

# Public Document Pack



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## OVERVIEW AND SCRUTINY MANAGEMENT BOARD

### **AGENDA SUPPLEMENT PACK 2**

**DATE: WEDNESDAY 31 MARCH 2010**  
**TIME: 2.00 PM**  
**PLACE: COUNCIL HOUSE (NEXT TO THE CIVIC CENTRE)**

**Committee Members –**

Councillor James, Chair  
Councillor Mrs Watkins, Vice Chair  
Councillors Coker, Fox, Purnell, Roberts, Thompson, Viney and Wildy

**Co-opted Representative –**

Mr D Fletcher (Chamber of Commerce)

**Substitutes–:**

Named substitutes from the Panels may act as a substitute member provided that they do not have a personal and prejudicial interest in the matter under review.

***Members are invited to attend the above meeting to consider the items of business overleaf.***

***Members and Officers are requested to sign the attendance list at the meeting.***

BARRY KEEL  
CHIEF EXECUTIVE

## **OVERVIEW AND SCRUTINY MANAGEMENT BOARD**

### **8. RESPONSE REGARDING INFORMATION REQUESTED AT BUDGET SCRUTINY IN RESPECT OF GRANTS (Pages 1 - 4)**

The Director for Corporate Support will respond to the request of the O & S Management Board at their budget scrutiny meeting of 15/17 February 2010 for details regarding grants not applied for, including information in respect of the on-going process for the monitoring of grant take-up.

### **12. QUARTERLY REPORTS:**

- 12a To receive quarterly reports from each Panel **(Pages 5 - 16)**
- Children & Young People's OSP
  - O & S Management Board

### **13. RECOMMENDATIONS FROM PANELS:**

- 13a To receive and consider recommendations from Panels for O & S Management Board, Cabinet or Council **(Pages 17 - 20)**
- Customers & Communities OSP
  - Plympton Area Committee

### **14. WORK PROGRAMMES:**

- 14a To consider and approve work programmes for O & S Management Board and each of the Panels, and consider draft work programmes for 2010/11 **(Pages 21 - 24)**
- Customers & Communities OSP 2009/10 and draft 2010/11
- 14e To receive updates on Task and Finish Groups **(Pages 25 - 30)**
- Customers & Communities OSP – Financial Inclusion Strategy

**RESPONSE REGARDING INFORMATION REQUESTED AT BUDGET SCRUTINY IN RESPECT OF GRANTS**

This brief document forms a response to the following query, raised by the Overview and Scrutiny Management Board of 15<sup>th</sup> February 2010.

**What Grants has the Authority not applied for in the last year and how much are they worth?**

As an Authority, we are made aware of a number of Grant Initiatives through various sources, including Grant Finder ,for which we have had a licence now for 11 months. Details of any potential grants that we are eligible to apply for are regularly forwarded on to Directorates for consideration. Before a bid can be submitted, the relevant Directorate must ensure that following criteria are satisfied;

- The funding opportunity enhances PCC's ability to meet its Corporate Priorities & Strategic Direction.
- Appropriate resources exist to enable the individual Directorate to meet its objectives and obligations relating to the funding opportunity and that they can be delivered within a realistic timeframe. In particular if a significant amount of revenue or capital match funding is required from PCC.
- The risks involved in the undertaking are fully understood and acceptable.

As a result of such criteria, a small number of larger initiatives have not been taken forward, these can be found in the table attached.

The complexities around Grant result in a high degree of financial and non-financial risks for the authority, which have to be managed effectively and in line with Corporate Priorities. As a result, greater focus has been placed on smarter, improved processes around the attracting of and bidding for external funding.

