

GOVERNANCE, STRATEGY AND RESOURCES SCRUTINY BOARD

Overview & Scrutiny Committee Agenda

Date Wednesday 9 October 2024

Time 6.00 pm

Venue Lees Suite, Civic Centre, Oldham, West Street, Oldham, OL1 1NL

Notes 1. DECLARATIONS OF INTEREST- If a Member requires advice on any item involving a possible declaration of interest which could affect his/her ability to speak and/or vote he/she is advised to contact Alex Bougatef or at least 24 hours in advance of the meeting.

2. CONTACT OFFICER for this agenda is Andrew Mather email constitutional.services@oldham.gov.uk

3. PUBLIC QUESTIONS - Any Member of the public wishing to ask a question at the above meeting can do so only if a written copy of the question is submitted to the contact officer by 12 noon on Friday 4th October 2024.

4. FILMING - The Council, members of the public and the press may record / film / photograph or broadcast this meeting when the public and the press are not lawfully excluded. Any member of the public who attends a meeting and objects to being filmed should advise the Constitutional Services Officer who will instruct that they are not included in the filming.

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Please also note the Public attendance Protocol on the Council's Website

https://www.oldham.gov.uk/homepage/1449/attending_council_meetings

MEMBERSHIP OF THE GOVERNANCE, STRATEGY AND RESOURCES SCRUTINY BOARD

Councillors Aslam, Azad, Harkness, Hughes, Ibrahim, Iqbal, Lancaster, McLaren (Chair), Moores (Vice-Chair), Rustidge and Williamson

Item No

- 1 Apologies For Absence
- 2 Urgent Business
Urgent business, if any, introduced by the Chair
- 3 Declarations of Interest
To Receive Declarations of Interest in any Contract or matter to be discussed at the meeting.
- 4 Public Question Time
To receive Questions from the Public, in accordance with the Council's Constitution.
- 5 Minutes of Previous Governance, Strategy and Resources Scrutiny Board Meeting (Pages 5 - 10)
The Minutes of the Governance, Strategy and Resources Scrutiny Board held on 31 July 2024 are attached for approval.
- 6 Corporate Performance Report - Quarter 1, 2024/25 (Pages 11 - 60)
The purpose of this report is to provide an overview of corporate performance against agreed service business plan measures for the 2024/25 Q1 period (April – June).
- 7 Revenue Monitor and Capital Investment Programme 2024/25 Month 4 (Pages 61 - 90)
To provide an update as at 31st July 2024 of the Council's 2024/25 forecast revenue budget position and the financial position of the capital programme together with the revised capital programme 2024/25 to 2028/29.
- 8 Local Government Ombudsman - Annual Report (Pages 91 - 104)
To consider the results of the Local Government and Social Care Ombudsman's Annual Review of Complaints and the Council's performance in dealing with complaints.
- 9 The Oldham Plan Update
To receive a presentation updating the Scrutiny Board on the development of the Oldham Plan.
- 10 Work Programme (Pages 105 - 110)
To note and comment on the Committee's Work Programme 2024/25

- 11 Key Decision Document (Pages 111 - 122)
Key Decision Document published 28 days prior to the Cabinet meeting to be held on 14th October 2024
- 12 Rule 13 and 14
To consider any rule 13 or 14 decisions taken since the previous meeting.

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Present: Councillor McLaren (Chair)
Councillors Harkness, Ibrahim, Iqbal, Kenyon (Substitute),
Moore, Lancaster and Rustidge

Also in Attendance:

Shelley Kipling- Assistant Chief Executive Officer
Chris Kelsall- Assistant Director of Finance
Nasir Dad- Director of Environment
Steve Hughes- Assistant Director Strategy & Performance
Fran Lautman -Head of Customer and Digital Experience
Kirsty Adderley- Complaints Manager
Durga Paul- Constitutional Services

1 **APOLOGIES FOR ABSENCE**

Apologies for absence were received from Councillors Hughes and Williamson.

2 **URGENT BUSINESS**

There were no items of urgent business received.

3 **DECLARATIONS OF INTEREST**

There were no declarations of interest received.

4 **PUBLIC QUESTION TIME**

There were no public questions for the meeting to consider.

5 **MINUTES OF PREVIOUS GOVERNANCE, STRATEGY AND RESOURCES SCRUTINY BOARD MEETING**

RESOLVED that the minutes of the meeting held on 21st March 2024 be approved as a correct record.

6 **HEALTH AND SAFETY POLICY - MAY 2024 UPDATE**

The Director of Environment presented the Updated Health and Safety Policy to the Committee.

This policy identifies the essential elements of Oldham's Health and Safety management system and details the commitment the Council has for maintaining and improving the health, safety and wellbeing of the staff, and others who may be affected by their activities. So far as is reasonably practicable, the Council will provide a safe and healthy work environment that meets statutory requirements.

The Policy outlines the structure and legal responsibility of the Council for staff, but also in their role as a corporate Landlord.

Oldham requires each service to examine their own work activities and make suitable and sufficient assessments of any health and safety risks. These assessments will determine

service priorities and set objectives for eliminating hazards, reducing risks and achieving a progressive reduction in injury, work related ill-health and other types of loss. Appropriate training is provided to individuals to reflect their level of responsibility.

Members queried whether the Policy was equipped to consider the safety concerns to Councillors and Officers during Council Meetings. Officers advised that safety concerns and plans were picked up through a separate meeting and procedure and concerns regarding relocating the meeting if the need arises have already been addressed following incidents at last years meetings.

Members queried whether increased Health and Safety precautions were being taken in our schools and communities following the tragic events that transpired in Southport last week. The Assistant Chief Executive confirmed that Security assessments and additional guidance has been provided to all appropriate venues.

Members questioned the process of risk assessments for services based outside of the office and Officers confirmed that a site visit would take place and specific risk assessments would take place for each service. When questioned on the number of Safety Representatives Oldham currently has, Officers advised that most areas will have one, but specific numbers are not known. The Director of Economy to review this and feedback to members.

Resolved that

1. The Health and Safety Policy is noted and Endorsed by the Committee.
2. The Director of Environment is to review and feedback to members details of the number of Safety Representatives the Council has.

7

LOCAL GOVERNMENT OMBUDSMAN - INITIAL DRAFT ANNUAL REPORT

The Head of Customer and Digital Experience and the Complaints Manager presented on Local Government and Social Care Ombudsman Annual Review of Complaints for 2023/24.

During the period 1 April 2023 to 1 April 2024, the Local Government and Social Care Ombudsman (LGSCO) completed 14 investigations in relation to Oldham Council. Following these investigations, the LGSCO upheld 12 cases and found 2 to not be upheld, giving an uphold rate of 86%. This compares to an average uphold rate of 80% in similar organisations.

In 42% of upheld cases, Oldham Council had already provided a satisfactory remedy before the complaint reached the Ombudsman. This compares to an average of 14% in similar organisations. Where the LGSCO upholds a complaint, it will

often make recommendations to put things right or help to prevent similar situations arising in the future. Oldham Council complied with 100% of the recommendations put forward by the LGSCO. This compares to an average of 99% in similar organisations.



Over the last 2 financial years (2022/23 and 2023/24), the average uphold rate for Oldham Council has been 70%. This compares to an average of 78.5% in similar organisations.

Over the last 2 financial years, Oldham Council has identified satisfactory remedies in 21% of upheld cases before they have reached the LGSCO. This compares to an average of 12% in similar organisations.

Overall, although the uphold rate has increased for Oldham Council in 2023/24, this upward trend has been seen across similar organisations. When looking at the Council's performance over the last 2 years, the uphold rate is below average and the percentage of cases whereby the Council has identified suitable remedies through its own complaints process is above average.

Members questioned whether any trends have been identified with the types of cases that go to the Ombudsmen. Officers advised there are a higher number of cases linked to Adult Social Care but will be due to the nature of the work and assessments may need to be made which could cause delays. 4 of the 12 delays were due to things not being implemented in a timely manner and Members requested details for the cause of the delays- Officers did not have this information to hand but will share the delay reasons with members.

Officers explained to the Committee that there is ongoing work being done within the service to improve training, create a staff guide and a report of ongoing complaints. Officers to share a more detailed outline of these steps at the next meeting.

Resolved that

1. The Local Government Ombudsman Draft Annual Report is noted by the Committee.
2. Officers to share with members reasons for response delays in 4 cases that were not resolved in a timely manner.
3. An update be provided at the next meeting scheduled for 9th October 2024 where Officers will share an outline of the steps taken to improve dealing with complaints and timescales.

8

**CORPORATE PERFORMANCE REPORT 2023/24
QUARTER 4**

The Committee heard from the Assistant Director Strategy & Performance on the Corporate Performance Report 2023/24 for Quarter 4. The Officer gave an overview of the report and highlighted some key successes including;

- The highest uptake of Healthy Start Vouchers yet which is a Public Health Success
- Positive report from Ofsted rating Children's Services Good in all areas
- Incredibly close to the target number of new homes built
- Improvements in Customer Service with complaints below target and an increase in service and calls answered

Members commented on the length and substance of the report and indicated that not enough information has been provided and 1 page per service area is not adequate. Officers explained that reports have been amended to make them more accessible and suitable for the various meetings they are presented at. Members also requested that these reports be printed in colour in the future where a traffic light colour system is being used to indicate performance. This was supported by the Assistant Chief Executive.

The Committee also discussed some of the compliance figures that have been provided, specifically for Street Lighting. 100% compliance has been indicated in the report, but this is not accurate as there are several exceptions to this figure. The Assistant Chief executive is to request the full figures including exceptions from the relevant parties.

Members noted that the report indicates that recycling continued to be a challenge and questioned what steps were being taken to improve the rates. Officers confirmed that a full response could be provided to the Committee by the Director of Environment.

Members queried why there were no complaints targets for Adult's and Children's Services, the areas which receive the most complaints. Officers explained that due to the changes to the service a full review is being completed. A link between the number of complaints and lack of a target has been identified but it is a complex issue that would need to be investigated further. Officers can bring this back to Committee in October and provide updates following investigation.

Resolved that

3. The Corporate Performance Report is endorsed and noted by the Committee.
4. Officers to request exceptions to the compliance figures from relevant parties for street lighting.
5. The Director of Environment to provide a full response on steps being taken to improve recycling rates.
6. Corporate Performance Reports to be printed in colour for future meetings.

The Assistant Director of Finance presented on the Draft Annual Statement of Accounts. The Committee heard the salient points on the major categories of expenditure.

1. Revenue Account- Additional £16.1m of earmarked reserves required to fund the annual overspend. The total use of earmarked reserves was £29.5m. The General Fund Balances remain at £18.9m.
2. Capital Programme- Annual expenditure £81.2m, £1.7m above the M9 forecast
3. Housing Revenue Account- Annual deficit of £1.4m, in line with forecasting leaving balances of £21.1m
4. Dedicated Schools Grant- Annual surplus of £5.6m leaving balances of £3.7m
5. Collection fund- £2.7m used to finance 2023/24 expenditure. Balance remaining is £1m.

There has also been reductions in earmarked reserves- reduced by £29.5m from £79.1m to £49.6m.

The Committee heard about the Annual Governance Statement. There is a statutory requirement for councils to review governance arrangements at least once a year . This enables the authority to monitor achievement of strategic objectives, consider whether these objectives have led to the delivery of appropriate, cost effective services and demonstrate to the public that it has effective stewardship of the public funds it is entrusted to spend.

The Annual Governance Statement identified six significant governance issues;

1. Financial Resilience
2. Procurement regulations
3. Creating a Better Place Programme
4. Health Integration
5. Partnership Governance
6. IT Security

The biggest issue facing the Council is Financial Resilience.

The Committee discussed the use of reserves and the implications that would have for a balanced budget. They were particularly concerned with why overspending hadn't been foreseen. The Assistant Chief Executive Officer explained that every council is facing overspend issues due to the significant increase in Placement, Temporary Accommodation and Social Work costs. Work is being done to mitigate the cost of these services such as the work to build residential care homes within the borough, but projects take time to deliver.

Resolved that, the Draft Annual Statement of Accounts is noted by the Committee.

10

WORK PROGRAMME

The Chair confirmed the work programme for the remainder of the year would be restructured to accommodate items that were scheduled for the meeting on 19th June 2024 which was cancelled.

Members suggested adding Contract Management as an item to the Work Programme. The Chair in agreement with the Assistant Chief Executive advised that this would be best suited to a separate workshop rather than a Committee meeting where they could look into Contract Management Skills in more detail.



Resolved that,

1. That the work programme will be restructured to accommodate items missed due to meeting cancellation of 19th June 2024.
2. Workshop to be arranged for members to look into Contract Management Skills in more detail.
3. That the Work Programme be noted by the Committee.

11

KEY DECISION DOCUMENT

The Scrutiny Board considered the Key Decision Document which records key decisions that the authority is due to take.

Resolved that, the Key Decision Document be noted.

12

RULE 13 AND 14

There was nothing to report under Rule 13 and 14.

The meeting started at 6:00pm and ended at 7:39pm



Report to Governance, Strategy and Resources Scrutiny Board

Corporate Performance Report 2024/25 for Q1 Corporate Performance Report (1st April to 30th June 2024)

Portfolio Holder (CPR):

Cllr Arooj Shah, Cabinet Member for Building a Better Oldham

Officer Contact (CPR):

Steve Hughes, Assistant Director Strategy & Performance

Report Author (CPR):

Gail M. Stott, Performance Improvement Lead, Strategy & Performance

CPR collated by: Performance Improvement Team, Strategy & Performance

Contact: StrategyandPerformance@oldham.gov.uk

Date: 9th October 2024

Reason for decision

Scrutiny of corporate performance aims to provide assurance that:

- our corporate priorities are aligned to the needs of our residents (resident focus)
- our services are good, or are on track to good
- any services that are not on track, or have identified risks, are being supported or challenged to rectify this
- any demand indicators or resource pressures are being noted and service provision is being re-assessed accordingly
- the organisation has robust performance management processes in place.

Summary

The purpose of this report is to provide an overview of corporate performance against agreed service business plan measures for the 2024/25 Q1 period (April – June).

The current reporting format has been developed with the intent of bringing more mature performance reporting online once the ongoing Business Insight, Performance and Strategy Programme (BIPS) Programme and Digital Services Foundation (DSF) Project have been completed.

Historically, a full CPR has gone to the Governance, Strategy and Resources (GSR) Scrutiny Board; however, now there are four Scrutiny Boards, it is deemed more appropriate that the constituent parts go to the appropriate meeting to enable more in-depth analysis and discussion of the CPR alongside other associated reports.

