

# South Hams Overview and Scrutiny Committee



<b>Title:</b>	<b>Agenda</b>												
<b>Date:</b>	<b>Thursday, 16th June, 2022</b>												
<b>Time:</b>	<b>2.00 pm</b>												
<b>Venue:</b>	<b>Council Chamber - Follaton House</b>												
<b>Full Members:</b>	<p style="text-align: center;"><b>Chairman</b> Cllr Thomas</p> <p style="text-align: center;"><b>Vice Chairman</b> Cllr Smerdon</p> <p><i>Members:</i></p> <table style="width: 100%; border: none;"> <tr> <td style="width: 50%;">Cllr Austen</td> <td style="width: 50%;">Cllr Rose</td> </tr> <tr> <td>Cllr Birch</td> <td>Cllr Rowe</td> </tr> <tr> <td>Cllr Chown</td> <td>Cllr Spencer</td> </tr> <tr> <td>Cllr Jackson</td> <td>Cllr Sweett</td> </tr> <tr> <td>Cllr Jones</td> <td>Cllr Taylor</td> </tr> <tr> <td>Cllr McKay</td> <td></td> </tr> </table>	Cllr Austen	Cllr Rose	Cllr Birch	Cllr Rowe	Cllr Chown	Cllr Spencer	Cllr Jackson	Cllr Sweett	Cllr Jones	Cllr Taylor	Cllr McKay	
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Cllr McKay													
<b>Interests – Declaration and Restriction on Participation:</b>	Members are reminded of their responsibility to declare any disclosable pecuniary interest not entered in the Authority's register or local non pecuniary interest which they have in any item of business on the agenda (subject to the exception for sensitive information) and to leave the meeting prior to discussion and voting on an item in which they have a disclosable pecuniary interest.												
<b>Committee administrator:</b>	Democratic.Services@swdevon.gov.uk												

- 1. Apologies for Absence**
- 2. Minutes** **1 - 6**  
to approve as a correct record the minutes of the Committee held on 21 April 2022;
- 3. Urgent Business**  
brought forward at the discretion of the Chairman;
- 4. Division of Agenda**  
to consider whether the discussion of any item of business is likely to lead to the disclosure of exempt information;
- 5. Declarations of Interest**  
In accordance with the Code of Conduct, Members are invited to declare any Disclosable Pecuniary Interests, Other Registerable Interests and Non-Registerable Interests including the nature and extent of such interests they may have in any items to be considered at this meeting;
- 6. Public Forum** **7 - 8**  
A period of up to 15 minutes is available to deal with issues raised by the public;
- 7. Third Party Partners**  
Presentations to be received from:
  - LiveWest – Suzanne Brown and Russell Baldwinson - Executive Director of Development
  - South West Mutual Bank – Tony Greenham
- 8. Council Delivery against Corporate Theme: Council Services** **9 - 18**
- 9. Progress of Recruitment on Future Lawyers**  
Minute Ref O&S70/21 Refers  
To note that all five vacancies within the Legal Services Team are currently being advertised. The closing date for applications is 20 June 2022. A report on the progress of the recruitment will be brought to the next meeting of the Committee
- 10. Task and Finish Group Updates (if any)**
- 11. O&S Annual Work Programme 2022/23** **19 - 20**

**MINUTES of the MEETING of the  
OVERVIEW & SCRUTINY COMMITTEE,  
Held in the Council Chamber, Follaton House, Totnes, on  
THURSDAY, 21 APRIL 2022**

<b>Panel Members in attendance:</b>			
* Denotes attendance		∅ Denotes apology for absence	
*	Cllr L Austen	*	Cllr J T Pennington
*	Cllr J P Birch (Chairman)	∅	Cllr J Rose
*	Cllr M Chown	*	Cllr P C Smerdon (Vice Chairman)
*	<i>Cllr S Jackson</i>	*	<i>Cllr B Spencer</i>
*	<i>Cllr L Jones</i>	∅	<i>Cllr J Sweett</i>
*	<i>Cllr J McKay</i>	*	<i>Cllr D Thomas</i>
*	<i>Cllr D M O'Callaghan</i>		

