

# Taunton Deane Borough Council

**Executive – 16 June 2010**

## **Performance Monitoring – Outturn report 2009/2010**

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

(This matter is the responsibility of Executive Councillor Terry Hall)

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

- 1.1 This report outlines the final performance data of the Council for the 2009/10 year
- 1.2 The detailed 2009/10 financial outturn data is submitted in a separate report although a high level summary is included in the Scorecard.
- 1.3 The monitoring of the Corporate Strategy, service delivery, performance indicators and budgets is an important part of the overall performance management framework.
- 1.4 **A high level summary of successes/improvements** in 2009/10 include the following:
  - NNDR debit collection exceeded target and improved on last year
  - a new Economic Development Strategy has been adopted
  - a significant decrease in serious acquisitive crime in Taunton Deane
  - a significant increase in visits to leisure centres & successful first year of the Free Swimming initiative
  - Carbon Management Plan completed
  - 96% of calls to the Customer Contact Centre were resolved at the first point of contact
  - Speed in processing planning applications ('minor' and 'other' applications)
  - 90% satisfaction of businesses with regulation services (Environmental Health service)
  - 'Street Scene' indicators (ie litter, detritus, graffiti, fly-posting, fly-tipping) have all improved on last year
  - 'Sort It Plus' roll out across the borough
- 1.3 **A high level summary of areas off course/objectives not met** in 2009/10 include:
  - Council Tax collection rates
  - Procurement benefits
  - Housing rent collection
  - Overall employment rate in the borough has decreased significantly
  - Additional homes provided and affordable homes delivered both significantly missed target due to the economic downturn
  - Household waste levels & recycling have missed target
  - Speed of processing 'major' planning applications, & planning appeals allowed
  - Environment Health inspections (licensing and health & safety)
  - Southwest One failed to achieve 9 KPI targets (4%) during 2009/10




## 2. The Performance Scorecard (please see Appendix A)

- A new Performance ‘Scorecard’ has been developed to monitor and manage the performance of all council services, and was introduced in Quarter 3, 2009/10. This scorecard is designed to be simple to use and to reduce the size of performance reports.
- Following submission of the Quarter 3 report & scorecard, feedback was gained from CMT, Executive and Corporate Scrutiny Committees, and improvements have been made for the Quarter 4 (Outturn) scorecard:
  - More ‘signposting’ to avoid too much detail on the scorecard
  - The alerts are more logical
  - The reason for Amber & Red alerts are more clearly identified

2.1 **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 by the 7 sections as listed above | 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/Executive will provide further information in addressing under performance. |

### Key to alerts:

|  | Reasons for alert   | Notes  |
|--|---|--|
| <br>(green) | Planned actions are on course                                   | Justification for the Green alert will be provided.<br>Key successes or exceptional performance will be outlined.  |
|  | Performance indicators are on target                            |  |
| <br>(amber) | Some uncertainty in meeting planned actions                     | The reason for the Amber alert will be made clear.<br>Mitigating actions will be outlined  |
|  | Some concern that performance indicators may not achieve target |  |
| <br>(red)   | Planned actions are off course                                  | A brief high level summary is included within scorecard.<br>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                  |  |

2.2 Please see the TDBC Scorecard at Appendix A for full details of 2009/10 Q4 performance.

**3. Finance Comments** from the Strategic Finance Officer (S151 Officer)

- The revenue outturn position is virtually on budget and well within any tolerances.
- The capital program and the HRA outturn are disappointing due to the amount of slippage being reported. We shall be looking at the profiling of the budgets involved to ensure that the correct in year budget and slippage is reported.
- The general fund reserve is above the minimum requirement showing a healthy reserve going ahead into very tough local government finance times.

3.1 A separate detailed report on the financial performance for 2010/11 is included on the agenda for this meeting.

**4. Legal Comments**

There are no legal implications in this report.

**5. Links to Corporate Aims**

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

**6. Environmental and Community Safety Implications**

Please see the following sections of the Scorecard for those areas contributing to the above: 1.3 & 1.5 (corporate strategy aims); 2.4 (Service Delivery – 'Street Scene'); 5.4 (Somerset Waste Partnership).

**7. Equalities Impact**

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

**8. Risk Management**

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

**9. Partnership Implications**

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

**10. 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 where necessary.

**Contact:**
















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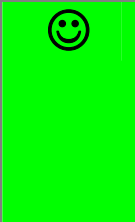
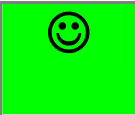
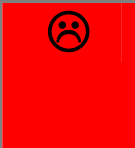
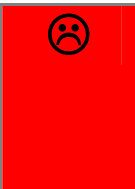
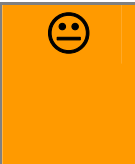
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## 1. CORPORATE STRATEGY AIMS