Recommendations

Scrutiny Board members are asked to:

- note the progress in implementing the business plan objectives
- celebrate areas of consistent good performance
- note the comments on progress
- consider areas for review (good or poor) that could produce learning for the organisation
- note the interconnection of these actions with ongoing activities within the Directorate or Portfolio and corporate key projects such as our [Cost of Living Response](#) and [Don't Trash Oldham](#)
- consider benchmarking reports from open data sources
- review performance in the context of our borough and the demands on our services.

Corporate Performance Report 2024/25 Quarter Q1

1. Background

Business Planning

1.1 The [Corporate Plan](#) 2022/27 was approved by Cabinet in September 2022; service and business plans are closely aligned to the priorities set out in this Plan.

1.2 Revised guidance for the development of directorate or service level business plans was issued for 2024/25 in January 2024.

1.3 Directorate or service level business plans include a range of performance metrics, both 'business as usual' and transformational, aimed at achieving the aspirations of the Corporate Plan and putting our Residents First.

1.4 It is noted that business plans can be influenced by both internal and external factors, including increased demand, available funding or resources, changes in legislation or policies, and so are kept under review.

1.5 It is important that performance is viewed in the context of our borough; our published [district profiles](#) and the [Oldham JSNA](#) provide more detail on our borough alongside open data sources, such as the [the Health Foundation Local Authority Dashboard](#). These statistics and projections need to be considered when reviewing current and projected service levels and demands.

Performance Reporting Systems

1.6 The fundamental foundation of a Performance Management Framework is a performance management system that generates data that is utilised at all levels for decision-making; together with a transparent and efficient performance reporting cycle supported by good governance processes.

1.7 As part of the Council's ongoing management processes, each service has regular opportunities, via forums such as their Directorate Management Team (DMT), Performance Area Meeting (PAM) or Portfolio meeting, to review their performance at a service and directorate level. It is in these forums that services can:

- raise issues or concerns
- consider performance more holistically in the wider context of the service
- reflect on changes in demands or resources
- agree actions to improve or maintain performance levels.

1.8 Data scrutinised in these forums will be more detailed and focused on the particular service or function. It is from these discussions that the comments made in the CPR by Heads of Service and Portfolio Holders are derived.

1.9 The intent of the CPR is to enable key (high-level) data to be presented to provide reassurance, whilst also allowing space for discussion. Historically, a full CPR – covering all service areas - has gone to the Governance, Strategy and Resources (GSR) Scrutiny Board. From 2024/25 it has been agreed that it is more appropriate for the constituent parts go to the appropriate scrutiny meeting:

-
- **People CPR** – split between Children & Young People Scrutiny Board **and** Adult Social Care & Health Scrutiny Board
 - **Place CPR** – Place, Economic Growth and Environment Scrutiny Board
 - **Resources CPR** – Governance, Strategy and Resources Scrutiny Board

1.10 This will support more in-depth analysis and discussion of the CPR alongside other relevant reports, supported by relevant senior officers from each area. The Performance Improvement Team will continue to offer support and capture feedback where required.

1.11 The Corporate Performance Reports (CPR) are currently presented in PowerPoint for clarity and in keeping with previous feedback; they include:

- a summary for each service
- service successes
- key metrics
- areas for development
- capacity for Head of Service / Director's comments
- opportunity for Portfolio holder comments
- a glossary / list of acronyms and colour key (if required).

1.12 The current reporting format (agreed 5th October 2023 GSR Scrutiny Board) was developed as a solution to the decommissioning of CorVu but, with a view to bringing more mature performance reporting online once the Business Insight, Performance and Strategy Programme (BIPS) Programme and Digital Services Foundation (DSF) Project are fully completed. These projects remain ongoing into 2024/25.

Benchmarking

1.13 In addition to reviewing in-house reporting, Scrutiny Boards may wish to consider performance reports from open data sources. This will enable them to benchmark Oldham against other authorities. Much of this data is historical and on its own does not present a complete picture of the Council's performance however, these reports can be used to generate questions or key lines of enquiry.

1.14 LG Inform provides a number of ready built reports that use published data; they provide useful trend or comparator information.

1.15 The Office for Local Government (Oflog) Local Authority Data Explorer was launched with the primary purpose of '*providing a transparent and authoritative source of information about the performance of local government*' - current reporting is in relation to:

- Adults Social Care
- Corporate & finance
- Planning
- Roads
- Waste management

1.16 Greater Manchester Combined Authority (GMCA) produces business intelligence to inform all Greater Manchester priorities. This includes the Greater Manchester Strategy Performance Dashboards - six-monthly dashboards that assesses performance against the ten priority targets of the Greater Manchester Strategy.

Please contact StrategyandPerformance@oldham.gov.uk if you require any assistance in accessing these reports.

Performance Reporting – ongoing development

1.17 As part of the 2024/25 business planning cycle, data owners (Heads of Service) are reviewing their metrics and Key Performance Indicators (KPIs) with support from the Performance Improvement Team. The aim is to ensure services have the right measures that demonstrate the right outcome or impact. They also need to ensure they correlate to Oflog measures and any other statutory returns where possible.

1.18 Our ongoing review has determined that a standardised ‘one size fits all’ approach to performance monitoring is not feasible as the performance data that services produce differs. Some services produce data that is quantitative and readily assessed against milestones. However, in order for these to have the maximum relevance they need to be set in an appropriate timeframe – for example education services data needs to be reported termly as opposed to in financial year quarters. Similarly, some strategic programmes, such as public health initiatives, will only show meaningful results over a number of years.

- Any variance in timeframe or other aspects of the KPI will be highlighted in reporting.

1.19 Many core services provide a supporting role to others, so performance within their functions cannot be measured quantitatively and success is identified by ‘outcomes’ or the performance of the services they support. These services are developing business plans outlining their overarching strategies but with performance measures that are outcome, milestone or project based. To avoid repetitive or inaccurate reporting for these services, performance reporting may only occur at the beginning and the close of the year when major milestones can be effectively and accurately reflected on.

1.20 Member and officers are recommended to avail themselves of the resources provided by the Local Government Association; these include:

- **performance management guide for councillors** - an overview of what performance management is and the role of councillors in the performance management of the council
- **performance management e-learning module for councillors** - key points from the guide are available in a convenient and free to access module which should take around 30 minutes to complete
- **performance management guide for local authority officers** – provides a helpful overview of performance management in local government for officers.

Appendix:

1. Resources CPR - Finance; Legal Services; Corporate Resources

Report to Governance, Strategy and Resources Scrutiny Board

Corporate Performance Report 2024/25 for Quarter 1: 1st April to 30th June 2024

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Portfolio Holder (CPR): Cllr Arooj Shah, Cabinet Member for Building a
Better Oldham

Officer Contact (CPR): Steve Hughes, Assistant Director of Strategy & Performance

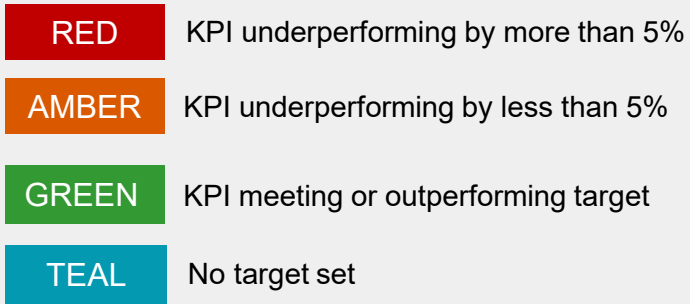
Report date: 9th October 2024

CPR collated by: Performance Improvement Team
StrategyandPerformance@oldham.gov.uk

Core Resources

Key Performance Indicators

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Communications & Research

Performance Measures & Business Plan Report

Portfolio Holder: Cllr Arooj Shah, Cabinet Member for Building a Better Oldham

Officer Contact: Smyth Harper (*Interim Head of Communications and Research*)

Service Summary:

The Communications and Research team strategically plans, manages and delivers all communications and research activity for Oldham Council, focused on achieving agreed corporate priorities. Communications and engagement activity is delivered across a range of digital and traditional channels, including through the press, social media, web content, face to face engagement, out of home collateral and more; all tailored to our diverse external and internal audiences and adapted for the channels they use.

Communications & Research Strategic priorities

We have four agreed strategic priorities for 2023/24.

These will be fully evaluated as new metrics are available in 2024/25.

Interim activity against each of the measurables is detailed on the following slides, followed by a quarterly snapshot of metrics on our key digital channels.

Increase pride in the borough from the Resident Survey of 2022/23. In that survey, 74% of respondents said they were satisfied with their local area but only 35% said they would recommend it as a tourist destination. We'll increase these to at least 79% (LGA average) and 40% by the next Resident Survey.

Increase resident satisfaction with Council communications - We'll measure this by aiming to reduce the number of people who say they don't receive any information from the Council (21% in the 2022/23 Resident Survey) to less than 20%.

Improve two-way engagement with our workforce. In our most recent Staff Survey only 41% of staff said senior management "communicate effectively with me". We aim to improve that to at least 50% by the next Staff Survey via the implementation of a strategic Internal Communications Strategy. The strategy will also act as our 'golden thread' of engagement touchpoints we have with staff in 2023/24.

Manage key reputational issues in an honest, transparent and people-focused way. We will ensure our residents have access to factual and timely information and enable media to produce fair and balanced reports.

Communications & Research

Key Metrics- Social Media

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Facebook
followers (End of
Quarter)

33,919



Percentage
Difference:
+2.78%

Q4: 33,000

Instagram
followers (End of
Quarter)

5,037



Percentage
Difference:
+0.86%

Q4: 4994

LinkedIn
followers (End
of Quarter)

9,157



Percentage
Difference:
+1.73%

Q4: 9000

Residents'
Newsletter
Subscribers (End
of Quarter)

8365



Percentage
Difference:

Q4: 8113

Twitter
followers (End
of Quarter)

31,158



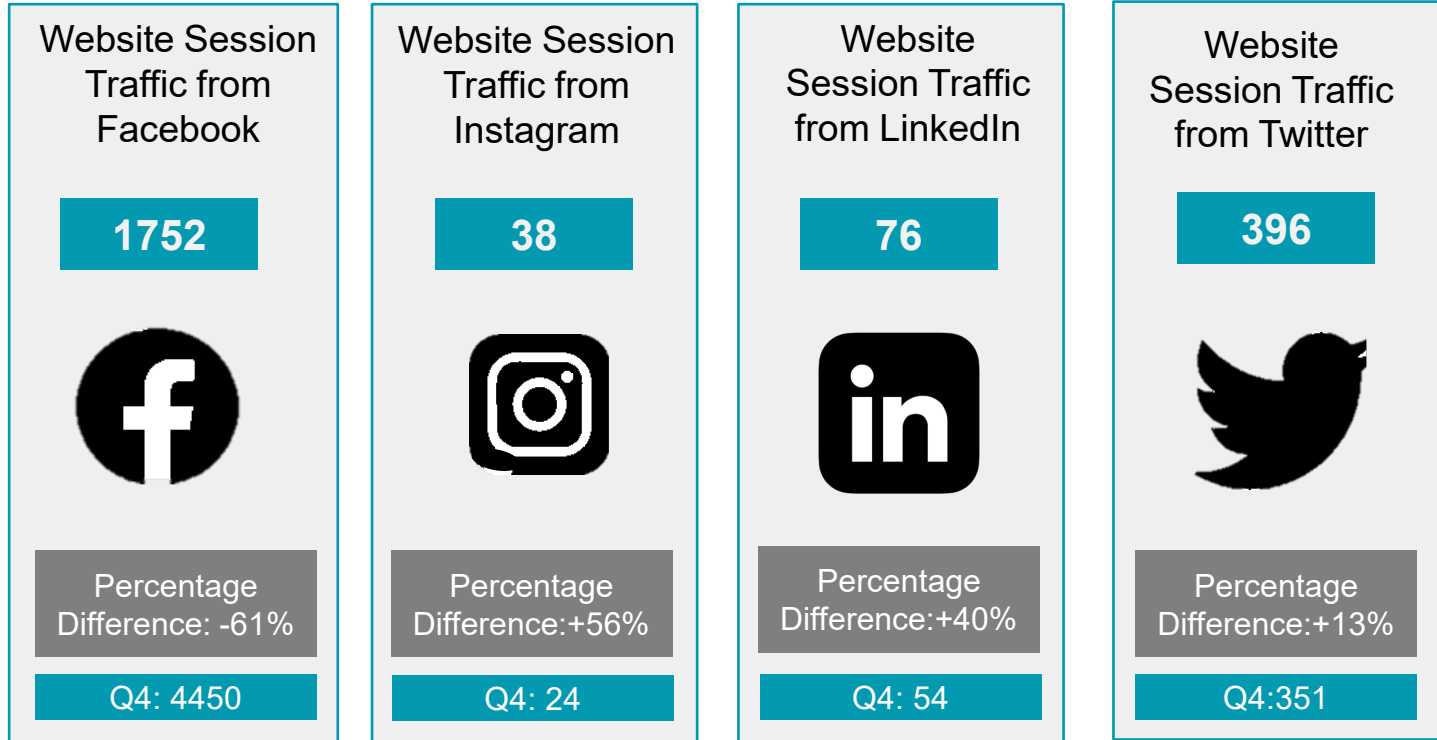
Percentage
Difference:
+0.83%

Q4: 30,900

Communications & Research

Key Metrics- Web Figures

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* Figures are an average over 3-month period

Communications & Research

Progress Against Key Annual Priorities

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Developed and secured approval for new Communications strategy and approach including c10 major campaigns; four key themes of activity including Council Reputation and implemented delivery of new more focused approach. Major proactive campaigns developed and launched securing positive social media reach, engagement and response and positive media coverage including Creating a better Oldham – Town Centre transformation; Giving children the best start in Life – foster parents, Family Hubs; 175th Anniversary.



Increased social media engagement (positive online response) to series of new content with new focus on featuring local people, alongside key events and activities and greater use of people-centred videos and storytelling.

Communications & Research

Progress Against Key Annual Priorities

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Improve two-way engagement with our workforce

New internal communications channel developed and implemented – CEO Update, securing positive response and increased ‘open rate’ v Team Brief



Managing key reputational issues

Successful delivery of communications for two major elections.
Reactive and proactive media relations and external relations advice and implementation around issues arising from elections
Proactive response and communications/media handling for major employer’s redundancy announcement to secure positive Council positioning
Ongoing responses to a wide range of tactical and service delivery issues
In-person meetings with key journalists; implemented more proactive approach.

Communications & Research

Comments

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Q4: David Rose (Interim Head of Communications and Research)

High volume outbound activity in line with 90-day pre-election plan. Continued measurable impact of core campaigns on children's social worker recruitment, fostering/adoption uptake.

Feb and March 2024 activity included successful short Housing campaign developed and deployed ('Local Solutions to Tackle National Housing Crisis') and series of news announcements and stories across priorities including progress with major capital economic development projects and Council intervention into key areas and priorities.

