficient, effective and high quality services through a programme of continuous improvement.	Review reconfigured overview and scrutiny arrangements and make recommendations for improvement December 2007		Progress presently on track with review planned for December 07.
PP O4	To ensure that the organisation remains fit for purpose through the ongoing development of Business Continuity and Health & Safety arrangements	<p>Test and review arrangements for business continuity in Directorates by December 2007</p> <p>Investigate external accreditation for Health & Safety by July 2007</p> <p>Review and amend systems as required by accreditation criteria by December 2007</p> <p>Apply for accreditation by March 2008</p>	 	<p>External consultants have been engaged to validate and test our plans, and work commenced in August 2007. The Business Continuity Plan was part tested in Municipal Building Flooding incident.</p> <p>Evaluation of product carried out seeking Management Team approval to scheme</p> <p>Refer above</p> <p>Refer above</p>



Progress against 'other' objectives

Service Plan Ref.	Objective	Key Milestone	Progress Quarter 1	Commentary
PP05	Work with the Policy and Performance Boards to develop and review policy proposals and hold Executive to account.	<p>Complete 06 – 07 Work Programme by 30th June 2007</p> <p>Agree 07-08 Work Programmes for each PPB by 30th June 2007</p>	 	<p>Although several topics have fallen behind schedule work is progressing through normal channels and with PPB Chairs.</p> <p>Progress is being made but some deliberations are still ongoing which will result in some slight delay in completing work programmes for this year.</p>

Progress against Key Performance Indicators

Ref	Indicator	Actual 06 / 07	Target 07 / 08	Quarter 1	Progress	Commentary
BVPI 3	% Of citizens satisfied with the overall service provided by their authority.	58	N/a	N/a		This is a three-year measure as part of the BVPI customer survey. Overall satisfaction has shown an increase from the 55% level recorded in 2003. This is against a declining national trend (51% average for 2007),
PPLI 4	Overall satisfaction with the communications of the Council (%)	48	N/a	N/a	Refer comment	This is a three-year measure as part of the BVPI customer survey. Additional methods for measuring satisfaction are to be considered as part of the updated communications strategy
PPLI 5	Satisfaction with internal communications of the Council (%)	78	75	N/a		Issues raised from '07 internal communications survey are to be incorporated into the forthcoming Internal Communications Strategy
PPLI 6	% Of residents in Halton's NM pilot areas reporting an increase in satisfaction with their neighbourhoods as a place to live.	50	55	N/a	N/a	50% of residents felt that their area had improved, a lot or a little, as a place to live over the last 2 years (Survey 2006). Further surveys are to be undertaken during the course of this year.
PPLI 9	% Of BVPI's showing improvement and / or achieving target.	67.8	69	Refer comment	N/a	This indicator can only be reported annually with 07/08 outturns becoming available following year-end. The baseline for 06/07 shows a considerable number of PI's either achieving target or showing an improved level of performance over the previous year.
PPLI 15	% Of floor targets with positive direction of travel	98	97	Refer comment		Annual performance review in April/May showed most targets moving in right direction.

Progress against 'other' Performance Indicators

Ref	Indicator	Actual 06 / 07	Target 07 / 08	Quarter 1	Progress	Commentary
PPLI 17	Proportion of Departments with up to date Risk Registers	100	100	See comment		Corporate Risk Management group has not met following the resignation of Chairperson and resultantly no monitoring has taken place. Corporate risk register has been amended and published on Council's web site
PPLI 23	% Of working days lost due to sickness absence within Department	3.6	3.0	3.8		Performance at quarter 1 is marginally below target although at this early stage of the year this is not cause for undue concern.

POLICY & PERFORMANCE

Revenue Budget as at 30th June 2007

	Annual Revised Budget £'000	Budget To Date £'000	Actual To Date £'000	Variance To Date (Overspend) £'000	Actual Including Committed Item £'000
<u>Expenditure</u>					
Employees	2,191	563	554	9	569
Premises	109	0	0	0	0
Supplies & Services	500	173	161	12	192
Corporate Subscriptions	128	64	78	(14)	78
Agency & Contracted	42	10	9	1	10
Transport	50	13	13	0	13
Support Services	3,207	0	0	0	0
Total Expenditure	6,227	823	815	8	862
<u>Income</u>					
Support Service Recharges	-2,037	0	0	0	0
Emergency Planning Grant	-148	-148	-157	9	-157
Grants	-202	-51	-57	6	-57
Total Income	-2,387	-199	-214	15	-214
Net Expenditure	3,840	624	601	23	648

Comments on the above figures:

In overall terms spending is currently below the budget to the end of the first quarter. It is expected that the overall total net spending will be in line with the Department budget by year-end.