| Ref | OBJECTIVES   | MEASURES                                      | ALERT   | ISSUES (current & future) and IMPACTS  |
|-----|--|---|---|--|
| 1.1 | Economy (Aim 1)<br>Regenerating Taunton and strengthening the economy of the Borough | Actions - progress against the key activities |    |  New Economic Development Strategy adopted<br> TDBC supported a number of partnerships and schemes working to strengthen the rural economy<br> Cultural provision encouraged through support of the Brewhouse development scheme and various arts projects<br> Delivery of business support events to meet skills demand |
|     |  | Overall employment rate (LAA target: 77.5%)   |    | <b>74.5%</b> (Latest data from period Oct 08 - Sept 09)<br>Reduced from 83% in Sept 2008. The Somerset Economic Assessment states "the short-term future for the public sector is now uncertain" and that if there was a drop of 1000 Public sector jobs (approx 2%) it would lead to a further 500 job losses in the wider economy (eg retail & hospitality)<br><b>Action:</b> Enterprise Gateway Job Clubs created and focusing on inward investment (Project Taunton)   |
| 1.2 | Transport (Aim 2)<br>Minimising the growth in traffic congestion                     | Actions - progress against the key activities |    |  Cycling task & finish group has produced recommendations<br> TDBC staff travel survey expected in 2010<br> Work on TDBC travel plan has not yet resumed<br><b>Action:</b> Currently exploring the establishment of a Taunton Car Club for employees and residents.   |
|     |  | No measures available at Q4                   | N/A   | <i>These are annual or ad hoc measures and are not available at this time.</i>   |
| 1.3 | Crime (Aim 3)<br>Promoting safer communities and tackling anti-social behaviour      | Actions - progress against the key activities |  |  New CCTV cameras installed in Halcon<br> Licensing inspections backlog due to reduced team (ref 2.2)  |
|     |  | Serious acquisitive crime rate (decrease)     |  | <b>14% decrease on last year</b> - down from 1044 to 895 (= 149 fewer crimes)<br>A significant decrease on the previous year's figures. This represents 8.44 crimes per 1000 population, compared to 9.7 last year.  |
|     |  | Serious violent crime rate (decrease)         |  | <b>2% decrease on last year</b> - down from 1651 to 1610 (= 41 fewer crimes)<br>More actions are planned such as alcohol education workshops and more work with the night time economy. This slight decrease is set against closure for several late night venues, meaning less choice and potentially more crowded venues. It is therefore a reasonable achievement for the year.   |

|     |  |  |   |   |
|-----|--|--|---|---|
| 1.4 | <b>Healthy living (Aim 4)</b><br>Promoting healthy & sustainable communities | <b>Actions - progress against the key activities</b>             |    | <ul style="list-style-type: none"> <li> Hamilton Park and Oake play areas successfully opened and are well used</li> <li> Fuel Poverty reduction targets met</li> <li> Free swimming initiative year one was successful, resulting in overall 13% swimming growth. Other health initiatives also being delivered successfully (eg Health Walks, &amp; child obesity programme)</li> <li> Public Swimming Task &amp; Finish review up and running</li> </ul> |
|     |  | Net additional homes provided (Target= 1000pa)                   |    | <p><b>2009/10 = 458 dwellings</b><br/>                     5% increase on 2008/09, however completions are still well below LAA target and the strategic requirements set by the Proposed Changes to the Revised Regional Spatial Strategy for the South West. This is primarily as a result of the significant uplift in requirements since the draft RSS was published and the time it takes to produce the Core Strategy (which will identify deliverable sites increasing our supply). Additionally, the credit crunch and lack of developer finance has meant that many housing schemes have stalled or slowed output considerably.<br/> <b>Action:</b> addressed in new Corporate Strategy (2010-13) under new 'Regeneration' aim</p>   |
|     |  | Number of affordable homes delivered (Target = 233pa)            |    | <p><b>2009/10 = 124</b><br/>                     91% increase on last year, but does not meet the target of 233 due to difficulties with delivery on Section 106 sites due to critical financial situation nationally.<br/> <b>Action:</b> addressed in new Corporate Strategy (2010-13) under new 'Affordable Housing' aim</p>   |
|     |  | Number of households in temporary accommodation (Target= 56 max) |  | <p><b>45 as at end of Quarter 4</b><br/>                     2008/09 = 43<br/>                     This total has held at a relatively stable level for the last year. It is unlikely that it will reduce significantly in the coming months and is vulnerable to increasing because of a number of factors.</p>  |
|     |  | Leisure & swim visits (Target = 4% increase)                     |  | <p><b>Ref: Key Partnerships – Tone Leisure Section 5.3, (page 13)</b></p>   |

|     |  |  |  |  |
|-----|--|--|--|--|
| 1.5 | <b>Environment (Aim 5)</b><br>Safeguarding and Enhancing the local environment | <b>Actions -</b><br>progress against the key activities                      |   | ☺ Carbon Management Plan & accompanying Action Plan completed March 10<br>☺ CO2 emissions from TDBC operations reduced by 7.6% from last year (-365 tonnes)<br>☺ Sustainability standards within 'Taunton Protocol' signed up to for all TDBC owned sites (eg Firepool)<br>☺ Biodiversity Action Plan – 100% of targets achieved & 11/15 actions met |
|     |  | Improved street & environmental cleanliness                                  |   | <b>Ref: Service Delivery – Ensuring the Borough is a clean and attractive place to live, work &amp; visit</b><br>Section 2.4, (page 6)   |
|     |  | Residual household waste (Target = 362kg per household)                      |   | <b>Ref: Key Partnerships – Somerset Waste Partnership</b><br>Section 5.4, (page 13)  |
|     |  | % of household waste sent for reuse, recycling & composting (Target = 49.2%) |   | <b>Ref: Key Partnerships – Somerset Waste Partnership</b><br>Section 5.4, (page 13)  |
| 1.6 | <b>Delivery (Aim 6)</b><br>Delivering accessible, value for money services     | <b>Actions -</b><br>progress against the key activities                      |  | <b>Ref: Service Delivery (section 2)</b> for a summary of the key performance measures and issues of the key council services  |

## KEY TO ALERTS

|  |                                      |  |   |  |  |
|--|--------------------------------------|--|---|--|--|
| <br>(green) | Planned actions are on course        | <br>(amber) | Some uncertainty in meeting planned actions                     | <br>(red) | Planned actions are off course                 |
|  | Performance indicators are on target |  | Some concern that performance indicators may not achieve target |  | Performance indicators will not achieve target |

