

# Taunton Deane Borough Council

## Executive committee – 20 June 2012

### Corporate Performance Monitoring – Quarter 4 / Outturn 2011/2012

#### Report of the Performance and Client Lead Officer

(This matter is the responsibility of Executive Councillor Mrs Vivienne Stock-Williams)

#### **IMPORTANT – PLEASE NOTE:**

In order for this performance information to be debated in the most efficient manner at the Executive committee, we would encourage Members who have queries with any aspect of the report to contact the appropriate officer(s) named (at the end of the report) before the meeting so that information can be collated in advance or relevant officers can be invited to the meeting.

#### **1. Executive Summary**

This report outlines the final performance data of the Council for the 2011/12 year.

The detailed 2011/12 financial outturn data is to be submitted in a separate report in June.

The monitoring of the Corporate Strategy, service delivery, performance indicators and budgets is an important part of the overall performance management framework.

Analysis of the overall performance of the Council reveals that 65% of all performance measures are on target (ie Green alert). This is a slightly improved position compared to the previous quarter (Quarter 3 was 64%).




## 2. Introduction to the Performance Scorecard (please see Appendix A)

- 2.1 The TDBC Scorecard at **Appendix A** contains full details of Quarter 4 performance, however section 4 (below) of the report provides further information and guidance for members on the key issues that have been identified through analysis of the data. Additional commentary has also been provided by responsible officers and CMT where appropriate
- 2.2 Scorecard explanation / key




Each section of the scorecard uses the same template and is structured as follows:

Ref	OBJECTIVES	MEASURES	ALERT	ISSUES (current & future) and IMPACTS
	Strategic & corporate objectives categorised in the 7 sections of the scorecard	Key performance indicators (& targets where possible) used to measure the objective.	Red, Amber or Green (see below)	A brief summary highlighting reasons for and issues surrounding the alert reported (see Green, Amber, Red below). Also any known problems that may jeopardise attainment. Where relevant, CMT will provide further information in addressing under performance.

### 2.3 Key to performance alerts:

	Reasons for alert	Notes
 Green	Planned actions are on course	Justification for the Green alert will be provided. Key successes or exceptional performance will be outlined.
	Performance indicators are on target	
 Amber	Some uncertainty in meeting planned actions	The reason for the Amber alert will be made clear. Mitigating actions will be outlined
	Some concern that performance indicators may not achieve target	
 Red	Planned actions are off course	A brief high level summary is included within scorecard. Where the Corporate Management Team consider a Red alert to be a priority issue requiring further detail and explanation, a separate one page information sheet for more detail will be appended to the report
	Performance indicators will not achieve target	

2.3 A summary / overview of the Quarter 4 scorecard (appendix A) is in the table below

Section	No. of measures	 Green	 Amber	 Red	N/A	Trend (from last quarter)
1) Corporate Strategy Aims	20	60% (12)	25% (5)	10% (2)	5% (1)	↓
2) Service Delivery	15	73% (11)	20% (3)	7% (1)		↑
3) Managing Finances	7	71% (5)	14% (1)	14% (1)		N/A - awaiting year-end £
4) Key Projects	4	50% (2)	50% (2)			↔
5) Key Partnerships	9	55% (5)	11% (1)	33% (3)		↓
6) People	6	83% (5)		17% (1)		↑
7) Corporate Management	11	64% (7)	36% (4)			↑
<b>TOTALS</b>	<b>72</b>	<b>65% (47)</b>	<b>22% (16)</b>	<b>11% (8)</b>	<b>1% (1)</b>	↑

**KEY:**

- ↑ = Improving (ie more Green, less Amber &/or Red alerts)
- ↓ = Worsening (ie less Green, more Amber &/or Red)
- ↔ = No change

**3. Comments from Scrutiny**

This report was considered by the Corporate Scrutiny Committee on 24<sup>th</sup> May. The list below includes the key comments, queries and concerns that were raised. These points are being addressed by the relevant Officer, and further responses will be circulated as appropriate to members of the Corporate Scrutiny & Executive Committees.

- Tackling deprivation (1.1, objective 1) – worsening deprivation within Taunton Deane, and reducing resources at TDBC – concerns that we are letting down the most deprived areas
- Job Clubs (1.1, objective 2) – good feedback being received from residents – Members are reminded to use the Customer Feedback process to capture this (the guidance and process is to be circulated)
- North Taunton & Link Partnerships (1.1, objective 3) – some disquiet due to a recent lack of communication from TDBC
- Customer Contact KPI failures in March (2.3 & 5.2) – a concern that management did not learn lessons from previous trends of increases in call volume. A report has been provided by Southwest One’s Head of Customer Contact to the Client team – this

details the reasons for the high demand in March, as well as actions that were taken to mitigate impact, ie: additional hours offered to staff; movement of multi-skilled Customer Service Advisors across service lines; temporary staffing for those on long term sickness; additional staffing provided by SWOne. Discussions continue between SWOne Revenues & Customer Contact on future delivery programmes for future summons runs.

- Debt Management / Sundry Debts (3.4) – request that reports include more detailed information, and the cost to TDBC of carrying unpaid debts (a report is due to be taken to Corporate Governance committee in June)
- Fly-tipping (2.4) – it was confirmed that the number of actions (eg investigations) increased significantly reflecting the increase in incidents
- Staff sickness levels (6.1) – concerns over the increase in 2011/12 – more detail and analysis was requested (ie breakdown data by short/long-term, Themes, grades). The Retained HR Manager is preparing an action plan for CMT to consider.
- Southwest One service delivery (5.2) – question raised as to what credible plans are in place to ensure service delivery is as required – this was responded to by Cllr Nottrodt (ref Service Delivery Plans, KPI monitoring by the Client team)

#### **4. Finance Comments**

The 2011/12 Budget Outturn report will follow as a separate report at June's Corporate Scrutiny committee meeting.

#### **5. Legal Comments**

There are no legal implications in this report.

#### **6. Links to Corporate Aims**

As this report covers all aspects of the Council's performance, all Corporate Priorities are affected.

#### **7. Environmental and Community Safety Implications**

Please see the following sections of the Scorecard for those areas contributing to the above: 2.4 (Service Delivery – 'Street Scene'); 5.4 (Somerset Waste Partnership).

#### **8. Equalities Impact**

See the scorecard section 7.3 for details of equalities progress within the council.

