

OVERVIEW AND SCRUTINY PERFORMANCE BOARD 28 MARCH 2019

PERFORMANCE AND IN-YEAR BUDGET MONITORING

Summary

1. The Board is asked to consider the feedback provided by Scrutiny Panel Chairmen, following the discussion of Quarter 3 (October – December 2018) performance monitoring information and the draft Cabinet Resources Report – Revenue and Capital Budget Monitoring to Period 10 (Month Ending 31 January 2019).

Background

2. Performance and financial monitoring are part of the Scrutiny Panels' role in maintaining oversight of service provision and a key role for Scrutiny.
3. Recently, performance monitoring had varied on a panel by panel basis and in-year budget monitoring was not taking place in a formalised way although each Panel was carrying out budget scrutiny from November to January each year.
4. It is envisaged that by carrying out regular performance and financial monitoring, Panels will have a better oversight of service provision and an understanding of emerging issues enabling them to carry out relevant, timely Scrutiny.

Performance Information

5. At the March Scrutiny Panel meetings, members were provided with sample performance information reports and feedback was requested.
6. The Panels welcomed the information and gave both general and panel specific feedback which is being considered (and incorporated where possible) for future reports.
7. The aspiration, moving forward is that the information available to each Panel will be broadly similar in format and consistent with the information presented at Directorate Leadership Team (DLT) meetings. It isn't the intention to restrict each Panel's flexibility in determining its information requirements and it is acknowledged that some Panels may require additional information from time to time.
8. Currently, due to the variety of mechanisms used for gathering performance information, there is a challenge around providing this to Scrutiny pitched at the right level without information overload and being manageable to produce for a public meeting. Ultimately, a digital solution is likely to be the best way forward.

Financial Information

9. Due to time constraints, the Panels considered the draft Cabinet Resources Report – Revenue and Capital Budget Monitoring to Period 10 (Month Ending 31 January 2019). The Panels welcomed the early release of the draft Cabinet Report.

10. The aspiration for the financial information available to Panels moving forward is for a summary sheet of the latest financial forecast at the end of a quarter, with an explanation of reasons for an increase in the forecast or underspend.

Balanced Scorecard

11. The Balanced Scorecard is the means of understanding progress against the Council's Corporate Plan. The Scorecard contains a range of indicators linked to key priorities and themes. Many measures are long-term and may be affected by a wide range of factors, some of which are outside the direct control of the Council.

12. The Corporate Balanced Scorecard for each Directorate is reported to Cabinet and is also available on the Council's website [here](#)

13. The recent Panel discussions highlighted that Members would like a 'refresher' on the Balanced Score to better understand the information available through this.

Purpose of the Meeting

14. The Board is asked to:

- consider and comment on the feedback from Scrutiny Panel Chairmen following the discussion of Quarter 3 (October – December 2018) performance monitoring information and the draft Cabinet Resources Report – Revenue and Capital Budget Monitoring to Period 10 (Month Ending 31 January 2019) and
- determine whether any further information or scrutiny on a particular topic is required.

Contact Point for this Report

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Background Papers

In the opinion of the proper officer (in this case the Head of Legal and Democratic Services) the background papers relating to the subject matter of this report:

Agenda and minutes of:

- Adult Care and Well-Being Overview and Scrutiny Panel – 14 March 2019
- Children and Families Overview and Scrutiny Panel - 6 March 2019
- Economy and Environment Overview and Scrutiny Panel – 5 March 2019
- Corporate and Communities Overview and Scrutiny Panel – 13 March 2019 available [here](#)