## 2. SERVICE DELIVERY

*Excellent services - Customer driven - A dynamic organisation - Local focus*

| Ref | OBJECTIVES   | MEASURES   | ALERT | ISSUES (current & future) and IMPACTS  |
|-----|--|--|-------|--|
| 2.1 | <b>Ensuring development proposals are dealt with positively, with an emphasis on quality outcomes</b><br>Delivering the aims of the Development Management Service | Planning Applications<br>Speed of Processing<br><br>Targets:<br>a) Major 65%<br>b) Minor 75%<br>c) Other 85% | ☹️    | ☹️ a) Major applications = <b>54%</b> (last year = 75%)<br>😊 b) Minor applications = <b>78%</b> (last year = 75%)<br>😊 c) Other applications = <b>88%</b> (last year = 83%)<br>Major applications – from 24 decisions, 10 were not decided within the 13 week target. 2 delays from Planning Committee decision, 3 from late amendments, 3 from S106 finalisation, 2 protracted negotiations.  |
|     |  | % of appeals allowed against the authority's decision (Target 25%)   | ☹️    | <b>2009/10 = 43%</b> (last year = 17%)<br>Total 12 appeals allowed against the council's decision<br>4 re concerns raised by Highways<br>1 re concerns raised by Highways & Conservation Officer<br>1 re concerns raised by Highways & Blackdown Hills AONB Planning Officer<br>1 re concerns raised by the Environment Agency<br>5 re interpretation of TDBC policies.<br><b>Action:</b> reported at Corporate Scrutiny 20 <sup>th</sup> May 2010 |
| 2.2 | <b>Safeguarding the health, safety &amp; welfare of everyone in the Borough</b><br>Delivering the aims of the Environmental Health Service                         | Satisfaction with EH regulatory services (Target = 75%)  | 😊     | <b>2009/10 = 90%</b><br>2008/09 result was 80%   |
|     |  | Food Safety compliance (Target = 80%)  | 😊     | <b>2009/10 = 88%</b> (2008/09 result was 86.5%)<br>😊 The Food Team have started a project to work with food business operators to provide healthier menus for children. Stage 1 involved a successful seminar.   |
|     |  | Environmental Protection Team<br>a) reactive tasks<br>b) proactive tasks                                     | 😊     | a) Requests for Service (e.g. pest control, dog warden, noise, odour, drainage, air pollution, public health).<br><b>89.4%</b> Total Service Requests responded to within target time (1922/2150)<br>b) Inspection Programme (e.g. Inspections of polluting industrial processes and private water supplies)<br><b>92%</b> Inspections that should have been carried out that were carried out   |





# TDBC SCORECARD Q4 2009/10 (Appendix A)




















|     |  |  |  |   |
|-----|--|--|--|---|
|     |  | Health & Safety intervention visits (Target = 90%)                 |  | <p><b>2009/10 = 77%</b> (277 / 359 visits)<br/>Due to reduced staff capacity.<br/><b>Action:</b> The H&amp;S inspections should be back on target in 2010/11 as we have radically changed the way the team works by merging with the Food Safety team, and have committed to fewer projects, which will allow them to concentrate on inspections.</p>   |
|     |  | Licensing inspections (Target = 100%)                              |  | <p><b>2009/10 = 49%</b> (207 / 421 inspections)<br/>Target unrealistic considering lack of staff and Licensing Manager during Core Council Review. Priority given to statutory work.<br/><b>Action:</b> Licensing Manager in post as of April 2010 and a new Licensing Officer is receiving training, and Licensing inspections will resume later this year, although it is anticipated that the number of inspections will not be as high as in previous years (NB: target 2010/11 = 75%) until the whole team is back on track with other work.</p> |
| 2.3 | <p><b>Delivering customer driven services</b><br/>To deliver customer focussed services, achieving high levels of customer satisfaction.</p> | 85% of calls resolved at 1 <sup>st</sup> point of contact          |  | <p><b>2009/10 = 96%</b><br/>Maintained the same level of performance as in 2008/09</p>  |
|     |  | 80% of calls answered within 20 seconds                            |  | <p><b>2009/10 = 84%</b><br/>2008/09 result was 86%</p>  |
|     |  | Complaints measures<br>- 10 day response<br>- % Complaints upheld  |  | <p><b>65%</b> responded to within 10 day target (98/134) (2008/09 result was 63%)<br/><b>51%</b> of complaints were upheld. (08/09 was 45%)<br/><b>Action:</b> briefing note being issued in June to all Managers re Corporate Feedback policies &amp; processes.<br/>A detailed report for 2009/10 will be provided to Members.</p>  |
|     |  | Satisfaction with the local area                                   |  | <p><b>2008 result = 88%</b> (Place Survey 2008)<br/>Top quartile nationally (average national = 81%).<br/>Next survey due later this year.</p>  |
|     |  | Benefits Service:<br>Time to process new claims<br>Target= 22 days |  | <p><b>Actual as at end Q4 = 18.6 days</b><br/>2008/09 result was 19.2 days</p>  |

# TDBC SCORECARD Q4 2009/10 (Appendix A)



|                   |   |  |  |  |
|-------------------|---|--|--|--|
|                   |   | <p>Benefits Service:<br/>Time to process changes of circumstance<br/>Target = 8 days</p> |   | <p><b>Actual as at end Q4 = 9 days</b> (last years result was 7.1 days)<br/>This is due to the impact of recession – more customers with changes in their circumstances due to changes in their income. Caseload and number of changes have increased accordingly.<br/>A full report on the Benefits Service administration was taken to Corporate Scrutiny 15<sup>th</sup> April 2010.<br/><b>Action:</b> Various improvements being implemented: pilot re processing at time of visit; process re-engineering; e-claims product launch by May 10 (to capture new claims &amp; changes electronically); &amp; plans for dealing with change of circumstances by phone</p> |
|                   |   | <p>Landlord Services – satisfaction with repairs<br/>(Target = 98%)</p>                  |   | <p><b>2009/10 result = 98%</b><br/>Latest survey results from January 2010</p>   |
| <p><b>2.4</b></p> | <p><b>Ensuring the Borough is a clean and attractive place to live, work &amp; visit</b><br/>Delivering Parks, Street Cleansing, Highways &amp; Transport Services that are high quality and cost-effective</p> | <p>Street &amp; environmental cleanliness targets.</p>                                   |   | <p><b>86% satisfied with local environment</b> (Place Survey 2008)<br/><br/>All areas improved on last year:<br/>% of surveyed land that is assessed as having deposits of:<br/>Litter 1%; Detritus 17%; Graffiti 1%; Flyposting 0%<br/>Fly-tipping – achieved a grade 1 (very effective)</p>  |
|                   |   | <p>Quality Assurance accreditation / Awards</p>  |  | <p>We have three Green Flag Parks: Vivary Park; Victoria Park; &amp; Wellington Park. The awards are judged annually &amp; all three parks have maintained this status for many years. Taunton has won the South West in Bloom competition for the last few years; we compete against Bath &amp; other large towns in our population class<br/>We have this year also submitted French Weir for Green Flag status and Swains Lane Nature Reserve for Green Pennant status.</p>   |

