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AGENDA FOR

OVERVIEW AND SCRUTINY COMMITTEE

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To: All Members of Overview and Scrutiny Committee

Councillors : S Carter, D Cassidy, A Cummings, J Daly,
L Fitzwalter, M Hankey (Chair), P Heneghan, M James,
S Nuttall, D O'Hanlon and T Tariq

Dear Member/Colleague

Overview and Scrutiny Committee

You are invited to attend a meeting of the Overview and Scrutiny Committee which will be held as follows:-

Date:	Tuesday, 25 March 2014
Place:	Peel Room, Bury Town Hall
Time:	7.00 pm
Briefing Facilities:	If Opposition Members and Co-opted Members require briefing on any particular item on the Agenda, the appropriate Director/Senior Officer originating the related report should be contacted.
Notes:	

AGENDA

1 APOLOGIES

2 DECLARATIONS OF INTEREST

Members of the Overview and Scrutiny Committee are asked to consider whether they have an interest in any matters on the agenda and, if so, to formally declare that interest.

3 MINUTES (*Pages 1 - 6*)

Minutes of the last meeting, held on 12 February 2014, are attached.

4 PUBLIC QUESTION TIME

A period of 30 minutes has been set aside for members of the public to ask questions on matters considered at the last meeting and set out in the minutes or on the agenda for tonight's meeting.

5 LGA SAFEGUARDING DIAGNOSTIC AND OFSTED UPDATE (*Pages 7 - 30*)

Report from the Assistant Director (Safeguarding and Social Care) is attached.
Inspection Action Plan attached.

6 CORPORATE PLAN - QUARTER 3 (*Pages 31 - 50*)

Report from the Leader attached.

7 CORPORATE PLAN 2014-2015 - PROPOSAL OF KEY PROJECT S AND PERFORMANCE INDICATORS (*Pages 51 - 60*)

Report attached.

8 CIVIC HALLS - PROGRESS REPORT (*Pages 61 - 68*)

9 SCHOOL ADMISSIONS OVERVIEW PROJECT GROUP - FINAL REPORT (*Pages 69 - 84*)

The Chair of the Group, Councillor Fitzwalter, will present the findings and recommendations of the Group

10 WORKLESSNESS OVERVIEW PROJECT GROUP

The Chair of the Group, Councillor Tariq, will provide an update at the meeting.

11 URGENT BUSINESS

Any other business which by reason of special circumstances the Chair agrees may be considered as a matter of urgency.

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Minutes of: **OVERVIEW AND SCRUTINY COMMITTEE**

Date of Meeting: 12 February 2014

Present: Councillor M Hankey(in the Chair);
Councillors D Cassidy; S Carter; A J Cummings; J Daly;
M James; P Heneghan; L Fitzwalter; S Nuttall; D O'Hanlon;
and T Tariq

Public in attendance: No members of the public were present.

Also in attendance: Councillor J Smith– Deputy Leader of the Council and
Cabinet Member for Finance and Corporate Affairs

Apologies for absence:

OSC.764 DECLARATIONS OF INTEREST

Councillor Heneghan, as a Deputy Cabinet Member, declared a personal and prejudicial interest in all budgetary matters relating to issues within the Children and Families portfolio.

Councillor Tariq, as a Deputy Cabinet Member, declared a personal and prejudicial interest in all budgetary matters relating to issues within the Communities and Community Safety portfolio.

Councillor Fitzwalter declared a personal interest in all housing matters relating to private tenancies, as a landlord of properties within the borough.

OSC.765 PUBLIC QUESTION TIME

There were no members of the public present at the meeting to ask questions under this item.

OSC.766 MINUTES OF THE MEETING HELD ON 14 JANUARY 2014

It was agreed:

That the Minutes of the meeting of the Overview and Scrutiny Committee, held on 14 January 2014, be approved as a correct record and signed by the Chair.

OSC.767 MATTERS ARISING

In respect of Minute OSC.673, Medium Term Financial Strategy, the Executive Director of Resources undertook to ensure Members received forecast figures with regard to the cost per household as a result of the budget cuts.

OSC.768 CORPORATE FINANCIAL MONITORING REPORT – APRIL 2013 TO DECEMBER 2013

The Cabinet Member for Finance and Resources submitted a report informing Cabinet of the Council's financial position for the period April to December 2013 and projects the likely outturn at the end of 2013/14.

The report included Prudential Indicators in accordance with CIPFA's Prudential Code.

Questions and comments were invited from the Committee and the following issues were raised:

- The Chair, Councillor Hankey, placed on record thanks to the Council's Financial Team, Executive Directors and Portfolio Holders for their efforts in reducing the forecast overspend at month 9.
- In response to a question relating to Adult Care cost pressures, the Executive Director explained that a number of preventative strategies would take time to bed in, with the full benefits not being realised until future years. It was highlighted that although the cost per case had been reduced through improved procurement and the use of personal budgets, a rising demand and some existing expensive care packages still contributed to budget pressures in this area.
- In response to a question from Councillor Daly concerning non service specific areas, the Executive Director acknowledged that, without the forecast underspend in this area, the budget would, at month 9, be showing an increased overspend. The Assistant Director of Resources explained that it was important to consider the direction of travel in respect of the financial position and highlighted the work of Departments to manage down cost pressures during the course of the financial year.
- With regard to the positive contribution to the budget from the Council's Treasury Management activity, it was stressed that all Executive Directors were aware of the necessity to manage cost pressures and in no way be reliant on Treasury Management to balance departmental budgets.
- In response to a question concerning SEN transport, the Assistant Director of Resources confirmed that this was procured through an ongoing tendering process to ensure value for money.
- Councillor O'Hanlon expressed concerns in relation to under spending in Children's Services for the use of one off funding. The Executive Director referred to external grants being off-set against the departments existing level of resource and highlighted that in some cases external funding could contribute to existing workstreams. It was explained that there was some headroom within particular grants and that carrying funds forward was permitted in certain cases.
- In response to a question from Councillor O'Hanlon concerning severances, staff vacancies and sickness levels, the Assistant Director of Resources reported that there had been no drop in performance highlighted within the Council's Corporate Plan. With specific regard to sickness levels, the

Assistant Director referred to the role of the Audit Committee in monitoring this area and stated that there had been no discernible increase in levels of staff sickness.

- Councillor James enquired whether demand pressures would be built into next years budget? The Assistant Director of Resources referred to the Council's Medium Term Financial Strategy which sets out that demand pressures are not built into the budget. The Cabinet Member highlighted the role of Star Chambers in identifying demand pressures at an early stage.
- In response to concerns about the management of the Six Town Housing Capital Programme, the Assistant Director of Resources confirmed that fortnightly meetings were now taking place between himself and Six Town Housing to monitor the situation and try to ensure the programme will spend to budget.

It was agreed:

That the financial position of the Council as at 31 December 2013 be noted.

OSC.769 DRAFT BUDGET 2014/15 TO 2015/16

The Deputy Leader and Cabinet Member for Finance and Corporate Affairs submitted a report setting out details of the Capital Programme for 2014/15 to 2016/17 and the Revenue Budget for 2014/15 to 2015/16. The report also included details of the Council's strategy for tackling the range of challenges and opportunities it faces through the Plan for Change 3. A draft programme of savings and consultation responses were appended to the report.

The report recommended that the Capital Programme be limited to those schemes fully funded from external sources.

With regard to the revenue budget the report outlined details of:

- The final Local Government Finance Settlement for 2014/15
- Forecast outturn for 2013/14
- The budget strategy for 2014/15 and 2015/16 and the approach to balancing the budget as set out in the Plan for Change 3.

It was explained that the report had been prepared on the basis that the Bury element of the Council Tax would be frozen for 2014/15, to be funded in part by £0.772m of Central Government grant.

Questions and comments were invited from Members of the Committee and the following issues were raised:

- In response to a question from Councillor Cassidy, the Assistant Director of Resources explained the new approach with regard to the local retention of business rates. It was confirmed that due to the volatility of the issue of business rate appeals, provision had been built into the budget.
- Councillor Fitzwalter expressed concerns about the number of empty business properties and suggested the Council use its influence with the

Millgate to encourage non traditional service type businesses to take up vacant premises.

- In response to questions from Councillor Daly, the Assistant Director confirmed that the cost of increments had been budgeted for in last years budget. With regard to assumptions for a 1% pay award it was reported that provision for this would come from within the £2.220m additional savings requirement.
- Councillor O'Hanlon suggested that wording within the conclusion of the report should reflect the accountability of each Executive Director to be responsible for the management of their individual departmental budget. The Assistant Director confirmed this was set out in the Council Constitution and associated Finance Procedure Rules
- Councillor O'Hanlon stressed the importance of ensuring that any savings proposals resulted in a parity of services being maintained across geographical boundaries within the borough.
- In response to a question from Councillor Daly, the Executive Director reported that he was not aware of any compulsory redundancies arising from the savings requirements set out in the report.

It was agreed:

That the report be noted.

OSC.770 DRAFT HOUSING REVENUE ACCOUNT 2014/15

A joint report of the Cabinet Member for Finance and Corporate Affairs and Cabinet Member for Adult Care, Health and Housing was submitted which detailed the proposed Housing Revenue Account (HRA) for 2014/2015. The report set out proposals in respect of Dwelling and Garage rents, Sheltered Support, Management, Amenities, Heating and Furnished Tenancy charges. Proposed rent increases for Dwellings and Garages of 3.7% along with a 3.2% rise for Sheltered Amenity charges were outlined in the report.

During discussion of this item, Members of the Committee highlighted concerns in relation to the issue of Former Tenant Arrears (FTA). The Executive Director acknowledged difficulties in recovering these arrears and referred to the boundaries of the data protection legislation. Whist being reluctant to write of these arrears, the Executive Director stressed the importance of focussing on current tenants to prevent an increase in FTA's in the future.

Councillor O'Hanlon stressed the importance of clearly highlighting what is and is not included within furniture packages that attract furnished tenancy charges. The Executive Director of Resources undertook to raise the issue with Six Town Housing and report back to Councillor O'Hanlon

It was agreed:

That the report be noted.

**ISC.771 TREASURY MANAGEMENT STRATEGY AND PRUDENTIAL INDICATORS
2014/2015**

The Deputy Leader and Cabinet Member for Finance and Corporate Affairs submitted a report setting out the suggested Strategy for 2014/2015 in respect of the following aspects of the Treasury Management Function:-

- Treasury limits in force which will limit the Treasury risk and activities of the Council
- Prudential and Treasury Indicators
- The current treasury position
- Prospects for interest rates
- The borrowing strategy
- The borrowing requirement
- Debt re-scheduling
- The investment strategy
- The minimum Revenue Provision Policy

The primary objective of the Council's Treasury Management Function would continue to be the minimisation of financing costs whilst ensuring the stability of the Authority's long-term financial position by borrowing at the lowest rates of interest and by investing surplus cash to earn maximum interest, all at an acceptable level of risk.

The overall strategy for 2014/15 would be to finance capital expenditure by running down cash/investment balances and using short term temporary borrowing rather than more expensive longer term loans.

It was agreed:

That the Treasury Management Team be congratulated for their good performance managing the investments of the Council.

COUNCILLOR M HANKEY
Chair

(The meeting started at 7pm and ended at 8.30pm)

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REPORT TO OVERVIEW & SCRUTINY

Title:	LGA SAFEGUARDING DIAGNOSTIC AND OFSTED UPDATE
Date of Meeting:	TUESDAY 25 MARCH 2014
Project Lead Officer:	JACKIE GOWER, AD (CSC & SAFEGUARDING)
Project Sponsor:	MARK CARRILINE, EoDCS

1.0 PROJECT DESCRIPTION

In September 2013 Children's Services provided the Overview and Scrutiny Committee with a draft action plan against the then draft Ofsted Single Inspection Framework (SIF).

- 1.1 The Ofsted SIF was first published in October 2013, implemented from 19 November 2013 and published in its final form on 3 December 2013.
- 1.2 The SIF covers children in need of help and protection, looked after children and care leavers and includes inspection of Local Authority fostering and adoption services and 'review' of the effectiveness of the Local Safeguarding Children's Board.
- 1.3 The SIF regime is a rigorous, virtually unannounced (24 hour notice), inspection programme which takes place over four working weeks involving the submission of a number of key strategic documents and sophisticated datasets; in depth case file study and analysis; examination of the quality of decision making throughout the child's 'journey'; shadowing and interviewing case practitioners and interviewing children, young people, parents and carers.
- 1.4 Judgements are made against a four point scale of 'outstanding', 'good', 'requires improvement' and 'inadequate'. The use of the phase 'requires improvement' is a change from previous inspection frameworks.
- 1.5 The intention of the SIF is to improve the standard of social work and social care services to the most vulnerable children and families in our society - in order to improve the outcomes for this most vulnerable client group.
- 1.6 It goes without saying that any measures which support and engender improvements in the standard of social work and social care services has the support of Bury Children's Services.
- 1.7 The first tranche of Local Authorities inspected (Derbyshire, Hartlepool, Slough, Sheffield and Hillingdon) under the SIF framework were inspected week commencing 19 November 2013. The second tranche of SIF commenced week beginning 13 January 2014 (Bolton, East Sussex, Essex, Hounslow, Staffordshire and Coventry). Two further Authorities have followed (Bradford

and Hampshire) and further tranches will be announced on 11 March, 18 March and then approximately monthly over the three year period in which all Authorities will be inspected.

- 1.8 The inspection reports for the first tranche of Local Authorities have been published. Two LA's were adjudged 'Good', two adjudged to 'require improvement', one adjudged 'inadequate'. At the time of writing the reports of the second tranche of Authorities have yet to be published.
- 1.9 The advice from those LA's who have been subject of a SIF (whether or not their reports are published) is that the SIF is both more demanding and more rigorous than previous Ofsted inspection regimes and that nothing should be assumed from judgments of previous Ofsted inspections.
- 1.10 During January and February 2014 Bury Children's Services have been subject at short notice of an Ofsted Early Help (EH) Thematic Inspection and also a planned LGA Safeguarding Diagnostic (SD). The outcomes of this external and objective scrutiny indicate:

'Striking improvements' in safeguarding services since the SLAC (May 2012)

Improved quality of assessment of child need and risk

Outcomes for children improved by involvement of CSC and Early Help

Thresholds for CSC involvement appropriate, understood and consistently applied

Multi-Agency Safeguarding Hub – 'second to none'

Strong operational and strategic leadership

Exceptional frontline – managers, social workers and social care staff

Outward looking, self aware and honest – we know ourselves 'warts and all' and actively seek solutions to improve outcomes for children and families.

- 1.11 The EH Thematic and the SD also indicate the areas for improvement and the LGA provide recommendations for action. The Early Help feedback is part of a national report which will be published in the Summer but will not include any published judgments on Bury. Significant recommendations and areas for improvement are in respect of CSC capacity, Early Help capacity and the infrastructure supporting CSC (administrative, IT, WFD and HR). Improvement in challenge and scrutiny is also recommended.
- 1.12 In preparation for a SIF inspection, Children's Social Care is in a constant state of 'self evaluation' against new information and improved understanding. Progress against the SIF Draft Action Plan presented to the Overview and Scrutiny Committee in September 2013 is attached.

2.0 **ISSUES**

- 2.1 Ofsted judgments have been highly significant in terms of the reputations of Local Authorities and have a major impact in terms of ability to recruit and retain an appropriately qualified and experienced social work workforce. An unstable workforce contributes to poor service delivery and thus poor outcomes

for children and families. Bury Council is beginning to experience difficulty in recruiting to social work management posts.