<b>Other Members also in attendance:</b>
<i>Cllrs V Abbott; J Brazil; J Hawkins; J Pearce – in person Cllrs H Bastone; N Hopwood; G Pannell – remote attendance via Teams Meeting.</i>

<b>Item No</b>	<b>Minute Ref No below refers</b>	<b>Officers in attendance and participating</b>
All		Deputy Chief Executive, Director of Place & Enterprise; Monitoring Officer; Democratic Services Specialist; IT Officer; and Democratic Services Officers
Item 7	O&S.68/21	Specialist – Leisure
Item 8	O&S.69/21	Head of Housing and Benefits; Senior Specialist Housing

**O&S.65/21 MINUTES**

The minutes of the meeting of the Overview and Scrutiny Committee (O&S) held on 17 March 2022 were confirmed as a correct record.

**O&S.66/21 DECLARATIONS OF INTEREST**

Members and officers were invited to declare any interests in the items of business to be considered during the course of the meeting, but there were none declared.

**O&S.67/21 PUBLIC FORUM**

In accordance with the Public Forum Procedure Rules, the Chairman informed that no questions had been received for consideration.

**O&S.68/21 LEISURE CONTRACT – FUSION ANNUAL REPORT 2021**

Further to the discussion on the Leisure Contract at the previous Overview & Scrutiny Committee meeting on 17 March 2022, (minute O&S.61/21 refers) the Chairman clarified that the purpose of this agenda item would be to hear a short presentation from the Business Manager (Devon) of Fusion, with questions focusing solely on four areas. These would be: activities in surrounding rural areas; Key Performance Indicators (KPIs); carbon reduction /solar energy projects; and pricing.

The lead Executive Member for Community Wellbeing introduced Mr Peter King, the Business Manager (Devon) of Fusion. Mr Chris Jones, Head of Sport and Community Development of Fusion, also joined the meeting via Teams.

During the question and answer session, the following points were made:

- The new pricing structure had been decided upon after taking into consideration potential challenges ahead, with the aim to bring some legacy pricing into line with local industry. The next review would be at the end of 2022, with implementation being in February/March 2023.
- Different levels of membership were available, including monthly or weekly subscriptions, and all centres were open to non-members for use. It was acknowledged that communication of the membership tariffs required improvement.
- Centres were available through General Practice subscription, with the ability to self-refer onto a 12 week programme. It was agreed that the matter of health referrals would be covered in more depth in the six month update in September 2022.
- Fusion were appointing a Development Community Officer whose focus would be on outreach and working with local partners, stake holders and local authorities. Once in place, the Fusion representatives confirmed that KPIs would be set (and reviewed) for the new outreach person.

Following a discussion regarding overview of the Fusion financial information, it was **PROPOSED**, **SECONDED** and **CARRIED** at the subsequent vote.

It was then:

### **RESOLVED**

The Committee Work Programme be updated to ensure that the Committee receive financial figures and a full report on the Leisure Contract every six months, with a three monthly update being received from the Lead Executive Member for Leisure, to include all relevant financial matters.

Following the Council's adoption of the Better Lives for All Strategy in September 2021, the Committee was provided with an update on the Improving Homes strand of the Better Lives for All Strategy.

Each project, outlined in Appendix A of the attendant report, was then reviewed in turn:

IH1.1: Affordable definition confirmed as that outlined in NPPF (National Planning Policy Framework). Subsequent reports would have numbers split down into various categories. Affordable housing was classed as delivered once it had been handed over to the housing association.

Following discussions, it was then:

### **RESOLVED**

That the Overview and Scrutiny Committee **WELCOMED** this initiative but **NOTED** it was ambitious and the importance of local Ward Members being involved at the earliest opportunity was recognised.

IH1.2: Following the update on this action, the Executive Lead Member stated that housing need surveys were required to identify local needs. There was also a need to identify sites where these houses could be built.

It was then:

### **RESOLVED**

That the Overview and Scrutiny Committee **NOTED** this action.