Q1: David Rose (Interim Head of Communications and Research)

Successful development and initial delivery of new corporate communications strategy with focus on coherent campaigns to better show Council activities and 'intervention' to improve the borough and people's lives

Two elections and surrounding issues managed smoothly.

Improved proactive media relations approach securing better quality and volume of coverage

Improved 'people-centred' approach to social media content

New, coherent corporate campaigns and themes underway to improve Council reputation

Successful one-off communications support to Council and political 'one off' activities

Signed Off: 24/07/2024

Communications & Research

Portfolio Holder Comment

Q4: Cllr Arooj Shah (Cabinet Member for Reform & Regeneration)

I am pleased that progress continues to be made in how Oldham Council reaches out to our residents and tells them about the work we do on their behalf every day. I am also grateful that efforts are being made to improve our internal communications to staff because I know given that around three-quarters of them live in the Borough it's vital that they can confidently act as our ambassadors.

Q4: Cllr Arooj Shah (Cabinet Member for Reform & Regeneration)

Two instances of PERP have limited the Council's opportunities to communicate to our residents but the time has allowed the team to focus on planning ahead for the year and to alter the way they deliver communications campaigns. I am hopeful this change in approach can have a positive impact on the Council's reputation and look forward to seeing the Comms team highlighting the good work that this organisation does every day of the week to support our residents, improve their lives and the Borough.

Signed Off: 31/07/2024

Customer Services

Performance Measures & Business Plan Report

Portfolio Holder: Cllr Peter Dean, Cabinet Member for Thriving Communities & Culture

Officer Contact: Pam Siddall (Head of Customer Services)

Service Summary:

Customer Services provides the following services:

- Customer Support Centre
- Access Oldham & Helpline
- Support & Inclusion
- Welfare Rights
- Blue Badge
- Local Welfare Provision
- Service Development, Systems & Quality

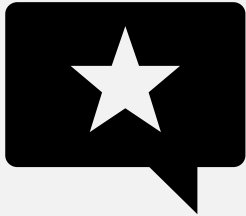
Customer Services

Key Metrics

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Post Call Customer Satisfaction Surveys

90.45%



Q4 (2023/24): 92.19%

No target

Call Quality Evaluation

95.24%

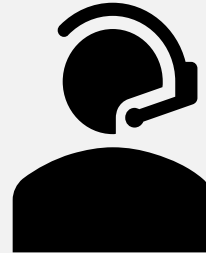


Q4 (2023/24): 94.97%

No target

% Calls Answered

88.26%



Q4 (2023/24): 84.69%

Target: 89%

Average Call Wait time (All Queues)

00:06:08



Q4 (2023/24): 00:07:29

Target: <00:12:00

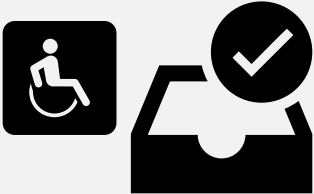
Customer Services

Key Metrics

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Blue Badge: Average number of days taken from Application to decision

32 days




Q4 (2023/24): 25 days

No target

Blue Badge: Average number of days taken from Referral for IMA to decision

19 days




Q4 (2023/24): 34 days

No target

LWP % Processed within 3 days

90.88%



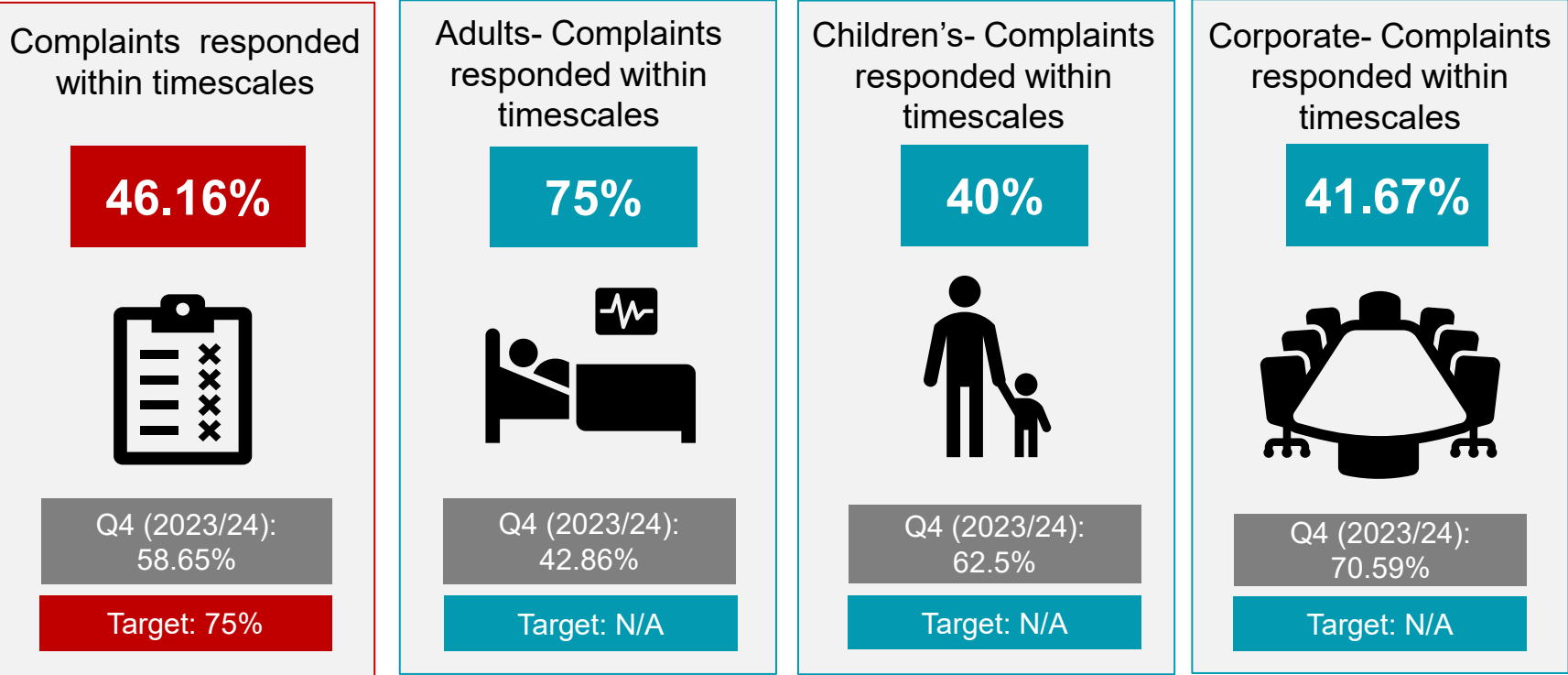
Q4 (2023/24): 90.24%

Target: 90%

Complaints

Key Metrics

Page 29



Customer Services

Average Waiting Times

	Q1	Q4 (23/24)	Difference
Average Wait Time: Benefits	00:17:34	0:18:01	-00:00:27
Average Wait Time: Blue badge	00:06:36	0:09:22	-00:02:46
Average Wait Time: Council Tax	00:15:13	0:15:34	-00:00:21
Average Wait Time: Elections	00:01:33	0:03:50	-00:02:17
Average Wait Time: ENV Health	00:07:23	0:11:15	-00:03:52
Average Wait Time: Environment	00:06:28	0:08:14	-00:01:46
Average Wait Time: Highways	00:08:08	0:09:00	-00:00:52
Average Wait Time: Housing Options	00:13:34	0:16:51	-00:03:17
Average Wait Time: Libraries	00:02:47	0:02:07	+00:00:40
Average Wait Time: Payments	00:00:40	0:00:44	-00:00:04
Average Wait Time: Pest Control	00:05:03	0:04:47	+00:00:16
Average Wait Time: Registrars	00:02:19	0:03:28	-00:01:09
Average Wait Time: School Admissions	00:05:22	0:06:55	-00:01:33
Average Wait Time: Street Lighting	00:01:43	0:01:37	+00:00:06
Average Wait Time: Switchboard	00:00:22	0:00:17	+00:00:05
Average Wait Time: Team Oldham Helpline	00:01:26	0:03:12	-00:01:46
Average Wait Time: Waste & Recycling	00:09:08	0:12:54	-00:03:46

Customer Services Successes



Complaints
responded
within
timescales

The Complaints team has recently delivered 2 training sessions for Adult Social Care and Children's Social Care staff with regards investigating and responding to complaints. It is hoped that the information provided in these sessions, along with accompanying staff guidance will aid managers in completing timely and comprehensive responses.



Blue Badge:
Referral for IMA
to decision

A new way of working has been implemented which has greatly reduced the wait time for occupational therapist assessments to be completed.



% Calls
Answered

Performance during Q1 has improved, we have seen lower call volumes at certain times of the week which has increased the average calls answered; Mondays continue to be a challenge.



Call Quality
Evaluation

Performance monitoring shows a slight increase in agent handling of calls.



Average
Call Wait
time (All
Queues)

Average wait time continues to benefit from the quieter times of the week bringing the overall weekly average down.

Customer Services

Areas for Development



Complaints responded within timescales

The Complaints Team is currently reviewing its processes and systems to ensure they are efficient and effective, with a view to increase capacity where possible. It will also be looking at reporting improvements in order to provide timely updates on complaint progress to all services.



Blue Badge: Application to decision

A new way of working to reduce the time for applicants waiting for assessments, has resulted in a longer wait time to decision as more decisions are going to the occupational therapist overall.



% Calls Answered

We will be recruiting further staff to fill vacancies as soon as DDR for the grade to be advertised has been signed off.



Call Quality Evaluation

We continue to evaluate surveys and comments to improve the service.



Average Call Wait time (All Queues)

Lower performing queues should see an improvement following recruitment and training of staff later this year.

Customer Services

Comments

Q4 Comments: Emma Chamberlain (Service Development and Quality Manage)

Performance has increased slightly during Q4 compared to Q3 however we continue to struggle meeting the demand, particularly with Housing Options who we are still working closely with to reduce call volumes. We are in the process of training staff on additional services to help us maintain and improve performance across all our services.

In addition to the automated line closures during periods when wait times reach unacceptable levels we have also made some changes to our call back service to improve the customer experience and reduce wait times which is reflected in the reduction of our overall average wait times during Q4.

As the average wait time also includes the switchboard, we do expect to see an increase in the overall average wait time once a large majority of these calls are removed following the implementation of the automated Switchboard, however this will not impact the average wait times on individual services.

Q1 Comments: Pam Siddall (Head of Customer Service)

Performance has been steady and, in some areas, improved. There are some areas for development and work continues to implement digital solutions to remove non-added value activity. Pressures remain until recruitment can be carried out, which is imminent. Further loss of established staff has provided challenge specifically on the Benefits line; the team are working with the back-office service to enable training for our team as soon as practicable. Implementation of the automated switchboard went very well, and we are close to optimum levels of automated transfers on that line.

Signed Off: 10/07/24

Customer Services

Portfolio Holder Comments

Q1 Comments: Cllr Peter Dean, Cabinet Member for Thriving Communities & Culture

I am pleased that since an automated switchboard was launched in May, over 80% of calls received via the switchboard are now handled by the self-service solution with staff on hand to support residents who prefer or need to speak to a member of the team. This change is crucial to supporting capacity to be diverted to other service lines. And I am particularly happy that satisfaction remains above 90% with this switch in place.

Customer Support Glossary:

- CSC: Customer Support Centre
- LWP: Local Welfare Provision
- IMA: Independent Mobility Assessment

Finance

Performance Measures & Business Plan Report

Portfolio Holder: Cllr Abdul Jabbar, Cabinet Member for Value for Money & Sustainability

Officer Contact: Julie Smethurst (*Assistant Director Revenues & Benefits*)

Service Summary:

The Finance Service provides a wide range of functions primarily focussed on the delivery of financial management information, advice and support to Council officers and Members, but also members of the public, Central Government and other partner organisations.


Finance

Key Metrics

Page 37

Average time taken to process Housing Benefits new claims and change of circumstances

6 days



Q4 (2023/24): 5 days

Target: 27 days

Average time taken to process council tax reduction (new claims and change events) CTR

8 days

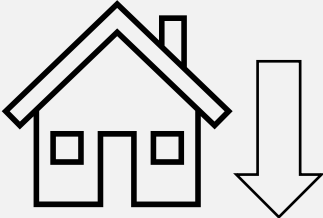


Q4 (2023/24): 10 days

Target: 20 days

Average time taken to process housing benefit/council tax reduction claims and change in circumstances

8 days



Q4 (2023/24): 9 Days

Target: 20 Days

Finance

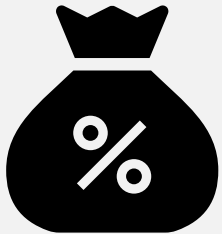
Key Metrics

Page 38

Percentage of in-year Council Tax collected

28.1%

Current position
(cumulative)



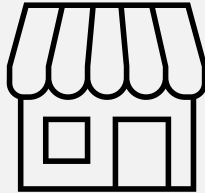
Q1 (2023/24):
45.93%

End of Year
Target: 94%

Percentage of in year national non-domestic rates collected

30.38%

Current position
(cumulative)



Q1 (2023/24):
47.01%

End of Year Target:
97.2%

Valid invoices paid within 30 days

93.06%

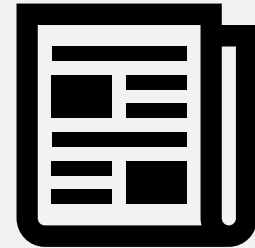


Q4 (2023/24):
93.15%

Target: 94%

FOI & EIR completed within timescales

89%



Q4 (2023/24):
89%

Target: 85%

Finance

Successes




Percentage of in
year national non-
domestic rates
collected

On Target

Finance

Areas for Development



Percentage of
in-year
Council Tax
collected

The first reminder run for 24/25 debts was done later than in previous years and this is reflected in the collection level.

Finance

Comments

Q4: Julie Smethurst (Assistant Director Revenues & Benefits)

Performance was slightly below target for council tax collection, but still above 94% for the year. The mid-year recharging of previous SPD awards and new properties being brought into the list raised the level of net debit and gave residents a shorter period of time within the financial year to pay increased charges, which many have struggled to do. Business rates collection has been impacted by the revaluation and the removal of many short term discretionary reliefs post Covid, meaning that many businesses are at full charge for the first time in a number of years, but struggling to meet that commitment in a challenging economy.

Q1: Julie Smethurst (Assistant Director Revenues & Benefits)

Overall performance is encouraging at the end of the first quarter despite the challenges presented to staff with sickness, vacancies and the ongoing transformation project placing additional pressures.