- 2.2 The Secretary of State for Education has the power to intervene if s/he considers that a Local Authority is failing in its safeguarding duties toward children - such intervention is potentially costly to a Local Authority reputationally and financially. Although the exact form of intervention has varied between Authorities, all those who have been judged inadequate by Ofsted have experienced some form of intervention. Where a Local Authority is judged by Ofsted to be inadequate for overall effectiveness, a full inspection will take place within 12 to 18 months (unless otherwise directed by the Secretary of State).
- 2.3 There is a need to review the capacity and skill set in business support services in order that they can develop and provide 'real time' performance monitoring data for the social care management team and maintain the complex dataset required by the SIF inspection team within 24 hours of notification of inspection.
- 2.4 The demands of the SIF are such that there is significant challenge to middle/senior management capacity within Children's Services and, in particular, within social care to manage both the demands of a four week Ofsted SIF Inspection at the same time as ensuring a safe child protection and safeguarding service for children and families.
- 2.5 The SIF requires Local Authorities to evidence good practice in this area. For all children and young people the expectation is that help, care and protection are sensitive and responsive to age, disability, ethnicity, faith or belief, gender, gender identity, language, race and sexual orientation.
- 2.6. Children's Social Care quality assurance framework ensures that all audit activity includes a focus on ensuring that the service performs consistently well in the area of equalities and diversity.

3.0 **CONCLUSION**

- 3.1 Objective assessment by Ofsted (EH Thematic) and the LGA (SD) supports that significant progress has been made against the draft SIF action plan presented to the Overview and Scrutiny Committee in September 2013. This progress should be commended. It should, however, be acknowledged that the current inspection regime incorporates a very high level of challenge compared to previous regimes.
- 3.2 SIF action planning (Council wide) will be ongoing and responsive to emerging knowledge and understanding of the requirements and implications.

Contact Details:-

Jackie Gower
Assistant Director (Safeguarding and Social Care)

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INSPECTION ACTION PLAN

**CHILDREN IN NEED OF HELP
AND PROTECTION**

Services likely to be judged 'Good' if:	Action Required By CSC	Timescale Completion	Strategic Lead Officer	September 2013. Measures of progress Measures of Impact	Update March 2014
<p>1.0 Children are listened to & practice is focused on their experiences & influenced by their wishes & feelings.</p>	<p>i) Review of Independent Reviewing Officer (IRO) service against requirements of Care Planning regulations (2011) & the recommendations of Ofsted report 'Tackling Change' - June 2013.</p>	<p>i) Dec 2013</p>	<p>i) SGU</p>	<p>Recommendations of review presented to CMT by December 2013.</p> <p>Implementation of review by March 2014.</p> <p>Children seen consistently & routinely by IRO's.</p> <p>The wishes, views & feelings of children are recorded & taken into account in formulation of plans.</p>	<p>Review of the IRO service completed December 2013 and shared with IRO's.</p> <p>Dates & notes of IRO visits to children are now being recorded on the ICS system. Evidence that these visits are becoming routine. Capacity issues owing to increased expectations and demand.</p> <p>Work is ongoing with all practitioners including IRO's to improve their recording of the wishes & feelings of children – & their recording of how the formulation of plans has taken into account their wishes & feelings.</p> <p>A pilot is about to start to ensure that those children & yp who wish to attend CP conferences are supported by an independent advocate who can support them in ensuring their wishes & views are heard & considered.</p> <p>Chief Officers have a programme of attendance at CP conferences as part of the QA framework.</p>

Services likely to be judged 'Good' if:	Action Required By CSC	Timescale Completion	Strategic Lead Officer	September 2013. Measures of progress Measures of Impact	Update March 2014
<p>1.1 Children are consistently seen & seen alone by social workers where statutory guidance requires this should happen & professionally judged to be in the best interests of the child.</p>	<p>ii) Guidance to be issued to social work staff to affirm required visiting frequency to children & expectations of purpose of statutory visits.</p> <p>iii) Guidance to be developed for staff to establish consistent quality & kind of recording of the wishes & feelings of children; & as to how these wishes & feelings have influenced practice, plans & service provision.</p>	<p>ii) Sept 13</p> <p>iii) Oct 13</p>	<p>ii) Placement Service and SGS</p> <p>iii) Placement Service and SGS</p>	<p>Children seen at the appropriate frequency by social workers & seen alone at appropriate frequency.</p> <p>The wishes, views & feelings of children are recorded & taken into account in formulation of plans.</p>	<p>The ongoing development of a 'real time' performance monitoring tool is increasingly allowing frontline managers to ensure that children are seen at the appropriate frequency & seen alone by social work staff. There is a high level and improving level of compliance.</p> <p>Case file audits (including by LGA SDT) indicate that the wishes & feelings of children & yp are being more clearly recorded – further work is required to ensure that the wishes & feelings of children & yp are explicitly considered and are influential of care planning and service provision.</p>

Services likely to be judged 'Good' if:	Action Required	Timescale Completion	Strategic Lead Officer	September 2013 Measures of progress Measures of Impact	Update March 2014
1.2 Children are engaged in all actions & decisions & understand the intentions of the help they receive.	As above (1.1)	As above (1.1)	SGU SGS	The wishes, views & feelings of children are recorded & taken into account in formulation of plans.	Case file audits (including by the LGA SDT) indicate that the wishes & feelings of children & yp are being more clearly recorded – further work is required to ensure that the wishes & feelings of children & yp are explicitly considered and are influential of care planning and service provision. Ofsted Judgement against this descriptor will not be confined to the performance of CSC.
1.3 Social workers engage with children & families so that they understand what has to change, what help is offered & what the options are for the future.	Review of experience, skills and social work capacity.	March 14	AD	Review of frontline social work capacity to be completed by Jan 14 & implemented by April 14. All children are seen regularly & are able to develop a consistent relationship with their social worker. Social workers have the time & skills to undertake the required direct work with children & families & to ensure accurate & timely recording of their direct work with children & families.	Review of frontline social work capacity has been ongoing. Its completion has been delayed by the EH Thematic & the LGA SDT in Jan/Feb. 14. The recommendations arising from external scrutiny will now inform the review which is now unlikely to be completed until end of April 14 or implemented before July 14. Short term arrangements have been made to ensure social workers have the time & skills required to undertake direct work & ensure accurate recording of their work.

Likely to be judged 'Good' if:	Action Required	Timescale	Strategic Lead Officer	September 2013 Measures of progress Measure of Impact	Update March 2014
<p>1.4 Practice is informed by feedback from children & families about the effectiveness of the help they need from the time it is first needed until it ends.</p>	<p>iv) Review of systems, procedures & services to determine to what extent they support effective engagement & participation of children, yp & families & their feedback on the effectiveness of services is influential of practice, service design & service delivery.</p>	<p>March 14</p>	<p>PP&P</p>	<p>Review to be completed by December 13 and implemented from March 14.</p> <p>Systematic collection & collation of feedback on effectiveness of all services & evidence of influence of C&YP on practice, service development & service design.</p>	<p>This work is ongoing.</p> <p>Developments within CSC include a pilot to ensure YP are supported and heard in CP conferences and the development of a junior 'children in care council'.</p> <p>Complaints are collated and emergent themes identified.</p>

Likely to be judged 'Good' if:	Action Required	Time scale	Strategic Lead Officer	September 2013 Measures of progress Measures of impact	Update March 2014
<p>2.1 C&YP & families are offered help when concerns are first identified & as a consequence children's circumstances improve & the need for targeted services is lessened or avoided.</p>	<p>i) Implementation of MASH.</p> <p>ii) Implementation of EH Offer, EH Team & multi-agency EH Panel.</p>	<p>Oct 13</p> <p>Sept 13</p>	<p>i) AD</p> <p>ii) EH/Early Years & Children's Centres</p>	<p>Co-located multi-agency team. Recruitment of staff to EH team. TOR of EH Panel agreed, membership established, first panel by end Sept 13.</p> <p>More timely & effective response to child welfare concerns. Increase in number of plans through CAF. Reduced number of cases requiring statutory services. High performance against statutory assessment timescales.</p>	<p>i) The MASH went live Oct.13. A wide range of agencies are co-located at Bury Police Station. The evidence of the EH Thematic & LGA SGD is of a highly effective service which ensures a timely & effective first response to child welfare concerns.</p> <p>ii) Recruitment to the EH Team is complete. The team have been operational since Nov. 13. The multi-agency EH panel went live in Oct. 13. It ensures that children & families who need help but not statutory social work intervention receive an appropriate service either through a TAC or from the EH Team.</p> <p>It is too early to measure the impact of the above. Indications are positive.</p>

Likely to be judged 'Good' if:	Action Required	Timescale	Strategic Lead Officer	September 2013 Measures of Progress Measures of Impact	Update March 2014.
2.2 The interface between early help & statutory child protection work is clearly & effectively differentiated.	Threshold Document to be reviewed, revised and published by the BSCB.	Oct. 13	BSCB Business Manager SGU	Document published by BSCB Oct. 13. The interface between Early Help & statutory CP work is clearly & effectively differentiated & understood by all partners.	LGA SDT considered the threshold document particularly helpful & found thresholds being appropriately applied. Ofsted EH Thematic considered cases were 'in the right place'.
2.3 Thresholds for intervention are understood by partners, consistently applied, well embedded, reviewed & updated regularly.	i) Multi-agency training. ii) Implementation of EH Panel.	i) Nov. 13 ii) Sept.13	i) SGU ii) EH, Early Years and Children's Centres.	Workshops delivered throughout Nov 13. TOR of EH Panel agreed, membership established, first EH panel by end Sept. Increased number of support plans via CAF/reduced demand statutory social work intervention; high conversion rate of referrals to assessments; reduced re-referral rate to CSC.	Workshops delivered throughout Nov 13. Panel effective from Oct 13. Too soon to measure impact although early indications are positive.

Likely to be judged 'Good' if:	Action Required	Timescale	Strategic Lead Officer	September 2013 Measures of Progress Measures of Impact	Update March 2014.
2.3.Thresholds for intervention are understood by partners, consistently applied, well embedded, reviewed & updated regularly.	iii) Development & launch of CSC QA framework	iii) Sept. 13	iii) AD	QA framework embedded during 2013. QA framework includes calendar for review of & regular updating of Threshold Document.	QA framework in place – continues to be embedded. Case file auditing ongoing, an increasing number of performance monitoring reports becoming available.
2.4 Social work expertise is available to advise & support other professionals in determining the best steps to take next.	i) Social work expertise to be available in the Early Help service. ii) Implementation of the MASH	Sept 2013. Sept 13	i) Early Help, Early Years & CC's. ii) AD	Recruitment of social work posts to EH Team to be completed by Sept. 13 Co-located multi-agency team by end Sept 13. Improved management of complex cases 'below' statutory threshold. Increased number of support plans via CAF. Timely identification of risk. Timely assessment of risk – reduced drift/delay in provision of help & services to vulnerable children.	Social workers in post and effective from Nov 13. Development of their role to advise and support others is ongoing. Implementation of MASH has also provided professionals a SPOC for advice and support. Too soon to assess impact - early indications are of more timely identification of risk & improved management of complex cases 'below' statutory threshold.

Likely to be judged 'Good' if:	Action Required	Timescale	Strategic Lead Officer	September 2013 Measures of progress Measures of Impact	Update March 2014
2.5 Information sharing between agencies is timely, specific and effective.	i) Implementation of Multi-Agency Safeguarding Hub (MASH) & Early Help (EH) Panel.	Oct. 13	i) AD EH/Early years and Children's Centres.	Co-located multi-agency team. Establishment of EH Panel Improved timeliness of decision making, service provision & outcomes for children. Increase number of support plans through CAF. Reduced demand of statutory services.	See above 2.1 See above 2.1
	ii) Development of integrated pathway & single integrated plans for children with special and complex needs.	Sept. 14	ii) Health and Partnerships.	Implementation of integrated pathway and plans. Improved accessibility & coherence of services for those with special & complex needs.	See above 2.1 See above 2.1
3.0 There is timely & effective response to referrals (including out of office hours). Drift & delay are avoided.	i) Development of MASH. ii) Establishment of new 'Out of Hours (OOH) Team.'	Sept 13 Sept 13	i) AD ii) SGU	Co-located MASH by end of Sept 13. Recruitment to OOH Team by Sept 13.	See above 2.1 Completed

Likely to be judged 'Good' if:	Action Required	Timescale	Strategic Lead Officer	September 2013 Measure of Progress Measure on Impact	Update March 2014
<p>3.0 There is timely & effective response to referrals (including out of office hours). Drift & delay are avoided.</p>	<p>iii) Review of frontline management & social work capacity.</p> <p>iv) Establishment of EH Team & EH Panel.</p>	<p>Sept 13 - Jan 14.</p> <p>Sept 13</p>	<p>iii) AD</p> <p>v) EH, Early Years and Children's Centres.</p>	<p>Review of management capacity by Sept 13. Implementation of recommendations of review of management capacity by Nov 13. Review of frontline social work capacity to be completed by Jan 14 & implemented by April 14.</p> <p>Optimal size of supervisory groups established. Safe caseloads established. 100% same day response to CSC referrals. Low numbers/zero unallocated CSC cases. High degree of compliance with CSC assessment timescales (80% or above). Timely recognition of risk, timely reduction or removal of risk. More timely provision of effective help.</p>	<p>iii) Management capacity increased, posts established – recruitment ongoing.</p> <p>iii) Ongoing see above</p> <p>iv) As Above</p> <p>Too early too evidence impact. Caseloads remain high.</p> <p>Approaching 100% same day response to CSC referrals.</p> <p>Low – zero unallocated cases.</p> <p>Compliance with assessment timescales compromised due to high caseloads.</p> <p>Recognition of risk is timely. Too early to assess whether there is more timely provision of effective early help.</p>

Likely to be judged 'Good' if:	Action Required	Timescale	Strategic Lead Officer	September 2013 Measures of progress Measure on Impact	Update March 2014
3.1. Children & YP who are privately fostered are identified by the L.A. in conjunction with partners. Once identified the L.A. discharges in full its statutory responsibility to ensure that they are safe & that their health & well being are promoted.	i) Develop communication strategy to ensure & raise awareness of PF amongst partners & public.	Nov 13	SGU	<p>Communication Strategy to be available to CMT by October 2013 & implemented from November 2013.</p> <p>Increase in the number of known PF arrangements.</p>	<p>Demand & capacity have not supported progress against this element of the action plan.</p> <p>Recent progress has been made. A review of policy, procedures & communication strategy is to be presented to the AD within 4 weeks.</p>

Likely to be judged 'Good' if:	Action Required	Timescale	Strategic Lead Officer	September 2013 Measure of Progress Measure of Impact	Update March 2014
3.2 Child protection enquiries are thorough, timely & always led by a qualified & suitably experienced social worker. Findings in relation to significant harm are clear.	i) Review capacity, skills & experience of social work staff. ii) Introduce & embed a range of tools to support assessment of risk of significant harm.	i) Dec 13. ii) Nov 13	AD SGS	Review of frontline social work capacity to be completed by Jan 14 & implemented by April 14. Tools available to all child protection social workers October 13.	See above Bruce Thornton Risk Assessment Toolkit increasingly embedded. CSE risk tool in use. CAADA DASH (DV) increasingly used.