#### **9. Risk Management**

Significant risks associated with each 'key issue' are identified in this report (section 4).

See the scorecard section 7.4 for details of risk management progress within the council.

## **10. Partnership Implications**

See the scorecard section 5 for details of the council's key partnerships.

## **11. Recommendations**

It is recommended that the Executive review the Council's performance and financial position as at the end of Quarter 4, taking corrective action or requesting further information from Theme Managers where necessary.

### **Contacts:**

#### **Dan Webb**






Performance & Client Lead Officer

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## 1. CORPORATE STRATEGY AIMS

### Tackling Deprivation & Sustainable Community Development (Aim 1)

Ref	OBJECTIVES	MEASURES	ALERT	ISSUES (current & future) and IMPACTS
1.1	<b>Objective 1</b> Focus on Taunton East, North Taunton & Rural Deprivation	Index of Multiple Deprivation (IMD) score <i>For Information only</i>	 Red	IMD data is only published every 3 years, consequently this indicator will remain as 'Red' throughout this period and is ' <i>for information only</i> ' as it does not reflect current TDBC performance re delivery of this corporate aim. The latest IMD data for 2010 highlights that levels of deprivation within Taunton Deane are worsening (especially North Taunton & Taunton East). Our focus is on the delivery of the 'Priority Areas Strategy' (PAS) programme.
		<b>Actions –</b> Progress against key activities	 Amber	A Priority Areas Strategy (PAS) for urban & rural has been completed and work stream leads identified. Taunton Deane Partnership has approved the Strategy which includes 4 new priorities & a supporting action plan. (Presented to Community Scrutiny March 12). The 4 priorities are: 1) Encourage strong, informed & active communities; 2) Improve access to services, information & advice; 3) Improve the lives of our most vulnerable households; 4) Improve the look and feel of the local area. Key issues: A) Limited staff resource within TDBC Strategy Team will mean that success is increasingly dependent on the contribution of Partners. B) The level of resource that partners are able to commit remains unclear Work is underway to refine governance arrangements; clarify partner role/responsibilities and find out the level of input that they can make. This will be completed in May 2012. Success criteria has been identified for each priority & leads are responsible for monitoring each work component.
	<b>Objective 2</b> 'One-Stop' advice on skills, employment & training	<b>Actions –</b> Progress against key activities	 Green	Vista commenced a new contract to manage the delivery of the 3 Job Clubs in November 2011 (Priorswood, Halcon, & Wellington). This is now a funded project until March 2013. Vista staff are working extremely hard to deliver an enhanced scheme and the project is developing well.
		Number of people supported / back to work	 Green	SLA targets – 40 attendances per month (combined); 4 jobs per month; 6 'soft' outcomes (placements, training etc). Reports in March 2012 indicate that targets are being met, although job outcomes are proving to be very challenging in the current climate. All targets will be reviewed with Vista in May.
<b>Objective 3</b> Secure medium term future of N. Taunton & Link Partnerships	Funding & delivery against Service Level Agreement (SLA)	 Amber	Funding for 2012/13 has been agreed and this is the final year of a 3 year agreement. We need more clarity over output & outcomes which in some cases are currently unclear and not easily measured or monitored. A Service Level Agreement with both the Resource and Link Centres re roles & responsibilities, output & outcomes will be agreed for 2012/13 and future funding / SLAs will be decided / agreed by the new Grants Panel	

As at: 12/06/2012 **TDBC SCORECARD Q4 2011/12** (Appendix A)

Regeneration (Aim 2)				
Ref	OBJECTIVES	MEASURES	ALERT	ISSUES (current & future) and IMPACTS
1.2	<b>Objective 4</b> Facilitate the creation of a leading Green Knowledge economy	<b>Actions –</b> Progress against key activities	 Amber	<ul style="list-style-type: none"> <li>Shifting priorities this year (ie Olympic Torch event) have affected the delivery plan</li> <li>Proactive programme of events &amp; PR for local businesses is on-going and award of 3 business grants during 2011/12</li> <li>Members agreed to withdraw from the 'Into Somerset' partnership at the end of 2011/12 – Ec Dev are now working with Project Taunton to design a new inward investment marketing programme (aiming for launch summer 12)</li> <li>Engagement with the Hinkley supply forum to encourage Taunton Deane businesses to benefit from Hinkley supply opportunities</li> <li>A busy programme of TDBC planned events for businesses include: Tourism conference (March); Wellington Business conference (Feb); Carbon Reduction meeting (Jan); Olympic Torch relay celebrations (May); Business breakfast (May); Leaders dinner (May); Ambassadors lunch (May)</li> <li>Business Improvement District (BID) proposal for Taunton town centre was rejected by businesses at end March 12 – discussions underway re future of town centre management in Taunton</li> </ul>
		Number of companies visited & supported	 Amber	The target is to visit approx 100 companies during the year. During 2011/12 approx 60 – 70 companies were visited or engaged with on a 1-2-1 basis.
	<b>Objective 5</b> Facilitate Housing growth	<b>Actions –</b> Progress against key activities	 Green	The examination of the Core Strategy by a Government appointed independent inspector is due to start on 7 February 2012. Anticipated that the plan will be adopted by summer 2012. Work on the Strategic Housing Land Availability Assessment has been completed and is published on the TDBC website.
		Net additional homes provided	 Red	<b>The target for 2011/12 = 700 dwellings</b> <b>Net increase of domestic dwellings = 474* in 2011/12.</b> (2010/11 = 459; 2009/10 = 458) * NB – final data still to be validated
		Supply of ready to develop housing sites	 Amber	<b>Target = 5 year supply of housing land within Taunton by December 2011</b> The assessment has now been published and indicates a <b>marginal under supply</b> against 5 year requirements. Members have agreed to the identification of further interim release sites capable of contributing to the 5 year supply (although at present these sites are not counted towards deliverable supply).
	<b>Objective 6</b> Deliver Infrastructure	<b>Actions –</b> Progress against key activities	 Green	<ul style="list-style-type: none"> <li>Infrastructure Delivery Plan published July 11 (subject to future reviews)</li> <li>TDBC has adopted an interim policy on Planning. Consulting on a draft Community Infrastructure Levy (CIL) charging schedule May 2012. The document will be subject to formal representation &amp; examination in autumn 2012 (adopted by end 2012/13).</li> </ul>