Signed Off: 16/07/24

Finance Glossary:

- FOI: Freedom of Information
- EIR: Environmental Information Regulations
- CTR: Council Tax Reduction
- SPD: Single Person Discount

Procurement

Performance Measures & Business Plan Report

Portfolio Holder: Cllr Abdul Jabbar, Cabinet Member for Value for Money & Sustainability

Officer Contact: Jasmin Banks-Lee Head of Procurement (Interim)

Service Summary:

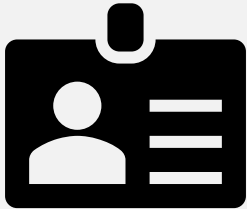
Oldham Council's Commercial Procurement Unit (CPU) provides a professional support service in relation to all areas of external expenditure for the Council. The CPU operates as both an operational and commercial strategic support, linking in with the voluntary sector to maximise the delivery for the local community and protecting the 'Oldham Pound' as much as possible.

Procurement Key Metrics

Page 44

Number of local direct employees (FTE) hired/retained (re-tendered contracts) on contract for 1 year or the whole contract duration

10.22

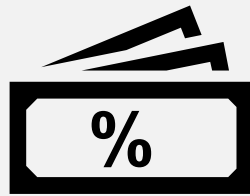


Quarter 4 (2023/24):
9

No Target

Percentage Council spend in Oldham (12 month rolling)

53.1%

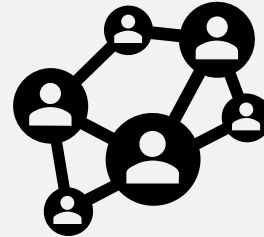


Quarter 4 (2023/24):
52%

Target: 55%

Total amount (£) spent in LOCAL supply chain through the contract (OT18)

£11,150,000

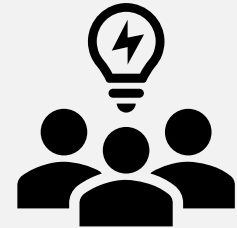


Quarter 4 (2023/24):
£13,437,854

No Target

Total amount (£) spent through contracts with LOCAL micro, small and medium enterprises (MSMEs) (OT19)

£219,290



Quarter 4 (2023/24):
£23,505

No Target

Procurement Successes

Page 45



Number of local direct employees (FTE) hired/retained (re-tendered contracts) on contract for 1 year or the whole contract duration

There is a modest increase in the number of local direct employees from 9 in Q4 23/24 to 10.22 in Q1 24/25. This suggests positive momentum in local hiring, though still within the range of normal fluctuations. Continued support for local employment initiatives will help maintain and potentially enhance this growth.

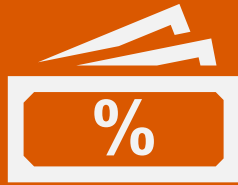


Total amount (£) spent through contracts with LOCAL micro, small and medium enterprises (MSMEs) (OT19)

The amount spent through contracts with local enterprises has increased significantly from £23,505 in Q4 23/24 to £219,290 in Q1 24/25. This substantial rise is a positive development, reflecting investment in local enterprises.

Procurement

Areas for Development



Percentage
Council spend
in Oldham (12
month rolling)

The percentage of council spend in Oldham increased slightly from 52% in Q4 23/24 to 53.1% in Q1 24/25. This positive adjustment moves the spending closer to the target, demonstrating a commitment to investing in the local economy. Sustaining and potentially increasing this percentage remains a key focus.



Total amount (£)
spent in LOCAL
supply chain
through the
contract (OT18)

While there is a decrease in the amount spent in the local supply chain from £13,437,854 in Q4 23/24 to £11,150,000 in Q1 24/25, the overall spending remains significant. This variance is within expected ranges and reflects normal fluctuations. Efforts to ensure consistent investment will continue to support local suppliers effectively.

Procurement Comments

Q4: Jasmin Banks-Lee (Interim Head of Procurement)

To support in progressing a more strategic and operationally efficient approach to procurement, a STAR review of the procurement function is underway. In addition, it will address how the procurement team and wider organisation prepare for the new procurement Regulations due to go live in Autumn 2024. Training and education courses for the new Regulations, provided by the Government Commercial College is now available and all category procurement staff will be undertaking the courses. Separately, recruitment is now winding up to fill the current vacancies in the team.

Q1: Jasmin Banks-Lee (Interim Head of Procurement)

STAR review is complete, and report being considered by HoP and FD to determine proposals for Management. All staff have completed the Procurement Act training in readiness for the new Regulations which go live in October 2024. Some staff will be undertaking the deep dive, to be considered super-users. Category Pipelines are drafted ready for circulation to stakeholder leads to allow for better planning of procurement activity and strategic priorities. This will support the longer-term vision for the team in terms of permanent structure, workloads, resource planning and compliant procurement delivery.

Signed Off: 24/07/24

Procurement Glossary:

- FTE: Full Time Employment
- MSMEs: Micro, Small, Medium Enterprises

Human Resources & Organisational Development

Performance Measures & Business Plan Report

Portfolio Holder: Cllr Abdul Jabbar, Cabinet Member for Value for Money & Sustainability

Officer Contact: Vikki Morris (Assistant Director of Human Resources and Organisational Development)

Service Summary: The service provides a range of workforce related functions that support good employment practice and workforce engagement for the Council and external paying customers

- HR advisory, policy & employee relations
- Job Evaluation
- Recruitment
- Workforce systems, workforce data & statutory workforce reporting
- Payroll, pensions & HR transactional
- Learning & Development
- Apprenticeships
- Workforce Wellbeing
- Organisational development & design
- Employee engagement
- Workforce planning

HR & OD

Key Metrics

Page 50



No. of
Vacancies
advertised:
117

Q4 (2023/24): 107



Percentage
Turnover:
2.85%

Q4 (2023/24): 2.41%



Employee
Relations
Cases:

Q4 (2023/24): 196



No. of
New
Starters:
131

Q4 (2023/24): 132



No. of
Leavers:
78

Q4 (2023/24): 66



Sickness
Absence
Rate:
5.06%
working days
lost

Q4 (2023/24): 6.09%



Committed*
Levy Spend
£211,300

**Spend over the duration of the
apprenticeships learning programme*

Q4 (2023/24): £202,148



Number of new
apprenticeships
(upskilling
current
workforce):

28

Q4 (2023/24): 8



Number of new
apprenticeships
(new starters):

2

Q4 (2023/24): 10



% New starters
completing
MeLearning
induction:
70%

Q4 (2023/24): 51%

HR & OD Successes

Page 51



No. of Roles
advertised

Successful role out of new application tracking system and greater.job platform - which will enhance applicant and manager experience through increased opportunities for personalised communications with applicants and also increased data collection throughout the attraction and recruitment cycle.



Number of new
apprenticeships
(upskilling
current
workforce)

Greater Leaders L3 & L5 cohorts provided a boost to the number of existing apprentices starting a qualification. Learning at Work week (13-19 May 2024). Target learning initiatives cascaded throughout the week to support personal, role and career development.



% New starters
completing
MeLearning
induction

There were 105 new starters registered to complete the MeLearning induction between April-June 2024. Of which 70 completed and 7 in progress.

HR & OD

Areas for Development

Page 52



No. of
Vacancies
advertised

Changed indicator to No. Adverts instead of vacancies as some adverts can be for multiple roles.



Sickness
Absence Rate

The FTE has reduced slightly between Q4 and Q1 and the number of working days lost due to sickness has reduced when comparing Q4 to Q1. There were also slightly less working days in Q1 compared to Q4 of 2023/24.

HR & OD

Comments

Q4: Vikki Morris (Assistant Director of Human Resources & Organisational Development)

Capacity and appropriate technical skills mix (payroll & pensions) remain a challenge within the service. We continue to support Council services in delivering improved workforce engagement and development.

Q1: Vikki Morris (Assistant Director of Human Resources & Organisational Development)

Recruiting to key roles in the service remains a significant pressure. Learning at Work week in May evidences a positive workforce intervention which supports individual, team and service development.

IT (Operations)

Performance Measures & Business Plan Report

Portfolio Holder: Cllr Abdul Jabbar, Cabinet Member for Value for Money & Sustainability

Officer Contact: Mark Edgar (Head of IT Operations and Cyber Security)

Service Summary:

The role of the IT team is to deliver seamless and reliable IT services and projects that drive the success of Oldham Council. IT are committed to enhancing operational efficiency, supporting all departments, and embracing innovation to meet the evolving needs of our organisation.

IT (Operations)

Key Metrics

Page 55

Breached Tickets

106

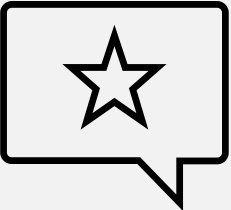


Q4 (2023/24):
182

Min target: <75

Customer Satisfaction

99.6%

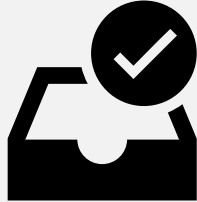


Q4 (2023/24):99.2%

Min target: 80%

First Contact Resolution rate (60 min)

81.74%




Q4 (2023/24):
80.3%

Min target: 60%

Service Level Agreement Compliance

96.9%




Q4 (2023/24):
94.9%

Min target: 90%

Contact Centre Telephone Availability

100%



Q4 (2023/24):
99.3%

Min target: 97%

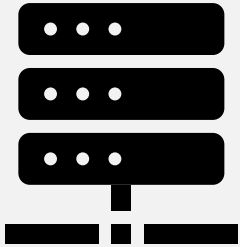
IT (Operations)

Key Metrics

Page 56

Business Critical Applications Available

99.78%

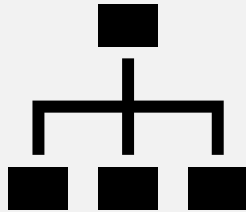


Q4 (2023/24): 99.9%

Min target: 97%

Business Critical Infrastructure

100%

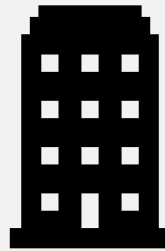


Q4 (2023/24): 100%

Min target: 97%

LAN Availability – Civic Centre

90.42%

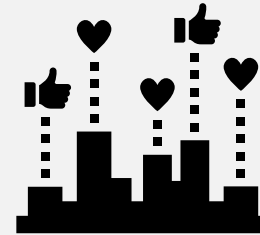


Q4 (2023/24): 98.7%

Min target: 97%

WAN Availability – Council Sites

100%

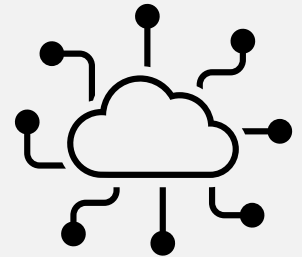


Q4 (2023/24): 100%

Min target: 95%

Remote Connection Availability

100%



Q4 (2023/24): 100%

Min target: 97%

IT (Operations)

Areas for Development

Page 57



LAN Availability –
Civic Centre

Due to the impacts of the Wi-Fi issues in Spindles early adoption, we need every remaining month to be at 100% in order to hit our minimum target

IT (Operations)

Comments

Q4: Mark Edgar (Service Assurance and Compliance Manager, Head of IT Operations and Cyber Security)

For Q4, despite achieving success in meeting our KPIs and observing increases in various areas, we must address a notable challenge: a significant uptick in tickets breaching the support SLA, marking the highest average spike of the year. This surge in breached SLAs signals a critical area for improvement, demanding our immediate attention.

Throughout the year, we've encountered operational hurdles, ranging from resource limitations to the demands of pivotal transformational projects. Despite these challenges, the IT team has consistently showcased resilience and dedication, ensuring the smooth functioning of critical services.

As we move forward, it is crucial to conduct a thorough review of our Target Operating Model. This strategic evaluation will enable us to realign our structure and resources with the evolving needs of the council, ensuring our ability to meet future demands effectively.

Q1: Mark Edgar (Service Assurance and Compliance Manager, Head of IT Operations and Cyber Security)

In April, our Local Area Network (LAN) availability was significantly impacted by issues experienced with the new Spindles WiFi solution. These issues persisted for over a week, leading to a substantial reduction in network performance and stability at that site. The rollout of the Spindles WiFi solution faced unforeseen technical difficulties, including compatibility issues with existing infrastructure and hardware, causing frequent outages and degraded performance. The complexity of these problems led to extended downtime, directly reducing network availability. Users experienced intermittent connectivity, impacting their efficiency and increasing support requests, further straining IT resources and delaying resolution. However, as we cannot measure intermittency, we have just considered for the KPI that it was 'Down.'

Signed Off: 10/07/24

Finance / Procurement / HR & OD / IT

Portfolio Holder Comments

Q4: Cllr Abdul Jabbar (Cabinet Member for Value for Money & Sustainability)

I remain satisfied that despite workforce/vacancy issues across a number of departments that fall within the finance and corporate resources portfolio that Oldham Council is providing good value for money for our residents and there are a number of plans in development to help frontline staff deal with increasing demand for services.

Q1: Cllr Abdul Jabbar (Cabinet Member for Value for Money & Sustainability)

Like Council's across the country, we still face significant challenges, funding pressures and increased demand. I am grateful to the work that teams in Finance, HR&OD, IT and Procurement and putting in to attempt to mitigate these challenges.

Signed Off: 31/07/2024

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Governance, Strategy, and Resources Scrutiny Board



Revenue Monitor and Capital Investment Programme 2024/25 Month 4 – July 2024

Portfolio Holder: Councillor Abdul Jabbar MBE, Deputy Leader of the Council and Cabinet Member for Value for Money and Sustainability

Officer Contact: Sarah Johnston, Director of Finance

Report Author: Lee Walsh, Assistant Director of Finance

9 October 2024

Reason for Decision

The report provides Cabinet with an update as at 31 July 2024 (Month 4) of the Council's 2024/25 forecast revenue budget position (at Annex 1) and the financial position of the capital programme together with the revised capital programme 2024/25 to 2028/29 (at Annex 2).

Executive Summary

Revenue Position

The forecast overspend position based on the Month 4 profiled budget is £7.202m which if not addressed would result in a year-end overspend of £21.065m (£26.033m at month 3).

This financial monitoring report follows on from the position reported at Month 3 and should be used as a warning of the potential year-end position if no further action is taken to reduce net expenditure. The management actions already implemented for 2024/25 have been factored into the Month 4 forecasts and this has resulted in a reduction in the position previously reported. Work continues across the organisation to address this position and it is anticipated that by the year end, the current outturn deficit position should reduce even further.

An update on the Month 4 2024/25 position is detailed within Annex 1.

Capital Position

The report outlines the most up to date capital spending position for 2024/25 to 2028/29 for approved schemes. The revised capital programme budget for 2024/25 is £103.935m at the

close of month 4 (£101.680m at Month 3), a net increase of £2.255m. Actual expenditure to 31 July 2024 was £17.397m (16.74% of the forecast outturn).

It is likely that the forecast position will continue to change throughout the year with additional re-profiling into future years.