Likely to be judged 'Good' if:	Action Required	Time scale	Strategic Lead Officer	September 2013 Measures of progress Measure of Impact	Update March 2014
<p>3.2 Child protection enquiries are thorough, timely & always led by a qualified & suitably experienced social worker. Findings in relation to significant harm are clear.</p>	<p>iii) Introduce & embed a systemised programme of qualitative case audits designed to scrutinise timeliness, thoroughness & quality of child protection enquiries & that the outcomes are clearly recorded in terms of risk of harm.</p> <p>iv) Introduce & embed q.a. & performance reporting framework which ensures managers are alerted to & can respond to emerging issues & deficiencies in practice and services.</p>	<p>iii) Sept 13</p> <p>iv) Sept 13</p>	<p>AD</p> <p>AD</p>	<p>Case Audit tools available from Sept 13.</p> <p>Case audit 'team' established from Sept 13.</p> <p>Calendar for reporting of outcomes of audit activity to be in place from Sept 13.</p> <p>All CP enquiries undertaken by qualified and suitably experienced social workers.</p> <p>High degree of compliance with statutory timescales for CP enquiries.</p> <p>High use of risk assessment tools.</p> <p>Qualitative audits which inform as to the safe and effective practice and workforce and training requirements.</p>	<p>Development of additional tools in progress.</p> <p>All frontline & senior managers identified to undertake case file audits. Capacity compromises compliance with the established calendar of audits.</p> <p>All CP enquiries undertaken by qualified & suitably experienced social workers.</p> <p>High degree of compliance with statutory timescales for CP enquiries.</p> <p>See above.</p> <p>Development & use of a range of qualitative case file audit tools is ongoing.</p>

Likely to be judged 'Good' if:	Action Required	Time scale	Strategic Lead Officer	September 2013 Measures of progress Measure of Impact	Update March 2014
4.0 Decisions are always undertaken by suitably experienced and qualified social workers and managers with decisions clearly recorded.	i) Review of frontline management & social work capacity.	Sept 12 – Jan 14.	AD	Review of management capacity to be completed by Sept 13. Implementation of recommendations of review of management capacity by Nov 13. Review of frontline social work capacity to be completed by Jan 2014 and implemented by April 2014.	See above 1.3 See above 1.3 See above 1.3
	ii) Workload management policy to be established supporting managers in the allocation of work (volume & complexity) to suitably skilled & experienced social workers.	Nov 13	SGS	Workload Management policy available to CMT by end of Oct 13 for implementation during Nov 13.	Workload Management Policy not progressed. The significant increase in demand in Q3 2013 undermined the possibility of introducing such a policy. Caseloads are monitored & in the short term measures are in place to manage the increased demand. Work is ongoing to ensure caseloads & workloads are safe & to effect a caseload & workload policy.

Likely to be judged 'Good' if:	Action Required	Time scale	Strategic Lead Officer	September 2013 Measures of progress Measure of Impact	Update March 2014
<p>4.0 Decisions are always undertaken by suitably experienced & qualified social workers & managers with decisions clearly recorded.</p>	<p>iii) Case supervision policy to be reviewed & re-launched including guidance to managers in the production of consistent quality & kind of recording of case decisions & the supporting rationale.</p>	<p>Oct 13</p>	<p>SGS</p>	<p>Review & re-launch of supervision policy & accompanying guidance to be completed by end Oct. 13.</p> <p>Management capacity is consistent with required levels of management oversight and decision making.</p> <p>Social work caseloads (size and complexity) reflect their experience and skills.</p> <p>Improved recording of decision making and rationale.</p>	<p>Review of the supervision policy & accompanying guidance undertaken. Work to embed is ongoing.</p> <p>The increase in demand Q3 2013 is working its way through the CSC service & compromising the capacity of frontline managers to evidence the required frequency & quality of management oversight. Nevertheless there is improved evidence of management oversight as indicated by the LGA Safeguarding Diagnostic.</p> <p>See 4 (ii)</p> <p>See above.</p>

Likely to be judged 'Good' if:	Action Required	Time scale	Strategic Lead Officer	September 2013 Measures of progress Measure of Impact	Update March 2014
<p>4.1 Assessments (including CAF) are always timely, proportionate to risk, informed by research & learning & by the historical context & significant events & address all domains of the local framework for assessment.</p>	<p>i) See 3.0 above</p> <p>ii) Access to research provided to all SW's.</p> <p>iii) Ongoing training & guidance to be available to social work staff in respect of relevance of historical information.</p> <p>iv) Protocol User Group (PUG) to be established. PUG to work with social work staff to overcome technological barriers to maintenance of chronologies.</p>	<p>ii) Aug 13.</p> <p>iii) Oct. 13 and ongoing</p> <p>iv) Oct 13</p>	<p>AD</p> <p>PP&P</p> <p>PP&P</p>	<p>Online research tool available to all social work staff.</p> <p>Training plan includes module on relevance of historical context to assessment of risk.</p> <p>PUG established & by Nov 13 produces a plan to support social workers maintain chronologies on the electronic database.</p> <p>PUG plan implemented by Jan 14.</p> <p>Assessments informed by research, learning and historical context.</p> <p>High degree of compliance with statutory assessment timescales.</p> <p>High degree of compliance with the statutory requirement that every case record contains an up to date chronology.</p>	<p>PUG has been unable to address this issue effectively. LGA SDT advise the ICS system in this respect does not support social workers. SDT advise a local solution not dependant on the ICS chronology.</p> <p>Alternative local solution being sought.</p>

Likely to be judged 'Good' if:	Action Required	Timescale	Strategic Lead Office	September 2013 Measures of progress Measure of Impact	Update March 2014
<p>5.0 Assessments & plans are dynamic & change in the light of emerging risks.</p> <p>5.1 Plans & services are reviewed & alternative action is taken where the circumstances for children do not change & the risk of harm or actual harm remains.</p> <p>5.2 Authoritative action is taken where change is not secured and the risk to children intensifies or remains the same.</p>	<p>See 1.0 above.</p> <p>Review of IRO service against requirements of Care Planning regulations (2011) & the recommendations of Ofsted report 'Tackling Change' - June 2013.</p> <p>This review to include the relationship of IRO's with Cafcass and escalation procedures.</p>	<p>March 14</p>	<p>SGU</p>	<p>Recommendations of Review presented to CMT by December 2013.</p> <p>Implementation of Review by March 2014.</p> <p>All children & yp have a plan informed by a current & relevant assessment of need.</p> <p>Reduced number of CP plans of more than 18 months duration.</p> <p>Improvement in achievement of legal permanence for vulnerable children.</p>	<p>See 1 (i) above</p> <p>The numbers of children subject of CP plans is currently high. The indications are that the revised threshold document is supporting appropriate assessment of risk and escalation.</p> <p>There has been significant improvement in the achievement of legal permanence for vulnerable children and a reduction in the time taken to achieve legal permanence.</p>

Likely to be judged 'Good' if:	Action Required	Timescale	Strategic Lead Office	September 2013 Measures of progress Measure of Impact	Update March 2014
<p>6.0 Children in need (CIN) & children in need of protection are subject of either a CIN or CP plan that clearly identifies the help offered; the changes which need to be achieved & the appropriate timescales for the child.</p>	<p>i) Audit of all CIN cases to ascertain that; All have a plan and that plans clearly identify the help offered, the changes required and the appropriate timescales for the child.</p> <p>ii) Establish systematic process of ongoing Team Manager review of CIN plans.</p> <p>iii) Review IRO service against requirements of Care Planning regs (2011).</p> <p>Specific consideration to be given to the role of IRO's in ensuring CP plans clearly identify the help offered; the changes to be achieved & the appropriate timescales for the change.</p>	<p>Nov 13</p> <p>Nov 13</p> <p>Dec 13 – March 14</p>	<p>SGS</p>	<p>Report & recommendations of audit of CIN cases to be presented to CMT by end of Oct 13. Process for systematic frontline manager review of CIN plans is established by end of Oct 13 and implemented by Nov 13. Recommendations of review of IRO service presented to CMT by December 2013. Implementation of the IRO review to be achieved by March 2014.</p> <p>All children in receipt of a social work service have a plan & have a plan consistent with an assessment of need which identifies the help to be offered, the changes to be achieved and the timescales for change.</p> <p>See above – 5.0</p>	<p>Audit of CIN cases undertaken.</p> <p>Issues identified in respect of how CIN plans for CwD are recorded. This is being addressed.</p> <p>CIN Plans being reviewed in supervision.</p> <p>Processes for systematic audits of CIN in development.</p> <p>Work is ongoing with IRO's to support them in ensuring that plans are always SMART.</p>

Likely to be judged 'Good' if:	Action Required	Timescale	Strategic Lead Officer	September 2013 Measures of progress Measures of impact	Update March 2014
<p>7.0 Children who live in households where a parent/carer misuses substances or suffers mental ill-health or where there is evidence of DV are helped & protected. Incidents are monitored & multi-agency responses are co-ordinated including through management by MARAC.</p>	<p>To be agreed with partners.</p>	<p>Nov 13</p>	<p>AD</p>	<p>Partner Engagement</p> <p>Effective MARAC</p> <p>Effective services for substance misusing adults and those with mental health.</p>	<p>Partner engagement:</p> <p>Children's Trust Supporting Communities Improving Lives (SCIL) Multi agency Domestic Abuse Steering group. MARAC effective and addresses 16/17 yr olds in abusive intimate relationships.</p> <p>Health service represented in the MASH, Early Help and YOT service to support engagement with mental health services and DAT.</p>

REPORT TO OVERVIEW AND SCRUTINY



Title:	Corporate Plan Performance Monitoring Report – Quarter 3 2013-14
Date of Meeting:	25th March
Project Lead Officer:	Leader of the Council
Project Contact:	Sarah Marshall, Performance Officer – Adults Planning

1.0 PROJECT DESCRIPTION

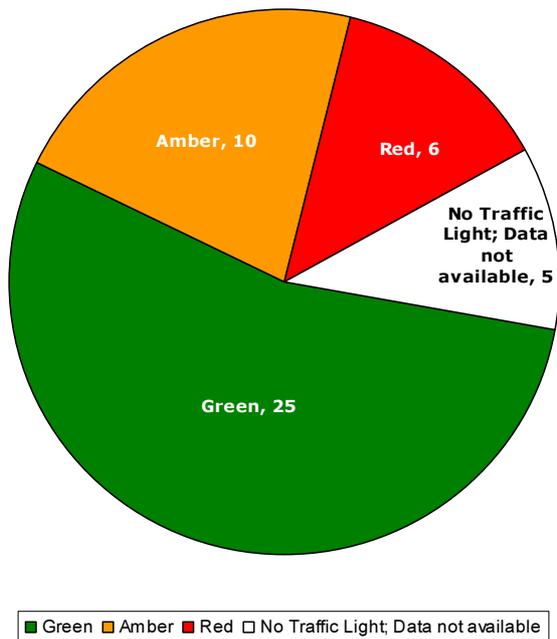
- 1.1 The council publishes a Corporate Plan each year with progress updates reported to Cabinet bi-annually and performance updates reported to Overview and Scrutiny quarterly. This report outlines performance against the plan for quarter 3 2013-14.
- 1.2 The Corporate Plan Performance Report outlines the progress during quarter three 2013-14 for the corporate performance indicators within the Bury Council Corporate Plan. The information is extracted from the Performance Information Management System (PIMS).

2.0 DECISIONS REQUIRED

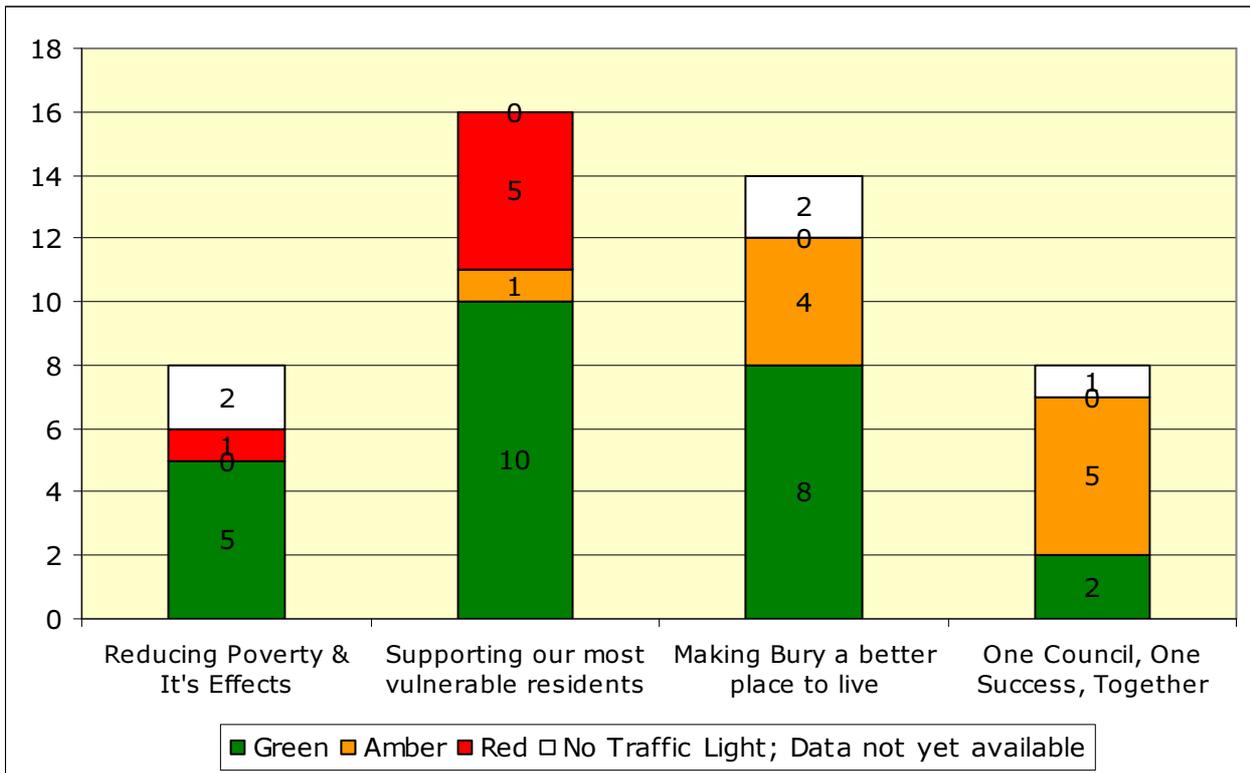
- 2.1 Overview and Scrutiny are asked to note the contents of the report.