As at: 12/06/2012 **TDBC SCORECARD Q4 2011/12** (Appendix A)





**Affordable Housing (Aim 3)**

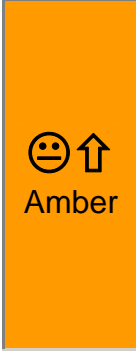




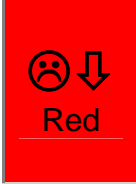

Ref	OBJECTIVES	MEASURES	ALERT	ISSUES (current & future) and IMPACTS		
1.3	Objective 7 Making homes more affordable	Actions – Progress against key activities	 Green	<ul style="list-style-type: none"> <li>Affordable Housing Development Partnership has been established and the Partnership will facilitate the provision of new high quality affordable housing and help meet the identified housing need</li> <li>£6.7 million secured HCA Funding for affordable housing schemes completed in 2011/12 and £2.75 million secured to date for 2012/13 schemes.</li> </ul>		
		Target of 200 affordable homes delivered	 Green	<p><b>218 affordable units were completed</b> during the period 01 April 2011 – 31 March 2012. The key schemes that completed this year were: Waterside House (Firepool); Wordsworth Drive; Hyde Lane; Bishops Hull.</p> <p>Previous years data: 2008/09 = 65; 2009/10 = 124; 2010/11 = 197</p> <p>The 2012/2013 affordable housing target is 200 units.</p>		
		% of non-decent council homes	 Green	<p><b>0.07% were non decent (4 out of 5971 properties) as at end March 2012</b></p> <p>Target = max 0.5% (25 properties)</p>		
	Somerset West Private Sector Housing Partnership  Objective: Better standards and interventions in the private sector stock, by improving housing conditions				Measure	Quarter 4 - cumulative performance 2011/12
					Energy efficiency	670 loft insulations; 481 cavity wall insulations; 21 boiler replacements; 13 night storage heater replacements; 18 gas heating system replacements (no targets as demand led/budget constrained)
					No of private sector homes improved to Decent Homes	180 made decent Annual Target = 100
					No of empty properties brought back into use	New Homes Bonus (year 2: Oct 10 – Oct 11) = 45 empty properties brought back into use (Annual Target 60). 2011/12 cumulative = 67 (In addition 110 through a street survey in last quarter)
			No of statutory Disabled Facilities Grants* approved & implemented	47 in private sector stock, 49 in Council stock Annual Target = 36 private sector, 48 in Council stock * statutory responsibility if eligibility proven		
			No of statutory housing standards interventions (enforcement activities)	32 Houses in Multiple Occupation (HMO) inspected Target = 30 HMO inspections to be completed 36 fitness conditions complaints dealt with Target = 15 fitness complaints to be dealt with		






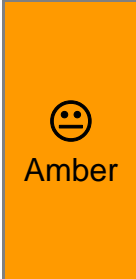


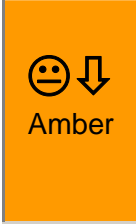

As at: 12/06/2012 **TDBC SCORECARD Q4 2011/12** (Appendix A)

**Climate Change (Aim 4)**


Ref	OBJECTIVES	MEASURES	ALERT	ISSUES (current & future) and IMPACTS
1.4	<b>Objective 8</b> Meet TDBC's & partner organisation's internal climate change commitments	<b>Actions –</b> Produce and implement Carbon Management Plan (CMP)	 Green	<ul style="list-style-type: none"> <li>• CMP (containing 52 actions in 2011/12) - 81% are on track or completed (42/52) and 19% (10 actions) have either been removed or deferred.</li> <li>• A formal progress monitoring report will be produced in May 2012</li> <li>• The Carbon Management Steering Group informally tracks progress quarterly and is also reported informally to staff in the quarterly Footprint Newsletter</li> <li>• The Green Champions project on reducing paper usage is on-going</li> <li>• Draft CMP for 2012/13 has been produced with adoption anticipated June 2012</li> </ul>
		3% reduction in CO2 by Mar 12		<p><b>2011/12 outturn data will be ready by end May</b></p> <p>TDBC's annual 3% reduction in Co2 (2009/10 to 2010/11) is slightly better than the average reduction of the 9 districts in our 'family group'</p>
		Adapting to climate change	 Green	LAA target now removed, however Climate Change Adaptation plans were updated by Core Council Managers early 2010, and are currently included within the 2011/12 Core Council Service Plans.
	<b>Objective 9</b> Work with communities to reduce carbon emissions across the Deane	<b>Actions –</b> Progress against key activities	 Green	<ul style="list-style-type: none"> <li>• Taunton Deane Partnership has agreed the setting up of working groups to coordinate the development of a Climate Change &amp; Local Resilience Strategy. A scoping workshop with community stakeholders was held in January. 3 working groups are now operational. All Stakeholders to reconvene in June. Strategy to be completed Dec 2013.</li> <li>• TDBC has made a commitment to build 4 flats on a council owned site for elderly people to 'Passivhaus' standard</li> <li>• Planning has commenced on a workshop for Councillors on Sustainable Construction in partnership with Building Control (Sept 12)</li> </ul>
	Per capita CO2 emissions in TD area	 Green	<p>Latest data published in Sept 2011 showed an <b>11% reduction</b> from 2006 to 2009 in Taunton Deane. At 5.8 tonnes per head, Taunton Deane is 7% better than the South West average, and 10% better the UK average.</p> <p>(NB - data published annually in September but with a 2 year time lag)</p>	