Capital Projects as at 30th June 2007

Capital Expenditure	Actual to Date	Allocation 07/08	Allocation 08/09	Allocation 09/10
	£000	£000	£000	£000
Risk Management	0	120	120	120
Net Expenditure	0	120	120	120

Comments on the above figures

It is expected that the full allocation will be spent by the financial year-end.




Local Strategic Partnership expenditure as at 30th June 2007

	Annual Budget	Budget to Date	Actual to Date	Variance to Date
	£000	£000	£000	£000
Local Strategic Partnership				
LSP Team	382	80	14	66
Community Empowerment	28	7	0	7
Net Expenditure	410	87	14	73

Regular monitoring reports are sent to the Local Strategic Partnership (LSP) in respect of all LSP projects and any areas of concern are dealt with throughout the year by the LSP support team and individual project managers. Some variances against the budget to date are expected, as the LSP have deliberately over-programmed in order to ensure that the full allocation of Neighbourhood Renewal Fund is spent during the year.

Application of Traffic Lights

The traffic light symbols are used in the following manner:

	<u>Objective</u>	<u>Performance Indicator</u>
<u>Green</u>	 <p>Indicates that the <u>objective is on course to be achieved</u> within the appropriate timeframe.</p>	Indicates that the <u>target is on course to be achieved</u> .
<u>Amber</u>	 <p>Indicates that it is <u>unclear</u> at this stage, due to a lack of information or a key milestone date being missed, <u>whether the objective will be achieved</u> within the appropriate timeframe.</p>	Indicates that it is either <u>unclear</u> at this stage or too early to state whether the target is on course to be achieved.
<u>Red</u>	 <p>Indicates that it is <u>highly likely or certain that the objective will not be achieved</u> within the appropriate timeframe.</p>	Indicates that the <u>target will not be achieved</u> unless there is an intervention or remedial action taken.

QUARTERLY MONITORING REPORT

DIRECTORATE: Corporate and Policy

SERVICE: Property Services

PERIOD: Quarter I to period end 30th June 2007

1.0 INTRODUCTION

This Monitoring Report covers the Property Services first quarter period up to period end 30th June 2007. It describes key developments and progress against 'key' objectives and performance indicators for the service.

The way in which traffic light symbols have been used to reflect progress is explained within Appendix 5.

2.0 KEY DEVELOPMENTS




Having signed up to the Local Authority Carbon Management Programme the department has undertaken a considerable amount of preliminary work to establish baseline data that will be used to inform the development of the authority's Carbon Reduction Plan.

Good progress is being made in preparing for the refurbishment of Runcorn Town Hall and staff are presently moving to temporary accommodation within Halton Lea. The temporary relocation of the Registry Office into the Civic Building has been successfully coordinated.

3.0 EMERGING ISSUES

The authority is facing shortages in the labour market, particularly in relation to Valuation Surveyors, and this is leading to some difficulties in recruitment and selection. At present North West authorities currently have 30 – 40 vacant posts which are proving difficult to fill. This results from a downturn in the number of students enrolling on relevant course of study, and in light of the upturn in renewal activity locally problems are likely to persist over the medium term.

4.0 PROGRESS AGAINST KEY OBJECTIVES / MILESTONES

Total	4		4		0		0
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All of the key objectives are presently on track and additional information is provided within Appendix 1.

4.1 PROGRESS AGAINST OTHER OBJECTIVES / MILESTONES

Total	2		2		0		0
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The two remaining objectives are presently progressing as planned and therefore do not require reporting by exception at this stage.

5.0 SERVICE REVIEW

There are no issues relating to service review to be reported at this time.

6.0 PROGRESS AGAINST KEY PERFORMANCE INDICATORS

Total	4		2		2		0
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Although at this stage it is too early to say with certainty two of the key indicators for the service may be adversely affected following the resignation of the Land and Property Manager and the difficult trading patterns currently being experienced in Runcorn. Additional details are provided within Appendix 2.

6.1 PROGRESS AGAINST OTHER PERFORMANCE INDICATORS

Total	5		2		3		0
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Three of the remaining performance indicators for the service may potentially not progress as planned although at this stage it is too early to say with certainty. Two relate to stall take up in the retail markets where we are outperforming the national trends but the demand is reducing. The final indicator is concerned with time performance on construction projects where good progress has been made on cost control, but time and completion issues with contractors is a more complex and difficult issue. Additional commentary is provided within Appendix 3.