IH1.3: It was confirmed that Central Government had closed the loophole allowing second homes to self-describe as business properties and then apply for small business rate relief. From April 2023 there would be new requirements for registering for business rates, with the default for all to pay council tax unless it could be evidenced that the property had been rented out for at least 70 days per year, with availability to rent of 140 days, and would be administered by the Valuation Office Agency.

It was then:

### **RESOLVED**

That the Overview and Scrutiny Committee **NOTED** this action and thanked the officers for achieving a good performance

IH1.4: More people had been able to access grants for air source heat pumps, as financial limits had been reasonably generous.

It was then:

**RESOLVED**

That the Overview and Scrutiny Committee **NOTED** this action

IH1.5: There were no questions on the Homelessness strategy which had been considered twice recently by the Executive.

It was then:

**RESOLVED**

That the Overview and Scrutiny Committee **WELCOMED** the progress that had been made and requested examples of the benefits of the scheme, and that there be Ward Member involvement.

**O&S.70/21 ANNUAL STANDARDS REPORT 2021/22**

The Leader outlined what had happened with the Council's Independent Persons (IPs), who had an annual allowance of £500 each. It was clarified that three of five IPs needed to be ratified at the next Council, which would be the Annual Council meeting on the 19 May 2022. This would take the IPs up to May 2023 when a new Council term would begin and the situation reviewed.

It was then:

**RECOMMENDED**

The Overview and Scrutiny Committee **RECOMMEND** to Full Council to ratify the appointments of George Barnicott, Trevor Kirkin, and Peter Boreham as independent persons from the Annual Meeting in May 2019 to the Annual Meeting in May 2023

Following the Monitoring Officer's update on the Annual Standards report, it was noted that there was a shortfall of four lawyers in the legal department, with difficulties recruiting to those posts. The Deputy Chief Executive confirmed that resolving this situation was a key priority for the Senior Leadership Team. One Member of the Committee highlighted the need for communication and expectation management, whilst another Member welcomed the report and the inherent transparency. The Monitoring Officer acknowledged that communication was absolutely critical.

It was confirmed that part of the review of the Constitution would cover the Council's complaints process, with increased oversight given to Members of standard complaints. It was highlighted that the revised Constitution would be requesting that the Audit Committee take on responsibility for Standards under the guise of the newly titled 'Audit

and Governance' Committee. This would be presented for approval at the Annual Council meeting to be held on 19 May 2022.

It was then:

### **RESOLVED**

That the Overview and Scrutiny Committee **NOTES** the contents of the Annual Standards Report for 2021/22, and **REQUESTS** a report to the next meeting on the progress of recruitment on future lawyers, to enable the Standards provisions be implemented within the time period set out in the policy and procedure document.

## **O&S.71/21 OUTSIDE BODIES – ANNUAL REPORT**

The report presented an update on each of the Outside Bodies to which the Council had made Member appointments for 2021/22 at its Annual Meeting held on 20 May 2021 (minute 18/21 refers). It was noted that some Members were not reporting back using the template that had been agreed by Council, including identifying particular decisions relevant to Ward Members.

It was then:

### **RECOMMENDED**

That the contents of the Annual Report (as set out at Appendix A of the attendant report) be **NOTED** and

That the Overview and Scrutiny Committee **RECOMMEND** to Full Council that the specific recommendations arising from the Task and Finish Group in March 2021 (minute 18/21 refers), and approved by this Committee, be implemented in the coming year.

## **O&S.72/21 REVIEW OF S106 MONIES.**

At the Chairman's behest, it was agreed to defer this item to the next meeting for consideration.

## **O&S.73/21 TASK AND FINISH GROUP UPDATES**

### **a) Housing**

Following feedback from the Executive, the Task and Finish Group (T&FG) met on the morning of this Committee meeting to discuss the request from the Executive for further information regarding exemplar projects (minute E.107/21 iii) refers) before a decision was made. It was decided that a template would be sent to the T&FG Members asking for one exemplar project from each Member, giving the reason why the stated example should serve as a model, to be submitted. The

Chair and Vice Chair would collate the examples before then relaying to the Executive.