Recommendations

That Cabinet:

1. Notes the contents of the report.
2. Approves forecast profiled budget, being an adverse position of £7.202m at Month 4 and the forecast potential adverse position by year end of £21.065m, with mitigations in place to reduce expenditure.
3. Approved the revised capital programme for 2024/25 including the proposed virements and the forecast for the financial years to 2028/29 as at Month 4 as outlined in Annex 2.

Revenue Monitor and Capital Investment Programme 2024/25 Month 4 – July 2024**1 Background**

- 1.1 The Authority's 2024/25 revenue budget was approved by Council on 28 February 2024 at a sum of £299.818m to be met by government grants, Council Tax, Business Rates, and the use of General Earmarked Reserves. This report sets out the updated revenue financial position at Month 4.
- 1.2 As the year progresses the monthly and outturn projections will reflect the evolving position of the impact of management actions put in place to mitigate in-year pressures, new developments and changes in the profile of planned expenditure and any additional grants that are announced from the Government.

2 Current Position

- 2.1 As with the monitoring report previously presented, a cautious approach has generally been taken when preparing the current forecasts. For this period however, the impact of management actions particularly around staffing and non-essential spending have been included.
- 2.2 This Month 4 revenue monitoring report can be used to give a general direction of travel and highlight any significant areas of concern which may not just impact on the current year, but also when preparing future budgets. A projected overspend based on the Month 4 profiled budget is £7.202m which if not addressed urgently has a year-end forecast of £21.065m (£26.033m at Month 3). This is an improved position of £4.968m from that reported at Month 3.
- 2.3 The main areas of concern identified in the Month 4 monitoring report (based on the month 3 profiled budget) are the same as those reported at Month 3 and are:
- Community Health and Adult Social Care an adverse position of £1.868m,
 - Children's Services estimated overspend of £4.400m; and
 - Strategic Housing, in particular Temporary Accommodation a forecast overspend of £1.767m.
- 2.4 The projected net adverse variance is of concern and as a result, management mitigations have been actioned and are contributing to the change in the forecast position reported along with the re-assessment on assumptions within the Capital, Treasury and Technical Accounting and the work within Children's Services. Further detail on the mitigations implemented are detailed in Annex 1 and are essential to support the financial resilience of the Council.
- 2.5 Every effort will be made to reduce the forecast variance by the year end to mitigate any potential impact on the 2025/26 budget, together with the projected budget gap for the following year.
- 2.6 The original capital programme for 2024/25 totalled £99.683m. The revised capital programme as at Month 4 taking into account any approved carry forwards, approved new funding, new schemes and variations and proposed variations/ re-phasing gives

projected revised expenditure of £103.935m (£101.860m as at Month 3). This revised programme incorporates the impact of the updated Creating a Better Place programme as reported to Cabinet on 15 July 2024. Actual expenditure at Month 4 was £17.397m (16.74% of the forecast outturn). Further details of expenditure and schemes within the capital programme can be found in Annex 2.

2.7 The Annual Review of the capital programme is currently taking place. This is likely to lead to further reprofiling of planned expenditure and the realignment of capital resources between schemes. Its findings and recommendations will be reported in the month 6 report.

3 Options/Alternatives

3.1 The options that Cabinet might consider in relation to the contents of this report are;

- a) to consider the forecast revenue and capital positions presented in the report including proposed changes
- b) to propose alternative forecasts

4 Preferred Option

4.1 The preferred option is that the Committee considers the forecasts and changes within this report; option (a) at 3.1.

5 Consultation

5.1 Consultation with the services within the Council and the Director of Finance.

6 Financial Implications

6.1 The full financial implications are detailed in the report.

7 Legal Services Comments

7.1 There are no legal issues at this time.

8 Co-operative Agenda

8.1 Improving the quality and timeliness of the financial information available to citizens of Oldham supports the co-operative ethos of the Council.

8.2 The revenue budget and capital strategy/ programme have been prepared so that they embrace the Council's co-operative agenda with resources being directed towards projects that enhance the aims, objectives and co-operative ethos of the Council. Ongoing budget monitoring is key to ensuring this objective is met.

9 Human Resources Comments

9.1 There are no Human Resource implications.

10 Risk Assessments

10.1 The risk is that the proposed management actions are not achieved in full. Should this be the case then alternatives will be sought and implemented.

11 IT Implications

11.1 There are no IT implications.

12 Property Implications

12.1 There are no Property implications.

13 Procurement Implications

13.1 There are no Procurement implications.

14 Environmental and Health & Safety Implications

14.1 There are no Environmental and Health and Safety implications.

15 Equality, Community Cohesion and Crime Implications

15.1 There are no Equality, Community Cohesion and Crime implications.

16 Implications for Children and Young People

16.1 There are no direct implications for Children and Young People

17 Equality Impact Assessment Completed

17.1 An equality impact assessment has been included at Annex 3.

18 Key Decision

18.1 Yes

19 Key Decision Reference

19.1 FCR-16-24

20 Background Papers

20.1 The following is a list of background papers on which this report is based in accordance with the requirements of Section 100(1) of the Local Government Act 1972. It does not include documents which would disclose exempt or confidential information as defined by the Act:

File Ref: Revenue Background Papers are contained in Annex 1 including, Appendices 1
Officer Name: Lee Walsh
Contact: lee.walsh@oldham.gov.uk

File Ref: Capital Background Papers are contained in Annex 2 including Appendices 1 and 2A to 2H

Officer Name: James Postle
Contact No: james.postle@oldham.gov.uk

21 Appendices

Annex 1 Revenue Budget Monitoring Report 2024/25 Month 4 - July 2024

Appendix 1 Directorate Summary Financial Position

Annex 2 Capital Investment Programme Report 2024/25 Month 4 - July 2024

Appendix 1 Proposed Changes
Appendix 2A SUMMARY – Month 4 - Community Health and Adult Social Care
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Appendix 2C SUMMARY – Month 4 - Communities
Appendix 2D SUMMARY – Month 4 - Place and Economic Growth
Appendix 2E SUMMARY – Month 4 - Housing Revenue Account (HRA)
Appendix 2F SUMMARY – Month 4 - Corporate/Information Technology
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Annex 3 Equality Impact Assessment- Financial Monitoring 24-25 (Month 4)

REVENUE BUDGET MONITORING REPORT 2024/25**Month 4 - July 2024****1 Background**

- 1.1 The Authority's 2024/25 revenue budget was approved by Council on 28 February 2024 at a sum of £299.818m to be met by government grants, Council Tax, Business Rates, and the use of General Earmarked Reserves. This report sets out the updated revenue financial position at Month 4.
- 1.2 Under established budget procedures all services are required to monitor and review their approved budgets during the financial year. As part of this process, a forecast of the year-end position has been prepared by all services. The forecast is reported based on a comparison of profiled budgets as at the end of Month 4 which in turn forecasts a potential year end position. The services forecasts include all known commitments, issues, and planned management actions.

2 Outlook and Budget Context

- 2.1 The budget for 2024/25 was set against a backdrop of challenging economic and fiscal conditions, with inflationary pressures, high interest rates and low levels of economic growth impacting on local and national finances. The lingering impact of the Covid 19 pandemic and the ensuing cost of living crisis has meant that locally demand for services and the cost of providing those services has been increasing over the last couple of years which has placed further strain on the Council's budgetary position. In addressing these pressures, the Council sought to deliver savings of £19m and apply £10.8m of usable reserves to help balance the need to provide services and to set a balanced budget. In setting the budget it was acknowledged that significant financial pressures remained on the Council over the medium term due to the longer-term impacts of high inflation and demand.
- 2.2 At the August Monetary Policy Committee (MPC) meeting, the Bank of England voted to cut the Base rate by 0.25% to 5%, making this the first reduction in Base Rate for four years. Whilst this brings a slight relief to households and business within the borough, that have been struggling with higher mortgage costs and debt repayments, future interest rate cuts in the short term remain uncertain. Moreover, the impact of high inflation on the cost of utilities, fuel and food is such that these costs remain significantly higher than they were a couple of years ago which presents an ongoing challenge in boroughs like Oldham where high levels of deprivation are widespread. The pressures are unlikely to reduce, and the impact is such that these will continue to impact on budget setting for 2025/26 and beyond.
- 2.3 Following the recent change in Government it is hoped that the budget in October 2024 will provide the Local Government sector with some positive indications for short term funding, however, with the settlement is expected to be for one year only, which means uncertainty over the funding landscape still persists. A multi year spending review

announced for Spring 2025 is welcomed and should more certainty for future budget planning.

3 Current Position

3.1 The current net revenue budget of £302.677m represents an increase of £1.909m against the revised budget of £300.768m reported at Month 3. This is due to the notifications of two additional Government grants received during this reporting period.

3.2 Following the Month 3 report, the details within this revenue monitoring report outline the general direction of travel for the financial year and highlight any significant areas of concern which may not just impact on the current year, but also when preparing future budgets. An overspend position based on the Month 4 profiled budget is £7.022m which if not addressed is projected to lead to a year-end deficit of £21.065m. This is an improved position of £4.968m from that reported at Month 3 which was a forecast adverse variance for the year of £26.033m.

3.3 The forecast position at Month 4 is detailed in the table below. The projected outturn position is clearly improved from Month 3 which demonstrates that Management actions are helping reduce the deficit. Whilst the quantum of the gap is reducing and Officers continue to seek out and implement further actions to reduce this gap, there remains a significant projected budget overspend which will impact on the size of the budget gap in the Medium-Term Financial Strategy for 2025/26 and the level of Earmarked Reserves.

Table 1 – Summary of Month 4 Profiled Budget Position

Directorate	Profiled Budget at Month 4 £000	Profiled Forecast at Month 4 £000	Profiled Variance at Month 4 £000	Outturn based on Month 4 Variance* £000
Adult Social Care	25,367	27,235	1,868	5,605
Children's Services	24,368	28,768	4,400	13,200
Public Health	7,855	7,751	(103)	(310)
Place and Economic Growth	22,407	25,127	2,720	8,160
Corporate Services	10,899	9,927	(972)	(2,915)
NET DIRECTORATE EXPENDITURE	90,896	98,809	7,913	23,740
Capital, Treasury and Technical Accounting	9,997	9,105	(892)	(2,675)
NET COUNCIL EXPENDITURE	100,893	107,914	7,022	21,065

Notes: * Forecast Outturn figures assume reserves movements shown in Table 3.

3.4 The forecast outturn based on the Month 4 position is an adverse variance of £21.065m based on the profiled budget forecast as at Month 4.

Significant revenue variances by Directorate

- 3.5 There are significant variances contained within the projected net overspend position.
- 3.6 As reported at Quarter 1, there are currently three areas which are forecasting significant pressures;
- Adult Social Care is reporting a pressure of £1.868m at Month 4 with an estimated adverse year end position of £5.605m (£5.616m at Month 3).
 - Children's Services is reporting a pressure of £4.400m and is forecast to be overspent by £13.200m at the year-end (£14.187m at Month 3), this continues to be the most significant contributing factor to the Council's adverse variance.
 - Within Place and Economic Growth, Strategic Housing and in particular Temporary Accommodation is reporting a pressure of £1.767m for Month 4 and an outturn forecast of £5.301m (£5.059m at Month 3).

Adult Social Care adverse variance at Month 4 of £1.868m, estimated Year End adverse position of £5.605m (£5.616m at Month 3)

- 3.7 The Community Health and Adult Social Care service continues to report significant pressures forecast to be £4.648m (£4.785m at year end). This is mainly people with physical disabilities accessing care at home and direct payments and is a £0.137m reduction from the previous position reported.
- 3.8 The Mental Health service is reporting an adverse position of £1.048m (£0.906m at Month 3). This is a £0.142m adverse movement in the forecast position between the two reporting periods and is due to an increase in homecare packages alongside a reduction in anticipated income. These areas are being offset by a reduction in the number of nursing packages, cost reductions and staff vacancies.
- 3.9 The Learning Disability service is reporting an overspend position of £0.269m (£0.273m at Month 3) due to the cost of care packages particularly within care at home, supported living and short stay care. This is a slight reduction of £0.004m from the position previously reported.
- 3.10 These overspends are offset by favourable variances across the remainder of the Directorate of £0.276m, largely as a result of vacant posts.

Children's Services adverse variance at Month 4 of £4.400m, estimated Year End adverse position of £13.200m (£14.187m at Month 3)

- 3.11 As highlighted at Month 3, Children's Services demand and cost pressures have continued from previous financial years into this year. Increases in the number of Children Looked After have resulted in increased pressures for differing placements particularly residential, where costs for this provision are significant. Alongside Children Looked After placement costs, the continued reliance on agency staff and an increase in demand for Special Educational Needs and Disabilities (SEND) provision is having an impact on the services' financial position.

3.12 The pressures relating to Children Looked After, children in residential placements and Children's Social Care, has had an adverse impact on the forecast of £12.261m (£13.145m at Month 3). This improved position from that previously reported is due to a reduction in forecasts for staffing costs including agency and additional income.

3.13 The Education Skills and Early Years service is projected a year end adverse variance of £0.956m (£1.068m at Month 3). The largest contributing pressure within this service remains Home to School Transport at £0.910m (previously £1.022m) due to the continued increase in Education Health Care Plans (EHCP's) issued and the ongoing increase in SEND demand. The reduction in the projected position between reporting periods is mainly as a result of aligning expenditure to funding sources.

Public Health favourable variance of £0.103m as at Month 4, estimated favourable variance at year end of £0.310m (£0.187m at Month 3)

3.14 Public Health is showing a favourable movement in year-end position of £0.123m from that which was reported at Quarter 1. This change in position is due to staff vacancies and is as a direct result of the management actions implemented to the service to address the previously reported position.

Place and Economic Growth adverse variance at Month 4 of £2.720m, estimated Year End position at an adverse variance of £8.160m (£8.850m at Month 3)

Communities

3.15 The Communities service area is projecting an adverse position of £5.302m (£4.609m at Month 3) of which Strategic Housing and in particular Temporary Accommodation are the main driver for this overspend. The forecasted year end pressure reported for this area of spend has increased by £0.242m to £5.301m at Month 4. This increase is due to demand which continues to rise.

3.16 As part of the Housing Recovery programme the Council is reviewing its income maximisation opportunities. As part of those opportunities, the Council will implement a policy whereby residents will be asked to contribute towards the cost of their temporary accommodation following an affordability assessment. More cost-effective delivery models of temporary accommodation are also being looked at which will also better meet our resident's needs.

Economy

3.17 Within Economy the Estates service area is the main reason for the reported adverse position. This is due to unachieved budget reductions, pressures within repairs and maintenance contracts and the impact of delays in the disposal of assets. Projections at Month 4 indicate that there will be an adverse variance by the end of the financial year of £2.474m (£2.450m at Month 3). Mitigations to reduce the projected overspend are being developed and it is expected that these mitigations will reduce the adverse position currently being projected in the coming months.