7.0 RISK CONTROL MEASURES

During the production of the 2007-08 Service Plan, the service was required to undertake a risk assessment of all Key Service Objectives.

Where a Key Service Objective has been assessed and found to have associated 'High' risk, progress against the application of risk treatment measures is to be monitored, and reported in the quarterly monitoring report in quarters 2 and 4.





8.0 PROGRESS AGAINST HIGH PRIORITY EQUALITY ACTIONS

During 2006/07 the service was required to undertake an Equality Impact Assessment. Progress against actions identified through that assessment, with associated High priority are to be reported in the quarterly monitoring report in quarters 2 and 4.




9.0 APPENDICES

Appendix 1 - Progress against Key Objectives/ Milestones
Appendix 2 - Progress against Key Performance Indicators
Appendix 3 - Progress against Other Performance Indicators
Appendix 4 – Financial Statement
Appendix 5 - Use of traffic light symbols




Progress against 'key' objectives

Service Plan Ref.	Objective	Key Milestone	Progress Quarter 1	Commentary
PYS 01	To complete review of property assets for disposal	Annual review to produce disposal programme complete March 2008		Ongoing no problems or issues foreseen.
PYS 02	Reduce backlog of maintenance on property portfolio	To £4.9 m by March 2008		On Target
PYS 03	Fulfil requirements of asbestos Audits and Management Regulations	Confirm 100% compliance		Ongoing, Range of Consultants being considered
PYS 04	DDA Works Corporate (Non Schools) subject to funding (currently £200k per annum)	Complete 60% of Priority 2 works by March 2008		On target

Progress against Key Performance Indicators

Ref	Indicator	Actual 06 / 07	Target 07 / 08	Quarter 1	Progress	Commentary
PYSLI 4	% Of rent collected as % of rent due (Excluding bankruptcies and the like) – industrial units	93	95	93		Whilst progress is presently on track the resignation of the Land and Property Managers may have an adverse impact in the longer term. However where possible mitigating measures will be introduced.
PYSLI 6	% Of rent collected as % of rent due (Excluding bankruptcies and the like) – Widnes market	95	95	99		Present collection levels are very high and efforts will be made to sustain this as far as possible taking account of any normal seasonal variations.
PYSLI 8	% Of rent collected as % of rent due (Excluding bankruptcies and the like) – Runcorn market	99	95	71		Performance is presently at a relatively low level and this reflects the difficult trading patterns currently being experienced in Runcorn generally and the market in particular. Although early engagement with traders is undertaken it has to be recognised that the Council cannot wholly control the trading climate and this can adversely affect rent collection levels.

Progress against 'other' performance indicators

Ref	Indicator	Actual 06 / 07	Target 07 / 08	Quarter 1	Progress	Commentary
PYSLI 5	Occupancy of Market (Widnes) %	82	93	81.5		Although occupancy of the indoor market remains high 53% occupancy of the outdoor market has impacted upon performance.
PYSLI 7	Occupancy of Market (Runcorn) %	70	90	65		Low levels of occupancy reflect the difficult trading conditions presently being experienced in Runcorn.
PYSLI 9	Time performance on projects over £ 5 K (Contract let to practical completion within a margin of 5% - excluding Client changes)	90	73	75		Although performance at quarter 1 is above targeted level some problems are being experienced with a small number of contractors. Steps are being taken, by way of encouragement and if necessary enforcement, to ensure that performance is maintained and additional emphasis will be placed upon future selection processes.

Financial Statement

Revenue Budget as at 30th June 2007

	Annual Revised Budget	Budget To Date	Actual To Date	Variance To Date (overspend)	Actual Including Committed Items
	£'000	£'000	£'000	£'000	£'000
<u>Expenditure</u>					
Employees	1,386	345	321	24	321
Repairs & Maintenance	3,004	751	583	168	583
Energy & Water Costs	478	146	184	(38)	184
NNDR	647	647	705	(58)	705
Rents	1,173	356	320	36	320
Property Recharges	1,279	0	0	0	0
Other Premises Costs	749	75	77	(2)	77
Supplies & Services	424	96	102	(6)	102
Surveys & Audits	376	144	188	(44)	188
Hired & Contracted Services	275	18	14	4	14
Transport	31	9	7	2	7
Asset Charges	1,840	0	0	0	0
Support Services	997	0	0	0	0
Total Expenditure	12,659	2,587	2,501	86	2,501
<u>Income</u>					
Rent – Markets	-1,134	-283	-247	(36)	-247
Rent – Industrial Estates	-1,238	-292	-255	(37)	-255
Rent – Commercial	-731	-131	-128	(3)	-128
Recharges to Capital	-1,611	0	0	0	0
Accommodation Recharges	-2,687	0	0	0	0
Repair & Maintenance Recharges	-3,165	0	0	0	0
Support Service Recharges	-1,022	0	0	0	0
Consultancy	-229	0	0	0	0
Other Income	-74	-1	-1	0	-1
Total Income	-11,891	-707	-631	(76)	-631
Net Expenditure	768	1,880	1,870	10	1,870

Comments on the above figures:

In overall terms spending in the first quarter is slightly under budget. However a revaluation of the business rates relating to Catalyst House has resulted in an increase in NNDR costs and the Waterloo Centre has incurred a backdated electricity charge covering the last three years.