### 3. MANAGING FINANCES (ref separate Budget Outturn report for detailed budget monitoring)

| Ref | OBJECTIVES  | MEASURES   | ALERT   | ISSUES (current & future) and IMPACTS  |
|-----|---|--|---|--|
| 3.1 | <b>Budgets</b><br>To achieve a balanced 2009/10 budget by the financial year end      | <b>General Revenue</b><br>within 0.5% = <br>0.5 – 2% = <br>over 2% =    |    | <b>Outturn = deficit of £10,100</b><br>This represents an <b>underspend of £8,500</b> against final budget for the year.<br><br>A separate detailed report is provided on the 2009/10 Outturn position.  |
|     |   | <b>Capital</b>   |    | Total expenditure for the year £4.562m (= <b>£1.925m underspend</b> ). A separate detailed report is provided on the 2009/10 Outturn position.   |
|     |   | <b>Housing Revenue</b><br>within 0.5% = <br>0.5 – 2% = <br>over 2% =    |    | <b>Outturn = £963,000 below budget</b><br>Due to underspend on maintenance (asbestos & exterior high level work). A separate detailed report is provided on the 2009/10 Outturn position.<br>HRA reserves (working balance) carried forward into 2010/11 = credit of £2.685m (subject to audit), well above the minimum expectation. |
| 3.2 | <b>Reserves</b><br>To maintain an adequate reserve (based on financial risk analysis) | <b>General Fund reserve</b><br>>£1.25m = <br>£1 - £1.25m = <br><£1m =  |    | <b>£1.564m</b> as at end March 2010 (subject to audit)<br><br>This is above the minimum reserves expectation within the Budget Strategy.   |
| 3.3 | <b>Next years budget gap</b>  | A balanced budget 2010/11  |  | 2010/11 Budget agreed and balanced (ref Full Council 16 <sup>th</sup> Feb)   |
| 3.4 | <b>Debt collection</b>  | Council Tax<br>Target = 98.5%  |  | <b>Achieved 97.7%</b><br>Decrease of 0.2% on previous year (2008/09 was 97.9% which met target)<br>Annual Revs & Bens performance report going to Corporate Scrutiny 17 <sup>th</sup> June   |
|     |   | NNDR<br>Target = 98.82%  |  | <b>Achieved 98.9%</b><br>Increase of 0.82% on previous year (08/09 was 98.1%)  |
|     |   | Housing Rent<br>Target = 98.3%   |  | <b>Achieved 97.7%</b> (Previous year (08/09) was 99.2%)<br>From April to Sept 09 no rent arrears recovery was possible due to payments not being posted onto rent accounts. Since then we have had several weeks   |

|     |   |  |    |  |
|-----|---|--|----|--|
|     |   |  |    | when payments have been late and the officers are not confident that the correct figure is showing on the accounts. The officers are actively carrying out arrears recovery and attending court as necessary. More checks have to be carried out before legal actions are taken.   |
|     |   | Sundry Debts position<br><br>(Quantifiable measures are being developed) | ☹️ | <p><b>£5,859,000 Outstanding debt as at 31<sup>st</sup> March.</b><br/>                 £3,564,000 as at 5<sup>th</sup> Feb 2010 (as per last report to Corporate Scrutiny 18<sup>th</sup> Feb 2010). There was a large number of DLO related invoices raised as interface problems were resolved in March. Year end always generates additional invoices. <b>Actions:</b></p> <ul style="list-style-type: none"> <li>• Dunning (reminders &amp; final notices) is now in operation (apart from invoices with instalment plans and those relating to Piper Lifeline invoices).</li> <li>• There is now good usage of SAP for raising invoices by TDBC staff with depot invoices now also being produced.</li> <li>• There remains some backlog in Accounts Receivable (AR) team on admin on contracts and invoices.</li> <li>• A user-group is being created and training/reference materials are currently being prepared to support users.</li> <li>• A number of Service managers are now trained and able to check the status of debts for their service at any given time.</li> </ul> |
| 3.5 | Benefits subsidy  | To achieve 100% subsidy  | 😊  | <b>100% achieved</b> by remaining in the lower threshold for LA error overpayments   |
| 3.6 | Transformation Projects<br>Ensure TDBC realises benefits of the various transformation projects, including the adoption of a new procurement strategy | Procurement benefits<br>Original estimated target at end Mar 10<br>£653k | ☹️ | <p><b>£427k actual savings delivered</b><br/>                 Savings are behind original forecast made in 2007 (£653k)</p> <ul style="list-style-type: none"> <li>• Monthly procurement update report to CMT in June – SWOne Senior Manager will be challenged to produce plans to close the gap &amp; update on the changes from the original procurement saving plan</li> <li>• Quarterly procurement report going to Change Programme Members steering group.</li> <li>• Half yearly procurement report going to Corporate Scrutiny 17<sup>th</sup> June</li> </ul> <p><b>Action:</b> Full years spend now available in SAP which will aid analysis of future savings opportunities. Wave 3 initiatives due to commence imminently.</p>  |
|     |   | CCR proposed savings 2009/10<br>= £342,000 for                           |    | This information will be provided in a verbal update at the Executive meeting.   |

As at: 09/06/2010















# TDBC SCORECARD 2009/10 – Quarter 4






|     |                           |  |  |  |
|-----|---------------------------|--|--|--|
|     |                           | Theme 1                                |  |  |
| 3.7 | <b>Efficiency Savings</b> | 3.5% savings p.a (of 2007/08 baseline) |  | This information will be provided in a verbal update at the Executive meeting. |