2. SERVICE DELIVERY							
Excellent services - Customer driven - A dynamic organisation - Local focus							
Ref	OBJECTIVES	MEASURES	ALERT	ISSUES (current & future) and IMPACTS			
2.1	Ensuring development proposals are dealt with positively, with an emphasis on quality outcomes Delivering the Development Management Service aims	Planning Applications Speed of Processing	 Amber	<b>Type</b>	<b>Outturn</b>	<b>Targets</b>	<b>Comments</b>
				a) Major	48.7% ↑ (19/39)	65%	The general performance is one of an improving picture, especially with Minor & Other applications, and Planning Appeals. The performance figure for major applications, although off target and slightly down on last year, improved throughout the year. A proposal to change the performance monitoring & targets for major applications from April 2012 was endorsed by the Executive in March.
				b) Minor	78.8% ↑ (242/307)	75%	
c) Other	86.5% ↑ (660/763)	85%					
		% of appeals allowed against the authority's decision	 Green	<b>Outturn 2011/12 = 22.7%</b> (Target max 25%) Total of 22 appeals lodged, with 5 of these allowed against the council's decision.  Last year was 31% (4 / 13)			
2.2	Safeguarding the health, safety & welfare of everyone in the Borough Delivering the aims of the Environmental Health Service	Satisfaction with EH regulatory services	 Green	<b>Outturn 2011/12 = 99%</b> (Target = 75%)			
		Food Safety compliance	 Green	<b>Outturn 2011/12 = 87%</b> (Target = 80%)			
		Environmental Protection Team reactive tasks	 Green	<b>Outturn 2011/12 = 86% Total Service Requests responded to in target time</b> Requests for service (eg pest control, dog warden, noise, odour, drainage, air pollution, public health)			
		Health & Safety intervention visits (Commercial premises only)	 Red	<b>Outturn 2011/12 = 31%</b> (Target = 90%) The target number of health and safety inspections has been reduced in line with the most recent HSE guidance, however, staff resources have been diverted as a result of events in November 2011, leaving a significantly depleted staffing level to cover the ongoing intensive workload			
		Licensing inspections	 Green	<b>Outturn 2011/12 = 112% of annual inspection programme completed</b> (161 inspections completed against annual target 144) Target 75%			







As at: 12/06/2012 **TDBC SCORECARD Q4 2011/12** (Appendix A)

2.3	<b>Delivering customer driven services</b> To deliver customer focussed services, achieving high levels of customer satisfaction.	Calls resolved at 1 <sup>st</sup> point of contact		<b>2011/12 monthly average = 96.5%</b> (Target 91%) The monthly KPI target was achieved for all 12 months during 2011/12.																																					
		Calls answered within 20 seconds		<b>2011/12 monthly average = 81%</b> (Target 80%) The monthly KPI target was achieved for 10 out of 12 months during 2011/12.																																					
		Calls abandoned		<b>2011/12 monthly average = 4.8%</b> (Target <5%) The monthly KPI target was achieved for 9 out of 12 months during 2011/12. NB: issues occurred in Qtr 4 (March) with combination of CTAX summonses, new bills and Garden Waste bills all being sent within a few days of each other																																					
		Complaints measures -10 day response - % Complaints upheld		<table border="1"> <thead> <tr> <th rowspan="2"></th> <th colspan="2">Total no. complaints</th> <th colspan="2">% 10 day response</th> <th colspan="2">% upheld</th> </tr> <tr> <th>Q4</th> <th>Q4 last year</th> <th>Q4</th> <th>Q4 last year</th> <th>Q4</th> <th>Q4 last year</th> </tr> </thead> <tbody> <tr> <td>TDBC</td> <td>57</td> <td>26</td> <td></td> <td>96%</td> <td></td> <td>22%</td> </tr> <tr> <td>SWP</td> <td>11</td> <td>29</td> <td></td> <td>52%</td> <td></td> <td>92%</td> </tr> <tr> <td><b>Total</b></td> <td><b>68</b></td> <td><b>55</b></td> <td><b>90% *</b></td> <td><b>73%</b></td> <td><b>38% *</b></td> <td><b>53%</b></td> </tr> </tbody> </table> <p>A detailed Customer Feedback report for 2011 was taken to Corporate Scrutiny 22 March. * Please note that these results are based on closed complaints – some complaints from Qtr 4 remain open on the recording system, therefore the overall results may change</p>					Total no. complaints		% 10 day response		% upheld		Q4	Q4 last year	Q4	Q4 last year	Q4	Q4 last year	TDBC	57	26		96%		22%	SWP	11	29		52%		92%	<b>Total</b>	<b>68</b>	<b>55</b>	<b>90% *</b>	<b>73%</b>	<b>38% *</b>	<b>53%</b>
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Benefits Service: Time to process new claims		<b>Outturn 2011/12 = 18.68 days</b> (Target = 22 days) (Q4 last year 2010/11 was 18.28 days)																																							
Landlord Services – satisfaction with repairs		<b>98.2% satisfied overall with the repairs service</b> (Target = 98%) Results from most recent survey results Q2 & Q3 (July – Dec 2011)																																							
2.4	<b>Ensuring the Borough is a clean and attractive place to live, work &amp; visit</b> Delivering Parks, Street Cleansing, Highways & Transport Services that are high quality & cost-effective	Street & environmental cleanliness Fly-tipping target		<b>2011/12 outturn = Grade 3 “not effective”</b> Target: <b>Grade 2 “effective”</b> A significant increase in fly tipping has occurred since the reduced opening hours have been in place at the civil amenity site. The grade is made up the number of incidents and the number of actions taken. <b>Incidents in 2010/11 = 407; Incidents in 2011/12 = 667.</b> NB - Somerset County Council are funding any additional Fly-Tipping over & above the level of previous years																																					
		Quality assurance accreditation / Awards		Taunton was awarded a Gold medal in the Britain in Bloom competition and the judges commented that ‘the standard of street cleansing was exceptional’ and ‘the street floral displays were outstanding’. In the same competition Vivary Park was awarded a heritage award and there were three local neighbourhood awards given. The four Green Flags (French Weir, Victoria, Vivary and Wellington Parks), Heritage Award (Wellington Park) and the Green Pennant (Swains Lane) have all been successfully retained.																																					