3.0 SUMMARY OF KEY ISSUES

- 3.1 Our position remains positive at this point of 2013-14:



- 3.2 Of the 53 corporate performance indicators detailed in the corporate plan, 46 of these have outcomes for quarter 3 on which we can report as some are collected annually. 25 indicators (54%) have demonstrated an improvement on the out turn for 2012-13 and/or exceeded the target set for this year. The number of indicators that have shown this improvement has increased from last quarter by 2.
- 3.3 10 indicators (represented as amber on the chart) have just fallen short of meeting our expectations. Considering the financial situation and other challenges facing services, this level of performance overall is consistent with last quarter (9) and demonstrates the potential to meet the high standards we set ourselves as a Council by year end.
- 3.4 6 areas under achieved:
- The achievement gap between pupils eligible for free school meals and their peers achieving the expected level at Key Stage 2 is 5% below our target (20%). However, the local authority figure is only 1% different from national. These results are yet to be validated so could still change.
 - Number of households living in temporary accommodation has increased to 16, 6 above target. This is due to fewer properties becoming available for letting (due to the festive period) which led to an increase in the number of households in temporary accommodation that had not received an offer of accommodation.
 - Percentage of carers receiving a needs assessment or review and a specific carer's service, or advice and information is showing the same figure as Q2 and is currently under target. Updated figures are not yet available due to the implementation of a new Adult Social Care information system in December 2013 and therefore it is not yet possible to assess whether the plans put in place to increase this outcome are having the desired effect.
 - The percentage of children and young people in care adopted during the year who were placed for adoption within 12 months of the decision that they should be placed for adoption has decreased significantly. This is due to a higher number of adoptions being placed during quarter 3. Eleven children were adopted during quarter 3 bringing the year to date figure to 16. 9 (56.3%) of these have been adopted within 12 months of the decision being made.
 - The gap has decreased slightly for Key Stage 2 attainment for Black and minority ethnic groups: Mixed White and Black Caribbean and brings us nearer to our target of 5%. Due to more challenging assessments the gap has increased from last year but care has to be taken when looking at these figures because of the small cohort size of 29 pupils out of 2061.
 - Key Stage 2 attainment for Black and minority ethnic groups: White Other the gap has increased by 2.6% from last year (9.4%). These results are still not validated so are subject to change. This indicator is also calculated from a small cohort of 50 pupils.
- 3.5 There are 5 indicators where progress cannot be analysed 4 of which are due to a lack of data from external sources. Work is ongoing to review the data set for future Corporate Plans so that non-reporting is minimised and the results selected provide a fair and meaningful reflection of the Council's position.
- 3.6 Analysing the results by the Council's priority outcomes, progress is being made across all four areas:



3.7 At this point of the year, the outturn is looking increasingly positive. The figures show that there is potential to do more but it is recognised that this has to be balanced with sustaining the levels of improvement already achieved.

4.0 EQUALITY AND DIVERSITY

4.1 An Equality Analysis was undertaken for the Bury Council Corporate Plan 2012-15 and it was concluded that the Plan has a positive impact by aiming to reduce poverty and inequality. This report provides a summary of the progress made.

5.0 CONCLUSION AND RECOMMENDATIONS

5.1 The report provides details of the progress made at quarter three 2013-14.

5.2 Overall, performance against the corporate plan indicates a positive picture with 25 out of 46 (54%) of indicators achieving target and/or performing better than last year, which is consistent with last quarter (56%). Where we have not performed as planned, the reasons have been identified and in most cases a proactive approach has been adopted to improve these outcomes throughout this year.

5.3 It is recommended that Overview and Scrutiny accept the report and note the actions being taken to address areas of under achievement against targets.

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One Council. One Plan.

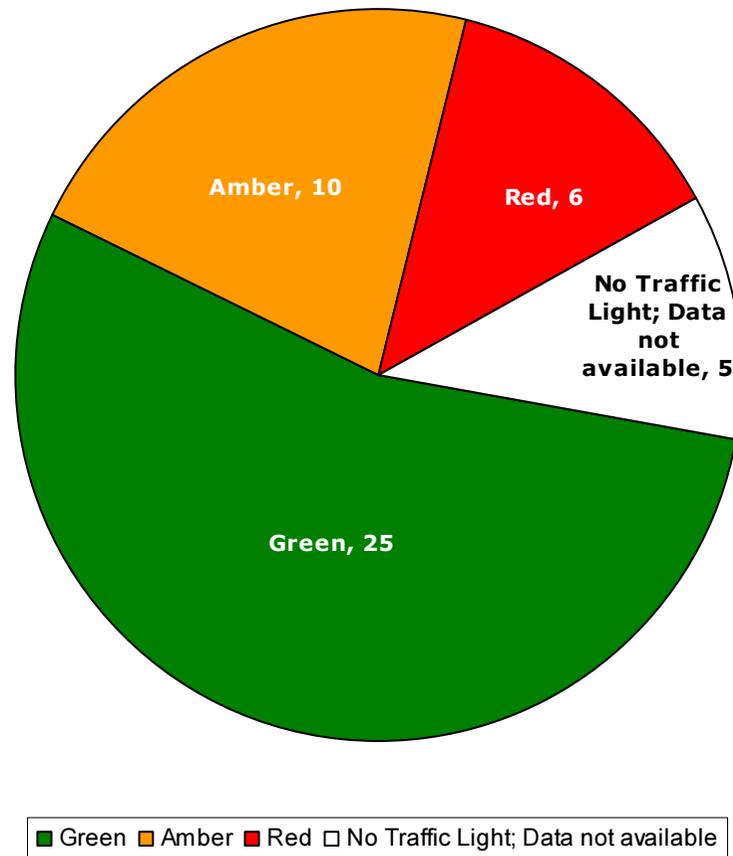
**Quarter Three 2013-14:
Performance Report**

INTRODUCTION

- 1.1 This report outlines progress during quarter three of 2013-14 for the corporate performance indicators within the Bury Council Corporate Plan. The information provided is extracted from the Performance Information Management System (PIMS).
- 1.2 There are currently 53 performance indicators from PIMS and this report provides a summary of the overall performance of these indicators.
- 1.3 Where data are unavailable for Quarter 3 2013-14, the report provides the latest inputted data from previous quarters.
- 1.4 Throughout this report the definitions of the colour-coding are:
 - Green – On target and/or better than 2012-13 performance
 - Amber – Within 15% of achieving target or within 15% of 2012-13 performance
 - Red – Below target or worse than we achieved in 2012-13.
 - No Traffic Light – Information not available due to various reasons.
- 1.5 The detail of this corporate performance report can be viewed or downloaded on the corporate performance information monitoring system (PIMS). If you require copies of the reports or need training on the operation of the monitoring system; *please contact Benjamin Imafidon on Ext 6592.*

SUMMARY

2.1 Overall the council currently reports performance against a total of 53 corporate performance indicators. For quarter 3, outcomes for 46 of these indicators were collected as some indicators are reported annually. The chart below shows the proportion of these performance indicators that are categorised as Red, Amber and Green using the criteria set out in paragraph 1.4.



Reducing Poverty and Its Effects

Performance Indicators

Measure	Higher/ lower is better	2012/13 Baseline	2013/14 Q3	Target	Commentary
Overall employment rate for Bury (working age)	Higher	75.2%	76.4% (Green)	70%	Our outcome at quarter 3 is above target and better than the baseline.
Working age people on out of work benefits (percentage difference between Bury and Greater Manchester)	Higher	2%	2.2% (Green)	1.6%	The gap between Greater Manchester (9.2%) and Bury (7%) for the percentage of out of work benefit claims has widened.
Percentage of working age people claiming out of work benefits in the worst performing neighbourhoods	Lower	Not available	Not available	32%	This data is no longer available at a super output area (neighbourhood) level.
Proportion of population aged 19-64 for males and 19-59 for females qualified to at least Level 2 or higher.	Higher	Not available	Not available	70%	Unable to provide data, statistics do not get recorded by the Skills Funding Agency and are not readily available. This is to be reviewed.
Proportion of children in poverty	Lower	18.31	17.90 (Green)	21.09	Our outcome is down from the previous figure and in line with the trend for England. Significantly lower than the England average (20.6). Figure calculated on data from 2011.
Achievement gap between pupils eligible for free school meals and their peers achieving the expected level at Key Stage 2	Lower	16%	20% (Red)	15%	Due to an update in figures the KS2 free school meals has increased slightly from last quarter taking us to 5% above our target where lower is better. However, the local authority figure was only 1% different from national and these results are yet to be validated so could still change slightly.
Inequality gap in the	Lower	18%	Not	28%	This is an annual indicator and will be

achievement of a Level 3 qualification by the age of 19			available		reported on at quarter 4.
Achievement gap between pupils eligible for free school meals and their peers achieving the expected level at Key Stage 4	Lower	23.2%	21% (Green)	22%	We have improved from last year where lower is better and have beaten our target. We are also 1.7% better than National.
Percentage of 16-18 year olds by academic age who are not in education, employment or training (NEET)	Lower	5.5%	6% (Green)	6.4%	This outcome at quarter 3 is an improvement from quarter 3 last year by 1%.

Supporting our most vulnerable residents

Performance Indicators

Measure	Higher/ lower is better	2012/13 Baseline	2013/14 Q3	Target	Commentary
Percentage achieving independence: older people through rehabilitation/ intermediate care	Higher	93.5%	82.1% (Green)	80%	Figure reported is from quarter 2. Data unavailable at quarter 3 due to the implementation of PROTOCOL. Outcome will be reported at quarter 4.
Adults with learning disabilities in settled accommodation	Higher	85.7%	85.9% (Green)	80%	Figure reported is from quarter 2. Data unavailable at quarter 3 due to the implementation of PROTOCOL. Outcome will be reported at quarter 4.
Adults with learning disabilities in employment	Higher	40%	38% (Green)	35%	Whilst we are ahead of target at quarter 3 the job market can fluctuate throughout the year.
Number of households living in temporary accommodation	Lower	12	16 (Red)	10	Due to Christmas holidays less properties were advertised on choice based lettings. This led to an increase in the number of households in temporary accommodation that had not received an offer of accommodation.
Percentage of social care	Higher	83.6%	91.8%	78%	Figure reported is from quarter 2. Data

assessments completed within 28 days			(Green)		unavailable at quarter 3 due to the implementation of PROTOCOL. Outcome will be reported at quarter 4.
Percentage of social care packages in place 28 days after assessment	Higher	77.5%	84.6% (Green)	60%	Figure reported is from quarter 2. Data unavailable at quarter 3 due to the implementation of PROTOCOL. Outcome will be reported at quarter 4.
Social Care clients receiving Self Directed Support (Direct payments and individual budgets)	Higher	30.7%	58.1% (Green)	55%	Figure reported is from quarter 2. Data unavailable at quarter 3 due to the implementation of PROTOCOL. Outcome will be reported at quarter 4.
Carers receiving needs assessment or review and a specific carer's service, or advice and information	Higher	16.6%	10.5% (Red)	25%	Figure reported is from quarter 2. Data unavailable at quarter 3 due to the implementation of PROTOCOL. Outcome will be reported at quarter 4.
The percentage of children and young people in care adopted during the year who were placed for adoption within 12 months of the decision that they should be placed for adoption, and who remained in that placement on adoption.	Higher	77.3%	56.3% (Red)	80%	Eleven children were adopted during quarter 3. Five of these eleven (45.5%) were placed within 12 months of the decision being made. Year to date: 9 out of 16 children (56.3%) have been adopted within 12 months of the decision being made.
Percentage of children becoming the subject of Child Protection Plan for a second or subsequent time	Lower	12.3%	19.7% (Amber)	17%	Of the 78 Bury plans that commenced between October and December inclusive, 6 (7.7%) are repeats. Year to Date: 238 new plans, of which 47 (19.7%) were repeats. Sustained high numbers of repeat plans but low percentages of repeats recently have reduced our year-to-date repeat rate. Low percentages of repeats between September and December have resulted in a year-to-date percentage of repeat plans below 20% for the first time in 2013-2014.

					The monthly average of new plans (26) remains higher than previous years (2012-2013 had a monthly average of 16).
The percentage of children and young people in care achieving 5 A*-C GCSEs (or equivalent) at key stage 4 (including English & Maths)	Higher	13.6%	19.2% (Green)	N/A	This is an annual indicator reported at quarter 2. Of the qualifying 26 children, 5 (19.2%) achieved 5 A*-C GCSEs including English and Maths. The cohort had a high SEN characteristic: 26% with Statements and a total of 57% on the SEN Code of Practice, receiving additional support and resources.
Percentage gap between pupils with Special Educational Needs and their peers achieving 5 A*-C GCSEs including English and Maths	Lower	49.2%	34% (Green)	44%	We have performed a lot better than last year and have achieved better than our target by 10%. We also achieved better than the national average by 3.2%.
Key Stage 2 attainment for Black and minority ethnic groups: Pakistani Heritage	Lower	4.7%	3.4% (Green)	3%	After a further key stage 2 results release on local authority figures the attainment gap for key stage 2 results for Pakistani heritage and other pupils has decreased to 3.4%. This is 0.4% from achieving our target and 0.6% better than the national average.
Key Stage 2 attainment for Black and minority ethnic groups: Mixed White and Black Caribbean	Lower	-10.9%	8.1% (Red)	5%	Changes to results have been released but still not validated. The gap has decreased slightly and brings us nearer to our target of 5%. Due to more challenging assessments the gap has increased from last year but care has to be taken when looking at these figures because of the cohort size of 29 pupils out of 2061 for Y6.
Key Stage 2 attainment for Black and minority ethnic groups: White Other	Lower	9.4%	12% (Red)	9%	After the production of the statistical first release in December 2013 figures have improved. The gap has only increased by 2.6% from last year showing that we are

					closer to our target. These results are still not validated and are for a small cohort of 50 pupils.
Percentage of pupils permanently excluded from school in the year	Lower	0.17%	0.11% (Green)	0.22%	Schools have continued to work hard over the last academic year to reduce the number of permanent exclusions. This has improved again from the previous academic year.

Making Bury a better place to live
Current Performance

Performance Indicators

Measure	Higher/ lower is better	2012/13 Baseline	2013/14 Q3	Target	Commentary
Visits in person to Galleries/Museum per 1,000 population	Higher	235.01	186.53 (Green)	241	This is a cumulative indicator and based on mid 11 population figures. The figure per thousand population at this stage last year was 165.55, so the figure is higher than at this point last year. Full year results will be re calculated at year end on mid 12 population figures.
Percentage of household waste sent for re use, recycling and composting	Higher	44.85%	45.12% (Green)	44%	This is a cumulative figure and is an estimate, awaiting confirmation from Greater Manchester Waste Disposal Authority. The outcome for the same period last year was 45.3%.
Residual household waste - kgs per household	Lower	450.5kg	344.32kg (Amber)	445kg	This is a cumulative figure and is an estimate, awaiting confirmation from Greater Manchester Waste Disposal Authority. The outcome for the same period

					last year was 350kg.
The percentage of urban and countryside parks, based on the ISPAL definition, that have achieved "green flag" status	Higher	85.71%	Not available	85.71%	This is an annual indicator and will be reported at quarter 4. All parks have been mystery shopped and retained Green Flag status.
Percentage of adults participating in at least 30 minutes moderate intensity sport and active recreation on three or more days a week	Higher	23.6%	Not available	25.5%	This is an annual indicator and will be reported at quarter 4.
Number of serious violent crimes per 1,000 population	Lower	0.52	0.34 (Green)	0.88	This is a cumulative indicator. 22 incidents were recorded during quarter 3 which equates to 0.11 per 1,000 population.
Number of serious acquisitive crimes per 1,000 population	Lower	11.43	8.12 (Green)	12.95	This is a cumulative indicator. 527 incidents were recorded during quarter 3 which equates to 2.84 per 1,000 population.
Assault with injury crime rate per 1,000 of the population	Lower	5.78	3.19 (Green)	6.25	This is a cumulative indicator. This is a cumulative indicator. 180 incidents were recorded during quarter 3 which equates to 0.97 per 1,000 population.
Reduction in the number of incidents of anti-social behaviour as measured by the National Codes for Incidences (NICL)	Lower	44.52	36.55 (Green)	46.2	This is a cumulative indicator. 1957 incidents were recorded during quarter 3. This equates to 10.57 per 1,000 population.
Percentage rate of repeat incidents of domestic violence	Lower	29.26%	29.30% (Green)	40%	18 repeat cases were discussed at a Multi Agency Risk Assessment Conference (MARAC) during quarter 3. During the period April – December, 46 repeat cases were discussed at MARAC.
Number of first-time entrants (FTEs) to the Youth Justice system aged 10-17 (Rate per 100,000)	Lower	637	361.86 (Green)	536.95	This is an annual indicator and was reported at quarter 1. The number of FTEs in Bury has reduced significantly over the last 3 years (from 1297 per 100,000 in March 2009).
Prevalence of breastfeeding at 6 to	Higher	40.95%	37.6%	42.8%	This is an annual indicator and was

8 weeks			(Amber)		reported at quarter 1. Data Taken from Pennine Care Q1 Breastfeeding Return.
Rate of alcohol-related hospital admissions per 100,000 population (DSR)	Lower	2067	Not available	1879	Data currently unavailable to Public Health Team due to development of a new data warehouse at Greater Manchester Commissioning Support Unit.
Percentage of the local authority principal road networks ('A' roads) where structural maintenance should be considered	Lower	3%	Not available	10%	This is an annual indicator and will be reported at quarter 4.
Percentage of the local authority non principal classified road networks ('B' and 'C' roads) where structural maintenance should be considered	Lower	3%	Not available	10%	This is an annual indicator and will be reported at quarter 4.
Increased number of tourist visitors (STEAM)	Higher	5,404,130	Not available	5,315,516	Tourism data is generated using Scarborough Tourism Economic Activity Monitor (STEAM). Although a GM wide report will still be available, which includes the Bury visitor data, Bury Council will no longer be funding the Bury specific STEAM Report (2012 info onwards)
Supply of ready to develop housing sites	Higher	100%	Not available	100%	This is an annual indicator and will be reported at quarter 4.
CO2 reduction from local authority operations	Higher	9%	9% (Amber)	13%	This is an annual indicator and CO2 reduction for 2013-14 will be available July 2014.
Visits in person to libraries per thousand population	Higher	5,384	4,834 (Amber)	5,300	Increased accessibility to online services is likely to have reduced physical visits, as virtual access has become an alternative to some services within the libraries. The last reported figure for online visits was 44,500, an updated figure will be reported at year end. More realistic targets will be set for 2014/2015.