## 4. KEY PROJECTS




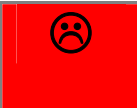
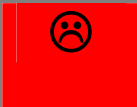
| Ref | OBJECTIVES  | MEASURES   | ALERT | ISSUES (current & future) and IMPACTS   |
|-----|---|--|-------|---|
| 4.1 | <b>Local Development Framework (LDF) Core Strategy</b><br>To identify sites to accommodate the Regional Spatial Strategy growth requirements to the year 2026 | Publish Core Strategy for consultation in Sept/Oct 2010<br><br>Adopt the LDF Core Strategy by September 2011 | ☺     | <ul style="list-style-type: none"> <li>• Reg 27 consultation in Oct/Nov rather than Sept/Oct, but will still achieve milestone for Housing &amp; Planning Delivery Grant (HPDG).</li> <li>• Core Strategy focus on smaller number of strategic sites and contribution to Core Strategy document from Urban Initiatives on employment deliver.</li> <li>• Detailed project plan prepared</li> <li>• Monthly LDF Steering Group meetings.</li> <li>• Interim release of sites in June to meet shortfall in Taunton's 5 year supply of housing sites.</li> </ul>   |
| 4.2 | <b>Housing Inspection project</b><br>Achieve min "performing adequately" score in formal housing inspection (Autumn 2010)                                     | Deliver project plan / work programme  | ☺     | Cross-theme Project Team meets monthly to monitor progress against outcome focused action plan. Key progress as at April 2010: <ul style="list-style-type: none"> <li>• evidence mapping completed</li> <li>• membership of the private sector housing partnership approved</li> <li>• affordable warmth and empty homes strategies drafted</li> <li>• asset management strategy objectives for landlord service agreed</li> <li>• tenant empowerment board recruited</li> <li>• strategic housing land availability assessment updated</li> <li>• strategy links outlined</li> </ul>   |
| 4.3 | <b>SAP implementation</b>   | SAP Back Office Processing (BOP) system implementation   | ☹     | The key elements of the system are working i.e. budgets, payments to suppliers, income posting, payroll, invoicing of debtors, the interface with the DLO systems.<br><b>Why is this amber?</b> - Because we still need to get the full 'procure-to-pay' automated payments process working and have yet to launch the HR module (this includes sickness notifications, claiming expenses/overtime, PREDs, H&S & the learning solution).<br><b>Action:</b> SW1 are currently making changes to the 'Organisational Management Structure' & 'Delegations' within the system. Once completed we will commence a phased rollout and training programme for the remaining elements<br><b>Impact:</b> the key functions are now working. Work-arounds are in place for the |


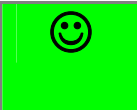
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|     |  |  |   | remaining functions. Using these work-arounds has minimal impact on TDBC, but significant impact on SW1.  |
|     |  | Customer Relationship Management (CRM) & website   |  | The new CRM system & website went live in late Nov 2009 with no significant problems having been encountered.   |
| 4.4 | Core Council Review  | Theme 2  |  | Growth & Development theme - Recruitment to agreed new structure<br>- Anticipate all vacant posts filled by end May 2010.   |
|     |  | Theme 3  |  | DLO - Implementation of option agreed by Members<br>- Project now under way to implement members' decision to pursue outsourcing of DLO, with internal transformation developed as a comparison option.   |
|     |  | Theme 4  |  | Community Services - Recruitment to agreed new structure<br>- Anticipate all vacant posts filled by end May 2010.   |
| 4.5 | Project Taunton<br>Improving quality of life, boosting business opportunity, building quality developments, improving transport infrastructure, developing sustainable communities and making the most of waterside living and working | Project progress & development milestones achieved<br><br>NB – full progress report produced by Project Director for Project Board quarterly |  |  <b>Firepool</b> – working well with St Mowden & positive progress being made<br> <b>Cricket Club</b> - Pegasus development & new stand now complete<br> <b>Tangier</b> – funding confirmed for The 3rd Way Road & bridge. Work began in April<br> <b>Retail</b> - £3.5m refurb of Old Market Centre complete<br> <b>Eco Development</b> - funding approved for studies to support future delivery of sustainable development<br> <b>Longrun Meadows</b> – planning consent granted for landscaping (inc flood prevention scheme), & work began in March<br> <b>'Our Place, Your Place'</b> – a successful community project ( <i>'Taunton: past, present &amp; future'</i> theme) with 4000 visitors<br> <b>Funding</b> - Growth Points revenue funding for 2010/11 received, however uncertainty about amount (possible 43% cut in promised allocation) and/or timing of capital funding for next year makes prioritisation of works & purchases complicated, & is having a severe effect on Project Taunton's ability to deliver.<br> <b>Brewhouse Theatre</b> – architectural scoping study complete for building extension/conversion. Urgent need for a water-tight business case & strong rationale for funding of the scheme<br> <b>Castle Green &amp; Goodland Gardens</b> – scheme progress dependent on capital funding for 2010/11. A difficult & complicated project due to number & interests of different owners. Many issues requiring resolution |