**3. MANAGING FINANCES** Separate Budget Outturn report to Corporate Scrutiny June 2012




Ref	OBJECTIVES	MEASURES	ALERT	ISSUES (current & future) and IMPACTS
3.1	<b>Budget monitoring</b> To control spending within approved budget total for the year	<b>General Fund Revenue</b> within 0.5% = 😊 0.5 – 2% = 😐 over 2% = 😞		2011/12 Outturn = xxxx (= xx%) against budgeted net expenditure of £xxxx  <span style="color: red;">Separate Budget Outturn report to follow - Corporate Scrutiny June 2012</span>
		<b>General Fund Capital</b> within 2% = 😊 2 – 3.5% = 😐 over 3.5% = 😞		2011/12 Outturn = xxxxx (excluding slippage) (= xx%) against budgeted net expenditure of £xxxx  <span style="color: red;">Separate Budget Outturn report to follow - Corporate Scrutiny June 2012</span>
		<b>Housing Revenue (HRA)</b> within 0.5% = 😊 0.5 – 2% = 😐 over 2% = 😞		2011/12 Outturn = xxxxx (= xx%) against budgeted gross expenditure of £xxxx  <span style="color: red;">Separate Budget Outturn report to follow - Corporate Scrutiny June 2012</span>
		<b>HRA Capital</b> within 2% = 😊 2 – 3.5% = 😐 over 3.5% = 😞		2011/12 Outturn = xxx (xx%) against budgeted net expenditure of £xxxm  <span style="color: red;">Separate Budget Outturn report to follow - Corporate Scrutiny June 2012</span>
3.2	<b>Reserves</b> To maintain an adequate reserve (based on financial risk analysis)	<b>General Fund reserve</b> >£1.25m = 😊 £1 - £1.25m = 😐 <£1m = 😞		General Fund Reserve Balance as at March 2012 is £xxm.  <span style="color: red;">Separate Budget Outturn report to follow - Corporate Scrutiny June 2012</span>
3.3	<b>Next year's budget gap</b>	A balanced budget 2012/13	 Green	At its meeting on 21 <sup>st</sup> February 2012 Full Council set a balanced budget for 2012/13

As at: 12/06/2012 **TDBC SCORECARD Q4 2011/12** (Appendix A)


Ref	OBJECTIVES	MEASURES	ALERT	ISSUES (current & future) and IMPACTS
3.4	Debt collection	Council Tax Target = 97.8%		<b>2011/12 outturn = 98.34%</b> (last year 2010/11 was 98.21%)
		NNDR Target = 98.4%		<b>2011/12 outturn = 99.22%</b> (last year 2010/11 was 99.01%)
		Housing Rent Target = 98.3%		<b>2011/12 outturn = 98.43 %</b> (last year 2010/11 was 98.1%)
		Sundry Debts position  In SAP only*	 Amber	
<b>Outstanding debt</b>	<b>£2.93m</b>	<b>£3.53</b>		
<b>Aged debt over 90 days old</b>	<b>£1.24m</b>	<b>£1.46m</b>		
				As can be seen above, the <b>outstanding debt</b> position at 31st March, 2012 was appreciably lower than for the corresponding time in 2011, which in turn was significantly lower than the balance of £5.88m which existed at 31st March 2010. Similarly <b>debt over 90 days</b> old is lower than the corresponding point in 2011 and less than half the value of over 90 day debt which existed at 31st March 2010 (£2.52m). <b>The overall direction of travel of sundry debt levels is therefore downward.</b> A report is due to go before Corporate Governance in June 2012 providing more detail on the progress which has been made in reducing sundry debt levels.
3.5	Benefits subsidy	To achieve 100% subsidy		<b>Projection for 2011/12 = 100%</b> (by remaining in the lower threshold for LA error overpayments). NB: This is subject to final validation by the Audit Commission
3.6	Procurement Transformation Project Ensure TDBC realises benefits of the various transformation projects	Value of Procurement Savings against original expectation (£10m over 10 years)	 Red	<b>This alert is red because the procurement savings which have been delivered to date remain significantly below the level envisaged at the start of the SwOne contract.</b> Progress is being made however. The gas servicing contract has recently been re-let, which should deliver significant savings (which are not yet included within the figures below). Work is also ongoing in respect of DLO stores and planned and routine property maintenance in addition to other initiatives. Procurement savings are 'top sliced' from budgets, in recognition of procurement initiatives signed-off, some of which deliver savings in just one year and others which deliver savings over several years. The sum to be 'top sliced' in respect of 2012/13 will be calculated in early June 2012 and again during the year as new procurement savings are identified. At the end of the 2011/12 financial year, a cumulative total of <b>£1.2m</b> had been top-sliced from budgets in recognition of procurement savings made so far. To date <b>£2.2m</b> of procurement savings have been signed-off, of which approx £1m will be delivered over future years.






## 4. KEY PROJECTS

Ref	OBJECTIVES	MEASURES	ALERT	ISSUES (current & future) and IMPACTS
4.1	<p><b>Local Development Framework (LDF) Core Strategy</b> To create a plan to deliver sustainable growth</p>	<p>- Publish Core Strategy for consultation in Mar/Apr 2011 - Adopt the LDF Core Strategy in March 2012</p>	 Amber	<p>The Core Strategy has been subject to an Examination in Public. Following publication of the new National Planning Policy Framework, the Inspector has requested further submissions to be made by interested parties before issuing his final report. <b>It is anticipated that the Plan will now be adopted by September 2012.</b></p>
4.2	<p><b>DLO transformation project</b></p>	<p>To deliver the specified benefits (financial and non-financial) of the DLO transformation</p>	 Green	<p>The transformation plan was approved by Full Council on 16 Aug 2011 and is on course to deliver above and beyond the specified benefits.  Progress is overseen by the DLO Transformation Members' Steering Group</p>
4.3	<p><b>SAP BOP (Back Office Processing) system re-launch</b></p>	<p>SAP Back Office Processing (BOP) system implementation</p>	 Amber	<p>As previously reported, all essential business critical modules of SAP are LIVE and in use across the organisation. Progress has been made in relation to the list of 106 items which the SwOne partners have been pursuing with SwOne in relation to SAP (some of these items are quite minor and others are more significant). This list has reduced to approx 48 items in recent months (not all of which does TDBC have an interest in, as some are partner specific). During the past 12 months, in addition to a number of smaller changes being made to SAP to improve the user experience or improve functionality, the following key changes have been implemented within SAP: LSO – online learning booking tool; Expenses; EPRF - electronic payment request functionality; PCR – Personnel change request form; Equalities – enhanced functionality now in SAP; HR headcount reports; Access rights for retained HR. The four key areas where TDBC are pursuing change with SwOne, before the remaining functionality is rolled out across the organisation are: <b>Sickness, PRED (performance review), Corporate Feedback</b> and <b>E-Recruitment</b>. For each of these functions adequate alternative arrangements are in place, and are working well, until such time as the SAP functionality is delivered by SWOne to meet the requirements of the Council. <b>This alert will consequently remain amber until these 4 areas of functionality have been rolled out across the Council.</b></p>

As at: 12/06/2012 **TDBC SCORECARD Q4 2011/12 (Appendix A)**




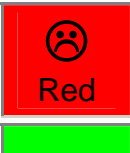
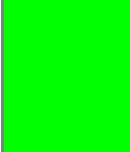