One Council, One Success, Together
Current Performance

Finance Summary

Department	Budget £000	Forecast £000	Variance £000
Adult Care Services	53,087	53,227	+140
Chief Executives	4,502	5,079	+577
Children's Services	32,402	32,810	+408
Communities & Neighbourhoods	36,029	36,042	+13
Non-Service Specific	22,227	21,174	-1,053
TOTAL	148,247	148,332	+85

The quarter 3 projected overspend of **£0.085m** represents approximately **0.06%** of the total net budget of £148.247m.

Performance Indicators

Measure	Higher/ lower is better	2012/13 Baseline	2013/14 Q3	Target	Commentary
Percentage Council Tax collected	Higher	97.33%	83.48% (Amber)	96.5%	This is a cumulative indicator. Down on last year's collection but this is to be expected with the changes to Empty Properties and the Council Tax Support Scheme. Cash collected is up on last year.
Percentage of business rates collected	Higher	93.93%	83.22% (Amber)	96%	Collection during quarter 3 has been good and although we are slightly under target the amount of cash collected (£43.55 million) is up on last year's collection at quarter 3 by £0.05

					million.
Average time taken in calendar days to process Housing Benefit/Council Tax new claims.	Lower	23.67	23.73 (Green)	26	Performance within target at end of Quarter 3. A significant amount of post is currently outstanding and preparation work for year end has started. Confident that the target for the year will be met.
Forecast outturn (Revenue) (council -wide) (£million)	Lower	-£0.093	+£0.085 (Amber)	£0	Forecasted overspend of £0.085m.
Forecast outturn (Capital) (council -wide) (£million)	Lower	£0	+£0.060 (Amber)	£0	Forecasted underspend of £0.060m.
Governance issues reported (council - wide)	Lower	0	0 (Green)	0	No governance issues were reported this quarter.
Number of FTE days lost due to sickness absence	Lower	9.42	9.51 (Amber)	9.2	This figure has increased since quarter 1 (9.41) and from the same quarter last year (9.42).
Percentage of employees satisfied with Bury Council as an employer	Higher	Not available	Not available	75%	There has been no full survey this year to measure this. Although we have run 6 engagers surveys this specific question is only asked on the three yearly survey.
Percentage staff turnover (council - wide)	Not applicable	2.80%	9.37%	No target	This is a contextual indicator, a target is not required to measure improvement levels. Employee turnover refers to the proportion of employees who leave an organisation over the monitoring period expressed as a percentage of total workforce numbers. All leavers are included, both voluntary and involuntary. Average employees in period are 8953. Leavers in period are 839. Turnover is $839/8953 = 9.37\%$.

Risk

Risk management is a systematic approach to assessing risks and opportunities surrounding achievement of core strategic, departmental and operational objectives. The council has a well established approach to risk management which assesses the likelihood and potential impact of a wide range of risks & opportunities. Risk Registers are compiled for all activities and projects, and are subject to review on a quarterly basis. Risk Registers are reported to all levels of management, and to elected members.

The following risks / opportunities have been identified that the council faces in meeting its own priorities and in contributing towards the council's corporate priorities and community ambitions:

Ref	Risk Event	Risk Owner	Impact (New)	Likelihood (New)	Quarter 1 Status	Quarter 2 Status	Quarter 3 Status	Quarter 4 Status	Measures
1	The <u>potential</u> liability facing the Council in respect of Equal Pay significantly weakens the Council's financial position	Mike Owen / Guy Berry	2	1	2	2	2		Risk substantially addressed as most cases have now been settled. To remain on register till exercise complete.
2	There is no robust financial strategy or change management strategy to address effectively the significant funding reductions that the Council faces over the next 3 years and beyond in order to ensure there is a sustainable and balanced budget	Steve Kenyon	4	2	6	6	8		Risk mitigated as balanced budget is in place for 2013/14, and significant savings options have been identified for 2014/15. These actions are counterbalanced by uncertainty around Comprehensive Spending Review (June 2013); hence scores remain unchanged. Impact of CSR to be reported when analysed.
3	The budget strategy fails to address the Council's priorities and emerging issues,	Mike Owen/Steve	4	2	6	6	8		Income pressures largely addressed in 2013/14 budget. Demand pressures

	e.g. demographic and legislative changes	Kenyon							remain a risk and will be monitored / managed through Star Chamber process.
4	The budget strategy does not reflect, or respond to, national policy developments, e.g. Council Tax Support scheme and changes to the Business Rates regime	Mike Owen/Steve Kenyon	4	3	12	12	12		Monitoring arrangements in place – to be addressed monthly and through Star Chamber process.
5	The Council's asset base is not operated to its maximum effect to deliver efficiency savings and ensure priorities are fulfilled. Ineffective use of assets presents both a financial and a performance risk.	Mike Owen	2	2	6	6	4		Asset Management Plan now in place; office accommodation moves took place Summer 2013.
6	The Council needs to be prepared for the impact of the Localism Act; this presents both opportunities, e.g. power of competency & community right to challenge	Jayne Hammond			2	2	Risk Removed		A process for dealing with applications has been approved by Cabinet; none received to date.
7	The amount of money received from the NHS to manage public health is insufficient to meet the performance outcomes expected by Government	Pat Jones-Greenhalgh	2	2	6	6	4		Settlement now received giving greater certainty; risk remains around performance of contracts inherited from PCT.
8	The Council fails to manage the expectations of residents, service users & other stakeholders in light of funding reductions	Mike Owen	3	2	3	3	6		Widespread consultation took place re: Budget / Plan for Change. Consultation taking place in respect of individual service reviews.

09	The Government's changes to Council Tax Benefit impact adversely upon the Public / Vulnerable People. Also budgetary risk to the Council in the event of claimant numbers rise	Mike Owen	3	3	9	9	9		Impact on residents being managed through Welfare Reform Board. Budgetary impact to be assessed through monthly monitoring / Star Chamber process.
10	Changes resulting from the wider Welfare reform agenda impact adversely upon the public / vulnerable people.	Mike Owen	3	3	9	9	9		Welfare Reform Board coordinating action plan with partner organizations (e.g. Six Town, CAB)
11	That the scale and pace of Public Sector reform impacts adversely upon key Council Services, compounded by the loss of capacity following staff leaving the Council (420+ since 2010)	Mike Kelly	4	2	8	8	8		Workforce Development Plan now in place and individual service workforce plans being developed to ensure continuity / succession planning.

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REPORT TO OVERVIEW AND SCRUTINY
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Title:	Corporate Plan 2014-15 – Proposal of key projects and performance indicators
Date of Meeting:	Tuesday 25th March
Project Lead Officer:	Pat Jones-Greenhalgh, Executive Director, ACS
Project Contact:	Sarah Marshall, Performance Officer – Adults Planning

1.0 PROJECT DESCRIPTION

- 1.1 It was decided that the 2014-15 corporate plan will be an updated and refined version of the current plan to allow strategic efforts to focus on the key changes planned for 2015 onwards. Therefore, the full corporate planning process has not been required.
- 1.2 We have carried through the priorities identified at the Team Bury planning event in February which are:
1. A strong local economy
 2. Stronger communities
 3. Health and Well-being
- as well as continuing the current priority 'One Council, One Success, Together'.
- 1.3 Liaison officers for projects detailed in the plan were contacted to establish which projects will continue into next year, which are no longer relevant and any new developments that could be included.
- 1.4 Meetings were held with performance leads for each department and Public Health to identify meaningful indicators for each priority.
- 1.5 To establish a golden thread that links our corporate priorities with the key projects and performance indicators we have incorporated measures that demonstrate the impact/outcome of key projects where possible.
- 1.6 This report proposes a list of key projects and performance indicators to be referenced in the Corporate Plan for 2014-15 as contributing towards meeting our priorities for Bury. These will be monitored quarterly to produce bi-annual progress reports to Cabinet and a quarterly performance report (indicators only) to Overview and Scrutiny.

3.0 SUMMARY OF KEY ISSUES

- 3.1 Efforts have been made to ensure we have a robust data set that can be reported on within the financial year.
- 3.2 There have been comments made at previous Overview and Scrutiny meetings requesting that performance indicators on specific areas of development are

included. Discussions with relevant departments are currently ongoing to ensure this is incorporated where possible.

- 3.3 To ensure the corporate plan performance indicators can be used to drive improvement we have removed those indicators that we have been unable to analyse and those that have consistently met their target. This approach to refreshing the projects and indicators in the plan will keep reporting concise and meaningful. The proposal details 55 indicators and 23 projects, as referenced in the table below.

	2013-14 Total	Keep	New	Remove	2014-15 Total
Projects	24	9	14	15	23
Indicators	53	29	28	24	57

4.0 EQUALITY AND DIVERSITY

- 4.1 An Equality Analysis was undertaken for the Bury Council Corporate Plan 2012-15 and it was concluded that the Plan has a positive impact by aiming to reduce poverty and inequality.

5.0 CONCLUSIONS

- 5.1 Moving into 2014-15 we want to move towards a situation where the Council is monitoring a meaningful set of key projects and performance indicators. The outcomes of which will inform members and the public whilst enabling the council to drive improvement. This is a refinement of the current process pending a full review of the corporate planning framework in the coming year.
- 5.2 This report is intended to form the basis of discussion with Overview and Scrutiny around performance and the type of information that Members would like to see in order to understand and monitor the performance of the Council.

Priority: A strong local economy

The current economic climate has had a tangible impact on the borough’s businesses and residents. The economic growth of our borough and its contribution to the Greater Manchester economy is crucial for the health and well being of our residents. Exclusion from the labour market creates a cycle of poverty and is linked to inequality of opportunity, health, status, education and life chances. One of our key priorities is to build a strong local economy to provide our residents with opportunities in order to develop a highly skilled and employable population that will attract and retain employers large and small to the borough.

Key Projects 2014-15:

KEEP

Backing Young Bury
Local Support Fund
New Horizons Programme

NEW

★Work Programme Leavers
★Business Engagement Strategy

Performance Indicators:

KEEP

Overall employment rate (working age)
Inequality gap in the achievement of a Level 3 qualification by the age of 19
Percentage of 16 to 18 years olds who are not in education, employment or training (NEET)

NEW

★Proportion of working age people on out of work benefits
★Fuel poverty
★Percentage of work programme leaver’s that move into employment.
★Percentage of total JSA claimants that are by youths (16-24)
★Proportion of people accessing the local support fund that are allowed a crisis award.
★Proportion of crisis awards allowed that are a direct result of a sanction, suspension or disallowance of a DWP benefit.

Priority: Health and wellbeing

The health and wellbeing of our residents is essential for all aspects of their daily living and can be affected by many factors. This includes housing, social care, early years and active living. Everyone has the right to good health but unfortunately there are huge differences in levels of physical health, mental health and wellbeing across our borough. The greatest challenge we face is to tackle inequalities and this remains a key priority.

Key Projects 2014-15:

KEEP

Affordable Warmth

Early Help Strategy

NEW

★Integrating Health & Social Care

★Early Years Strategy

★Health & Wellbeing Strategy

★SEND Reform

Performance Indicators:

KEEP

Proportion of children in poverty

Percentage gap between pupils eligible for free school meals and their peers achieving the expected level at Key Stage 2

Achievement gap between pupils eligible for free school meals and their peers achieving expected level at Key stage 4

Percentage of adults participating in at least 30 minutes moderate intensity sport and active recreation on 3 or more days

Proportion of older people (aged 65 and over) who are still at home 91 days after discharge from hospital into reablement/rehabilitation services (*reworded*)

Percentage of children and young people in care achieving 5

NEW

★Injuries due to falls in people aged 65 and over

★Proportion of social care service users with a completed review in the year

★Proportion of carers with a completed assessment in the year

★Permanent admissions of older people (aged 65 or over) to residential or nursing homes per 100,000 population

★Number of non elective admissions to hospital per 100,000 population

★Proportion of people using social care who receive direct payments

A*-C GCSEs (including English and Maths)

Percentage gap between pupils with Special Educational Needs and their peers achieving 5 A*-C GCSEs (including English and Maths)

Key stage 2 attainment for black and minority ethnic groups: Pakistani Heritage

Prevalence of breastfeeding at 6 to 8 weeks

Rate of alcohol related admissions to hospital per 100,000 population

★Proportion of children's social care assessments completed within timescales

★Proportion of looked after children contributing to or participating in their reviews

★Number of referrals to the Early Help Panel

Priority: Stronger Communities

A cohesive community is a place where people from all kinds of backgrounds have equal life opportunities and respect the law whilst feeling safe and secure. We also want a Borough where people are included and have their views listened to and acted upon. By working with individuals and groups, we see great potential in empowering communities and building local capacity to support our vision of making Bury a great place to live, study and work.