## 5. KEY PARTNERSHIPS


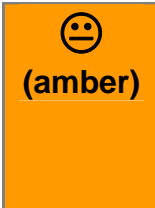
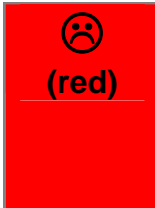
| Ref       | OBJECTIVES   | MEASURES   | ALERT   | ISSUES (current & future) and IMPACTS   |  |  |  |  |  |                   |                               |               |             |         |    |     |     |       |           |    |    |    |        |          |    |    |    |       |       |
|-----------|--|--|---|---|--|--|--|--|--|-------------------|-------------------------------|---------------|-------------|---------|----|-----|-----|-------|-----------|----|----|----|--------|----------|----|----|----|-------|-------|
| 5.1       | <b>Local Strategic Partnerships</b><br>Support Somerset LSP<br>Support Taunton Deane LSP | LAA PIs (NIS) on target within TDBC scope of influence   | N/A   | The performance of the Somerset Local Area Agreement (LAA) is reported to the SSP Joint Board & Joint Implementation Team.<br>The 2009/10 LAA Outturn report will be available in July.<br>The latest LAA performance report (Dec 2009) shows that of the available data, 74% of indicators were forecast to achieve 2009/10 target.<br>More detail can be found on the Somerset Strategic Partnership's website.   |  |  |  |  |  |                   |                               |               |             |         |    |     |     |       |           |    |    |    |        |          |    |    |    |       |       |
| 5.2       | <b>Southwest One</b>   | Efficient delivery of in-scope services (basket of KPIs)   |  | <b>Key Performance Indicators – full year 2009/10</b>   |  |  |  |  |  |                   |                               |               |             |         |    |     |     |       |           |    |    |    |        |          |    |    |    |       |       |
|           |  |  |   | <table border="1"> <thead> <tr> <th></th> <th>No. of indicators</th> <th>No. of times measured in year</th> <th>No. on Target</th> <th>% on target</th> </tr> </thead> <tbody> <tr> <td>Monthly</td> <td>13</td> <td>156</td> <td>152</td> <td>97.4%</td> </tr> <tr> <td>Quarterly</td> <td>12</td> <td>48</td> <td>45</td> <td>93.75%</td> </tr> <tr> <td>Annually</td> <td>23</td> <td>23</td> <td>21</td> <td>91.3%</td> </tr> <tr> <td>Total</td> <td>48</td> <td>227</td> <td>218</td> <td><b>96%</b></td> </tr> </tbody> </table> |  |  |  |  |  | No. of indicators | No. of times measured in year | No. on Target | % on target | Monthly | 13 | 156 | 152 | 97.4% | Quarterly | 12 | 48 | 45 | 93.75% | Annually | 23 | 23 | 21 | 91.3% | Total |
|           | No. of indicators  | No. of times measured in year  | No. on Target   | % on target   |  |  |  |  |  |                   |                               |               |             |         |    |     |     |       |           |    |    |    |        |          |    |    |    |       |       |
| Monthly   | 13   | 156  | 152   | 97.4%   |  |  |  |  |  |                   |                               |               |             |         |    |     |     |       |           |    |    |    |        |          |    |    |    |       |       |
| Quarterly | 12   | 48   | 45  | 93.75%  |  |  |  |  |  |                   |                               |               |             |         |    |     |     |       |           |    |    |    |        |          |    |    |    |       |       |
| Annually  | 23   | 23   | 21  | 91.3%   |  |  |  |  |  |                   |                               |               |             |         |    |     |     |       |           |    |    |    |        |          |    |    |    |       |       |
| Total     | 48   | 227  | 218   | <b>96%</b>  |  |  |  |  |  |                   |                               |               |             |         |    |     |     |       |           |    |    |    |        |          |    |    |    |       |       |
|           |  | <b>KPI failures</b>   |   | <b>Successes</b>   |  |  |  |  |  |                   |                               |               |             |         |    |     |     |       |           |    |    |    |        |          |    |    |    |       |       |
|           |  | <b>Customer Contact:</b><br>- % of calls answered in 20 secs (ref 2.3)<br>- abandoned call rate (less than 5%)<br><b>Finance:</b><br>- Budget monitoring (accuracy & quality of ¼ly report info)<br><b>Benefits:</b><br>- speed of processing changes of circumstances (ref 2.3)<br><b>Revenues:</b><br>- % of net collectable Council Tax debit collected in-year (ref 3.4) |   | <b>Customer Contact</b><br>- % of calls resolved at 1 <sup>st</sup> point of contact maintained at 96%<br><b>Benefits</b><br>- Customer Satisfaction Survey up 4.59% on last year.<br>- Speed of processing new claims achieved 18.63 days with a target of 22 days which is up 0.55%.<br><b>Revenues</b><br>- % of net collectable NNDR debit collected in-year, up 0.82% from last year, achieved 98.9% (target 98.82%)   |  |  |  |  |  |                   |                               |               |             |         |    |     |     |       |           |    |    |    |        |          |    |    |    |       |       |
|           | Transformation projects  | N/A  |   | SWOne Project updates were reported to Corporate Scrutiny 20 <sup>th</sup> May: SAP (Back Office & technology); Procurement; People Excellence Model (PEM); Customer Access Initiative. Measures & outcomes to be developed in 2010/11  |  |  |  |  |  |                   |                               |               |             |         |    |     |     |       |           |    |    |    |        |          |    |    |    |       |       |