4.4	<b>HRA Reform Project</b>	Monitor progress against required outputs for each workstream as detailed in the project outline	 <b>Green</b>	<p>The Business Plan 2012-42 and recommendations in the accompanying report received final approval from Community Scrutiny Committee and Executive in February 2012.</p> <p>A final debt settlement figure was received from the CLG in January 2012 and following advice from our Treasury Management Advisors the required sum was borrowed from the Public Works Loan Board. The financial transaction to exit the negative subsidy system was made successfully to the CLG on the 28<sup>th</sup> March 2012.</p> <p>The Project Group is now establishing how to effectively monitor the new business plan including a Social Housing Development Fund and is ensuring that the actions from the business plan are incorporated into Housing Services 'business as usual'.</p> <p>The project is now coming to a close and will not be monitored in the Corporate Performance Report in future. A project closedown report including lessons learnt has been produced.</p>
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## 5. KEY PARTNERSHIPS







Ref	OBJECTIVES	MEASURES	ALERT	ISSUES (current & future) and IMPACTS		
5.1	<b>Taunton Deane Partnership (TDP)</b>	Progress against the 3 TDP priorities	 Green	<p><b>Priority Areas Strategy (PAS):</b></p> <ul style="list-style-type: none"> <li>Please see section 1.1 (Tackling Deprivation, Objective 1) of the scorecard</li> </ul> <p><b>Planning Cycles:</b></p> <ul style="list-style-type: none"> <li>This priority is being delivered through the Troubled Families Programme. This is a national programme which is seeking to improve the lives of vulnerable households through intervention and more joined-up partnership service delivery.</li> <li>Key issue                             <ul style="list-style-type: none"> <li>Districts across the County are putting resources into the Project to fund a designated resource. Limited budget within the TDP and limited resource within the TDBC Strategy Team will mean that a similar resource commitment may not be possible. This will mean that success will be largely dependent on the work of partners within the TDP in progressing the Troubled Families work.</li> </ul> </li> </ul> <p><b>Promoting Taunton Deane:</b></p> <ul style="list-style-type: none"> <li>Having scoped this priority in some detail, it is clear that there are many agencies that are undertaking similar work. There is ongoing discussion with Partners about the need to continue with this priority.</li> </ul>		
5.2	<b>Southwest One</b>	Efficient delivery of in-scope services (basket of KPIs)	 Green	<p style="text-align: center;"><b>Key Performance Indicators – Quarter 4 (2011/12)</b></p> <p><b>Quarter 4 = 95.5% KPIs on target (63 / 66)</b>                      Year (2011/12) = 96.2% KPIs on target (204 / 212) (last year 2010/11 = 96.9%)                      A full Southwest One performance report will be brought to Corporate Scrutiny in July.</p>		
		Progress against key business objectives		 Amber	<table border="1" style="width: 100%;"> <tr> <td style="background-color: #FF0000; color: white; text-align: center;"><b>Quarter 4 KPI failures ☹️</b></td> <td style="background-color: #00FF00; color: white; text-align: center;"><b>Quarter 4 Successes 😊</b></td> </tr> <tr> <td> <p><b>Customer Contact:</b>                      % of calls answered in 20 secs – failed in March                      Abandoned call rate - &lt;5% - failed in March                      (Failures due to high level of inbound calls in first two weeks of the month).</p> </td> <td> <p><b>Revs &amp; Ben:</b> Best collection results ever achieved for in-year collection of Council Tax &amp; Business Rates</p> </td> </tr> </table> <p>Broadly business objectives are being met in most services and service delivery is stable. The Finance Advisory improvement plan is complete – service delivery has improved and continues to be monitored as business as usual. The ICT service still has areas of poor delivery which are being addressed with our authority partners &amp; through contractual remedies. Service delivery improvement plans are now agreed for most services &amp; actions are in place for those not agreed. Delivery of these plans will be monitored and tracked. The SW1 Board continues to progress the financial plan to address economic challenges &amp; the authorities continue to work with them to ensure service delivery is not impacted.</p>	<b>Quarter 4 KPI failures ☹️</b>
<b>Quarter 4 KPI failures ☹️</b>	<b>Quarter 4 Successes 😊</b>					
<p><b>Customer Contact:</b>                      % of calls answered in 20 secs – failed in March                      Abandoned call rate - &lt;5% - failed in March                      (Failures due to high level of inbound calls in first two weeks of the month).</p>	<p><b>Revs &amp; Ben:</b> Best collection results ever achieved for in-year collection of Council Tax &amp; Business Rates</p>					










As at: 12/06/2012 **TDBC SCORECARD Q4 2011/12** (Appendix A)

5.3	Tone Leisure 'More people, more active, more often'	Target 1% increase in total leisure visits	 Red	Quarter 4 saw a 1% growth in usage across the contract with fitness class usage very strong, Swimskool visits high and an improvement in casual swimming. However, overall for the full year the number of visits decreased by 3%, with declines in swimming, leisure activity and club and school usage.
		Progress against Tone Leisure key business objectives	 Red	2011-12 proved to be a very challenging year for Tone as projected. Though the full year accounts are not yet complete, the income in quarter 4 remained off target -£31k and the company ended the year £77k adrift of sales budget. The company focus remains very much on balancing costs with sales performance and during quarter 4 a number of SMT led projects commenced to allow Tone to flex its cost base in line with sales. A full Tone Leisure performance report will be presented to Community Scrutiny in June.
5.4	Somerset Waste Partnership To increase participation in the recycling service through promotion and enforcement	% of household waste sent for reuse, recycling & composting	 Green	<b>2011/12 outturn (cumulative to Quarter 4) = 46.2%</b> (Target = 45.4%)  (last year 2010/11 was 45.0%)
		Residual household waste	 Red	<b>2011/12 outturn (cumulative to Quarter 4) = 394 kg per household</b> <b>Target = 380 kg per household</b> (last year 2010/11 was 383 kg per household)
		Progress against key business objectives	 Green	The recycling rate (and tonnage of captured material) has risen slightly giving a slightly above target outcome. We have however also seen a moderate upturn in tonnage of residual household waste set out for collection. Both are assumed to be due in some measure to two potentially linked factors:- 1. The introduction of Sort It Plus has diverted voluminous material such as cardboard and plastic bottles out of wheeled bins. This has left more spare capacity for the householder to use for items that may not have been placed in bins previously. This hypothesis can only be fully tested by waste composition analysis. 2. People are less inclined to make trips to Recycling Centres and more inclined to use the kerbside service (which has net carbon / traffic reduction benefits). There are at least 3 possible reasons for this: (a) Sort It Plus has removed the need to take plastic bottles and cardboard to the RCs for recycling (b) Petrol/ Diesel prices have risen steeply in the period (c) Reduced hours introduced at Recycling Centres in 2011/12. Detailed performance reports are reported quarterly at the Somerset Waste Board – Members are provided access to these papers & minutes.
5.5	South West Audit Partnership	Target min 90% of 2011/12 Audit plan delivered	 Green	<b>95% of planned audits as at end of quarter 4 were complete or are at draft report.</b>