Key Projects 2014-15:

KEEP

Homelessness Strategy
 Increase recycling, reuse and composting
 Supporting Communities, Improving Lives
 Empty Properties

NEW

★Corporate Debt
 ★Digital Inclusion
 ★Domestic Violence Strategy

Performance Indicators:

KEEP

Percentage of pupils permanently excluded from school in the year
 Percentage of household waste sent for reuse, recycling and composting
 Residual household waste – kgs per household
 Number of serious violent crimes per 1,000 population
 Number of serious acquisitive crimes per 1,000 population
 Assault with injury crime rate per 1,000 population
 Reduction in number of incidents of ASB (as measured by the National Codes of Incidents)
 Percentage rate of repeat incidents of domestic violence

NEW

★No. of empty properties
 ★No. of empty properties brought back into use
 ★No. of homeless acceptances
 ★No. of families identified for SCIL programme
 ★No. of families turned around* through SCIL programme (*there are national and local criteria for a family to be considered complex. A family has turned around when they no longer meet this criteria.)
 ★Proportion of people who accessed debt advice that received a debt solution.
 ★ Proportion of people who entered the national careers service work programme that gained employment.

Number of first time entrants to the Youth Justice System aged 10-17	
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Priority: One Council, One Success, together.

We cannot underestimate the challenges facing the Council in the coming years as funding available to us reduces. As a matter of course, we aim for the organisation to be as efficient and effective as possible but making best use of resources in the years ahead calls for a new approach to how we operate and we will need to increase our efforts to reduce the council's running costs whilst continuing to secure good outcomes for local people based on sound evidence of need.

Key Projects 2014-15:

KEEP

None

NEW

- ★Departmental restructures
- ★Partnership, governance & accountability
- ★Digital by default
- ★Medium Term Financial Strategy
- ★Employee Engagement Survey

Performance Indicators:

KEEP

- Percentage council tax collected
- Percentage business rates collected
- Average time taken in calendar days to process Housing Benefit/Council Tax Benefit new claims and change events
- Number of FTE days lost due to sickness absence
- Forecast outturn (Revenue)
- Forecast outturn (Capital)
- Percentage of employees satisfied with Bury Council as an employer

NEW

- ★Percentage of employees satisfied with: senior management, communication and vision
- ★Percentage of employees satisfied with: employee voice
- ★Percentage of employees satisfied with: line management
- ★Percentage of employees satisfied with: supportive work environment
- ★Percentage of employees satisfied with: meaningfulness of work
- ★Percentage of employees satisfied with: person job fit

Projects and indicators proposed for removal

Key Projects

- ⌘ Council Tax Support Scheme – *work better reflected in new projects*
- ⌘ Poverty Strategy – *monitored in it's own right*
- ⌘ Housing Allocation Policy – *policy is now in place, ongoing working practice.*
- ⌘ New health and social care partnership with Bury Football Club – *partnership developed*
- ⌘ Registry Office Annual Performance Report – *annual requirement, not a specific project*
- ⌘ Extra Care Housing – *work complete*
- ⌘ Day Opportunities – *key decisions taken*
- ⌘ Investment in LED lighting – *ongoing project, no specific measures/indicators*
- ⌘ Remodelling of the library service – *key decisions taken*
- ⌘ Developing visitor attractions and economic developments – *ongoing development, not a specific project*
- ⌘ Adoption of the Local Core Plan Strategy – *ongoing project, no specific measures/indicators*
- ⌘ Streetsafe Strategy – *no measures/PIS*
- ⌘ Plan for Change - *ongoing*
- ⌘ Accommodation Review - *ongoing*
- ⌘ People Strategy - *ongoing*

Performance Indicators

- ⌘ Working age people on out of work benefits (percentage difference between Bury and Greater Manchester) – *replace with proportion for Bury*
- ⌘ Percentage of working age people claiming out of work benefits in the worst performing neighbourhoods – *unable to obtain data at a neighbourhood level*
- ⌘ Proportion of population aged 19-64 for males and 19-59 for females qualified to at least level 2 or higher – *data no longer available*
- ⌘ Key stage 2 attainment for black and minority ethnic groups: Mixed white and black Caribbean – *affected by small cohort*
- ⌘ Key stage 2 attainment for black and minority ethnic groups: White Other – *affected by small cohort*
- ⌘ Adults with learning disabilities in settled accommodation – *static outcomes, above target*
- ⌘ Adults with learning disabilities in employment - *static outcomes, above target*
- ⌘ Percentage of social care assessments completed in 28 days – *not used to drive performance*
- ⌘ Percentage of social care packages in place 28 days after assessment - *not used to drive performance*
- ⌘ Carers receiving needs assessment or review and a specific carer's service or advice and information – *monitor assessments instead*
- ⌘ % of urban and countryside parks, based on the ISPAL definition, that have achieved 'Green Flag' – *annual, no change since 2011.*

£%of the Local Authority Principal Road Networks ('A' roads) where structural maintenance should be considered – *not collated 14/15*

£% of non-principal classified roads ('B' and 'C' roads) where maintenance should be considered – *not collated 14/15*

£Increased number of tourist visitors (STEAM) – *no longer collated at Bury level*

£ Percentage staff turnover – *for monitoring purposes only, does not reflect good or bad performance*

£ Number of households in temporary accommodation – *replaced with no. of homeless acceptances*

£Proportion of people using social care who receive self directed support (assessment process to determine an indicative budget) – *monitor proportion of direct payments instead*

£Visits in person to galleries/museums per 1,000 population – *not an indication of tourism or economic generation*

£Supply of ready to develop housing sites (percentage of supply required for the next 5 years)

£CO2 reduction from local authority operations

£Visits in person to libraries per 1,000 population

£Governance issues reported

£The percentage of children and young people in care adopted who were placed for adoption within 12 months of the decision that they should be placed for adoption – *not used by children's social care teams to drive improvement*

£Percentage of children becoming the subject of a Child protection Plan for a second or subsequent time – *not used by children's social care teams to drive improvement*

INDEPENDENT PWC REVIEW OF CIVIC VENUES PROGRESS UPDATE REPORT Overview and Scrutiny 25TH March 2014

1.0 SUMMARY

- 1.1 This report provides an update on the work undertaken and the progress made on the recommendations made as a result of the independent review of Civic Halls.

2.0 MATTERS FOR CONSIDERATION/RECOMMENDATION

- 2.1 The Civic Venues progress report was last presented to Cabinet in September 2013 and it was agreed that a further update be presented to Overview and Scrutiny in March 2014 to demonstrate the work undertaken and the progress made.
- 2.2 Consider whether a further report is required on progress in 12 months

3.0 BACKGROUND INFORMATION

- 3.1 An independent review was carried out on Civic Venues service due to the continued financial pressures and subsidy required to operate the service.
- 3.2 The Venues operate in a very competitive market locally, and have in the past suffered from declining usage influenced in part by the wider economic recession and lack of investment in facilities. This market will be even more competitive once the Fusiliers development is completed.
- 3.3 The review was undertaken independently by Price Waterhouse Coopers (PWC) utilising service credits. The key points of the review were to;
- Identify underlying issues with the service
 - Develop a sustainable business model going forward
 - Propose a combination of short and long term options to achieve this
 - Improve upon the level of subsidy required at present
 - Improve user satisfaction
- 3.4 The report highlighted several issues namely
- Financial Assessment and Usage levels,
 - Marketing and Promotion,
 - Pricing Structure,
 - Catering,
 - Condition of Venues and
 - Management of Venues

4.0 REVIEW OUTCOMES

- 4.1 The PWC report made several conclusions and recommendations which are as follows.
 - 4.1.1 The Council should review margins and simplify the pricing structure, and consider removing the higher charges for the use of external caterers which appears to inhibit demand from local ethnic minorities.
 - 4.1.2 Budgets should be reviewed on a bottom-up basis and more realistic sales targets should be set.
 - 4.1.3 Consideration should be given to rationalising the catering service to the Elizabethan Suite only, and provide access to the catering facilities at the other venues as part of the hire charge.
 - 4.1.4 A review of marketing and sales should consider the option to outsource the function to a specialist provider on a commission basis.
 - 4.1.5 Work should be undertaken by the Council to explore the options for capital investment in the facilities to improve the quality of the service on offer.
 - 4.1.6 The option to engage with a development partner or third party individual to help improve marketing and the catering offer could provide advantages.
 - 4.1.7 The Council should reconsider the long-term options for the management and operational running of the Civic Halls, including alternative service delivery models being implemented by other local authorities.
 - 4.1.8 Set up a Civics Management Group.
 - 4.1.9 Explore the opportunity to integrate Venues Management across similar leisure and cultural areas to increase opportunities to widen the scope of activities taking place in venues.
 - 4.1.10 Aim to reduce the financial subsidy required and improve community value.

5.0 ACTION TAKEN

- 5.1 Civic Venues pricing structure was simplified removing the complex and high charges, changing to hourly room hire and inclusive rates for weekday and weekends.
- 5.2 Budgets have been realigned to reflect more closely the income and expenditure trends and act as a target incentive to management.
- 5.3 In terms of rationalising the catering services, progress has been made by virtue of improved service methods, changes to menus and the development of clear packages to complement an interchangeable a la carte range. We have also introduced Halal menus and drinks package as part of what is a

quality catering service. Catering is a necessary revenue stream at all venues and is contributing to improved financial performance.

5.4 The management group was set up and chaired by the Director of the Met organisation and developed a series of actions that included;

- Marketing plan and objectives for each venue
- Rebranding of suites as individuals rather than group
- Data development and management
- Identify Market Sectors, Audience profiling and development
- E-media development and digital press releases.
- Dedicated web page and ticket portal
- Cultural Partnership development – The Met - comedy & music, Festwich, SOS Rock, Vintage.
- Partnership arrangements – FORCH, 3rd Party promoters
- Seasonal promotions and brochure
- Customer Satisfaction Surveys
- Improved flexible use of vacant space

5.5 Due to tight resources and an effort to maximise viability, a member of the management team has been seconded to a part-time marketing role rather than the dedicated officer resource originally recommended. This post is taking the lead in developing and implementing the subsequent Marketing Plans based on the information above.

5.6 Expressions of interest were sought for a suitable partner to manage and operate the facilities at Radcliffe Civic Suite. This was followed by a decision to keep the Radcliffe Civic Suite under existing management but to develop the service.

5.7 Capital investment in Civic Halls is considered not to be compatible with the current economic situation. However the Civic Halls progress is being inhibited by the lack of investment and PWC recommendation of investment in the service to improve facilities and contribute the continued progress of the Civics.

5.8 A partnership agreement is now in place with the Ramsbottom Friends Group (FORCH). However, it is recognised that it will take time for the group to develop and grow. A change in management structure at Ramsbottom Civic Hall 12 months ago has brought about a number of new initiatives.

6.0 OUTCOMES

6.1 Implementation of the improvement plans is a gradual process reflected in the return to growth in the business. Despite the economy, the actions taken are showing positive results and the second successive year of increased income. Forecast for 13/14 also indicate an increase in income but the budget overall this year has not improved.

Although forecast income is up by £40k, this is offset by an increase of £43k in expenditure, mainly due as a result of necessary work and increase in publicity and artist fees, consequently the trading subsidy is forecast to worsen by £3k.

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A breakdown of which is below with a full venue breakdown attached as Appendix A.

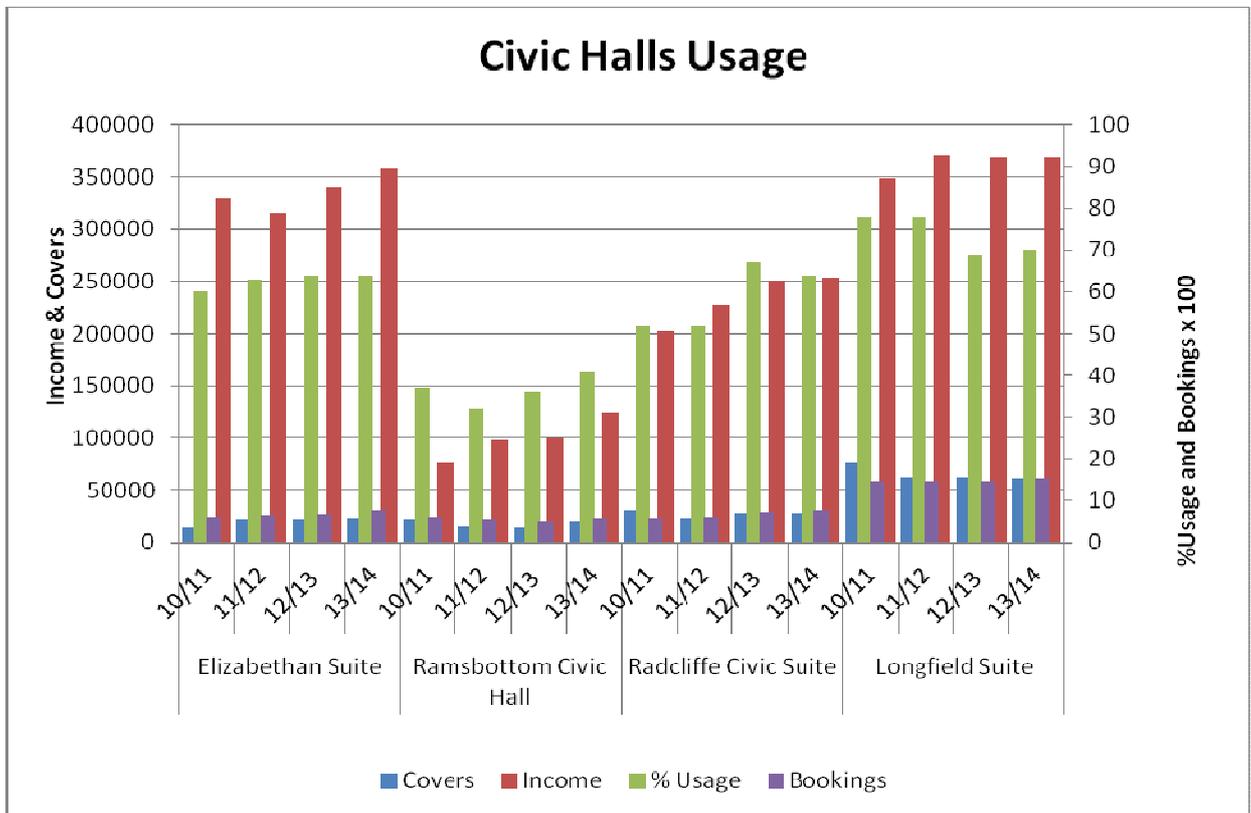
Civic Halls	10~11	11~12	12~13	13~14 Forecast
Income	(961,000)	(1,013,400)	(1,062,400)	(1,102,600)
Operational Expenditure	1,376,000	1,343,400	1,373,500	1,416,100
Trading Subsidy	415,000	330,000	311,100	313,500
Overheads				
Notional Depreciation	125,975.00	125,975.00	125,975.00	126,000.00
Grounds - Client	300.00	300.00	300.00	300.00
Directorate Recharge	11,787.00	13,396.00	8,500.00	7,000.00
Recharge - admin account	57,777.00	49,588.00	47,383.00	51,200.00
Central Department Support	49,700.00	49,700.00	49,700.00	51,200.00
FRS17/IAS19 current cost		(9144)	(17324)	(17400)
IAS19 Employee Benefits		(907)	(1379)	(1200)
Total Overheads	245,539.00	228,900	231,200.00	217,100
Exceptional Items (works)	138,000.00			
Total Subsidy	798,539.00	558,900.00	524,300.00	530,600.00

The forecast total subsidy £530,600 for 2013/14 includes fixed and notional costs of £400,700 which would not necessarily be saved in the short term. This includes a contribution of central and departmental overheads; grounds maintenance; depreciation and future pension liabilities; and contributions to the costs of the Catering Central Production Unit at Willow Street and the Town Hall building.