In addition Runcorn Market is still not fully occupied and therefore income from stallholder rents is lower than budgeted. There are a number of large vacant units on Seymour Court and St. Michaels Industrial Estates that are proving difficult to re-let and therefore income is expected to be below the budgeted target. These are likely to result in spending being above the budget at the end of the year.

Capital expenditure as at 30th June 2007




Capital Expenditure	Actual to Date	Allocation 07/08	Allocation 08/09	Allocation 09/10
	£000	£000	£000	£000
Runcorn Town Hall Refurbishment	114	2,500	1,500	0
Victoria Park Depot Reorganisation	255	269	0	0
Queens Hall Refurbishment	0	50	450	1,495
Disabled Access	81	300	300	300
Net Expenditure	450	3,119	2,250	1,795

Comments on the above figures

It is expected that the full allocation will be spent by the financial year-end.

Explanation of the use of Traffic Light Symbols

The traffic light symbols are used in the following manner:

	<u>Objective</u>	<u>Performance Indicator</u>
<u>Green</u>	 <p>Indicates that the <u>objective is on course to be achieved</u> within the appropriate timeframe.</p>	Indicates that the <u>target is on course to be achieved</u> .
<u>Amber</u>	 <p>Indicates that it is <u>unclear</u> at this stage, due to a lack of information or a key milestone date being missed, <u>whether the objective will be achieved</u> within the appropriate timeframe.</p>	Indicates that it is either <u>unclear</u> at this stage or too early to state <u>whether the target is on course to be achieved</u> .
<u>Red</u>	 <p>Indicates that it is <u>highly unlikely or certain that the objective will not be achieved</u> within the appropriate timeframe.</p>	Indicates that the <u>target will not be achieved</u> unless there is an intervention or remedial action taken.

REPORT TO: Corporate Services Policy and Performance Board

DATE: 4 September 2007

REPORTING OFFICER: Strategic Director Corporate and Policy

SUBJECT: Work Programme Progress Report

WARDS: Borough-wide

1.0 PURPOSE OF THE REPORT

1.1 To report on progress with work programme topics

2.0 RECOMMENDATION: That the report be noted

3.0 SUPPORTING INFORMATION

The Board confirmed the work programme for 2007-08 on 5 June 2007. Progress with the four topics is as follows:

1. Learning from Complaints. A project plan has been prepared (see Appendix) and a meeting of the working group is to be arranged for September.
2. Development of Web-based Service delivery. The lead member and lead officer have met and developed a proposed focus for this work. This is summarised in the appendix.
3. Disabled Access to Council Buildings and Services. Work on this topic has not yet commenced. A meeting is to be arranged in September for the lead officer and lead member.
4. Performance Management. A project plan has been prepared (see Appendix) and a meeting of the working group is to be arranged for September.

4.0 POLICY IMPLICATIONS

There are no policy implications arising directly from this report.

5.0 OTHER IMPLICATIONS

None at this stage

6.0 IMPLICATIONS FOR THE COUNCIL'S PRIORITIES

6.1 Children and Young People in Halton

6.2 Employment, Learning and Skills in Halton

6.3 A Healthy Halton

6.4 A Safer Halton

6.5 Halton's Urban Renewal

There are no implications for the five priorities at this stage.

7.0 RISK ANALYSIS

The only risk at this stage is failure to complete the topic work. Lead members and officers have been identified for each topic, and progress reports will be made to each meeting of the Board.

8.0 EQUALITY AND DIVERSITY ISSUES

None at this stage.