It was then:

### **RESOLVED**

That the Overview and Scrutiny Committee **NOTE** the above and **ACKNOWLEDGE** that the Committee Chairman and Vice-Chairman will collate the examples before they are then relayed to the Executive.

#### **O&S.74/21 ANNUAL WORK PROGRAMME 2022/23 – INITIAL THOUGHTS**

The draft annual work programme for the coming fiscal year was reviewed by the Committee.

It was confirmed to bring the S106 monies report and the update on lawyer recruitment to the next meeting on 16<sup>th</sup> June 2022. It was noted that the Committee still had not had a response from SWASFT. There was a request from the Chair to ask that representative(s) from the Devon Building Partnership attend a future Committee meeting to discuss functions and responsibilities.

#### **O&S.75/21 CHAIRMAN'S CONCLUDING REMARKS**

At the close of the meeting, the Chair informed the Committee that this would be his last meeting as Chair as he would not be putting himself forward for re-election at the Annual Council meeting on 19 May 2022. After three years as Chairman, he thanked the Members for their contributions, and, in particular, the Vice Chair for his support. The Chairman then gave special thanks to the officers, particularly the Deputy Chief Executive, the Democratic Services Manager, and the Democratic Services Specialist for their help and support during the last three years.

(Meeting started at 2:00 pm and concluded at 4:38pm)

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Chairman

## **PUBLIC QUESTIONS AT OVERVIEW AND SCRUTINY COMMITTEE MEETINGS**

There is a period of 15 minutes at meetings of the Overview and Scrutiny Committee during which members of the public can ask questions about items on the agenda.

Any member of the public who wants to ask a question should ensure that the question:

- a) is no more than 50 words in length;
- b) is not be broken down into multiple parts;
- c) relates to an item included on the agenda; and
- d) is suitable to be considered. A question will not be suitable if, for example, it is derogatory to the Council or any third party; relates to a confidential matter; it is about a specific planning matter; or it is substantially the same as a question asked in the past six months.

Questions should be sent to Democratic Services ([Democratic.Services@swdevon.gov.uk](mailto:Democratic.Services@swdevon.gov.uk)) by 1.00pm on the Monday before the meeting (the deadline will be brought forward by a working day if affected by a bank holiday). This will allow a detailed response to be given at the meeting. If advance notice of the question cannot be given the Chairman of the meeting has the discretion to allow questions on matters that are felt to be urgent;

For any further advice on questions to the O&S Committee, or to request a copy of the full Public Questions Procedure Rules, please contact Democratic Services ([Democratic.Services@swdevon.gov.uk](mailto:Democratic.Services@swdevon.gov.uk))

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Report to: **Overview and Scrutiny Committee**  
Date: **16 June 2022**  
Title: **Better Lives for All Thematic Update:**  
Portfolio Area: **Cllr Nicky Hopwood and Cllr Keith Baldry**  
**Lead Members for Delivering Quality Council Services (Internal) & (Commissioned)**  
Wards Affected: **All**  
Urgent Decision: **N** Approval and clearance obtained: **Y**

Date next steps can be taken:

Author: **Catherine Bowen**

Role: **Business Manager (Specialists)**

Contact: [Catherine.Bowen@swdevon.gov.uk](mailto:Catherine.Bowen@swdevon.gov.uk)

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**RECOMMENDATION: that the Overview & Scrutiny Committee:**

- 1. Note the progress in delivering against the Better Lives for All 'Council Services' Thematic Delivery Plan and make any necessary recommendations.**
- 2. Agree that the Key Performance Indicators be added to the Overview and Scrutiny Agenda for 21 July 2022**

**1. Executive summary**

- 1.1 The Council adopted its Better Lives for All Strategy in September 2021, alongside detailed Thematic Delivery Plans for each priority area.
- 1.2 This report provides the thematic update on the Council Services theme of the Better Lives for All Strategy.
- 1.3 The report also updates Members on the updated approach to reporting Key Performance Indicators.

## **2. Thematic Update Report**

- 2.1 The Performance Management Framework included with the Better Lives for All strategy commits that Overview and Scrutiny will receive a specific thematic update at each meeting in order to consider the progress against the agreed Thematic Delivery Plans.
- 2.2 The Council Services Thematic Update report is set out in Appendix A to this report.