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|     |  | Social & economic development   | N/A   | The SWOne contract includes 'deliverables' that support socio-economic development in the area, eg supporting new & small businesses, & promoting Somerset to businesses. A summary of progress of programmes & activities was included in the SWOne report to Corporate Scrutiny 20 <sup>th</sup> May. Measures & outcomes to be developed in 2010/11   |
| 5.3 | Tone Leisure<br>More people, more active, more often   | PI – Target 4% increase in total leisure visits                                   |    | <b>Total leisure visits up 5% against last year</b><br>1,024,279 total visits = approx 46,000 more visits than 2008/09 (Target of 2% increase for 2010/11)   |
|     |  | PI – Target 15% increase in swim visits   |    | <b>Swim visits up 13% on last year</b><br>'Free Swimming' initiative resulted in approx 23,300 more swims than 2008/09 (Target of 3% increase agreed for 2010/11)<br>A full report from Tone Leisure will be presented to Community Scrutiny Committee on 22 June 2010   |
|     |  | Progress against Tone Leisure key business objectives                             |    | Tone Leisure produces quarterly progress reports on their corporate business plan. A full report for Q4 from Tone Leisure will be presented to Community Scrutiny Committee on 22 June 2010.<br>The Q3 report (Community Scrutiny 30 March 2010) concludes that 'the overall contract performance is satisfactory, although there remain a number of key risks affecting performance'.   |
| 5.4 | Somerset Waste Partnership<br>To increase participation in the recycling service through promotion and enforcement | PI - % of household waste sent for reuse, recycling & composting (Target = 49.2%) |   | <b>2009/10 = 45.5%</b> (2008/09 was 48.2%)<br>The reduction in % of material sent for reuse, recycling and composting is due to the continuing economic downturn (eg less food waste). This has affected all of the Somerset Districts and is also mirrored nationally. Despite this, the TDBC results for recycling rates remain the best of all the Somerset Districts.<br><b>Action:</b> With the rollout of 'Sort It+' across the Borough during 2010/11 and any improvement to the economy, these can only improve the recycling rate and hopefully and put us back on track towards expected levels. |
|     |  | PI – Residual household waste (Target = 362kg per household)                      |  | <b>2009/10 = 381 kg per household</b> (2008/09 was 370kg)<br>The continuing economic climate resulted in some anomalies in the amount of residual waste collected. This was not predicted when modelling the targets for 2009/10 and resulted in an over optimistic target being set. The amount of residual waste actually increased during 2009/10, rather than reducing, as expected. TDBC results for residual waste remain the best in Somerset.  |











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|     |                              | Progress against key business objectives       |  | The roll-out of 'Sort It Plus' is a key achievement (all 5 Somerset Districts will also now be going on line, resulting in further cost savings). We are confident that the target to achieve over 50% recycling by 2011 will be achieved |
| 5.5 | South West Audit Partnership | Target min 90% of 2009/10 Audit plan delivered |  | 92% of planned audits in 2009/10 were completed or are in progress  |

## KEY TO ALERTS




|  |                                      |   |   |   |  |
|--|--------------------------------------|---|---|---|--|
| <br><b>(green)</b> | Planned actions are on course        | <br><b>(amber)</b> | Some uncertainty in meeting planned actions                     | <br><b>(red)</b> | Planned actions are off course                 |
|  | Performance indicators are on target |   | Some concern that performance indicators may not achieve target |   | Performance indicators will not achieve target |

## 6. PEOPLE (Human Resources)








| Ref | OBJECTIVES  | MEASURES   | ALERT   | ISSUES (current & future) and IMPACTS  |
|-----|---|--|---|--|
| 6.1 | <b>Investors in People (liP)</b><br>Achieve liP re-accreditation, by delivering the liP action Plan                           | Milestones achieved in liP Action Plan.                                    |    | Achieved all of the milestones in the action plan  |
|     |   | liP accreditation by March 2011  |    | New action plan April 2010-March 2011 to be agreed with liP Assessor by the end of May. This will work towards accreditation by March 2011.<br>Current position is 85% achievement of liP standard (33/39 strands)   |
| 6.2 | <b>Staff Sickness</b><br>Reduce sickness absence through strong absence management, revised policies & procedures, & training | Target = 10.5 working days max lost per FT employee                        |    | <b>10.39 days per employee</b><br>The 2009/10 target was met and is an improvement from 10.9 days last year, however the council is likely to remain in the worst quartile nationally.<br><b>Action:</b> Additional work to support the further reduction in sickness absence has been agreed as part of a Sickness Absence Action Plan taken to Corporate Scrutiny March 2010. This issue will be reported again at the same committee 17 <sup>th</sup> June.<br>NB: the proposed target for 2010/11 = 9 days |
| 6.3 | <b>PRED / Training Plans</b><br>Maintain effective performance management of people and establish & deliver development needs | 100% completion of PREDs   |    | <b>76%</b> of staff have had a PRED in the last 12 months (staff survey 2010) – we would not expect to up to 100% until later in the year though.<br><b>Action:</b> people management training planned for 2010, and standards & policies will also be reinforced  |
|     |   | 100% completion of training plans  |  | <b>90% complete.</b><br>Those not completed have no funded training activity for the coming year.  |
|     |   | 100% delivery of 'essential' training activities (corporate training plan) |  | <b>Approx 65%</b> of the 2009/10 Corporate training plan was delivered.<br><b>Action:</b> a new corporate training plan for 2010/11 is in place, and a delivery plan is close to being agreed with SWOne.  |
| 6.4 | <b>Staff Turnover</b>   | Target 12% (voluntary leavers as % of staff in post)                       |  | <b>Total turnover = 8.01%</b><br><b>Voluntary Turnover = 2.42%</b><br>Early Retirement/Redundancy = 4.23%<br>Ill Health Retirement = 0.15%<br>Other (End of Contract/Dismissal) = 1.21%  |





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| <p>6.5</p> | <p><b>Improve Staff Satisfaction</b></p>   | <p>Results from staff survey</p>   |  | <ul style="list-style-type: none"> <li> 45% response rate (higher than national average)</li> <li> Teamwork</li> <li> Pride in working for TDBC</li> <li> The job (use of skills, understanding of contribution to team &amp; organisation)</li> <li> Staff morale is a concern</li> <li> CMT are not sufficiently visible</li> <li> Management of change is not effective</li> </ul> <p>Results have still to be analysed in more detail but indication is that Staff Satisfaction has been maintained despite major change in the last year. There are some key issues to address though</p> <p><b>Action:</b> Focus groups &amp; staff events planned in May/June 2010 for all staff (Core Council &amp; SWOne Secondees) to dig deeper into the causes/ effects etc</p> |
| <p>6.6</p> | <p><b>Embed 'thematic working'</b><br/>Develop new ways of working and behaviours that are more flexible, involve project working and less rigid structures.</p> | <p>Results from staff survey. Positive evidence in cross organisational working, effective project teams, greater staff flexibility leading to improved organisational performance</p> |  | <p>Work is progressing well with major communication/engagement events (staff briefings) during May &amp; June. The Corporate Organisational Development plan sets down other initiatives for developing thematic working. This will be a long term initiative that will take time to embed, but progress is being made.</p> <p> The 2010 Staff Survey revealed that 64% of staff consider that 'co-operation between teams is good'</p>  |