9.0 LIST OF BACKGROUND PAPERS UNDER SECTION 100D OF THE LOCAL GOVERNMENT ACT 1972

Document	Place of Inspection	Contact Officer
None		

APPENDIX

COMPLIMENTS AND COMPLAINTS PROJECT PLAN

STAGE	ACTION	END DATE
Scoping	Draft scope and report to Corporate Services Policy and Performance Board.	June 2007
Planning	Meet with Research and Intelligence to discuss appropriate consultation methods.	June 2007
	Identify Local Authorities demonstrating good practice in complaint handling.	June 2007
	Identify most improved Local Authorities regarding 2003 -2006 BVPI survey results re complaints.	June 2007
Action	Map HDL systems dealing with complaints and service requests and sample check, including timescales.	July 2007
	Interrogate existing HDL CRM system to map out data.	August 2007
	Contact those Local Authorities demonstrating good practice or significant improvement with satisfaction of complaint handling that could be used at Halton e.g. Learning, Service Improvement, Customer Care.	August 2007
	Undertake a case study on a particular theme of complaints / service requests.	August 2007
	Consult with complainants by telephone survey, questionnaire, Halton 2000 and possibly focus groups to measure satisfaction with all channels of complaint handling.	August 2007
	Consult with staff on compliments and complaints and assess if they have procedures in place to learn from them in order to improve service delivery. Also consider Member Complaints.	August 2007
	Progress report to Corporate Services PPB.	September 2007

Analysis / Options Appraisal	Analyse research findings to date and appraise options for improvement.	September 2007
	Discuss outcomes of analysis and options appraisal with OD and then Lead Member / Working Group.	October 2007
Reporting	Progress report to Corporate Services PPB on outcomes of analysis and options appraisal.	November 2007
	Final report to Corporate Services PPB with recommendations for change.	January 2008
	Final report to Executive Board with recommendations for change.	February 2008

PERFORMANCE MANAGEMENT ACTION PLAN

Overview

- 1.0 The present arrangements concerning the development of Departmental Services Plans and the provision of the performance information that flows from them, by way of Quarterly Service Plan Monitoring Reports, have been in place since 2004.
- 2.0 Since then there has been a number of incremental improvements to the system and evidence from external inspection and increased levels of performance suggest that the process has served the Council well.
- 3.0 However experience to date and changes to the national performance framework as contained in the recent white paper and bill, would suggest that it might now be timely to undertake a more fundamental review of the process to ensure that it remains appropriate to the present and future needs of the organisation, and is making best use of available resources.
- 4.0 The review would concentrate predominantly upon the extent to which present arrangements are adequate in terms of existing and future organisational needs in relation to
 - The development of Departmental Service Plans and the way in which these are aligned to the higher level Corporate Plan.
 - The type and extent of performance information collated for the purposes of performance monitoring and the way in which such information is presented to the different audiences receiving it.
 - The way in which performance information is and can be used to optimise arrangements for review and continuous improvement in the delivery of services.

5.0 The are a number of internal stakeholders who will need to be consulted during the review and these are listed below. Consultation exercises will take a number of forms considered most appropriate to each group e.g. focus groups, structured interviews, questionnaires etc.

Stakeholder Group	Primary Focus
Senior Management Team	Determining organisational progress on Corporate Priorities / Decision Making / Managing Public Accountability
Operational Directors	Determining Operational activity aligned to Corporate Priorities / Monitoring departmental progress / Managing Divisional Accountability
Elected Members	Determining Operational activity aligned to Corporate Priorities / Monitoring progress / Public Accountability

Project Plan

Activity

Timeframe

	July	Aug	Sept	Oct	Nov	Dec
Map existing processes for the development of Departmental Service Plans and the production of Quarterly Monitoring Reports and identify where delays in the flow of information may presently exist.	█	█				
Develop checklist of essential features of business planning and reporting processes from information provided by inspecting bodies / local government agencies such as the Audit Commission / IDeA etc / previous inspection comments		█	█	█		
Establish possible consequences of changes within the external environment such as introduction of Comprehensive Area Assessments (April 2009) / amendments to national indicator data set etc.		█				
Analyse current service plan development and reporting processes and the degree to which they are aligned to other performance frameworks e.g. LSP, LPSA, LAA arrangements			█	█	█	
Scan the external environment to identify good practice amongst other local authorities / public bodies and where appropriate undertake follow up work with individual organisations		█	█			
Undertake consultation with the following stakeholder groups to determine the extent to which information and participation needs are being met and the strengths and weaknesses of present arrangements i.e.						
Corporate Management Team						
Elected Members						
Operational Directors / Divisional Managers						
Produce draft report and recommendations						
Undertake consultation on recommendations						
Finalise report and implement delivery						

WEB BASED ONLINE SERVICES.

The project delivery will be based upon the Corporate Service Delivery System (CSD) delivered to members allowing the completion of general enquiries and key services of which the group define and develop as and when required. The solution will be primarily focused upon aiding the councillor's role within member surgeries or from home dealing with telephone enquiries and issues.