Assistant Director for Finance, Assets and Efficiencies

March 2010

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**Responses Received per Scrutiny Query of 15th Feb 2010 - Grants PCC chosen not to apply for this year & why?**

Directorate	Funder	Initiative	Potential Grant	Cost to PCC	Response from Directorate
Development	European Community	Interreg Cycling Project	£m 0.1	£m 0.24	Considered to be too high risk for PCC therefore, despite initial investigations, we decided not to proceed
Childrens Services	DCSF	Universal Free School Meals	1.5 - 3.0	1.5-3.0	There is a 50% match funding requirement on this grant which needs to be considered by the Schools Forum in March. An Expression of Interest has been submitted in the meantime.
Development	HCA	Increased Housing Stock	not avail	not avail	An enquiry came through Development around HCA pot to enable councils to build own Council Houses. It was advised that as we were not a stock holding authority and about to close the HRA after transfer it did not make sense to bid, and neither were the HCA expecting us to do so. We are delivering in the top quartile on affordable housing without having the challenge of setting up and developing a delivery team to build and manage new homes ourselves with many RSL's doing the job well for us .

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**CITY OF PLYMOUTH**

**Subject:** Children and Young People Overview and Scrutiny Panel Quarterly Report

**Committee:** Children and Young People Overview and Scrutiny Panel

**Date:** 8 April 2010

**CMT Member:** Bronwen Lacey, Director for Children and Young People

**Author:** Richenda Broad (Acting Assistant Director for Commissioning, Policy and Performance - Lead Officer)

**Contact:** [richenda.broad@plymouth.gov.uk](mailto:richenda.broad@plymouth.gov.uk)

**Ref:**

**Part:** Part I

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**Executive Summary:**

This report sets out a review of the Children and Young People Overview and Scrutiny Panel for the third quarter of 2009/10.

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**Corporate Plan 2010-2013:**

The Children and Young People Overview and Scrutiny Panel provides strategic scrutiny of the following Corporate Improvement Priorities and key areas:

- CIP 7 - Keeping children safe
  - CIP 8 - Improving skills and educational achievement
  - CIP 9 - Developing high quality places to learn in
  - CIP 13 - Supporting staff to perform better
  - CIP 14 - Proving better value for money
- 

**Implications for Medium Term Financial Plan and Resource Implications:  
Including finance, human, IT and land**

None

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**Other Implications: e.g. Section 17 Community Safety, Health and Safety, Risk Management, Equalities Impact Assessment, etc.**

None

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**Recommendations & Reasons for recommended action:**

That the report is noted

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**Alternative options considered and reasons for recommended action:**

N/A

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**Background papers:**

Children and Young People Overview and Scrutiny minutes and forward plan

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**Sign off:** N/A

## CITY OF PLYMOUTH

## Children and Young People Overview and Scrutiny Panel Quarterly Report

**1. Introduction**

- 1.1 This report sets out a review of the Children and Young People Overview and Scrutiny Panel for the third quarter of 2009/10, incorporating the meetings of 19 November 2009 and 28 January 2010 respectively.

**2. Scope of the Overview and Scrutiny Panel**

- 2.1 The Children and Young People Overview and Scrutiny Panel is primarily concerned with the strategic scrutiny of the following Corporate Improvement Priorities and key areas:
- CIP 7 - Keeping children safe
  - CIP 8 - Improving skills and educational achievement
  - CIP 9 - Developing high quality places to learn in
- 2.2 The detailed terms of reference for the panel are contained in Appendix 1.
- 2.3 The panel consists of the following members and officers

Title	Name	Attendances (6 meetings)
Councillor (Chair)	Purnell	6
Councillor (Vice Chair)	Stephens	4
Councillor	Mrs Beer	4
Councillor	Bowie	3
Councillor	Mrs Bragg	6
Councillor	Delbridge	5
Councillor	Reynolds	2
Councillor	Roberts	6
Councillor	Vincent	4
Statutory Co-opted rep	C Bruce-Spencer (resigned 19.11.09)	-
Statutory Co-opted rep	T Lyddon	1
Statutory Co-opted rep	K Willis	3
Statutory Co-opted rep	M Gee (long-term sick)	-
Co-opted rep	A Kearnes	4
Co-opted rep	J Paget	4
Co-opted rep	K Taylor	3
Co-opted rep	Prof M Totterdell	-
Lead Officer	Richenda Broad/Claire Cordory-Oatway	5
Democratic Support	Cathy McCabe/Amelia Boulter/Rachel Watson	6



- 2.4 The Panel, through effective strategic and operational scrutiny, supports the following cabinet member and CMT officer

Title	Name
Cabinet Member (Children and Young People)	Grant Monahan
Director of Services for Children and Young People	Bronwen Lacey

- 2.5 The panel has a budget of £2,000 to support the scrutiny work.
- 2.6 The panel has requested practical training in respect of finance.