### **Key Performance Indicators**

- 2.2 The Overview and Scrutiny Committee consider Key Performance Indicators on a six-monthly basis, last considering them in January 2022.
- 2.3 We have recently updated the approach to Key Performance Indicator reporting; these indicators are now also being reported to Executive on a quarterly basis as part of the Better Lives for All Performance Management Framework.
- 2.4 The first quarterly report to Executive which includes the new suite of Key Performance Indicators is scheduled for 7 July 2022. It is therefore recommended that the first report to Scrutiny on the new Key Performance Indicators is considered at the meeting on 21 July 2022.
- 2.5 The report will be enhanced with narratives around performance and in a user friendly format.

## **3. Next Steps**

- 3.1 Progress against the Thematic Delivery Plan will continue to be regularly monitored by the Lead Members for Council Services, through regular meetings with the lead officers. Highlights will also be provided in the quarterly Integrated Performance Management Report considered by the Executive.
- 3.2 Following consideration by Overview and Scrutiny, the progress report will be published on the Council's strategy reporting pages <https://www.southhams.gov.uk/better-lives-for-all> as a public record of progress.
- 3.3 A report on the new Key Performance Indicators will be brought to the Overview & Scrutiny Committee on 21 July 2022.

#### 4. Implications

Implications	Relevant to proposals Y/N	Details and proposed measures to address
Legal/Governance	Y	Providing performance updates in respect of our strategic priorities contributes to Principle F of the CIPFA Delivering Good Governance in Local Government Framework. This principle is about managing risks and performance through robust internal control and strong financial management.
Financial implications to include reference to value for money		This report does provide updates in respect of financial information but does not make any recommendations or lead to any financial implications not considered by other committees.
Risk		The thematic update report considers the key risks for the Council in delivering each action within the Better Lives for All delivery plan for Council Services.
Supporting Corporate Strategy		Council Services
Climate Change - Carbon / Biodiversity Impact		Not relevant to this report
<b>Comprehensive Impact Assessment Implications</b>		
Equality and Diversity		No direct implications
Safeguarding		No direct implications
Community Safety, Crime and Disorder		No direct implications
Health, Safety and Wellbeing		No direct implications
Other implications		

## **Supporting Information**

### **Appendices:**

Appendix A – Thematic Update Report on Council Services

### **Background Papers:**

None



# Council Services

**Thematic Progress Update**

**June 2022**

# Lead Member Introduction

This report is the first thematic update report on the progress we are making against our Better Lives for All Council Services theme.

Since adopting our Corporate Strategy in September 2021, we have made significant progress against the actions set out in our plan.

Some of the highlights from year 1 (2021/22) of our Delivery Plan include:

- ✓ Customer orientated processes for the Energy Support payments and Ukrainian Refugee Host Payments to ensure financial assistance reaches customers
- ✓ Delivered a balanced budget for 2022/23
- ✓ Consultation & Engagement on key Council priorities such as the Homelessness Strategy and Totnes Skate park consultation
- ✓ Progressed service reviews in DM, Revenues & Benefits, the Contact Centre, Legal, and Assets on which we continue to build in accordance with improvement plans
- ✓ Annual objective setting process under way and performance management structure in place

Each action has a number of activities and the following table sets out the progress against those specific activities.

Activities on Track	Activities slightly off track but plan in place	Activities at risk of not completing as agreed	Activities not yet due to start
<b>5</b>	<b>2</b>	<b>0</b>	<b>0</b>

Over the coming pages, we set out more in-depth updated for each action and subsequent activities.