The CSD application will be fully Web based allowing remote access as well as office based access to identify a resident and detail any history or interactions with the authority where applicable given access rights issues. This application will be based upon the new web based application used by Halton Direct Link and a number of departments within the authority.

The objective of this project will be to develop a fast, secure and accurate way in which members can relay issues and requests at the point of contact to the authority using a web based solution, linked directly to HDL.

This will be taking an innovative approach to this service and we believe this will be the first online service of its kind in use for councillors. Essentially this is councillors CRM (customer relationship management).

REPORT TO: Corporate Services PPB

DATE: 4th September 2007

REPORTING OFFICER: Chief Executive

SUBJECT: Local Government Ombudsman's Annual Letter

WARDS: Boroughwide

1.0 PURPOSE OF THE REPORT

1.1 To report details of the complaints made to the Ombudsman and the Council's performance in dealing with those complaints during 2006/07.

2.0 RECOMMENDATION: That

- (1) the Ombudsman's Annual Letter be received; and**
- (2) the information contained in the Ombudsman's letter be fed into the Scrutiny topic on the complaints handling and the information be used to identify improvements in the way the Council handles and learns from complaints.**

3.0 BACKGROUND INFORMATION

- 3.1 Each year the Ombudsman produces an annual letter which summarises the complaints made against the Council and its performance in dealing with those complaints. The letter contains statistical data on the number of complaints received by subject area, the Ombudsman's decisions and the Council's response times. The statistical information is presented over three periods to enable comparisons to be made.
- 3.2 In terms of the overall trend the number of complaints continues to fall. The number of complaints submitted this year was 19 compared to 31 in 2005/06 and 36 in 2004/05. A particular note from the previous year had been a rise in the number of Social Services complaints but this year that level has now reduced.
- 3.3 The Ombudsman in investigating those complaints has not issued any reports against the Council during the year although six complaints were resolved by a local settlement. The Ombudsman's letter specifically refers to a local settlement about School Appeals and in this instance the Council has re-issued guidance to all Clerks to prevent a similar situation occurring in future years.
- 3.4 Last year the Council was asked to take specific steps to improve its response times and a series of measures were put in place to bring

about an improvement. The average response times for this year have dramatically improved and the Council will now try to build on this performance to ensure that all complaints are responded to within the average timescales.

- 3.5 The special report issued by the Ombudsman on the Telecommunications mast has been drawn to the attention of Officers in Planning. Although there have been no particular Ombudsman complaint about Halton's approach to this issue, Officers have been asked to review their procedures to ensure they are consistent with the findings of the Ombudsman's Report and thus reduce the risk of complaints arising. In relation to the complaints in other authorities about failings in Home Care Services provided under contract, Officers in Social Services have been made aware of the issues raised by these reports and have put in place measures to ensure that the Council does not repeat those problems that occurred in other authorities.

3.0 SUPPORTING INFORMATION

Not applicable.

4.0 POLICY IMPLICATIONS

Not applicable.

5.0 OTHER IMPLICATIONS

Not applicable.

6.0 IMPLICATIONS FOR THE COUNCIL'S PRIORITIES

6.1 Children and Young People in Halton

Not applicable.

6.2 Employment, Learning and Skills in Halton

Not applicable.

6.3 A Healthy Halton

Not applicable.

6.4 A Safer Halton

Not applicable.

6.5 Halton's Urban Renewal

Not applicable.

7.0 RISK ANALYSIS

Not applicable.

8.0 EQUALITY AND DIVERSITY ISSUES

Not applicable.

9.0 LIST OF BACKGROUND PAPERS UNDER SECTION 100D OF THE LOCAL GOVERNMENT ACT 1972

Document	Place of Inspection	Contact Officer
None	None	None

Notes to assist interpretation of the LGO's local authority statistics

1. Local authority report

This information forms an integral part of the Annual Letter to your council. Again this year, the Annual Letter will be published on our website, at www.lgo.org.uk

The detailed information in the printouts is confidential.

2. Complaints received

This information shows the number of complaints received by the LGO, broken down by service area and in total within the periods given. These figures include complaints that are made prematurely to the LGO (see below for more explanation) and that we refer back to the council for consideration. The figures may include some complaints that we have received but where we have not yet contacted the council.

3. Decisions

This information records the number of decisions made by the LGO, broken down by outcome, within the periods given. **This number will not be the same as the number of complaints received**, because some complaints are made in one year and decided in the next. Below we set out a key explaining the outcome categories.

MI reps: where the LGO has concluded an investigation and issued a formal report finding maladministration causing injustice.