### 3. Key achievements to date

The panel has now met on six occasions. Meetings have been well structured, managed efficiently and well attended by panel members. A positive contribution has been made to support an effective strategic and operational overview; in particular, the following achievements have already been made:

#### 3.1 Co-opted representatives

The panel has sustained a diverse group of co-opted representatives, including young people, and celebrates the wider perspective these representatives bring.

#### 3.2 Complaints and Compliments Annual Report

The Customer Relations Manager has a statutory requirement to present an annual report to the relevant local authority committee about the operation of its complaints procedure. The report focuses on the compliments, concerns and complaints received within the Children's Social Care Division between 1 April 2008 and 31 March 2009. In response to a specific request from Children and Young People OSP the report provided examples of how the learning from complaints informs and changes practice.

The Panel welcomed the annual report which showed that compliments received in 2008/09 had nearly doubled compared with 2007/08; there had been a slight improvement in timescales for responding to complaints at stage 1; stage 2 complaints had fallen from 13 to 5; there were no stage 3 complaints in 2008/09, compared with 5 in 2007/08.

#### 3.3 Performance and Budget Review

The panel received a detailed briefing on the financial position of Services for Children and Young People. This also touched on the contributions by partners through core and grant funding and how services are resourced. Linked to this was a briefing on performance related to Services for Children and Young People, in particular focussing on the Corporate Improvement Priorities and the priorities of the Children and Young People's plan. This provided a basis for a discussion on the importance of financial and performance data being part of every report to Children and Young People's OSP.

### **3.4 Children with Disabilities**

The panel received a briefing paper on Children with Disabilities and viewed a DVD on young people's views on short breaks. The DVD was part of a consultation process to find out what young disabled people wanted in the future. The panel reflected on the challenges of ensuring the inclusion of children with disabilities in all activities and the development towards this through effective commissioning of services.

The panel made the following resolutions:

- a joint task and finish group with Customers and Communities OSP on facilities for disabled people be included on the work programme;
- information on integration and support for children with disabilities, short breaks, independent living, pooled budgets and education be considered at a future meeting.

### **3.5 School Attainment Results**

The Panel received a report containing school attainment results. The OSP were informed that historically there had been a dip in performance between year 6 and 7 and this was part of the reason for the government to rebrand the KS3 curriculum which would be looking at a more thematic approach to improve transition between primary and secondary schools. The Panel considered the areas for improvement and identified 6<sup>th</sup> forms and the low entry to higher education as an area for further scrutiny.

The Panel made the following resolutions –

- more detailed information be provided on how underperforming 6<sup>th</sup> forms were to be addressed;
- that thanks be extended to staff who had contributed to the positive outcomes achieved by Children in Care and the support of the Panel for the concept of 'Virtual Head' be noted.

### **3.6 Carefirst**

It was reported to the Panel that there was a national problem with the efficiency of the Carefirst software package and the Council were taking steps to improve the system, to assist social workers to record on the system and improve the output of data. A project team has been set up, chaired by the Assistant Chief Executive, with a team of 15 – 20 people to deliver the project. The Panel discussed the impact on social workers of an inefficient system for data management and recording and made the following resolution –

- a bullet point synopsis of the 50 – 75% issues causing problems and how the new system would address them be provided to the Panel.

### **3.7 OFSTED Report**

The Panel received a response to the annual unannounced inspection of contact, referral and assessment arrangements within the Council's Services for Children and Young People and CIP 7 'Keeping Children Safe'. The Panel discussed the areas that could support improvement in managing the volume of referrals to the Advice and Assessment Service and made the following resolutions –

- that a presentation on thresholds and Common Assessment Framework (CAF) be provided to the Panel;
- that a copy of the 'e-safe guidance' due to be launched in April 2010 be provided to the Panel.