*Cllr Nicky Hopwood*

Cllr Nicky Hopwood

Executive Lead for Service Delivery

*Cllr Keith Baldry*

Cllr Keith Baldry

Executive Lead for Commissioned Services



**Cllr Nicky Hopwood**  
Lead Member for delivering quality Council services (Internal)



**Cllr Keith Baldry**  
Lead Member for delivering quality Council services (Commissioned)



**QS1.1 - Implementing IT Systems that make it easy for customers to access Council Services including:-**

- **Implementing a system which enables a single view of the customer**
- **Improving Access to Management Information**
- **Launching and improved website to make it easier for our customers to access council services**
- **Achieving a £70,000 ongoing reduction to costs as a result of more efficient IT systems**

**Key Highlights**

- Continuing progress in delivering Liberty Create processes giving direct, easier and faster access to services for the customer. There are now over 100 live processes including the new Energy Support payments and the Ukrainian Refugee Host Payment process, ensuring that those supporting refugees get financial assistance quickly and easily every month.
- We are on track with the new website for spring 2023 and we are testing it over the next few weeks
- We have started the roll out of Office365 across the organisation which will make on-line meetings easier
- Difficulties continue with the back office systems for Environmental Health and Planning which we are striving to address with the supplier through regular dialogues

**Key Risks / Issues**

- The delivery of a solution for connecting Liberty Create (the processes) with other back office systems has been delayed due to commitments on other priorities, but we do have a plan as to how this can be resolved and this is now back on track
- We are working with our supplier to resolve continuing difficulties with the back office system for Environmental Health and Planning but there is a significant risk that the costs of the planning system may increase, and the issues are causing a delay in the implementation of improvements identified in the service reviews discussed below
- Resolution of these difficulties may impact on progress of the new website.

**Looking ahead to the next 6 months**

Although reliant on the risks/issues identified above, plans for the next 6 months include:

- Moving Revenues & Benefits processes into Liberty Create to drive significant efficiency savings and delivery improvements to the Customer (avoiding duplication and resolving issues at the first point of contact)
- Creating a Legal Case Management system to give better access to and oversight of cases
- Implementing a new mobile solution for Locality Officers
- Complete the introduction of Office365 to officers and members

Overall Rating

**Amber - off track but plan in place to bring back on track**

**Action QS1.2 Develop a strategy setting out how our customers can access our services in the future, be that face to face, online or on the phone**

**Key Highlights**

This action has been carried forward from 2021/22 due to increased demand on Council services during the final quarter of the year (additional business grants / Covid cases increase among staff etc). We are pleased however that good progress is now being made with:

- A draft Customer Access Strategy (the Customer Experience) to be considered by Members' next month
- A Contact Centre review has been carried out and current progress has been reported to Members through the Executive



Key Risks / Issues	
<ul style="list-style-type: none"> <li>• Consistent approach to access to services</li> <li>• Putting the customer first and making a difference to the Customer</li> </ul>	
Looking ahead to the next 6 months	
<ul style="list-style-type: none"> <li>• Adoption of Customer Experience Strategy by Members</li> <li>• Develop the Customer Journeys that inform the strategy</li> <li>• Implement the Contact Centre Review improvement plan and evidence improvements</li> </ul>	
<b>Overall Rating</b>	Amber - off track but plan in place to bring back on track

Action QS1.3 – Ask our residents, businesses and partners for their views when developing plans for the area so they can inform our decision making by:-	
<ul style="list-style-type: none"> <li>- Developing a forward plan of Consultation and Engagement activities</li> <li>- Include details of consultation and engagement activity as a specific section within the Councils Annual Report</li> </ul>	
Key Highlights	
<p>Since adopting the Better Lives for All Strategy there have been a number of consultation and engagement activities undertaken including:</p> <ul style="list-style-type: none"> <li>• Homelessness Strategy Consultation</li> <li>• Totnes Borough Park skate park consultation</li> <li>• Engagement with our residents, businesses and Town and Parish Councils over plans for tree planting and biodiversity on Council land</li> </ul> <p>The Communications team are currently working with officers (and then Lead Members) to develop a forward plan of consultation, engagement and communication activities for the coming 12 months, aligned to each of the Better Lives for All themes.</p> <p>As a boost to our efforts to ensure our consultation and engagement activities are effective, we are pleased that the Council (with Plymouth City and West Devon) have been awarded Government funding to implement a map based consultation and engagement portal which will enable us to enhance our online engagement presence.</p>	
Key Risks / Issues	
Government funding for the online engagement portal is for two years. If it is successful we may wish to consider continuing with the arrangement and would need to identify budget.	
Looking ahead to the next 6 months	
<ul style="list-style-type: none"> <li>• Finalise our 12 month consultation and engagement activities programme with Lead Member input</li> <li>• Ensure our teams have a presence at key events across the District to engage with our residents</li> <li>• Go Live with the new consultation and engagement portal</li> </ul>	
<b>Overall Rating</b>	Green (On track)