LS (local settlements): decisions by letter discontinuing our investigation because action has been agreed by the authority and accepted by the Ombudsman as a satisfactory outcome for the complainant.

M reps: where the LGO has concluded an investigation and issued a formal report finding maladministration but causing no injustice to the complainant.

NM reps: where the LGO has concluded an investigation and issued a formal report finding no maladministration by the council.

No mal: decisions by letter discontinuing an investigation because we have found no, or insufficient, evidence of maladministration.

Omb disc: decisions by letter discontinuing an investigation in which we have exercised the Ombudsman's general discretion not to pursue the complaint. This can be for a variety of reasons, but the most common is that we have found no or insufficient injustice to warrant pursuing the matter further.

Outside jurisdiction: these are cases which were outside the Ombudsman's jurisdiction.

Premature complaints: decisions that the complaint is premature. The LGO does not normally consider a complaint unless a council has first had an opportunity to deal with that complaint itself. So if someone complains to the LGO without having taken the matter up with a council, the LGO will usually refer it to the council as a 'premature complaint' to see if the council can itself resolve the matter.

Total excl premature: all decisions excluding those where we referred the complaint to the council as 'premature'.

4. Response times

These figures record the average time the council takes to respond to our first enquiries on a complaint. We measure this in calendar days from the date we send our letter/fax/email to the date that we receive a substantive response from the council. The council's figures may differ somewhat, since they are likely to be recorded from the date the council receives our letter until the despatch of its response.

5. Average local authority response times 2006/07

This table gives comparative figures for average response times by authorities in England, by type of authority, within three time bands.

6. Categories of complaint

From 1 April 2007 we have amended our complaint category system, and you may notice some changes in the descriptions used in our decision letters and on the printouts attached.

The major change is that we now split social services cases between 'adult care services' and 'children and family services', in order that complaints relating to children and young people can be easily identified.

7. Complaints about personnel matters (employment and pensions)

We receive some complaints from members of council staff about personnel matters. These are usually outside our jurisdiction, and our practice is now to advise you that we have received the complaint without informing you of who made it.

For that reason, any such complaints on the attached printouts will show a blank space for the complainant's name.



The Commission for
Local Administration in England

The Local Government Ombudsman's Annual Letter to Halton Borough Council for the year ended 31 March 2007

The Local Government Ombudsman (LGO) investigates complaints by members of the public who consider that they have been caused injustice through administrative fault by local authorities and certain other bodies. The LGO also uses the findings from investigation work to help authorities provide better public services through initiatives such as special reports, training and annual letters.

Annual Letter 2006/07 - Introduction

This annual letter provides a summary of the complaints we have received about your authority. Where possible, we comment on the authority's performance and complaint-handling arrangements to assist with your service improvement.

I hope that the letter will be a useful addition to other information your authority holds on how people experience or perceive your services.

Two attachments form an integral part of this letter: statistical data covering a three year period and a note to help the interpretation of the statistics.

As you are a local Social Services authority I want to take this opportunity to draw your attention to an issue of significant public interest. In the last two years I have issued reports following complaints from people living in Blackpool, Liverpool and Sheffield about failings in home care services provided under contract.

In each case a vulnerable person was placed at significant risk as a result of carers failing to visit, calling late and failing to provide the specified care. Tragically, in one case the actions of a carer resulted in a death. Complaints had been made to all three Councils but no effective action had been taken. Although the services were provided under contract, it seems clear that similar problems could occur even if the carers are directly employed. I urge you to ensure that senior staff responsible for care services to adults are aware of the issues raised by these reports (which can be found on our web-site) and consider whether action needs to be taken by your Council. The 2006 report of the Commission for Social Care Inspection 'Time to Care? An Overview of Home Care Services for Older People in England' provides very useful contextual information.

Complaints received

Volume & Character

My office received 19 complaints against the Council in 2006/07 compared to 31 last year. That is a substantial fall and will no doubt be welcome to the Council. Last year I felt the need to comment briefly on the rise in complaints about social services. I am pleased to record that the level has now fallen from 10 to five.

Decisions on complaints

Reports and local settlements

A 'local settlement' is a complaint that is resolved by the Council taking, or agreeing to take, action which we consider is a satisfactory response to the complaint so that the investigation can be discontinued. In 2006/07 27.7% of complaints dealt with by the three Local Government Ombudsmen (excluding premature and those outside jurisdiction) were resolved by local settlement. When we complete an investigation we must issue a report.