### **4. On the Horizon**

As a consequence of the work undertaken by the panel, the following topic areas have been placed on the work programme for the final panel meeting of 2009/10:

- Joint Strategic Needs Assessment
- Teenage Pregnancy Update
- Performance review, including budget

### **5. Recommendation**

- 5.1 That the progress of the Children and Young People Overview and Scrutiny panel is noted by the Overview and Scrutiny Management Board

Richenda Broad  
Lead Officer Children and Young People Overview and Scrutiny Panel  
8 April 2010

## **Children and Young People Overview and Scrutiny Panel Terms of Reference**

### Responsibilities

- On-going monitoring of post-inspection action plans (relating to its policy areas);
- To review new and existing policies and consider how they may be improved and developed;
- To monitor the budget and performance of the Cabinet Member, Department and partners to ensure that the priorities for the area are being delivered upon;
- To monitor performance against the relevant Corporate Improvement Priorities;
- To review Policies within the Budget and Policy Framework;
- To consider Equality Impact Assessments against new and existing policies;
- To investigate local issues to find out how the council and its partners can improve to meet the needs of local people;
- To make recommendations about service delivery to the Cabinet (via the Overview and Scrutiny Management Board);
- To review and scrutinise the performance of partner organisations;
- To set up ad hoc Working Groups as and when required;
- To produce quarterly progress reports to go to the management board;
- Any work delegated to the panel by the Board.

### Policy Areas include:

- Children's Services
- Lifelong Learning
- Learning and Family Support
- Education
- Social Care relating to Children and Young People
- Children and Young People's Trust
- Children and Young People's Partnership
- Teenage Pregnancy
- Child Healthcare

### Policy Framework Plans and Strategies relating to Policy Areas

- Children and Young People's Plan
- Ideas for Change
- Youth Justice Plan

### Membership

The Chair of the Panel shall serve on the Overview and Scrutiny Management Board. The Children and Young People Overview and Scrutiny Panel will be chaired by a Member of the opposition political group with the vice-chair from the majority political group. All Members of the panel will adhere to the general rules of Overview and Scrutiny. There are 9 members of

the panel including the Chair and the vice-chair. The vice-chair is from the opposite political group to the Chair.

The Panel also includes 4 statutory members for education matters –

- 2 Parent Governors
- 1 Catholic Church representative
- 1 Church of England representative

All Members of the panel will adhere to the general rules of Overview and Scrutiny.

### Cabinet Member

Children and Young People

### Directorate

Services for Children and Young People

### Lead Officer

Assistant Director, Children's Services

### Corporate Improvement Priorities (CIPs)

- Safe Children (CIP 7)
- Skills and Education (CIP 8)
- High quality places to learn (CIP 9)
- Supporting council staff to perform better (CIP 13)
- Providing better value for money (CIP 14)

### LSP Link

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**CITY OF PLYMOUTH**

**Subject:** Overview & Scrutiny Management Board Quarterly Scrutiny Report  
**Committee:** Overview & Scrutiny Management Board  
**Date:** 31 March 2010  
**CMT Member:** Ian Gallin (Assistant Chief Executive)  
**Author:** Giles Perritt, Head of Policy, Performance and Partnerships  
**Contact:** giles.perritt@plymouth.gov.uk  
**Ref:**  
**Part:** Part I

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**Executive Summary:**

This report sets out a review of the performance of the Overview and Scrutiny Management Board for the period January to March 2010.

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**Corporate Plan 2009-2012:**

The Overview and Scrutiny Management Board provides management of strategic scrutiny of all Corporate Improvement Priorities and is the lead scrutiny body for the Corporate Plan. The Management Board has scrutinised the Corporate Plan 2010-13 during the period covered by this report.

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**Implications for Medium Term Financial Plan and Resource Implications:  
Including finance, human, IT and land**

The Management Board has scrutinised the revenue and capital budgets, and Corporate Improvement Priorities relating to the above during the period of this report.

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**Other Implications: e.g. Section 17 Community Safety, Health and Safety, Risk Management, Equalities Impact Assessment, etc.**

As above

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**Recommendations & Reasons for recommended action:**

That the report is noted

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**Alternative options considered and reasons for recommended action:**

N/A

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**Background papers:**

Overview and Scrutiny Management Board minutes, reports and work programme relating to meetings of 3, 15 and 17 February and 3 March 2010.