- 6.2 Civic Hall usage - Elizabethan Suite and Ramsbottom have increased across all four categories partially due to wedding and celebration packages that were launched with 13/14 results 21% up on the previous year, with similar numbers already booked for 14/15.

Radcliffe has improved but despite an increased number of functions and numbers attending % usage has fallen due to shorter occupancy.

Longfield Suite has maintained the number of bookings and function occupancy has increased slightly, but income has suffered partially due to the way Easter falls. Traditionally at Easter the Longfield Suite has a series of events that contributes substantially to income targets, but with no Easter weekend in 2013/14 (two in 12/13 financial period), income is down.



6.3 Progress on developing the business is inhibited by the inability to invest in the fabric and facilities of the building, something recognised several years ago.

With the current state of the Longfield Suite, despite the marketing efforts the lack of investment is now being reflected in the results. This is also similar with the Elizabethan Suite which as good as it is, is competing in an ever increasing competitive market and against quality venues. Both venues would benefit in continued investment if they are to attract the higher end events and reach the targets required.

6.4 Bar gross profit margins are targeted at 65% but on monthly audits, suites achieve 69/70% as the norm. Food profit margins are targeted between 55%-65% depending on meal type, but for accounting purposes surplus is treated as hall hire to take advantage of VAT allowances.

6.5 E-media development – all venues have Facebook and Twitter accounts, and collectively has over 4500 Facebook likes and 200 Twitter followers with the Longfield Suite and Longfieldlive accounting for the majority.

Our web presence has improved with Visit Bury, on line directories, such as Thomson and Yell and our own dedicated pages that give us regular high ranking on web searches, usually within the top five and with the development of an individual webpage this should improve further.

This live media source which is still in its infancy and as far as we are concerned is an excellent promotional medium but resource heavy with appropriate updated hardware and the need to constantly monitor and keep it up to date. To gain best advantage it may be possible to share the cost of this resource across a number of sections as the growth in Social Media continues to expand and becomes more relevant to other services.

- 6.6 Our database development has achieved over 15,000 contacts from information from our Bookings system, Ticketline and external sources. The data is profiled in preparation to launch a more tailored corporate business campaign and other entertainment and promotional campaigns.
- 6.7 It has been accepted that due to resource issues the work of the Management Group has been completed and it now no longer meets. Its role was very important and valued, the contribution by the members of the group is very much appreciated and with the knowledge and experience gained carried forward by the venue management team.
There is however a continuing relationship with The Met in terms of joint event programming.
- 6.8 Integration with our leisure partners has introduced a range of events from Burlesque to Boot Camps, Tai Chi and Zumba, Active dance, Boxercise and Circuit training; these are in addition to our regular roller skating, karate and keep fit classes.
- 6.9 With improved training with an emphasis on service, customer satisfaction levels has increased over the last three years from 90.3% to its current position of 95.8% at 13/14 and reflected by our repeat business which accounts for 35.4% of our events.
- 6.10 As part of the Civic management group a new marketing strategy was developed with promotional plans tailored to each venue which will be complete by the end of March and reviewed regularly. Initiatives from these plans have already been rolled out with positive results.
- 6.11 The above includes a joint marketing plan being developed with the Friends of Ramsbottom Civic Hall, including the development of mutually beneficial events.
- 6.12 Progress against the action plan has been closely monitored throughout the year through regular "Portfolio Meetings". This assessment should continue based on ongoing actions with a further progress report to Cabinet after closure of the 13/14 accounts.

Neil Long
Assistant Director (Operations)

Appendix A

Civic Halls 13~14	Elizabethan Suite	Ramsbottom Civic Hall	Longfield Suite	Radcliffe Civic Suite	Shared	Total
	£	£	£	£	£	£
Income	(356,000)	(124,300)	(369,300)	(252,000)	(1,000)	(1,102,600)
Expenditure	411,100	150,500	441,500	330,400	82,600	1,416,100
Trading Subsidy	55,100	26,200	72,200	78,400	81,600	313,500
Overheads	(5,100)	(2,200)	(4,200)	(2,800)	231,400	217,100
Total Subsidy	50,000	24,000	68,000	75,600	313,000	530,600

Civic Halls 12~13	Elizabethan Suite	Ramsbottom Civic Hall	Longfield Suite	Radcliffe Civic Suite	Shared	Total
	£	£	£	£	£	£
Income	(340,000)	(100,000)	(369,000)	(251,000)	(2,000)	(1,062,000)
Expenditure	392,000	137,000	415,000	321,000	108,000	1,373,000
Trading Subsidy	52,000	37,000	46,000	70,000	106,000	311,000
Overheads	(5000)	(2000)	(4000)	(3000)	227,300	213,300
Total Subsidy	47,000	35,000	42,000	67,000	333,300	524,300

Civic Halls 11~12	Elizabethan Suite	Ramsbottom Civic Hall	Longfield Suite	Radcliffe Civic Suite	Shared	Total
	£	£	£	£	£	£
Income	(315,700)	(98,300)	(370,700)	(227,300)	(1,400)	(1,013,400)
Expenditure	363,900	125,200	449,600	288,100	116,600	1,343,400
Trading Subsidy	48,200	26,900	78,900	60,800	115,200	330,000
Overheads	(200)	(100)	(300)	(200)	229,700	228,900
Total Subsidy	48,000	26,800	78,600	60,600	344,900	558,900

Civic Halls 10~11	Elizabethan Suite	Ramsbottom Civic Hall	Longfield Suite	Radcliffe Civic Suite	Shared	Total
	£	£	£	£	£	£
Income	(330,800)	(76,300)	(347,800)	(203,200)	(2,900)	(961,000)
Expenditure	400,200	110,300	429,300	296,300	139,900	1,376,000
Trading Subsidy	69,400	34,000	81,500	93,100	137,000	415,000
Exceptional Items (works)		138,000				138,000
Overheads	0		0		245,500	245,500
Total Subsidy	69,400	172,000	81,500	93,100	382,500	798,500

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WARDS AFFECTED: ALL	ITEM No.
REPORT OF: School Admissions Overview Project Group CONTACT OFFICERS: Paul Cooke, Strategic Lead (Schools, Academies & Colleges) Rachael Stirk, Team Manager, School Management Service Leigh Webb, Democratic Services Officer	
TITLE: FINAL REPORT – March 2014	

1.0 PURPOSE OF REPORT

- 1.1 To inform Members of the Overview and Scrutiny Committee of the work, findings and recommendations of the School Admissions Overview Project Group.

2.0 BACKGROUND

- 2.1 Historically, the birth-rate in Bury was in steady decline until 2003 and, as a result, demand for primary school places has, until recent years, been falling.
- 2.2 The rate of decline and the subsequent increase in birth-rate has differed from one area of the Borough to another. Additionally, some areas have experienced increased demands for school places as a result of inward migration both from Eastern Europe, but increasingly from other parts of the UK. Notably, a significant number of neighbouring authorities are currently in the process of creating additional capacity in order to meet unmet demand for school places, in both the primary and secondary sectors.
- 2.3 Whilst there is currently sufficient capacity across the Borough to meet the overall demand for places, there are some significant “hot-spots” in demand, particularly for primary school places in the East Bury and Prestwich areas, where the level of demand has been greater than the number of places available. This has been exacerbated by the popularity of some schools, and the localised pressure on places that this can create.
- 2.4 In 2013 these pressures were exacerbated still further by the very high number of siblings applying for places at two neighbouring schools in East Bury, which subsequently lead to significant numbers of admission appeals for these schools.

- 2.5 The LA has worked with schools in East Bury and Prestwich in order to address the levels of demand for the 2013 intake, through the creation of bulge classes and using the flexibilities provided in the Admissions Code.
- 2.6 Due to the pressure on primary school places experienced in 2013, the Overview and Scrutiny Committee requested that a Project Group was set up to examine the provision and arrangements for school places in the Borough. The key purpose of the review was to:
- Re-assure Members as to the robustness of the Forecasting Model
 - Examine where problems exist and identify of potential solutions and development of strategy (short, medium and long term)
- 2.7 The Membership of the Group comprised of Councillor Fitzwalter (Chair), Councillors Caserta, Gunther, Simpson, Tariq and O'Hanlon.
- 2.8 The Project Group was delegated to agree its own project plan which is set out at Appendix 1 to the report. The focus of the Review to date has included:
- Examination of the Pupil Forecasting Model, including an overview of updated forecasts
 - Analysis of local demand pressures
 - Examination of the level of migration into the borough

3.0 METHODOLOGY

- 3.1 As part of the review the Group interviewed/took evidence from:

Paul Cooke, Strategic Lead (Schools, Academies & Colleges)
Rachael Stirk, Team Manager, School Management Service
Marcus Connor, Head of Strategic Housing
Salford City Council

- 3.2 The Group has met on four occasions and has received statistical and geographical information relating to:
- The location of all Bury Primary Schools by Local Area Partnership.
 - The geographical distribution of children from the Health Authority Information aged 0+ to 4+.
 - The comparison of primary school forecasts from 2000 – 2013 indicating the % difference between the forecast number and the actual intake number.
 - The forecast number, actual intake number and admission capacity of primary schools per Local Area Partnership.

- The number of siblings per school expected for Reception 2014 intake and the number admitted per school in 2013.
 - The levels of average deprivation per school and ranking tables for all Bury Schools.
- 3.3 The Group also received briefing papers providing background information regarding the supply and organisation of school places, and details about the admissions process.
- 3.4 Furthermore, information was also received from Salford Council relating to their experience in dealing with demand pressures and the measures in place to address these pressures.
- 3.5 Relating to the issue of Migration, the Group received information from Strategic Housing setting out the limited information held by the Council in terms of social housing and inter-authority moves.

4.0 PUPIL FORECASTING METHODOLOGY

- 4.1 The LA has a well established model for forecasting future demand which has been recognised by Ofsted in terms of its detail and accuracy of future demand.
- 4.2 The Group examined the LA's forecasting methodology, including the variations in historical forecasts and actual intakes. In noting the accuracy of historical forecasts, the Group was reassured about the robustness of the incumbent model. However it was also recognised that due to the changing national and local context, it was necessary to review the current forecasting methodology and adapt as appropriate.
- 4.3 The Group also examined the demographic distribution of 0 – 4 year olds, and the forecast intakes, pupil rolls and surplus places in both the primary and secondary sectors.
- 4.4 In considering the local context, the Group noted that whilst Bury's resident population is expected to increase, as a proportion of the whole population, the younger age group will get smaller and there will be a 2% reduction in the 0-14 year old population by 2022.

5.0 PRIMARY FORECASTS

- 5.1 Primary forecasts are calculated using data supplied by the Pennine Care NHS Foundation Trust and are updated annually. Forecasts are also revised following each school census in order to reflect movement in and out of the Borough during the academic year.

- 5.2 In 2011, the forecast intake for 2012 was 2206 and the actual intake was 2178, a difference of 1.3%. Similarly the forecast intake for 2013 was 2285 and the actual intake was 2241, a difference of 2%.
- 5.3 The Group noted that the actual intake numbers for 2013 were broadly in line with the numbers forecast, and acknowledged that the problems that arose in 2013 were as a result of the high sibling rate at two neighbouring schools in an area where demand for places was already high. As a result, the LA is reviewing its forecasting methodology and working with schools in order to identify future levels of sibling demand.
- 5.4 Forecast intakes for 2014 indicate an overall increase of 2.5% from the 2013 intake, however current data provided by the Pennine Care NHS Foundation Trust indicates a gradual decrease in the population of 0-4 year olds, therefore whilst current primary forecasts show overall intakes peaking at 2015, numbers are starting to decline by 2016, with a decrease in the Reception intake of almost 6%.
- 5.5 Forecast intakes for the East Bury and Prestwich areas also begin to decrease by 2016, by 8% and 12% respectively.
- 5.6 The Group agreed that since current forecasts show a spike in numbers in 2015, in addressing the shortfall in capacity within these areas the LA needs to ensure that solutions should not only respond to the demand for places, but also provide a cost effective solution, long term sustainability for the area as a whole, and not be detrimental to other schools.

6.0 SECONDARY FORECASTS

- 6.1 A high number of extra district pupils have traditionally applied for places in Bury's secondary schools and a significant number of these pupils have secured places. With fewer resident pupils taking up places, the proportion of extra district pupils has risen significantly over recent years.
- 6.2 The increased pupil numbers from the primary sector are beginning to feed through into the secondary sector and intakes for 2014 are forecast to increase by 4.4%, from 2138 to 2232. The Group acknowledged that forecasts indicate that secondary intakes will begin to exceed admission capacity by 2016, although these forecasts do include current levels of demand from extra district residents. In practice, initial increase in demand from within the resident population can be met by displacing some of the extra district demand.
- 6.3 The Admissions Policy for Community secondary schools does give priority to Bury resident children through the use of catchment areas, however the Group noted that it is important for families to state realistic preferences when applying for secondary school places.

- 6.4 It was noted that a number of secondary schools have the physical capacity to accommodate additional pupil numbers should the need arise. If required, the LA will hold discussions with those schools about the possibility of increasing the number of places towards the number indicated by the net capacity in order to maximise capacity within the sector.

7.0 FACTORS AFFECTING SUPPLY FOR SCHOOL PLACES

- 7.1 The main factors affecting the supply of school places are the availability of capital funding, land and premises. Expansion of existing establishments can be constrained by the capacity of the premises, the size of their sites as well as wider considerations of their location. There is now a presumption that if a LA identifies the need for a new school, they must seek proposals for the establishment of an academy/free school. However, the LA can propose prescribed alterations to existing schools to enlarge the premises, or increase capacity at schools through the flexibility provided in the Admissions Code
- 7.2 Schools who are their own admission authorities can also create additional places by increasing their intake. In addition, the establishment of free schools may also receive approval by central government. There is currently no significant impact from these issues in Bury.
- 7.3 The LA has been able to provide sufficient school places to meet the current levels of demand through the creation of bulge classes and the flexing of admission numbers where there is sufficient capacity to do so. Should the need for additional school places arise, the LA will work with existing maintained schools to increase their capacity, either through capital investment to provide modest extensions, or through redesignation of community spaces and/or specialist areas such as libraries/ICT suites to provide core teaching accommodation.
- 7.4 Bury received £2.6m Basic Need funding between 2013 - 2015 and a further £4.4m has provisionally been allocated between 2015 – 2017. The LA has previously allocated Basic Need funding to fund projects addressing school building condition issues. However there is an expectation that allocations received from 2013/14 onwards will be used to fund the establishment of additional places.
- 7.5 The LA has therefore developed, through its Capital Strategy Group, a programme of investment to target projects that address the EFA's Basic Need criteria, whilst also addressing building condition and suitability issues. For example, Basic Need funding will be used to support schemes at St Luke's and St Thomas' in order to address these specific localised demand pressures.

8.0 FACTORS GENERALLY AFFECTING DEMAND FOR SCHOOL PLACES

8.1 The main factors affecting demand for school places are:

- Birth rates
- Inward & outward migration from the area
- Immigration into the UK
- Cross border movement
- Housing developments and changes in the housing market,
- Parental preference
- Changes in private education provision
- Establishment of academies and free schools
- The impact of welfare reforms

Many of these factors are subject to quite short-term uncertainty.

8.2 The Group noted that in Bury the rate of historical decline in pupil numbers and the subsequent increase in birth-rate has differed from one area of the Borough to another. Members recognised the potential impact on the demand for school places from inward migration, both from Eastern Europe, but increasingly from other parts of the UK.