I have not issued any reports against the Council during the year. Six complaints were resolved by local settlement. Two are worth specific reference. Both concerned an appeal for the Council's refusal to place a child at a school of choice and hence the resulting appeals. The problem was the same in both. The Clerk of the appeal panel failed properly to record the decision making process. That left an evidential gap of some significance. The Council accepted criticism and offered fresh appeals. I trust that the lesson has been learned and appropriate advice given to Clerks.

Other findings

In all, 19 complaints were decided by my staff of which six were premature – ie the Council had not been given a prior opportunity itself to investigate and respond. Where we identify such complaints we refer them back to the Council to go through its own complaints procedure. One other complaint was outside of my jurisdiction.

Your Council's complaints procedure and handling of complaints

I am not aware of any problems with the way the Council deals with complaints from members of the public.

Training in complaint handling

Part of our role is to provide advice and guidance about good administrative practice. We offer training courses for all levels of local authority staff in complaints handling and investigation. The feedback from councils that have taken up the training is very positive.

The range of courses is expanding in response to demand. In addition to the generic Good Complaint Handling (identifying and processing complaints) and Effective Complaint Handling (investigation and resolution), we now offer these courses specifically for social services staff and have also successfully piloted a course on reviewing complaints for social services review panel members. We can run open courses for groups of staff from different smaller authorities and also customise courses to meet your Council's specific requirements.

All courses are presented by an experienced investigator so participants benefit from their knowledge and expertise of complaint handling.

I have enclosed some information on the full range of courses available together with contact details for enquiries and any further bookings.

Liaison with the Local Government Ombudsman

On a happier note the Council has dramatically improved the average time it takes to respond to enquiries from my office. We ask for responses within 28 days. Last year I noted an average response time of over 36 days. In 2006/07 I am pleased to report that the average was just over 26 days. That excellent result is rather blemished by two responses about housing taking over 40 days, and I encourage the council not just to meet the average but also to ensure that every single case is within the target time.

LGO developments

You may be interested in the development of our initiative to improve the first contact that people have with us. A new Access and Advice Service will provide a gateway to our services for all complainants and enquirers. It will encourage telephone contact but will also deal with email, text and letter correspondence. We will let you have further details about how it will operate and the expected timescales and we will discuss with you the implications for your Council.

I hope you have received our latest special report about telecommunication masts. It draws on our experience of dealing with complaints about planning applications for masts which can be highly controversial. We recommend simple measures that councils can adopt to minimise the chances of maladministration occurring.

In July we will be publishing a special report about the difficulties that can be encountered with complaints when local authorities deliver services or discharge their functions through partnerships. *Local partnerships and citizen redress* provides advice and guidance on how these problems can be overcome by good governance arrangements that include an effective complaints protocol.

Conclusions and general observations

I welcome this opportunity to comment on our experience of complaints about the Council over the past year. I hope that you find the information and assessment provided useful when seeking improvements to your Council's services.

Anne Seex
Local Government Ombudsman
Beverley House
17 Shipton Road
York
YO30 5FZ

June 2007

Enc: Statistical data
Note on interpretation of statistics
Leaflet on training courses (with posted copy only)

Complaints received by subject area	Adult care services	Benefits	Children and family services	Education	Housing	Other	Planning & building control	Public finance	Social Services - other	Transport and highways	Total
01/04/2006 - 31/03/2007	0	0	5	3	2	6	3	0	0	0	19
2005 / 2006	3	0	7	3	5	8	3	1	0	1	31
2004 / 2005	1	1	0	7	8	6	7	1	2	3	36

Note: these figures will include complaints that were made prematurely to the Ombudsman and which we referred back to the authority for consideration.

Decisions	MI reps	LS	M reps	NM reps	No mal	Omb disc	Outside jurisdiction	Premature complaints	Total excl premature	Total
01/04/2006 - 31/03/2007	0	6	0	0	5	1	1	6	13	19
2005 / 2006	0	6	0	0	11	7	2	9	26	35
2004 / 2005	0	9	0	0	13	2	1	5	25	30

See attached notes for an explanation of the headings in this table.

Response times	FIRST ENQUIRIES	
	No. of First Enquiries	Avg no. of days to respond
01/04/2006 - 31/03/2007	9	26.2
2005 / 2006	18	36.3
2004 / 2005	21	29.3

Average local authority response times 01/04/2006 to 31/03/2007

Types of authority	<= 28 days %	29 - 35 days %	>= 36 days %
District Councils	48.9	23.4	27.7
Unitary Authorities	30.4	37.0	32.6
Metropolitan Authorities	38.9	41.7	19.4
County Councils	47.1	32.3	20.6
London Boroughs	39.4	33.3	27.3
National Park Authorities	66.7	33.3	0.0