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## CITY OF PLYMOUTH

## Overview &amp; Scrutiny Management Board Quarterly Report

**1. Introduction**

- 1.1 This report sets out a review of the Overview and Scrutiny Management Board for the first quarter of 2010, incorporating the meetings of 6 January, 3, 15 and 17 February and 3 March 2010.

**2. Scope of the Overview and Scrutiny Management Board**

- 2.1 The Overview and Scrutiny Management Board replaced the Commission following changes to the Council's scrutiny structure agreed in July 2009. The Board's remit was enhanced to include a more pro-active management role for the scrutiny process as a whole, a greater emphasis on the scrutiny of partnerships, and the lead scrutiny role for finance and performance management. The Board is also now responsible for the scrutiny of the Council's Corporate Plan, and revenue and capital budget proposals.
- 2.2 The detailed terms of reference for the O & S Management Board are contained within the Council's Constitution.
- 2.3 The O & S Management Board consists of the following members and officers

<b>Title</b>	<b>Name</b>	<b>Attendance (5 meetings)</b>
Councillor (Chair)	D.James	5
Councillor (Vice Chair)	Mrs Watkins	5
Councillor	Coker	5
Councillor	Fox	4
Councillor	Purnell	5
Councillor	Roberts	4
Councillor	Thompson	5
Councillor	Viney	5
Councillor	Wildy	4
Co-opted representative	D Fletcher	3
Co-opted representative (statutory, budget scrutiny only)	K Willis	2
Lead Officer	Giles Perritt	5
Democratic Support	Judith Shore/ Gemma Pearce/ Rachel Watson/ Ross Jago	2/2/4/1

- 2.4 The Panel, through its strategic management of the Council's scrutiny function, including monitoring of finance and performance, focuses on the role of the following Cabinet Members and CMT officers:

<b>Title</b>	<b>Name</b>
Cabinet Member (Finance, Property, People and Governance)	Cllr. Ian Bowyer
Cabinet Member (Customer Services, Performance and Partnerships)	Cllr. Steven Ricketts
Director for Corporate Support	Adam Broome
Chief Executive	Barry Keel
Leader of the Council	Cllr Mrs Pengelly



- 2.5 In addition to the above, the entire Cabinet, Corporate Management Team and most members of the Senior Management Team attended the meeting on 15 and 17 February for scrutiny of the Council's Corporate Plan and Budget.

### **3. Key achievements during the last quarter**

The last quarterly report for the board set the following targets for the Board:

#### **3.1 Effective scrutiny of the 2010 budget and Corporate Plan**

The Board took an innovative approach to planning the above scrutiny, with facilitated planning meetings working with an independent IDeA Peer Officer. A comprehensive report was produced, containing a series of recommendations covering the full scope of the Corporate Plan and associated financial planning documents. The report was unanimously accepted at the Council meeting of 1 March 2010, and Cabinet subsequently accepted all its recommendations at its meeting of 16 March, passing on thanks for the quality of the report and recommendations.

#### **3.2 Development of Councillor Call for Action and Petitions Protocol**

The Councillor Call for Action toolkit is an item on the agenda for this meeting of the Scrutiny Management Board

#### **3.3 Further development of protocols between the Local Strategic Partnership (LSP) Theme Groups and the Council's scrutiny panels**

Following the endorsement of the protocols at the 3 March meeting of the Board, an informal meeting between the Management Board and Theme Group Chairs is due to take place on 31 March to discuss ways in which alignment between the LSP and scrutiny panels can be further developed now that the protocols have been agreed.

#### **3.4 Press communications to improve greater public engagement**

Scrutiny activity has received coverage in the local press in respect of the Corporate Plan scrutiny, specialist cancer care for women and the Financial Inclusion strategy in the last quarter, but opportunities for greater coverage exist. No specific work has yet been undertaken in this area.