## 6. PEOPLE (Human Resources)

Ref	OBJECTIVES	MEASURES	ALERT	ISSUES (current & future) and IMPACTS
6.1	<b>Staff Sickness</b> Reduce sickness absence through strong absence management, revised policies & procedures, & training	Target = 8.5 working days max lost per FT employee	 Red	<b>2011/12 actual = 9.96 days</b>  (2010/11 actual 9.62 days)  <b>Please refer to appendix B for further detail.</b>
6.2	<b>PRED / Training Plans</b> Maintain effective performance management of people and establish & deliver development needs	100% completion of PREDs (staff appraisals)	 Green	Theme 1 are 100% up-to-date (where due) Theme 2 are 100% up-to-date (where due) Theme 3 are 90% complete (with remainder scheduled by the end of April) Theme 4 are 98.4% complete.
		100% completion of training plans	 Green	Although only 76% training plans were completed in 2011/12 , <b>there has been 100% completion with the 2012/13 training plans</b> (ie service training plans received as part of the annual service Learning & Development budget allocation).
		100% delivery of 'essential' training activities (corporate training plan)	 Green	All planned activity completed including work on 2012/13 training plans.
6.3	<b>Staff Turnover</b>	Target 12% (voluntary leavers as % of staff in post)	 Green	<b>Total turnover = 10.2%</b> <b>Voluntary turnover = 4.3%</b> Early retirement / redundancy = 2.7% Ill-health retirement = 0% Other (End of contract/ dismissal/TUPE) = 3.2%
6.4	<b>Improve Staff Satisfaction</b>	Results from staff survey / resulting action plan	 Green	The Staff Survey results have been provided to CMT and will now be discussed with UNISON and Leads to develop a new action plan. The previous action plan has helped achieve an <b>improvement in 56 of the 69 comparable questions</b> (from 2010 to 2011) and the average increase was 10.3% per question.

## 7. CORPORATE MANAGEMENT

Ref	OBJECTIVES	MEASURES	ALERT	ISSUES (current & future) and IMPACTS												
7.1	<b>Corporate Governance Action Plan</b> Deliver the action plan, focussing on high priority areas	Deliver 95% of High priority Actions, and 80% of Medium priority actions by target dates	 Amber	The 2011/12 Corporate Governance Action Plan has been reviewed and updated to include the most recent <i>external</i> audit recommendations. 24 actions from the previous plan have been completed – the new plan now includes 22 actions, with the status as at end December 2011 being: <table style="margin-left: 20px; border-collapse: collapse;"> <thead> <tr> <th></th> <th style="text-align: center;"><u>High priority actions</u></th> <th style="text-align: center;"><u>Total actions</u></th> </tr> </thead> <tbody> <tr> <td>Green (on course)</td> <td style="text-align: center;">= 50% (5/10)</td> <td style="text-align: center;">= 73% (16/22)</td> </tr> <tr> <td>Amber (some concern)</td> <td style="text-align: center;">= 50% (5/10)</td> <td style="text-align: center;">= 27% (6/22)</td> </tr> <tr> <td>Red (off course)</td> <td style="text-align: center;">= 0%</td> <td style="text-align: center;">= 0%</td> </tr> </tbody> </table> <p>A detailed report was taken to the Corporate Governance Committee 12<sup>th</sup> December, and the next progress update report is due in June</p>		<u>High priority actions</u>	<u>Total actions</u>	Green (on course)	= 50% (5/10)	= 73% (16/22)	Amber (some concern)	= 50% (5/10)	= 27% (6/22)	Red (off course)	= 0%	= 0%
	<u>High priority actions</u>	<u>Total actions</u>														
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Amber (some concern)	= 50% (5/10)	= 27% (6/22)														
Red (off course)	= 0%	= 0%														
7.2	<b>Audit &amp; Inspection</b> Ensure that statutory Audit & Inspection obligations are met	Internal audit findings	 Amber	2011-12 Internal Audit Work: In relation to quarters 1, 2, 3 & 4 there were 38 audits of which 29 audits are complete and 7 at draft report and 2 in progress. <p>The following audit assessments were reported in respect of these audits where complete or draft (draft reports could be subject to change):</p> <ul style="list-style-type: none"> <li> Comprehensive assurance = 3</li> <li> Reasonable assurance = 14</li> <li> Partial assurance = 10*</li> <li> No assurance = 0 (Non-Opinion = 6)</li> </ul> <p>Internal Audit (SWAP) reports quarterly on audit plan progress, assurance levels and priority recommendations to the Corporate Governance Committee (next report due June 2012).</p> <p>*Creditors &amp; debtors examined Q1 and Q3 so opinion recorded once to avoid duplication of same system.</p>												
		2010/11 Final Accounts unqualified	 Green	The 10/11 accounts were unqualified by District Audit												

As at: 12/06/2012 **TDBC SCORECARD Q4 2011/12** (Appendix A)