Environment

- 3.18 The Environment service is forecast to be in an adverse position of £1.278m (£1.804m at Month 3) by year end. The reasons, for this adverse variance continues to be due to agency costs, underachievement of income and other related costs. The reduction in the projected position between reporting periods is due staff vacancies across the whole service.

Corporate Services – favourable variance at Month 4 of £0.972m and estimated favourable position at year end of £2.915m (£2.433m at Month 3)

- 3.19 Corporate Services is projecting a favourable variance at Month 4 which has increased by £0.482m from that reported previously due to the implementation of corporate management actions around staff vacancies.

Capital, Treasury and Technical Accounting – favourable variance at Month 4 of £0.892m and estimated favourable position at year end of £2.675m (on budget at Month 3)

- 3.20 Following a review of the Capital, Treasury and Technical Accounting, and the assumptions for the remainder of the financial year, it is anticipated that there will be a favourable variance totalling £2.675m by year end. The main reasons, for favourable variance is a £0.500m reduction on the interest costs the Council is expected to pay and following an assessment on inflationary costs a reduction of £2.175m which includes pay and external contracts.
- 3.21 A detailed revenue table is attached at Appendix 1.

4 Mitigation of Current forecast Budget Position

- 4.1 The Local Government Act 1988 specifies that a Local Authority must set and maintain a balanced budget. Failure to do so results in the Council's Section 151 officer having to issue a Section 114 notice to indicate that a Council's forecast income is insufficient to meet its forecast expenditure for that year.
- 4.2 As detailed in the Month 3 report, in response to the phased overspend and projected outturn position, a series of management actions were implemented to identify options for reducing the projected overspend. The Council's Senior Leadership has been working within their service areas to reduce the in-year pressure through the introduction of a recruitment freeze, and through additional controls on discretionary expenditure. Alongside this, services have been reviewing their ways of working, structures and costs to reduce spend based on a thematic approach:
- Centralising, restructuring and reducing corporate and support services;
 - Reviewing and reducing management and administration;
 - Reviewing service operations and processes;
 - Income maximisation; and
 - Reviewing placements, contracts and commissioned services.

The changes identified to date will drive both in year savings and contribute to reducing the budget gap in future years.

- 4.3 The effectiveness of management action and corporate procedures will continue to be closely monitored by Management Teams throughout the financial year. Management action should ease the overall financial pressures and the impact of these actions will be reported to Members through the regular financial monitoring reports submitted to Cabinet during the year.

5 Progress on the delivery of the 2024/25 Approved Budget Savings

- 5.1 Table 2 below presents the progress on the delivery of the 2024/25 approved Budget savings which has been updated to reflect the position at Month 4. For savings rated as Amber, work is ongoing to achieve the saving or alternative delivery and in year mitigations are being identified to cover any potential shortfalls which may occur. The Red savings are included in the adverse forecast revenue Month 4 outturn position for 2024/25. If these Red rated budget savings are mitigated downwards, it would have a favourable impact on the forecast position for 2024/25. In addition, savings rated as Red are also impacting the work on the Budget setting process for 2025/26 and work is ongoing to try to mitigate the impact in the current and future years.

- 5.2 In terms of savings, £16.542m of the £20.379m (£16.587m in Quarter 1) approved budget reduction targets are either delivered or on track to be delivered (Green & Amber), representing 81% of the total savings target with a further 19% or £3.837m with a high risk of not being achieved within this financial year. The table below summarises the progress by Directorate:

Table 2 – Summary on progress on delivery of 2024/25 Approved Budget Reductions

2024/25 Impact of Approved Budget Reductions	Green £000	Amber £000	Red £000	Total £000
Adult Social Care	(3,950)	(3,500)	0	(7,450)
Children's Services	(1,095)	(907)	(2,219)	(4,221)
Public Health	(175)	0	0	(175)
Place & Economic Growth	(3,054)	(200)	(1,618)	(4,872)
Corporate	(3,397)	(264)	0	(3,661)
TOTAL	(11,671)	(4,871)	(3,837)	(20,379)

Significant Budget reduction variances by Directorate

- 5.3 As can be seen in the table above, £2.219m of Children's Services budget reductions are rated Red which is an increase of £0.145m from the figure reported at Month 3. This change relates to a budget reduction for social care placements including fostering and is due to demand in this area alongside an increase in price affecting its achievability.
- 5.4 At Month 4, the Place & Economic Growth Directorate budget reductions rated Red are reported at £1.618m which is 33% of its total with 67% either achieved or on target to achieve.

- 5.5 Mitigations for the Red budget reductions continue to be explored with updates to be provided within future reports.
- 5.6 There has been a £0.700m increase in those budget reductions now rated as Green between reporting periods and it is expected that as the year unfolds, those budget reductions currently rated as Amber will continue to move to Green. Delivery Board will continue its work on the unachieved budget reductions to mitigate the impact on 2024/25 and future years.

6 Reserves and Balances

- 6.1 On 1 April 2024, Reserves totalled £72.540m, split between Earmarked Reserves of £49.646m and other reserves such as Revenue Grant Reserve, Schools Reserve and DSG Surplus reserves totalling £22.894m. The General Fund Balance stood at £18.865m. Of the total Earmarked Reserves, approximately 29% are forecast to be spent in 2024/25.

Table 3 – Summary on Reserves Position

Directorate	Opening Balance £000	Use of Reserves £000	Contribution to Reserves £000	Anticipated Year End Position £000
Adult Social Care	(3,766)	2,366	-	(1,400)
Children's Services	(814)	-	-	(814)
Public Health	(1,114)	242	(385)	(1,257)
Place & Economic Growth	(3,057)	952	(50)	(2,155)
Corporate	(4,530)	437	-	(4,094)
Capital, Treasury and Technical Accounting	(19,712)	597	(2,115)	(21,230)
Balancing Budget 2024/25	(10,753)	10,753	-	-
Health & Social Care Integration Pooled Fund	(5,900)	1,491	-	(4,409)
Total Earmarked Reserves	(49,646)	16,838	(2,550)	(35,359)
Revenue Grant Reserves	(7,799)	1,610	(138)	(6,327)
Total Reserves	(57,446)	18,448	(2,688)	(41,686)

- 6.2 Since Quarter 1, there has been a slight movement in the use of reserves bringing the current forecast to £35.359m of Earmarked Reserves and £6.327m of Revenue Grant Reserves by the end of the financial year 2024/25.
- 6.3 There are significant management actions being implemented to address the projected in year deficit which should help reduce the overall gap by the year end, however to the extent that mitigations do not cover the deficit, there would need to be a further call on reserves. Any additional call on reserves to offset any unmitigated forecast deficit in year will adversely impact the financial resilience of the Council.
- 6.4 One of the management actions being undertaken since the last reporting period has been a full review of reserves looking at the council's policy and financial strategy, including the proposed use. This review is currently ongoing and will be reported back to Members once complete. The aim is to review all reserves and their use and consider the current and future impact on the financial resilience of the council.

7 2025/26 Revenue Budget

- 7.1 At the budget council meeting held in February 2024, a budget gap for 2025/26 of £11.305m was detailed. This gap was after the application of £11.178m of approved budget reductions and £1.432m of Earmarked Reserves. To address this gap, and considering the in-year financial position, early work began on a re-assessment of the 2025/26 revenue budget and how the gap could be bridged. Based on the presumption that much of the in-year pressure stems from continued demand for key Council services including adults and children social care and temporary accommodation, it is currently forecast that the unmitigated gap for 2025/26 could be between £26-30m. As detailed at 4.2, thematic work has been undertaken by Officers to identify both in year and ongoing options to reduce service spend and thus the potential budget gap in 2025/26.
- 7.2 At the time of writing this report, actions totalling £6.138m have been identified and potentially a further £1.543m is being investigated, which would reduce the forecast budget gap for 2025/26 to be between £20-24m. The table below shows the values by thematic area.

Table 4 – Summary on potentially identified thematic savings.

Thematic Area	Potential Savings Identified 2025/26 £000
Centralising, restructuring, and reducing corporate and support services	2,405
Reviewing and reducing management and administration	1,673
Reviewing service operations and processes	706
Reviewing placements, contracts and commissioned services	1,354
TOTAL POTENTIAL SAVING IDENTIFIED 2025/26	6,138

- 7.3 Alongside this the Council is currently consulting with employees around voluntary options for redundancy, retirement and changes to working hours. Other options continue to be looked at to ensure the Council can deliver a balanced budget.
- 7.4 Further details on the Council's funding are expected over the coming months with a Labour Budget scheduled for 30 October, and the Provisional Local Government Finance Settlement (PLGFS) expected at the end of the calendar year. The Spending Review scheduled for Spring 2025 is expected to provide more financial certainty over the medium term. The current iteration of the Medium-Term Financial Strategy is predicated on a

broadly unchanged funding landscape from 2024/25 however to the extent that changes are announced as part of either the October budget or PLGFS, these will be incorporated into further updates of the Council's Medium Term Financial Strategy.

8 Summary

- 8.1 The current projected position at Month 4 has improved since the last reporting period by £4.968m however, it still shows a potentially significant overspend position by the end of the financial year. The re-assessment on assumptions with the Capital, Treasury and Technical Accounting and the work within Children's Services has seen a reduction in the overall adverse position. The implementation of management actions particularly around staffing and essential spend can be seen and will continue to be monitored and implemented throughout the year. Whilst this improved position is a positive sign, the projected position is still of great concern for the Council and work must continue to reduce this further by the end of the financial year. Due to the significant overspend in 2023/24, the Council's ability to mitigate the in-year position through short term use of reserves is depleted.
- 8.2 Whilst 81% of savings are on track to be delivered or are delivered, given the overall financial pressures facing the Council, the uncertainty around the deliverability of the remaining 19% of savings is still of concern as this adds to the pressure on the budget. However, plans and mitigations are being developed and there is time for the reductions to be delivered and/ or mitigations to be put in place, and these will be closely monitored through the monthly Delivery Board meetings to ensure these targets are met.
- 8.3 Any use of reserves impacts on the financial resilience of the Council, and detailed within this report is the proposed net use of £14.288m of Earmarked Reserves and £1.472m of Revenue Grant Reserves. It is crucial that the use of reserves is kept to an absolute minimum. A review of the current proposed use of the reserves for 2024/25 is currently ongoing and will be reported back to Member at the earliest opportunity. The aim of the review is to look at the proposed use of reserves to protect the overall financial resilience of the Council.
- 8.4 In view of the adverse variance reported it is important that mitigations are continued to be found and implemented to address the in-year position but also to reduce the impacts in 2025/26. A further update on the financial position will be reported at Month 6.

APPENDIX 1 - Directorate Summary Financial Positions

DIRECTORATE	SERVICE AREA	2024 Mth 4 Profiled Budget £000	Month 4 Profiled Forecast £000	M4 Profiled Variance £000	Annual Forecast Variance £000
Adult Social Care	Commissioning	5,335	5,337	2	7
	Community Business Services	387	310	(77)	(232)
	Clusters	1,031	999	(32)	(97)
	Community Health & Social Care	9,243	10,792	1,549	4,648
	Director Adult Social Care	549	538	(10)	(31)
	Learning Disability	5,160	5,250	90	269
	Mental Health	3,324	3,674	349	1,048
	Safeguarding	338	336	(2)	(6)
Adult Social Care Total		25,367	27,235	1,868	5,605
Children's Services	Children in Care	13,767	17,796	4,029	12,087
	Childrens Safeguarding	967	919	(49)	(146)
	Fieldwork & Family Support	3,872	4,096	224	673
	Children's Services Intergration	1,141	1,024	(118)	(353)
	Central Education Services	262	262	0	0
	Community / Adult Learning	99	99	(0)	(0)
	Inclusion Service	(37)	(37)	0	0
	Learning Services	98	113	15	46
	Learning Services - Early Years	380	380	0	0
	Post 16 Service	13	13	0	0
	School Support Services	6	6	0	0
	SEND Services	2,450	2,753	303	910
	Skills and Employment	216	216	(0)	(0)
	Early Help	1,151	1,145	(6)	(17)
	Schools	(17)	(17)	0	0
	Children's Services Total		24,368	28,768	4,400
Public Health	Public Health (Client and Delivery)	6,623	6,541	(82)	(245)
	Leisure Services	1,231	1,210	(22)	(65)
Public Health Total		7,855	7,751	(103)	(310)
Place & Economic Growth	Business Growth	69	68	(1)	(4)
	Creating a Better Place	(75)	(75)	0	0
	Estates	(133)	691	825	2,474
	Facilities Management	(212)	(347)	(135)	(406)
	Planning	96	88	(7)	(22)
	Property Management	(730)	(745)	(16)	(47)
	Strategic Housing	92	63	(29)	(86)
	Town Centre and Markets	416	399	(16)	(49)
	Building Control	11	61	50	150
	Environmental Management	2,469	2,597	128	384
	Fleet Management	(108)	(108)	0	0
	Highways	1,354	1,406	52	157
	Public Protection	367	517	149	447
	Strategic Transport	5,757	5,757	0	0
	Street Lighting	1,426	1,411	(15)	(45)
	Waste Disposal Authority	5,963	5,963	0	0
	Waste Management Service	1,483	1,544	62	185
	Heritage, Libraries and Arts	2,035	2,040	5	14
	Community Safety	160	143	(18)	(53)
	District Partnerships	517	433	(85)	(254)
	Strategic Housing	1,135	2,902	1,767	5,301
	Stronger Communities	65	65	(0)	(0)
	Youth Services Client	250	255	5	14
Place & Economic Growth Total		22,407	25,127	2,720	8,160

DIRECTORATE	SERVICE AREA	2024 Mth 4 Profiled Budget £000	Month 4 Profiled Forecast £000	M4 Profiled Variance £000	Annual Forecast Variance £000
Corporate Services	Partnership Support (Borough and GM)	681	655	(27)	(81)
	Strategic Customer Service	183	183	0	0
	Chief Executive Management	650	555	(95)	(286)
	Communications and Research	312	292	(20)	(60)
	Customer Services	694	563	(131)	(392)
	ICT	1,679	1,575	(105)	(314)
	Executive Support	181	171	(10)	(30)
	Audit	1,209	1,119	(90)	(270)
	Commissioning and Procurement	189	133	(56)	(167)
	External Funding	19	19	0	0
	Finance	885	751	(134)	(403)
	Housing Benefit Payments	131	131	0	0
	Revenues and Benefits	1,289	1,381	92	276
	Transformation and Reform	105	(99)	(204)	(611)
	HR Strategy	1,008	919	(89)	(267)
	Organisational Development	93	44	(50)	(149)
	Democratic and Civic Services	567	555	(12)	(37)
	Elections	142	137	(5)	(15)
	Legal	567	596	29	87
	Registrars	7	(37)	(44)	(131)
Strategy and Performance	308	286	(22)	(66)	
Corporate Services Total		10,899	9,927	(972)	(2,915)
Capital Treasury and Technical Accounting	Corporate Expenses	7,274	6,549	(725)	(2,175)
	Interest and Investment Expenditure and Income	2,268	2,102	(167)	(500)
	Corporate and Democratic Core	334	334	0	0
	Parish Precepts	120	120	0	0
Capital Treasury and Technical Accounting Total		9,997	9,105	(892)	(2,675)
Grand Total		100,893	107,914	7,022	21,065

CAPITAL INVESTMENT PROGRAMME 2024/25 MONITORING REPORT Month 4 – July 2024

1 Background

- 1.1 The original capital programme for 2024/25 reflected the priorities outlined in the capital strategy as approved at Cabinet on 12 February 2024 and confirmed at the Council meeting on 28 February 2024.
- 1.2 The position at the end of Month 4 (July 2024) is highlighted in this report.
- 1.3 For the remainder of the financial year, the programme will continue to be monitored and revised to take account of any new developments and changes in the profile of planned expenditure.