#### **3.5 Scrutiny response to Comprehensive Area Assessment (CAA) and other corporate inspections.**

Due to the work programme between the CAA 'One Place' announcement in December 2009 and the present, this piece of work has not been completed.

#### **3.6 Ensure the delivery of effective training and development for scrutiny members**

There has been a delay in undertaking the specified training package agreed with the Improvement and Development Agency (IDeA), which will now take place following the local elections in May 2010.

3.7 In addition to the above, the Chair of the Overview and Scrutiny Management Board, Cllr David James, attended the Cabinet at its meeting of 19 January 2010 to present a summary of scrutiny activity. The Cabinet resolved the following:

3.7.1 Cabinet commends scrutiny for its contribution to the city's improvement agenda

3.7.2 Cabinet acknowledges the Board's role in the scrutiny of the Local Strategic Partnership

3.7.3 Scrutiny resources are kept under review to meet its expanding role

3.7.4 Cabinet will seek opportunities to allow further and earlier scrutiny of documents in the budget and policy framework prior to Cabinet approval.

#### **4. On the Horizon**

- Ensuring that the recommendations from the Management Board of 15 and 17 February are implemented effectively
- Ensuring that appropriate arrangements are in place to ensure continuity of the scrutiny function following the local elections in May 2010
- That outstanding actions regarding press coverage, and Comprehensive Area Assessment overview and scrutiny activity are taken forward.

#### **5. Recommendation**

5.1 That the progress of the Overview and Scrutiny Management Board be noted.

Giles Perrit, Head of Policy, Performance and Partnerships  
Lead Officer Overview and Scrutiny Management Board  
March 2010

**Draft  
Recommendations from Panel to the Overview and Scrutiny  
Management Board**

**Customers and Communities Overview and Scrutiny Panel  
Meeting – 29 March 2010**

**Draft Minute 69. National Indicator 192 Recycling Levels**

Recommended to the Overview and Scrutiny Management Board that following the completion of the work regarding recycling rates by the LSP Safe and Strong Theme Group, a revised report regarding partnership working is submitted to the Panel, with SMART targets and demonstrating a more proactive approach to the issue.

**Draft Minute 71. The Councillor Call for Action: Update**

Recommended to the Overview and Scrutiny Management Board that –

- (1) the views of the Councillors from both Efford and Compton Wards are sought relating to the progress of Councillor Ball's Councillor Call for Action;
- (2) one of the first priorities for the South East and North East and Central Localities is to review the issues raised in the Councillor Call for Action.

**Draft Minute 79. Work Programme 209/10**

Recommended to the Overview and Scrutiny Management Board that the tree strategy is allocated to the Growth and Prosperity Overview and Scrutiny Panel and is removed from the Panel's work programme.

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Plympton Area Committee – 8 March 2010

**Draft Minute 58 – COMMUNITY EVENTS AND ROAD CLOSURES.**

The Committee received a written report regarding community events and road closures and registered their disappointment that a representative from AMEY was unable to attend.

Questions were raised regarding the current policy, the need for community hosts to take out insurance, health and safety checks and possible costs incurred.

Recommended that Plympton Area Committee request that the Overview and Scrutiny Management Board consider an appropriate panel to scrutinise the current Community Events and Road Closure Policy, specifically with regards to the cost of closing roads for charitable events.

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## Customers and Communities Overview and Scrutiny Panel

### Work Programme 2009/10

Topics	J	J	A	S	O	N	D	J	F	M	A
Licensing Authority Policy Statement Under the Gambling Act 2005 ( <i>Written Report</i> )				28							
Life Centre and Related Projects						23		13			
Plymouth's Sports Facility Strategy					26			25			
Review of the Library Service ( <i>Task and Finish Group</i> )											
Plympton Library Replacement – Update ( <i>Written Report</i> )								25			
Cumulative Impact Policy ( <i>Written Report</i> )				28							
Equalities Framework (Equality Standards for Local Government Peer Review)											
Financial Inclusion Strategy – Refresh Action Plan ( <i>Task and Finish Group</i> )								25			
Localities Work ( <i>Task and Finish Group</i> )						2 / 5					
Crime and Disorder Reduction Partnerships											
Allotment Strategy											
Tree Strategy											
Waste Collection Policy/National Indicator 192 Recycling Levels										29	
Election Annual Review – Update ( <i>Written Report</i> )						23					
Access to Services Inspection – Update ( <i>Written Report</i> )						23					
Councillor Call for Action Took Kit								25			