7.3	<b>Equalities &amp; Diversity</b> Develop practices & policies based on Equalities Framework for Local Govt ('achieving' level)	Council reports including Equality Impact Assessments (EIA)	 Amber	21 reports sent to the Executive during Quarter 4 were monitored for equality impact, 16 of which had potential equality implications. <b>81% of these contained either an EIA or a full explanation of any equality implications.</b> This is a marked improvement on previous performance. (Breakdown - EIA's attached = 8; Full explanation within body of report = 5; No mention of equality implications = 3). Of the 5 reports with no apparent equality impacts, only 2 gave a full explanation as to why this was concluded.
		Themes/Service Equality Action Plans	 Amber	The strategy unit are currently developing new Equality Objectives for 2012/13. These will be published on the TDBC website, as required by new legislation, and will be embedded within the Performance Scorecard from Quarter 1 2012/13.
7.4	<b>Risk Management</b>	Delivery of RM Strategy & Policy & Procedures	 Green	A full review of strategic risks was undertaken by CMT in January – February 2012, and a refreshed Corporate Risk Register was discussed at the Corporate Governance Committee March 2012. The Corporate Risk Management Action Plan is on track.
7.5	<b>Value for Money / Benchmarking</b> To ensure that Services provide excellent Value for Money (VfM)	Council Tax charges – in lowest quartile	 Green	TDBC remained in the lowest quartile in 2011/12. (£136* = ranked 40 <sup>th</sup> out of 201 English Districts; 4 <sup>th</sup> out of 15 in 'Family Group'; & 3 <sup>rd</sup> out of the 5 Somerset Districts). * Council Tax average band D tax bill - amount paid to local services (excluding parishes)
		Target efficiency savings at areas with poor VfM	 Green	A project is underway to deliver a Value for Money analysis report for all TDBC services using comparative information on cost and performance. This analysis will inform the project to develop a new 3 year Corporate Business Plan for TDBC.
7.6	<b>Asset Management</b> Develop the Council's Asset Management arrangements	Implementation of Asset Mgt Plan (AMP)	 Green	Over 80% of the action points are complete or on target
		Target 70% of maintenance spend planned	 Green	All maintenance spend is now separated into planned and unplanned. Condition surveys now complete to enable more works to be planned.
7.7	<b>Health &amp; Safety</b> To raise the standard of Health & Safety knowledge & performance	Delivery of H & S Action Plan	 Green	Health and safety performance continues to improve across the priority issues identified in the current TDBC Health and Safety Forward Plan. However these priorities are now over three years old and a new approach is required to ensure consolidation and compliance across all functions of the Council. The Chief Executive has been asked to consider and consult on a new twelve month strategy which will achieve this aim and provide the data for the three H&S key performance indicators. This approach is fully aligned and supportive of the aim for "proper governance and safe stewardship of the organisation" as set out in the recent Theme 5 Core Council Review paper.

## Appendix B – Sickness absence (scorecard ref 6.1)

<b>Description of the issues / areas of concern</b>	<b>Sickness Absence</b>  3.6% increase in level of absence since 2010/11 per employee to <b>9.96 days * per employee</b> .  * This figure is subject to further examination and detailed analysis
<b>Risks &amp; impact</b>	Increased costs; Potential to lower team morale; Impacts on service delivery.
<b>Reasons that the issues have emerged</b>	Based on the returned BVPI the sickness levels for Core Council employees in 2011/12 are in the region of 9 days per employee and for 2010/11 were in the region of 8.5 days.  NB 2010/11 figures were audited by SWAP.
<b>Management actions &amp; CMT comments</b>	The BVPI returns for the last 8 years are set out below:  2004/5    12.6 days 2005/6    11.59 days 2006/7    11.62 days 2007/8    11.02 days 2008/9    10.9 days 2009/10   10.39 days 2010/11   9.62 days 2011/12   9.96 days *  Since 2008/9 several initiatives have been undertaken to reduce the level of sickness absence and this has included: <ul style="list-style-type: none"> <li>• Revision of Absence Management Policy and provision of training;</li> <li>• Specific training for DLO Supervisors in 2011/12 with Retained HR Manager;</li> <li>• Monthly reporting of sickness statistics by Theme to Retained HR Manager;</li> <li>• Monthly reporting of all long term sickness cases and management discussion on position/progress each month between SW1 HR and Retained HR Manager;</li> <li>• Monthly monitoring of employees who might trigger monitoring categories to identify early interventions;</li> <li>• Monthly reports to managers on staff meeting triggers and 1 follow up meetings now being held in accordance with Policy;</li> <li>• Increased use of Occupational Health Service for referral to achieve support for the employee and early return to work with assistance;</li> <li>• Additional advice on Occupational Health Services and processes to be followed has</li> </ul>

	<p>recently been completed for line managers;</p> <ul style="list-style-type: none"> <li>• Specific interaction with SW1 to achieve reduction of 4 days per employee in 2011/12 from the previous year;</li> <li>• Work with SCC, ASP and SW1 to develop an improved sickness absence module within SAP.</li> </ul> <p>.</p> <p>To ensure that we maintain a focus on wellbeing and sickness absence management further initiatives include:</p> <ul style="list-style-type: none"> <li>• Work with SW1 and UNISON on wellbeing initiatives;</li> <li>• Improvements to monthly reporting to include greater detail within Themes and also split between short term and long term;</li> <li>• Ability from 2012/13 for the Retained HR Manager to undertake more ad hoc reporting on all TDBC employees so that sickness types and trends can be monitored.</li> </ul>																								
<p><b>Sickness Comparison</b></p>	<p>Set out below is the comparison for Somerset districts over the last three years.</p> <table border="1" data-bbox="584 987 1326 1218"> <thead> <tr> <th>District</th> <th>2009/10</th> <th>2010/11</th> <th>2011/12</th> </tr> </thead> <tbody> <tr> <td>TDBC</td> <td>10.39</td> <td>9.62</td> <td>9.96 *</td> </tr> <tr> <td>MDC</td> <td>7.89</td> <td>8.74</td> <td>9.71</td> </tr> <tr> <td>SDC</td> <td>9.78</td> <td>9.40</td> <td>7.56</td> </tr> <tr> <td>SSDC</td> <td>9.56</td> <td>8.69</td> <td>6.92</td> </tr> <tr> <td>WSC</td> <td>6.39</td> <td>5.65</td> <td>3.42</td> </tr> </tbody> </table> <p>Data provided by the 'Sickness Absence Survey' in May 2011 by the Confederation of British Industry demonstrates that the average absence levels in the public sector is 8.1 days compared with 5.9 days in the private sector and an overall average of 6.5 days.</p>	District	2009/10	2010/11	2011/12	TDBC	10.39	9.62	9.96 *	MDC	7.89	8.74	9.71	SDC	9.78	9.40	7.56	SSDC	9.56	8.69	6.92	WSC	6.39	5.65	3.42
District	2009/10	2010/11	2011/12																						
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