Action QS1.4 – Carry out a resident’s satisfaction survey so that we know how we’re doing and can compare our performance to other local authorities.	
Key Highlights	
<p>This action has carried forward from 2021/22. There has been slippage in agreeing the framework and developing the plan for the residents’ satisfaction survey; however there is still time to achieve delivery of the survey by the end of this calendar year (the adopted plan says by the end of November 2022).</p>	



It is important to note that the main focus of the residents' satisfaction survey will be around South Hams as a place to live and work (which differs from the Institute of Customer Service survey that focuses on our processes and services). This insight is incredibly important as we look to deliver future year's delivery plans for the Better Lives for All Strategy.

#### Key Risks / Issues

Capacity to deliver the survey could be challenging as we look to deliver on the Councils' core services.

#### Looking ahead to the next 6 months

- Agree a plan and the questions for the Residents Satisfaction engagement with Lead Member
- Consultation for the Survey from the end of September (6 weeks)
- Results to Executive December 2022

Overall Rating **Green – on track**

#### Action QS1.5 – Set a balanced budget annually

##### Key Highlights

A balanced budget for SHDC for 2022-23 was approved at Council on 10<sup>th</sup> February 2022

##### Key Risks / Issues

- Cost of Living crisis
- Inflation provisions to be updated for the next iteration of the Medium Term Financial Strategy
- Pay award assumptions to be updated for the next iteration of the Medium Term Financial Strategy

#### Looking ahead to the next 6 months

- Regular quarterly budget monitoring to reported to the Executive on a quarterly basis
- Lobbying for a longer term Government financial settlement

Overall Rating **GREEN – On Track**

#### Action QS1.6 – Review our service areas to ensure that our customers get the best possible service by;

**Analysing key service performance**

**Adopting a Planning Service Improvement Plan**

**Carrying out a review of revenues and benefits and;**

**Identifying other areas for reviews in order to improve the customer experience**

##### Key Highlights

We have made good progress on service reviews in DM, Revenues & Benefits, Legal, Contact Centre and Assets

##### Key Risks / Issues

- Ensuring that consistent progress continues in accordance with the agreed Improvement plans so that improvements make a difference to the Customer

#### Looking ahead to the next 6 months

- Implementing the new DM structure to ensure improved delivery to the customers
- A fully resourced legal team to support the organisation in delivering its priorities



	<ul style="list-style-type: none"> <li>• A new Head of Revenues and Benefits to deliver on the Improvement Plan</li> <li>• Investment in the Contact Service to support consistent and easy access to Council services, and evidencing the outcomes from the Contact Centre review</li> </ul>
Overall Rating	GREEN – On Track

<b>Action QS1.7 Manage and support our employees to deliver a good outcomes for our residents and businesses by;</b> <b>Implementing an annual objective setting processes for staff</b> <b>Implementing a new system for recording objectives</b> <b>Carry out a staff satisfaction survey</b>	
<b>Key Highlights</b>	
<ul style="list-style-type: none"> <li>• Annual objective setting process underway and a new Performance Management System that captures objectives and records ‘check-in’ discussions between managers and staff will be implemented using the new HR and Payroll system over the Summer</li> <li>• All staff briefings have been carried out to thank staff, to re-empathise Customer Focus, core service quality and effective management.</li> <li>• Carry out a Staff Survey over the summer now that the current round of Staff briefings have taken place</li> </ul>	
<b>Key Risks / Issues</b>	
<ul style="list-style-type: none"> <li>• Embedding the new Performance Management and Appraisal system</li> </ul>	
<b>Looking ahead to the next 6 months</b>	
<ul style="list-style-type: none"> <li>• Implement new Line Managers’ Development Pathway to support key managers to be more effective leaders and managers</li> <li>• Develop and implement an action plan based on the findings of the Staff Survey</li> </ul>	
Overall Rating	GREEN – On Track
This update will be considered at South Hams District Council Overview and Scrutiny Meeting on 21 <sup>st</sup> April 2022 at 2pm. Watch live on  <a href="https://www.youtube.com/user/southhamsCouncil">YouTube</a> <a href="https://www.youtube.com/user/southhamsCouncil">https://www.youtube.com/user/southhamsCouncil</a>	