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## Customers and Communities Overview and Scrutiny Panel

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## Customers and Communities Overview and Scrutiny Panel (Scrutiny Reviews)

Tuesday 16 March 2010

### PRESENT:

Councillor Fox, in the Chair.  
Councillor Wildy, Vice Chair.  
Councillors Berrow and Mrs Nicholson.

The meeting started at 10.00 am and finished at 11.55 am.

*Note: At a future meeting, the committee will consider the accuracy of these draft minutes, so they may be subject to change. Please check the minutes of that meeting to confirm whether these minutes have been amended.*

### 5. DECLARATIONS OF INTEREST

There were no declarations of interest made by Members in accordance with the code of conduct.

### 6. FINANCIAL INCLUSION STRATEGY - REFRESH OF THE ACTION PLAN

The Assistant Director for Safer Communities provided a brief overview which highlighted the following main issues –

- (i) in 2006 the Council and its partners worked together to develop the only multi agency Income Maximisation Strategy in England; the strategy brought together advice agencies across all sectors to deliver the best possible services in Plymouth;
- (ii) the Income Maximisation Strategy successfully co-coordinated services that dealt with over £190m of problem debt and raised £13m of previously unclaimed welfare benefits and tax credits;
- (iii) the economic downturn presented new challenges such as unemployment, falling house prices, fuel poverty, affordable credit, problem debt and house repossessions;
- (iv) in response to these issues, the Financial Inclusion Strategy 2009-2012 was developed by the Council in partnership with other organisations to improve financial inclusion;
- (v) in January 2009, a consultation document was distributed via partners across all sectors to identify work that would enable the Council and its partners to work together to co-ordinate and monitor progress;
- (vi) the key aims of the strategy were–
  - maximise the take up of welfare benefits and tax credits with an emphasis on in work benefits;
  - reduce problem debt;
  - provide accessible and high quality financial inclusion services;
  - reduce fuel poverty;

- maximise opportunities for delivering financial inclusion through partnership working;
- (vii) the consultation exercise identified a change of emphasis in the strategy, which included -
- prioritisation of take up of in work benefits and tax credits;
  - more focus on money and debt advice for people adversely affected by the economic situation;
  - maximising income and assisting people in using their money to the best advantage;
  - delivering debt prevention services as well as debt remedy services;
- (viii) to achieve the aims of the strategy the following actions were undertaken –
- commissioning of face to face debt and money advice;
  - strengthening the provision of credit unions as an alternative to doorstep lending;
  - targeting advice to remove barriers to work eg tax credit and child care for parents;
  - raising awareness for advice agencies on fuel poverty;
  - the production of fact sheets reflecting economic climate;
  - welfare benefits and tax credit take up initiatives;
- (ix) the strategy's action plan would be refreshed annually;
- (x) in the last 12 months, the City had experienced 75 per cent increase in mortgage and 57 per cent increase in rent possession orders;
- (xi) the third sector expected to deal with over £100m of debt in the City this year and based on national figures, there could be £48.5m in unclaimed welfare benefits and tax credits;
- (xii) compared to the same time last year, debt enquires were up by 26 per cent and welfare benefit enquiries were up by 50 per cent.

The following responses were provided to questions raised by the Panel –

- (a) monitoring procedures were in place to ensure that services were 'hitting' the right people; in order to evaluate the services provided, Routeways sought feedback from one in five people who had used their services and the Citizens' Advice Bureau (CRB) one in ten users;
- (b) with the impending closure of the Devonport Regeneration Community Partnership, it was envisaged that access to services in the west of the City would not be adversely affected; Routeways would continue to provide services at Chapel Street;