## KEY TO ALERTS

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|--|---|--|--|--|---|
| <br>(green) | <p>Planned actions are on course</p>        | <br>(amber) | <p>Some uncertainty in meeting planned actions</p>                     | <br>(red) | <p>Planned actions are off course</p>                 |
|  | <p>Performance indicators are on target</p> |  | <p>Some concern that performance indicators may not achieve target</p> |  | <p>Performance indicators will not achieve target</p> |




## 7. CORPORATE MANAGEMENT

| Ref | OBJECTIVES  | MEASURES   | ALERT   | ISSUES (current & future) and IMPACTS   |
|-----|---|--|---|---|
| 7.1 | <b>Corporate Improvement Plan</b><br>Deliver the action plan, focussing on high priority areas                                      | Deliver 95% of High priority Actions, and 80% of Medium priority actions by target dates |    |  <b>85%</b> of High priority actions on target or completed<br> <b>95%</b> of Medium priority actions on target or completed<br>Based on detailed report considered at Corporate Governance Committee 15 Mar 2010.<br><b>ACTION:</b> Quarterly updates to Corporate Governance Committee and CMT at end June 10 |
| 7.2 | <b>Audit &amp; Inspection (including CAA)</b><br>Ensure that statutory Audit & Inspection obligations are met, and scores maximised | 2009 Use of Resources result (based on 2008/09 financial year) - target score of 3       |    | Comprehensive Area Assessment (CAA) has been abolished.<br><br>The 2008/09 CAA Organisational Assessment score for TDBC = 2, the same rating as 2/3rds of all English districts & a harder test than previous regime. Balanced against the level of change at TDBC, a score of 2 is a realistic assessment and our target for 2009/10 assessment should be to maintain the 2.   |
|     |   | 2009/10 Final Accounts unqualified   |    | External audit are undertaking substantive testing of the significant items in the accounts, which will determine their accuracy overall.   |
| 7.3 | <b>Equalities &amp; Diversity</b><br>Enhance the Council's approach to Equalities & Diversity                                       | Equality Standard: 'Achieving' level by 2011   |    | Training and support for Services has been delivered, partnership working with Southwest One and partner authorities is delivering on many aspects of the framework. However to keep the authority on track to achieve this target, ultimate responsibility lies with Theme Managers to deliver Equality Action Plans and actions from Equality Impact Assessments.   |
| 7.4 | <b>Risk Management</b><br>To ensure major risks are managed by embedding Risk Management Strategy                                   | Delivery of RM Strategy Action Plan  |  | <b>89%</b> of actions are on target or completed<br>Based on detailed report considered at Corporate Governance Committee 15 Mar 2010.<br><b>ACTION:</b> Quarterly updates to Corporate Governance Committee and CMT at end June 10.<br>Current priorities: review of arrangements & an audit of risk management status in projects & partnerships; completion of Service/Theme risk registers  |

|     |  |  |   |   |
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| 7.5 | <b>Value for Money / Benchmarking</b><br>To ensure that Services provide excellent value for money | Council Tax charges – in lowest quartile         |  | TDBC 2009/10 precept was within lowest 10% nationality  |
|     |  | Target efficiency savings at areas with poor VfM |  | The Council has significantly reduced its expenditure and re-prioritised services recently in order to balance its budget. The Core Council Review has been a key factor in this which aims to ensure the Council is fit for purpose to deliver our vision through widening roles and new ways of working. It is also delivering substantial efficiency savings. (See also Ref 3.7)   |
| 7.6 | <b>Asset Management</b><br>Develop the Council's Asset Management arrangements                     | Finalise and implement new AMP Apr-10            |  | The AMP has been approved by CMT and Portfolio Holders, & went to Corporate Scrutiny 20th May (now awaiting final approval by Executive). Some ongoing delays due to resourcing, notably clarifying budgets to enable the full condition survey to proceed. Once undertaken the planned maintenance programme can be developed, agreed and implemented. Ambiguity on budgets to complete works needs resolving.<br>A pilot survey for Wellington Leisure Centre has now been completed.<br><b>Action:</b> Finance to continue to work with Property & FM to improve budget structure and confirm available funds, prior to programme being developed.   |
|     |  | Target 70% of maintenance spend planned          | N/A   | Not yet able to report % of planned to reactive maintenance spend ratio due to reporting problems   |
| 7.7 | <b>Health &amp; Safety</b><br>To take Health & Safety forward                                      | Delivery of H & S Action Plan                    |  | <b>Plan still at 15% completed</b> and progress will happen now the Core Council Review is in place and managers start to risk assess their responsibilities. Health & Safety continues to receive high level support from the Scrutiny and Corporate Governance Groups. <ul style="list-style-type: none"> <li>• H&amp;S Committee and consultation with Trade Union Appointed Representatives continues to make progress.</li> <li>• Employers Joint Secretary role still awaiting final resolution, but Kevin Toller is currently covering.</li> <li>• Format of strategic H&amp;S Policy documentation provisionally agreed with the joint Secretaries and key policies will form briefing pack for refresher training for managers within new Themes.</li> <li>• Sharepoint to be populated with strategic policies.</li> <li>• Winter Working policy and Ten harmonised policies expected to be an agenda item for CCM? shortly.</li> </ul> |

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|  |  |  |  | <ul style="list-style-type: none"> <li>No significant injury accidents or incidents or trends to report for this quarter.</li> </ul> |
|--|--|--|--|--|

## KEY TO ALERTS

|   |                                      |   |   |   |  |
|---|--------------------------------------|---|---|---|--|
| <br><b>(green)</b> | Planned actions are on course        | <br><b>(amber)</b> | Some uncertainty in meeting planned actions                     | <br><b>(red)</b> | Planned actions are off course                 |
|   | Performance indicators are on target |   | Some concern that performance indicators may not achieve target |   | Performance indicators will not achieve target |