2 Current Position

- 2.1 Table 1 below shows the capital programme for 2024/25 and a further four years to 2028/29, and reflects the priorities outlined in the capital strategy as approved at Cabinet on 12 February 2024 and confirmed at the Council meeting on the 28 February 2024.

Table 1 – 2024/29 Capital Strategy

Directorate Budget	2024/25 £000	2025/26 £000	2026/27 £000	2027/28 £000	2028/29 £000	Total £000
Community Health and Adult Social Care	4,443	1,000	-	-	-	5,443
Children's Services	4,724	5,058	3,188	2,000	-	14,970
Communities	100	173	-	-	-	273
Place and Economic Growth	83,226	68,621	26,601	17,859	1,000	197,307
Housing Revenue Account (HRA)	628	95	-	-	-	723
Corporate/Information Technology (IT)	2,919	2,809	2,039	3,661	1,000	12,428
Capital, Treasury & Technical Accounting	2,600	-	125	10,120	-	12,845
Funding for Emerging Priorities	1,043	3,318	2,885	2,000	-	9,246
Total Expenditure	99,683	81,076	34,838	35,640	2,000	253,237

(subject to rounding – tolerance +/- £1k)

Funding	2024/25 £000	2025/26 £000	2026/27 £000	2027/28 £000	2028/29 £000	Total £000
Grant & Other Contributions	(43,834)	(28,633)	(6,494)	(4,054)	-	(83,015)
Prudential Borrowing	(49,638)	(51,646)	(27,851)	(31,494)	(2,000)	(162,629)
Revenue Contributions	(630)	(95)	-	-	-	(725)
Capital Receipts	(5,581)	(702)	(493)	(92)	-	(6,868)
Grand Total	(99,683)	(81,076)	(34,838)	(35,640)	(2,000)	(253,237)

(subject to rounding – tolerance +/- £1k)

The estimated additional costs (annualised) associated the prudential borrowing are outlined below:

Estimated annual additional Interest costs associated with prudential Borrowing	2,234	2,582	1,393	1,575	100	7,883
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2024/25 – 2028/29 Capital Programme

- 2.2 Following the approval of the Q1 Capital Investment programme 2024/25, there has been a Creating a Better Place (CaBP) update report presented and approved at Cabinet 15 July 2024 along with new approvals due to new grant offers, details of which area shown below.
- 2.3 The CaBP report approved the reduction to the overall capital programme 2024/25 - 2028/29 of £35m across all years. The reduction to the current year 2024/25 Capital Programme as a result of the CaBP review is £3.012m.

CaBP Reduction £35m

Service Area / Scheme	2024/25 £000	2025/26 £000	2026/27 £000	2027/28 £000	Grand Total
Corporate Property					
Royton Town Hall	380				380
Corporate Property Total	380	-	-	-	380
Corporate					
Funding for Emerging Priorities	3,010	5,000			8,010
Corporate Total	3,010	5,000	-	-	8,010
Regeneration					
Strategic Acquisitions- General Provision	(3,000)	(5,000)			(8,000)
Performance Space (formerly Oldham Coliseum Theatre - Phase C)	(4,842)	(2,636)	(6,522)		(14,000)
Alexandra Park Depot	750				750
Northern Roots	800				800
Flexible Housing Fund	-	(3,484)	(10,000)	(9,346)	(22,830)
Spindles Redevelopment	2,000	5,000			7,000
Old Library Refurbishment - Phase 2	1,000				1,000
Wrigley Head Solar Farm	700				700
Green Shoots (Rhodes Bank)	(3,810)	(5,000)			(8,810)
Regeneration Total	(6,402)	(11,119)	(16,522)	(9,346)	(43,390)
Grand Total	(3,012)	(6,119)	(16,522)	(9,346)	(35,000)

- 2.4 In addition to this there have been a number of new grant offers totalling £14.75m over the life of the programme circa £5.25m in 2024/25, £9.4m in 2025/26 and £0.1m in 2026/27. Details of these are provided in appendix I and shown in Table 3 for consideration and request for approval.
- 2.5 Following the approved changes since Q1 and assuming grant offers are approved, the revised Capital Programme 2024/5 to 2028/9 is a net reduction of £20.24m since the last reporting period (Q1). (This being the reduction in Prudential Borrowing Schemes of £35m offset by additional external grant of £14.75m).

- 2.6 Following the approval of grant offers the in year Capital Programme 2024/25 will be revised to £103.95m.
- 2.7 The In year proposed changes relates to the request to accept the grant offers totalling £5.256m shown by scheme in Appendix 1.
- 2.8 In addition to this there has been a small amount of additional DFG contributions totalling £11k for adaptations. It should be noted that there are inflationary pressures in relation to the DFG budget, the costs of delivering the adaptations are now nearly 50% higher than last year. Officers are currently reviewing the overall impact of the pressures, including any mitigating actions, and will report the outcome to the September CIPB meeting.

Table 3 – 2024/25 Capital Programme

Directorate Budget	Capital Strategy 2024-29 £000	Approved Virements to M03 £000	Approved Virements M04 £000	Proposed Virements M04 £000	Current Budget M04 £000	Spend to M04 £000
Community Health and Adult Social Care	4,443	(1,353)	11	-	3,101	867
Children's Services	4,724	1,611	-	1 65	6,500	205
Communities	100	116	-	-	216	32
Place and Economic Growth						
- Corporate Property	8,574	692	380	746	10,392	935
- Environment	343	753	-	252	1,348	604
- Housing	150	377	-	-	527	296
- Regeneration	57,781	(6,072)	(6,402)	3,760	49,067	11,486
- Transport	16,378	3,550	-	333	20,261	2,723
Housing Revenue Account (HRA)	628	700	-	-	1,328	-
Corporate/Information Technology (IT)	2,919	1,739	-	-	4,658	249
Capital, Treasury & Technical Accounting	2,600	-		-	2,600	-
Funding for Emerging Priorities	1,043	(116)	3,010	-	3,937	-
Grand Total	99,683	1,997	(3,001)	5,256	103,935	17,397

(subject to rounding – tolerance +/- £1k)

- 2.10 Given that this is the position as at Month 4 and in view of the current challenges being faced including the pressure caused by the economic position, there must remain an element of uncertainty about the forecast position. Proposed virements are detailed at Appendix 1 and a further breakdown of Table 3 on a service-by-service area basis is shown at Appendix 2 (A to H).
- 2.11 Actual expenditure to 31 July 2024 was £17.397m (16.74% of the proposed forecast outturn). This spending profile is similar to last year's (17.65%). As would be expected the majority of this spend is within the Place & Economic directorate which amounts for 78% of the total 2024/25 Capital Programme. The position will be kept under review and budgets will be managed in accordance with forecasts.

2.12 The revised capital programme for 2024/25 to 2028/29, considering all the above amendments in arriving at the revised forecast position, is shown in Table 4 together with the projected financing profile.

Table 4 – 2024/25 to 2028/29 Current Capital Programme

Directorate Budget	2024/25 £000	2025/26 £000	2026/27 £000	2027/28 £000	2028/29 £000	TOTAL £000
Community Health and Adult Social Care	3,101	1,000	-	-	-	4,101
Children's Services	6,500	5,058	3,188	2,000	-	16,746
Communities	216	173	-	-	-	389
Place and Economic Growth						
- Corporate Property	10,392	3,203	1,101	-	1,000	15,696
- Environment	1,347	100	1,070	100	-	2,617
- Housing	528	5,677	-	-	-	6,205
- Regeneration	49,067	50,894	942	6,359	-	107,262
- Transport	20,262	6,835	7,067	2,054	-	36,218
Housing Revenue Account (HRA)	1,328	95	-	-	-	1,423
Corporate/Information Technology (IT)	4,658	2,700	2,039	3,661	1,000	14,058
Capital, Treasury & Technical Accounting	2,600	-	126	10,120	-	12,846
Funding for Emerging Priorities	3,937	8,318	2,884	2,000	-	17,139
Grand Total	103,936	84,053	18,417	26,294	2,000	234,700

(subject to rounding – tolerance +/- £1k)

Funding	2024/25 £000	2025/26 £000	2026/27 £000	2027/28 £000	2028/29 £000	TOTAL £000
Grant & Other Contributions	(49,054)	(44,532)	(6,494)	(4,054)	-	(104,133)
Prudential Borrowing	(46,805)	(38,726)	(11,430)	(22,147)	(2,000)	(121,108)
Revenue Contributions	(1,358)	(95)	-	-	-	(1,453)
Capital Receipts	(6,719)	(702)	(493)	(92)	-	(8,006)
Grand Total	(103,936)	(84,053)	(18,417)	(26,294)	(2,000)	(234,700)

(subject to rounding – tolerance +/- £1k)

Estimated annual additional Interest costs associated with prudential Borrowing (cumulative)	1,053	3,074	4,328	5,186	5,771	
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2.13 The reduction of the Capital programme funded by Prudential Borrowing shows that by 2028/29 there will be an estimated reduction in annualised interest costs of approximately £2.1m from £7.9m (see Table 1) to £5.8m. This excludes further savings from a reduction in the amounts required to be set aside to repay the additional debt in accordance with the Council's Minimum Revenue Provision Policy.

Capital Receipts

- 2.14 The capital programme requires the availability of £6.719m of capital receipts in 2024/25 for financing purposes. This includes £2.600m to support transformational activity in the General Fund using the flexibility allowed by Government.

The total net usable capital receipts currently received in year is £0.244m, the first call being the £2.600m outlined above.

- 2.15 The capital receipts position as at 31 July 2024 is as follows:

Table 6 – Capital Receipts 2024/25

	£000	£000
Capital Receipts Financing Requirement		6,719
Usable Capital Receipt b/fwd.	-	
Actual capital receipts received to date	(244)	
Identified in year capital receipts remaining	(4,510)	
Further Required in 2024/25		1,965

(subject to rounding – tolerance +/- £1k)

- 2.16 Given the significant amount of capital receipts needed to finance the capital programme in this and future years it is imperative that the capital receipts/disposal schedule is adhered to. This is monitored at the monthly Capital Receipts meeting and will be subject to on-going review throughout the year. It is of course recognised that the ongoing economic instability with high interest rates and the impact on borrowing costs, coupled with the increase cost of living will continue to impact on business/economic activities making capital disposals more challenging.
- 2.17 The Capital Strategy and Capital Programme 2024/29 incorporates an expectation of the level of receipts that is anticipated in each of the respective years and therefore an estimate as to the resultant level of over or under programming in order to present a balanced budget. As can be seen below, the most recent review has produced a forecast which is below the financing projections included in Table 3. Should the currently estimated position prevail then the position would be as illustrated in the table below:

Table 7 – Capital Receipts 2024/25 to 2028/29

Capital Receipts	2024/25 £000	2025/26 £000	2026/27 £000	2027/28 £000	2028/29 £000
Capital Receipts Carried Forward	-	2,238	(5,950)	(6,897)	(9,382)
Identified Capital Receipts	(4,725)	(8,890)	(1,440)	(2,577)	
Received in year	244				
Total Receipts	(4,481)	(6,652)	(7,390)	(9,474)	(9,382)
Capital Receipts Financing Requirement	6,719	702	493	92	-
Over/(Under) programming	2,238	(5,950)	(6897)	(9,382)	(9,382)

(subject to rounding – tolerance +/- £1k)

- 2.18 Although the capital receipts forecast is currently lower than the required amount, given that this is the month 4 position and there is the opportunity for the forecast to improve, at this stage it is considered appropriate to retain the original forecast and review this during the course of the current year. The consequence should the level of capital receipts fall is either, a corresponding increase in the level of

prudential borrowing and hence an impact on the revenue budget, or a reduction in the overall capital programme.

Annual Review of the Capital Programme

- 2.19 In accordance with previous practice, there is once again a review of the capital programme over the summer months (the Summer Review). This is examining any further opportunities to reallocate, decommission or reprofile resources. It will also include an in-depth analysis of capital receipts to support a revised forecast.

3 Conclusion

- 3.1 A detailed review of the capital programme (the Annual Review) is being undertaken to establish if there are any surplus resources that can be realigned or any further re-profiling required. It is therefore likely that there will be further rephasing across all years to reflect developments relating to individual projects/schemes. Again, this will be reported to CIPB in September, which will then make appropriate recommendations to Cabinet.
- 3.2 The capital programme is being continually monitored and is reported to Members on a regular basis.