- (c) flexibility had been built into the strategy to accommodate the changing needs of the City;
- (d) Routeways had been commissioned to work with Council staff to maximise the take up of in work benefits;
- (e) increasing the take up of council tax benefits would be more challenging, as older people were reluctant to make claims; this was a national problem and not just inherent to Plymouth;
- (f) information on council tax benefits was included in the literature circulated with the council tax bills; a 'tell granny' campaign was previously run and consideration would be given to what sort of take up campaigns were needed in future;
- (g) in order to reach people that had been adversely affected by the economic situation the emphasis of the strategy had changed to focus more on money and debt advice and in work support;
- (h) a national Pension Service hotline had been set up which provides assistance in applying for pension credit over the telephone which has reduced the need for face to face advice;
- (i) facilitators could be placed within libraries to provide assistance with online applications, as it was recognised that older people preferred to receive face to face advice;
- (j) our contracted partners ensure that an outcome is achieved within 21 days of initial contact, or if this had not been achieved the reason.

The Community Cohesion Officer highlighted the following areas of the action plan –

- (xiii) eight targeted campaigns aimed at different vulnerable groups had been delivered;
- (xiv) one partner funding bid had been successful in securing funding of £300,000 for the separated partners project; other bids had been applied for including the flexible new deal £80,000 per annum over five year, future jobs fund and £7,000 to train 'money friends';
- (xv) a preferred partner credit union provider would be selected by the end of March 2010 -
  - the Council had provided funding of £20,000 for one year, to offer services to council staff and members via payroll;
  - staff would benefit from receiving support with borrowing and cheaper insurance;
  - the credit union had a membership of 1000 but there were currently 12,000 people using doorstep lenders;
- (xvi) the fuel poverty awareness sessions had been delivered to at least 25 people;
- (xvii) staff from the Council, Routeways and the Citizens' Advice Bureau would be trained to access the funds that were available from the utility trust funds;

- (xviii) the Council had worked in partnership with Job Centre Plus to run an advice session with people who had been made redundant from Toshiba; as a direct result of this, 25 people had been able to go straight back into employment with the help of tax credits;
- (xix) personal debt was approximately £60,000 per person which included credit cards, loans and mortgages;
- (xx) development of the financial inclusion pages on the Council's website including the possibility of using interactive software would be delayed due to the corporate review of the website;
- (xxi) information on the breakdown of schools and the take up of free school meals would be provided; this would assist in targeting those localities with the greatest need.

The following responses were provided to questions raised by the Panel –

- (k) a trained debt adviser had been working along side housing officers and as a result of this 42 householders had been assisted with repossessions;
- (l) five per cent of people that had used the services provided by Routeways and the Citizens' Advice Bureau had learnt about them via the debt advice pages on the Council's web pages;
- (m) the service provided by the Citizens' Advice Bureau was accessible from 9am – 5pm; the feasibility of increasing accessibility of the service was being investigated.

## 7. **RECOMMENDATIONS**

Recommended to the Overview and Scrutiny Management Board that the following recommendations are forwarded to the Cabinet for approval –

- (1) to ensure the robust and timely monitoring of the impact of the work delivered through the action plan in respect of those areas of work subject to contract with external providers and in order to accommodate new demands as they arise (eg the needs of people new to the benefits system, as a result of the impact of the economic downturn) and to assess the impact of the action plan on city wide inequalities;
- (2) to consider the provision of information about financial inclusion services using a range of channels (eg through the Council website and facilities managed by the Council including libraries) and at times convenient to people requiring this information;
- (3) to consider opportunities to link up advice giving opportunities to encourage people to claim all their entitlements; (the Panel is fully supportive of campaigns to promote this work);
- (4) that links with partner organisations and other employers are further explored in order to make the best use of available resources to support work delivered through the action plan, and consideration of the role of Council departments and partner organisations in tackling fuel poverty;
- (5) that barriers for the take up of free school meals are explored to ensure those eligible for this service receive their entitlements.

The Overview and Scrutiny Management Board is asked to acknowledge the task and finish group's thanks for the opportunity to comment on the action plan and to make recommendations in respect of the forthcoming year's activities and to note the valuable work carried out by the Social Inclusion Unit in respect of this agenda and the successes of the last year, in particular, the work relating to credit unions.

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