## OVERVIEW AND SCRUTINY PANEL

### INITIAL DRAFT ANNUAL WORK PROGRAMME PROPOSALS – 2022/23

Date of Meeting	Report	Lead Exec Member/Officer
16 June 2022	Council Delivery against Corporate Theme: Council Services	Cllrs Hopwood & Baldry/Catherine Bowen
	Third Party Partners: LiveWest – Suzanne Brown and Russell Baldwinson - Executive Director of Development to present	Cllr Judy Pearce / Isobel Blake
	Third Party Partners: South West Mutual Bank – Tony Greenham	Cllr Hilary Bastone / Lisa Buckle
	Progress of recruitment on future lawyers (min O&S.70/21) – verbal update	Cllr Judy Pearce / David Fairbairn
	Task and Finish Group Updates <i>(if any)</i>	
	O+S Annual Work Programme <i>(to include preparation for next meeting)</i>	
21 July 2022	Council Delivery against Corporate Theme: Economy	Cllr Hilary Bastone / Lisa Buckle
	Quarterly update re Fusion – written submission	Cllr Jonathan Hawkins/Jon Parkinson
	S106 monies review (postponed from previous meeting)	
	Update on Legal Recruitment	David Fairbairn
	Task and Finish Group Updates <i>(if any)</i>	
	O+S Annual Work Programme <i>(to include preparation for next meeting)</i>	
29 September 2022	Council Delivery against Corporate Theme: Built Environment	Cllr Judy Pearce
	Devon Building Control Partnership – Nigel Hunt (Head of Partnership)	To invite
	Bi-annual Report – Fusion (to include health referrals and usage by Ward)	Cllr J Hawkins/Chris Brook/ Jon Parkinson
	Task and Finish Group Updates <i>(if any)</i>	
	O+S Annual Work Programme <i>(to include preparation for next meeting)</i>	
3 November 2022	Contact Centre Review	Cllr Nicky Hopwood / Dale Cropper
	Task and Finish Group Updates <i>(if any)</i>	
	O+S Annual Work Programme <i>(to include preparation for next meeting)</i>	
8 December 2022	Council Delivery against Corporate Theme: Climate	Cllr Tom Holway / Adam Williams
	Quarterly update re Fusion – written submission	Cllr Jonathan Hawkins / Jon Parkinson
	Six monthly update - Broadband	Cllr Pearce / Gemma Bristow

	Task and Finish Group Updates <i>(if any)</i>	
	O+S Annual Work Programme <i>(to include preparation for next meeting)</i>	
January 2023 (12 or 19 – tbc)	Council Delivery against Corporate Theme: Communities	Cllr Jonathan Hawkins
	Task and Finish Group Updates <i>(if any)</i>	
	O+S Annual Work Programme <i>(to include preparation for next meeting)</i>	
16 March 2023	Council Delivery against Corporate Theme: Homes	Cllr Judy Pearce
	Bi-annual Report – Fusion	Cllr Jonathan Hawkins / Jon Parkinson
	Task and Finish Group Updates <i>(if any)</i>	
	O+S Annual Work Programme <i>(to include preparation for next meeting)</i>	
20 April 2023	Council Delivery against Corporate Theme: Council Services	Cllrs Hopwood & Baldry
	Task and Finish Group Updates <i>(if any)</i>	
	O+S Annual Work Programme <i>(to include preparation for next meeting)</i>	
To be considered or scheduling:	SWASFT Devon Building Control Partnership – Nigel Hunt (Head of Partnership) Electric Vehicle Strategy	Adam Williams/Drew Powell