8.3 The Group considered the merits of targeted strategies to address levels of demand/shortages in particular schools and the importance of forecasting whether these shortages were temporary in nature. Popularity of particular schools may result in high levels of oversubscription, however it was recognised that in considering whether additional places should be created on a permanent basis, the wider impact on the sustainability of other schools must be taken into account.

9.0 INWARD MIGRATION

9.1 With regards to inward migration, Members recognised the potential impact on wider Council Services and Community needs and highlighted the need for information on how the Council's Housing Strategy looks to respond to this issue. The Group examined data on inter authority moves provided by Marcus Connor, Head of Performance & Housing Strategy. It was recognised that inter-authority moves into social rented or affordable housing will be limited to relatively small numbers. The net inflow to Bury appears greatest from Salford, Manchester and Rochdale, with the net outflow from Bury being to Bolton and Rossendale.

10.0 SALFORD CITY COUNCIL

10.1 The Group also examined the experience of Salford Council over the last few years, including details of the factors that contributed to their problems around school places, the actions undertaken to respond to these

challenges, and the policy decisions which have driven the management of school places.

- 10.2 Since 2010, an additional 1700 additional places have been provided across Salford City Council, the majority of which have been reception places. The initial increase in demand had not been identified in pupil projections, however there was a significant shortfall in Reception places following admissions applications in 2010. This unanticipated demand was initially met through the creation of bulge classes at several schools, utilizing existing accommodation through the use of specialist spaces such as libraries, ICT suites and community rooms.
- 10.3 The increased demand in Salford is due to increased birth rate and high rates of migration from Europe and from the South of England. Salford has subsequently revised its pupil place forecasting methodology, which the Group noted was closely aligned to Bury's incumbent model.
- 10.4 Due to the scale of additional places required, Salford has developed a range of short, medium and long term strategies. Short term proposals have included increasing intakes in schools that have sufficient building capacity, and re-using community space and/or specialist areas to provide core teaching accommodation. Some options also require building projects in the form of extensions.
- 10.5 Medium and long term strategies focus on reviewing potential re-use of surplus buildings and sites, use of other educational-use accommodation (such as children's centres) and construction solutions to enable larger scale building extensions. The creation of additional capacity will be funded through the Basic Need programme and through Section 106 agreements with planners.
- 10.6 Salford has also developed a model of programme governance in order to review the development of proposals and consider which will be taken forward. A stakeholder steering group comprising Headteacher and diocesan representatives has also been established to ensure wider ownership of and engagement with the programme.

11.0 PRIMARY SCHOOL PLACES

11.1 Demand Pressures 2013

- 11.1.1 Despite the demand pressures experienced in 2013, the Group noted that overall levels of parental satisfaction remained high. All Bury resident children were offered a Reception school place for September 2013, with 87% receiving their first preference school and 94% receiving a school of preference.

- 11.1.2 In Bury East, whilst intake numbers were as forecast, demand for places at St Luke's & St Thomas' in particular was exacerbated by the high number of places allocated to siblings, resulting in only a small number of places being offered under the distance criterion. Siblings accounted for 44 of the 60 places offered at St Luke's and 29 of the 35 places at St Thomas'. This unprecedented level of sibling demand across two neighbouring schools was quite exceptional.
- 11.1.3 Since siblings enjoy priority under admission arrangements, this resulted in a number of other children living very close to St Luke's & St Thomas' being unable to obtain places, and subsequently being offered places at other schools some considerable distance away from their homes. This, in turn, lead to significant numbers of admission appeals for these two schools.
- 11.1.4 In order to address these levels of demand, Basic Need funding is supporting schemes at St Luke's and St Thomas' in order to create bulge classes for September 2013, each accommodating up to 15 additional children. Pupils are initially being accommodated in existing accommodation, whilst schemes have been developed to provide additional capacity and address condition and suitability issues at each of the schools. Each scheme will also enable admission of a further 15 children (in addition to the Published Admission Number in 2014) if required.
- 11.1.5 In the Prestwich area, the demand for places was focused around Butterstile, Heaton Park, St Margaret's and St Mary's.
- 11.1.6 Whilst some schools are limited by the physical capacity of their buildings, others do have some ability to accommodate additional numbers. Furthermore, the Admissions Code provides greater flexibility for schools to respond to demand for places, enabling admission numbers to be breached. Therefore, in collaboration with a number of schools, the LA agreed to admit a small number of children above the admission number, where this could be achieved without breaching infant class size legislation, and where there was sufficient capacity within the schools to do so.
- 11.1.7 Members acknowledged the levels of demand in particular hot spots within the Borough, particularly within Bury East and Prestwich, and considered the measures put in place to deal with these issues. The Group has considered the merits of targeted strategies to address shortages in particular schools and the importance of forecasting whether these shortages were temporary in nature.

11.2 September 2014 Intake

- 11.2.1 The application process for Reception places in September 2014 is currently ongoing. Offers will be sent out on 16 April 2014 and data exchanges with neighbouring Authorities are taking place throughout March. Initial analysis of applications received to date indicates that whilst the East Bury and

Prestwich areas continue to experience high levels of demand, there is sufficient capacity in these areas to meet the current applications received. The LA continues to work closely with schools in order to ensure that applications are received from all known families, including pupils with siblings or nursery children, and any that have not yet applied are being followed up.

11.2.2 The South of the Borough is also experiencing very high levels of demand from the Roman Catholic sector, with Our Lady of Grace, St Bernadette's and St Michael's all being heavily oversubscribed. Capacity within the sector was increased several years ago with an expansion of St Bernadette's to accommodate a 1½ form of entry intake in order to meet levels of demand. There are currently sufficient places in Community schools within the area to accommodate applicants, however further discussions are currently taking place with the Diocese in order to assess whether these levels of demand are expected to be sustained in future years.

11.2.3 Whilst several schools in the North and West of the Borough are oversubscribed, these areas are generally undersubscribed, with a number of schools having surplus capacity.

12.0 THE SECONDARY SECTOR

12.1 Whilst the main focus of this review was on primary school places, the Group also gave consideration to the issues affecting the secondary sector.

12.2 A high number of extra district pupils have traditionally applied for places in Bury's secondary schools and a significant number of these pupils have secured places. With fewer resident pupils taking up places, the proportion of extra district pupils has risen significantly over recent years. Of the 10,792 pupils currently attending maintained secondary schools, 13% of these reside in neighbouring authorities.

12.3 The Group noted that, whilst several schools continued to be heavily oversubscribed, levels of parental satisfaction remain high, with 88% of Bury residents being offered a place at their first preference school, and 97% being offered a place at a school of preference for the September 2013 intake.

12.4 September 2014 Intake

12.5 Secondary offers will be sent out on 3 March 2014. 90% of Bury residents will be offered a place at their first preference school and 97% will be offered a place at one of their preferred schools.

12.6 A number of schools continue to be heavily oversubscribed and it is anticipated that there will be a high number of appeals for places at The Elton, Parrenthorn and Woodhey High Schools.

- 12.7 Whilst Bury Church also continues to be oversubscribed, places have been offered to children without evidence of Church attendance. Within the R.C. sector, St. Monica's is extremely oversubscribed, whilst St. Gabriel's have been able to satisfy all their R.C. demand and have offered places to non R.C. children. Again, further discussions will take place with the Diocese regarding these issues.

13.0 MANAGING PARENTAL EXPECTATION

- 13.1 The Group received detailed information concerning the actual school admissions process together with the information provided to parents.
- 13.2 This included information regarding the timeframes involved, collation of cohort details from schools, other teams within Children's Services and the application process. The Group examined sample correspondence with parents and the information provided in the Information Guide. The Group gave consideration to the accessibility of online applications and the importance of providing an alternative method of application. However it was also noted that the promotion of and increase in online applications had resulted in improved efficiency of the process and contributed to wider e-government initiatives.
- 13.3 During the Groups consideration of this issue, Members highlighted the often complex nature of the information supplied to parents and queried the measures in place to support parents in the school applications process. It was stressed that parents should be fully informed and aware of the process, and the importance of making realistic preferences.
- 13.4 The Group highlighted the importance of managing parental expectations during the admissions process and considered how this could be communicated effectively to parents. The role of members was acknowledged as policy makers and in providing support to their constituents during the admissions and appeals process.

14.0 THE STATUTORY FRAMEWORK

- 14.1 The LA has a statutory duty to ensure that there are sufficient school places available to meet demand from within its resident population.
- 14.2 Whilst the Government is keen to support the expansion of popular and successful schools, the LA role is also to try and ensure that this is not at the expense of other neighbouring schools, and that all schools serving the area are successful and viable.
- 14.3 The School Organisation (Prescribed Alterations to Maintained Schools) (England) Regulations 2013, and The School Organisation (Establishment And Discontinuance Of Schools) Regulations 2013 prescribe the revised

process to be followed for maintained schools and local authorities to propose and implement changes to the size and characteristics of their schools, and the establishment or discontinuance of schools.

- 14.4 An expansion without a physical enlargement to the premises of the school does not require a statutory proposal. Increases in pupil numbers may be achieved through an increase in the Published Admission Number under the School Admissions Code.

15.0 SEN FUNDING

15.1 The Group noted that the LA is currently undertaking a review of all SEN provision, which will set out proposals for the way in which educational provision for children and young people with Special Educational Needs and disabilities can be developed in order to meet future needs and demands.

15.2 The proposed aims of the review are:

- To increase inclusion by ensuring that more children with SEN have the opportunity to attend mainstream preschool settings and schools, if that is what their parents want
- To ensure that any funding and resources for special educational needs are used as effectively as possible
- To reduce the number of children and young people who have to go outside Bury to have their SEN met
- To more effectively meet the needs of excluded pupils, in the context of new statutory requirements

15.3 Whilst not within the remit of this Group, Members agreed that the implication of the review in terms of the impact on provision and SEN funding required further examination.

16.0 CONCLUSION

16.1 Local authorities are under a statutory duty to ensure that there are sufficient school places in their area, promote high educational standards, ensure fair access to educational opportunity and promote the fulfilment of every child's educational potential. They must also ensure that there are sufficient schools in their area, promote diversity and increase parental choice.

16.2 The LA must also balance the need to provide sufficient places, and meet parental preference, whilst ensuring that there is not too much capacity and that all schools serving the area are successful and viable.

16.3 The Group recognised the robust forecasting methods used by Children's Services and the accuracy with which future demand has been predicted for

the majority of schools. Whilst intakes have not deviated from LA forecasts, there was an unprecedented level of demand from siblings at St Luke's and St Thomas' for the September 2013 intake. As a result, the LA is reviewing its forecasting methodology and working with schools in order to identify future levels of sibling demand.

- 16.4 The Group recognised that some of the demands being seen nationally are as a result of inward migration in addition to an increased birthrate, and some of the demand pressures on neighbouring authorities are from migration from other parts of the UK because of a South to North shift. Therefore, should these factors begin to impact in Bury, it will not always be possible to predict the scale and timing of the impact accurately, therefore it is important to have contingency plans if pupil numbers begin to deviate from the LA's forecasts.
- 16.5 School place planning is a complex process, influenced by demographics, mobility and housing yield as well as parental preference, geography and transport. With rapid shifts in economic conditions and changing patterns of migration, planning requires a proactive approach in order to respond to both short and medium term demand for places.
- 16.6 The statutory framework for schools and academies has undergone much change in recent years and with increasing school autonomy, a planning mechanism with strong local knowledge is needed to ensure that funding to secure sufficient school places is allocated effectively and efficiently.

17.0 SUMMARY OF RECOMMENDATIONS

- (i) The Group acknowledges the complex nature of school place planning and supports the need for a proactive approach to develop strategies that respond to both short and medium term demands for places.
- (ii) Whilst acknowledging the difficulties in measuring migration into the borough, the Group highlight the need to regularly monitor patterns and developments through the Strategic Housing Land Availability Assessment; the Council's Core Strategy; and regular liaison with neighbouring boroughs.
- (iii) Targeted strategies employed to manage demand pressures continue to be monitored with regular consultations with local headteachers at affected schools.
- (iv) The Group acknowledges that the admissions system is complex but seems to be fair. Members, who are often asked for advice on applications by parents, should be offered an annual briefing from Children's Services on the process and any changes to the system.

- (v) Consideration be given to the development of a simplified summary of the school admissions paperwork provided to parents
- (vi) Consideration be given to the role of Elected members in the admissions and appeals process.

Background Documents:

- Demand for School Places – Capital Strategy Group
- Demand for School Places in East Bury
- Demand for School Places – Reception Intake September 2013
- School Admissions Overview Project Group - Briefing Paper October 2013

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Appendix 1

Scrutiny Review Scoping Template

Review Topic (name of review)	School Admissions
<u>Councillor Involvement</u> (names of Cllr involved)	Councillors Fitzwalter; Caserta; Carter; Gunther; Tariq; Simpson; and O’Hanlon
<u>Officer Support</u> (names of Officer required)	Paul Cooke Rachael Stirk
<u>Rationale</u> (key issues and/or reason for doing the Review)	Group appointed to carry out the Review by the Overview and Scrutiny Committee.
<u>Purpose of Review/Objective</u> (Specify exactly what the review should achieve)	<ul style="list-style-type: none"> • Members to be re-assured as to the robustness of the Forecasting Model • Examination of where problems exist, identification of potential solutions & development of strategy (short, medium and long term) • Manage expectations – parental/schools/ members • Identify communication strategies – Officers/Members with clear roles & responsibilities
<u>Indicators of Success</u> (What factors would indicate that a Review has been successful)	Measures in place to provide solutions which look to ensure sufficient school places are available to meet the needs of local communities.
<u>Methodology/Approach</u> (what types of enquiry will be used to gather evidence and why)	<ul style="list-style-type: none"> • Examine Statistical Breakdown of School Places (including map of schools across the borough which identify hotspots) • Examination of forecasting methodology • Interview relevant people (as set out below)
<u>Specify Witnesses/Experts</u> (who to see)	<ul style="list-style-type: none"> • Children’s Services Senior Officers • NHS Bury Representatives

	<ul style="list-style-type: none"> • Strategic Housing (Bury Council) • Head Teachers • Ward Councillors (East ward/Prestwich) • Cabinet Member for Children and Families 		
<p><u>Specify Evidence Sources For Documents</u> (which to look at – national and local)</p>	<ul style="list-style-type: none"> • Background information – supply of school places • Demand for School Places (East Bury) – Briefing note • Forecast intakes/rolls and surplus places data • Map of schools across the borough which identify hotspots • Breakdown of Multiple Deprivation Index (socio economic data) in relation to school admissions • GP registration data • Housing strategy 		
<p><u>Specify Site Visits</u></p>			
<p><u>Publicity Requirements</u> (what is needed – press release, fliers, leaflets, radio broadcasts, etc)</p>	Key findings and recommendations will be made public through Council Website /press release		
<p><u>Resource Requirements</u> (people, expenditure)</p>	Officer time – preparation of reports/ attendance at meetings		
<p><u>Barriers/dangers/risks/etc</u> (identify any weaknesses and potential pitfalls)</p>	<ul style="list-style-type: none"> • Any solutions in terms of additional places must be mindful of the need to maintain the sustainability of all schools in the Borough and of the potential impact upon capital investment • Recommendations need the “buy in” from local Schools/Head teachers • Information sharing from Health/Housing 		
<p>Projected start date</p>	03.10.2013	<p>Projected completion date</p>	31.03.2014

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