4 Appendices

- 4.1 Appendix 1 - PROPOSED CHANGES
Appendix 2A - SUMMARY – Month 4 - Community Health and Adult Social Care
Appendix 2B - SUMMARY – Month 4 - Children’s Service
Appendix 2C - SUMMARY – Month 4 - Communities
Appendix 2D - SUMMARY – Month 4 - Place and Economic Growth
Appendix 2E - SUMMARY – Month 4 - Housing Revenue Account (HRA)
Appendix 2F - SUMMARY – Month 4 - Corporate/Information Technology
Appendix 2G - SUMMARY – Month 4 - Capital Treasury and Technical Accounting
Appendix 2H - SUMMARY – Month 4 - Funding for Emerging Priorities

APPENDIX 1: SUMMARY – Month 4 (July 2024) Proposed Changes

EXPENDITURE BUDGETS TO BE REPROFILED AS AT 31 JULY 2024	2024/25	2025/26	2026/27	Comments
Directorate / Scheme	£000	£000	£000	
People				
Castleshaw Centre - Roof Replacement	165			New grant
People – TOTAL	165			
Place and Economic Growth				
Gallery Oldham – Priority Maintenance Work	807	440	460	New grant / Realignment
Corporate Property - Major Repair Works (Priority 1)	(61)	(1,000)	(359)	Realignment
Oldham Green New Deal Delivery Partner	3,300	4,400		New grant
Oldham Mumps/Princes Gate - New Homes		5,552		New grant
CRSTS Bus Pinch Point - Grampian Way / Trent Road, Shaw	12			New grant
CRSTS BPP - Ashton Road West	61			New grant
CRSTS – EVCI Resource Funding	110			New grant
ATF - Frederick Street	150			New grant
Northmoor Library - ACE Project	152			New grant
Oldham Library - ACE Project	308			New grant
Renovation of Tennis Courts	252			New grant
Place and Economic Growth TOTAL	5,091	9,392	101	
TOTAL	5,256	9,392	101	

(subject to rounding – tolerance +/- £1k)

FINANCING BUDGETS TO BE REPROFILED AS AT 31 JULY 2024	2024/25	2025/26	2026/27
Fund Source	£000	£000	£000
Grants and Contributions	(4,647)	(10,096)	
Prudential Borrowing	(603)	704	(101)
Revenue Contribution	(7)		
Capital Receipts			
TOTAL	(5,256)	(9,392)	(101)

(subject to rounding – tolerance +/- £1k)

APPENDIX 2: SUMMARY OF CHANGES

SUMMARY – Month 4 (July 2024) - Community Health and Adult Social Care

APPENDIX 2A

Service area	Capital Strategy £000	Approved Changes /Virements to M03 £000	Approved Changes /Virements to M04 £000	Proposed Virements M04 £000	Revised Budget (M04) £000	Expend to M04 £000
Adult Services	4,443	(1,353)	11	-	3,101	867
Community Health and Adult Social Care Total	4,443	(1,353)	11	-	3,101	867

(subject to rounding – tolerance +/- £1k)

SUMMARY – Month 4 (July 2024) – Children’s Services

APPENDIX 2B

Service area	Capital Strategy £000	Approved Changes /Virements to M03 £000	Approved Changes /Virements to M04 £000	Proposed Virements M04 £000	Revised Budget (M04) £000	Expend to M04 £000
Children, Young People and Families (CYPF)	-	682	-	165	847	33
Schools - General Provision	3,545	(221)	-	-	3,324	47
Schools – Primary	1,084	506	-	-	1,590	9
Schools – Secondary	85	630	-	-	715	113
Schools – Special	10	15	-	-	25	3
Children’s Service Total	4,724	1,611	-	165	6,500	205

(subject to rounding – tolerance +/- £1k)

SUMMARY – Month 4 (July 2024) – Communities

APPENDIX 2C

Service area	Capital Strategy £000	Approved Changes /Virements to M03 £000	Approved Changes /Virements to M04 £000	Proposed Virements M04 £000	Revised Budget (M04) £000	Expend to M04 £000
Local Investment Fund	100	116	-	-	216	32
Communities Total	100	116	-	-	216	32

(subject to rounding – tolerance +/- £1k)

SUMMARY – Month 4 (July 2024) – Place and Economic Growth

APPENDIX 2D

Service area	Capital Strategy £000	Approved Changes /Virements to M03 £000	Approved Changes /Virements to M04 £000	Proposed Virements M04 £000	Revised Budget (M04) £000	Expend to M04 £000
Asset Management – Corporate Premises	5,705	(172)	380	746	6,659	929
Asset Management - Education Premises	2,869	864			3,733	6
Corporate Property Total	8,574	692	380	746	10,392	935
Boroughwide District Projects	17	10			27	-
Cemeteries and Crematorium	-	46			46	-
Countryside	91	38			129	81
Parks	235	491			726	191
Playing Fields & Facilities	-	157		252	409	332
Parks & Playing Fields	-	11			11	-
Environment Total	343	753	-	252	1,348	604
Private Housing	150	377			527	296
Housing Total	150	377	-	-	527	296
Boroughwide Developments	18,868	4,173	(560)	460	22,941	4,439
Strategic Acquisitions	4,669	478	(3,000)		2,147	133
Town Centre Developments	34,244	(10,723)	(2,842)	3,300	23,979	6,914
Regeneration Total	57,781	(6,072)	(6,402)	3,760	49,067	11,486
Accident Reduction	516	549			1,065	97
Bridges & Structures	3,926	1,488			5,414	551
Fleet Management	370	298			668	981
Highway Major Works/Drainage schemes	11,188	627			11,815	1,013
Minor Works	227	280		223	730	22
Miscellaneous	151	308		110	569	59
Transport Total	16,378	3,550	-	333	20,261	2,723
Place and Economic Growth Total	83,226	(700)	(6,022)	5,091	81,595	16,044

(subject to rounding – tolerance +/- £1k)

SUMMARY – Month 4 (July 2024) - Housing Revenue Account (HRA)**APPENDIX 2E**

Service area	Capital Strategy £000	Approved Changes /Virements to M03 £000	Approved Changes /Virements to M04 £000	Proposed Virements M04 £000	Revised Budget (M04) £000	Expend to M04 £000
Housing Revenue Account	628	700	-	-	1,328	-
HRA Total	628	700	-	-	1,328	-

(subject to rounding – tolerance +/- £1k)

SUMMARY – Month 4 (July 2024) – Corporate/Information Technology (IT)**APPENDIX 2F**

Service area	Capital Strategy £000	Approved Changes /Virements to M03 £000	Approved Changes /Virements to M04 £000	Proposed Virements M04 £000	Revised Budget (M04) £000	Expend to M04 £000
Information Technology	2,919	1,739	-	-	4,658	249
Information Technology Total	2,919	1,739	-	-	4,658	249

(subject to rounding – tolerance +/- £1k)

SUMMARY – Month 4 (July 2024) – Capital Treasury and Technical Accounting**APPENDIX 2G**

Service area	Capital Strategy £000	Approved Changes /Virements to M03 £000	Approved Changes /Virements to M04 £000	Proposed Virements M04 £000	Revised Budget (M04) £000	Expend to M04 £000
Cross Cutting /Corporate	2,600	-	-	-	2,600	-
Capital Treasury and Technical Accounting Total	2,600	-	-	-	2,600	-

(subject to rounding – tolerance +/- £1k)

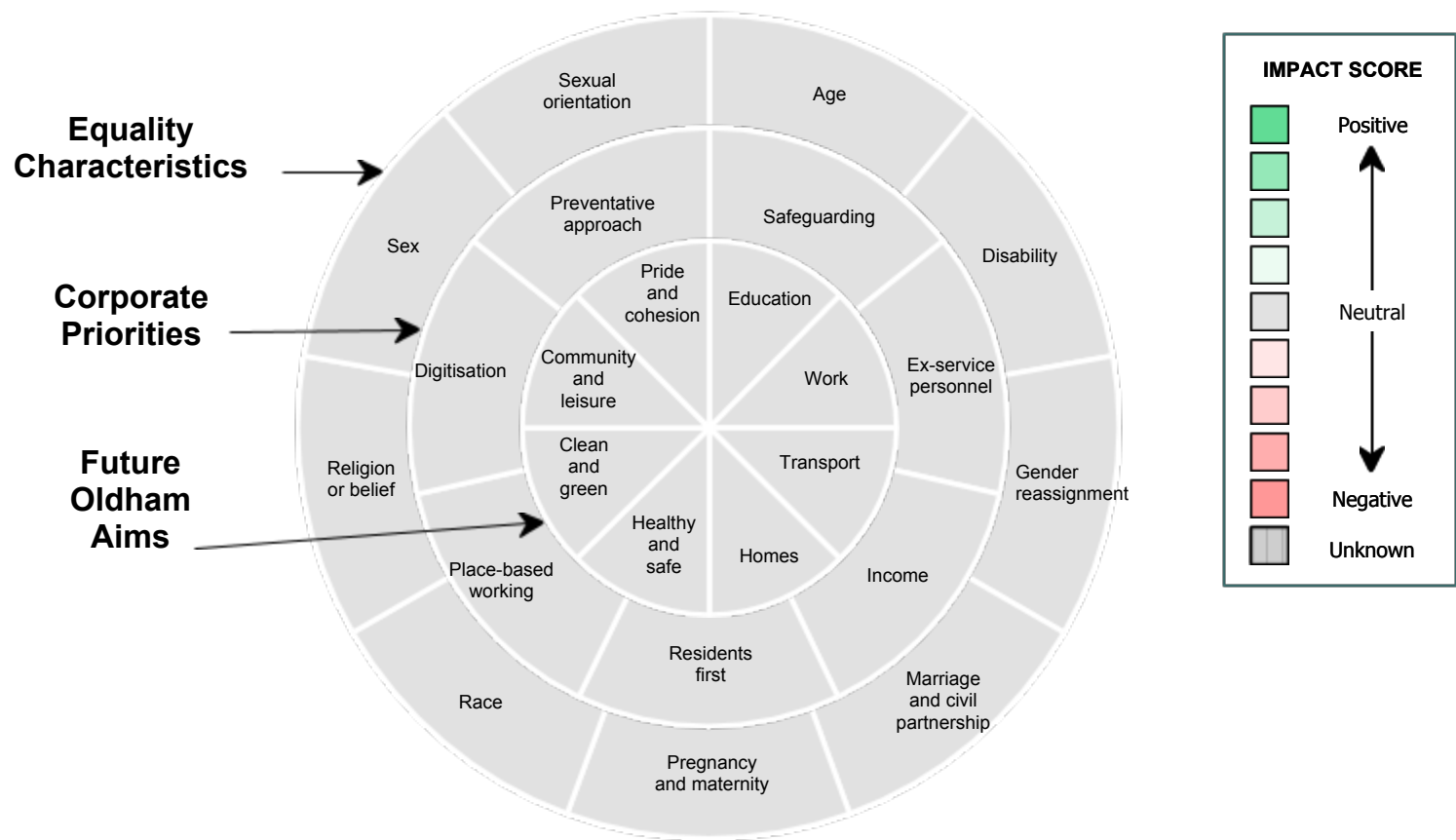
SUMMARY – Month 4 (July 2024) - Funding for Emerging Priorities

APPENDIX 2H

Service area	Capital Strategu £000	Approved Changes /Virements to M03 £000	Approved Changes /Virements to M04 £000	Proposed Virements M04 £000	Revised Budget (M04) £000	Expend to M04 £000
Funding for Emerging Priorities	1,043	(116)	3,010	-	3,937	-
Funding for Emerging Priorities Total	1,043	(116)	3,010	-	3,937	-

(subject to rounding – tolerance +/- £1k)

Annex 3 - EIA: Financial Monitoring 24/25 (Mth 4)



Annex 3- EIA: Financial Monitoring 24/25 (Mth 4)				
	Impact	Likelihood	Duration	Comment
Equality Characteristics				
Age	Neutral	Possible	Short Term	The report considers the 2024/25 financial position of the Council at Month 4 (31 July 2024) and as such, in isolation has no direct impact on Equality
Disability	Neutral	Possible	Short Term	As Above
Gender reassignment	Neutral	Possible	Short Term	As Above
Marriage and civil partnership	Neutral	Possible	Short Term	As Above
Pregnancy and maternity	Neutral	Possible	Short Term	As Above
Race	Neutral	Possible	Short Term	As Above
Religion or belief	Neutral	Possible	Short Term	As Above
Sex	Neutral	Possible	Short Term	As Above
Sexual orientation	Neutral	Possible	Short Term	As Above
Corporate Priorities				
Safeguarding	Neutral	Possible	Short Term	The report considers the 2024/25 financial position of the Council at Month 4 (31 July 2024) and as such, in isolation has no direct impact on Equality
Ex-service personnel	Neutral	Possible	Short Term	As Above
Income	Neutral	Possible	Short Term	As Above
Residents first	Neutral	Possible	Short Term	As Above
Place-based working	Neutral	Possible	Short Term	As Above
Digitisation	Neutral	Possible	Short Term	As Above
Preventative approach	Neutral	Possible	Short Term	As Above
Future Oldham Aims				
Education	Neutral	Possible	Short Term	The report considers the 2024/25 financial position of the Council at Month 4 (31 July 2024) and as such, in isolation has no direct impact on Equality
Work	Neutral	Possible	Short Term	As Above
Transport	Neutral	Possible	Short Term	As Above
Homes	Neutral	Possible	Short Term	As Above
Healthy and safe	Neutral	Possible	Short Term	As Above
Clean and green	Neutral	Possible	Short Term	As Above
Community and leisure	Neutral	Possible	Short Term	As Above
Pride and cohesion	Neutral	Possible	Short Term	As Above



Report to Governance, Strategy and Resources Scrutiny Board

Local Government and Social Care Ombudsman: Annual Review of Complaints 2023/24

Portfolio Holder: Councillor Peter Dean, Cabinet Member for Thriving Communities and Culture

Officer Contact: Fran Lautman, Head of Customer and Digital Experience and Alex Bougatef, Interim Assistant Director of Legal Services

Report Author: Kirsty Adderley, Complaints Manager

9 October 2024

Executive Summary

At the end of the Council's corporate, Adult Social Care and Children's Social Care complaint processes, residents can approach the Local Government and Social Care Ombudsman (LGSCO) if they are dissatisfied with the outcome of their complaint. Each year, the LGSCO provides an annual review of Local Authorities' performance.

In 2023/24, the LGSCO received 71 complaints/ enquiries relating to Oldham Council, an increase from 59 in 2022/23. Despite the increase, the overall number of contacts the LGSCO received regarding Oldham Council remains relatively low when compared to the number of contacts the Complaints Team receives from residents.

In total, the LGSCO issued 72 decisions relating to Oldham Council in 2023/24. The majority of cases were not taken forward for detailed investigation but of the 14 cases that were taken forward, fault was found in 12 cases, giving an upheld rate of 86%. Out of the 12 upheld cases, Oldham Council had already identified a suitable remedy in 42%, a good indication that the Council is receptive of feedback and identifies appropriate ways to put things right.

The LGSCO's Annual Review showed that in 2023/24, the overall upheld rate for similar authorities nationally was 80%, and across the Greater Manchester authorities, the average upheld rate was 85%.

Recommendations

It is recommended that Members consider the report and comment as appropriate.

Local Government and Social Care Ombudsman Annual Review of Complaints 2023/24**1 Background**

- 1.1 The Council handles complaints about the services it provides according to the requirements of five different sets of legislation:
- The Local Government Act 1974 - Corporate complaints
 - The Children Act 1989 - Children's Social Care complaints
 - The Local Authority Social Services and NHS Complaints Regulations 2009 - Adult Social Care complaints
 - The Housing Act 1996 - Housing complaints
 - The Localism Act 2011 - Housing complaints
- 1.2 Corporate complaints, Adult Social Care complaints and Children's Social Care complaints have the Local Government and Social Care Ombudsman (LGSCO) as the last stage in the process. The Ombudsman's role is to review cases where the Council and the complainant still do not agree after the Local Authority's complaints procedure has been exhausted.
- 1.3 Each year, the results of the LGSCO's Annual Review of Complaints and the Council's performance in this regard is submitted for scrutiny. It is the role of the Governance, Strategy and Resources Scrutiny Board to consider this information.

2 Current Position**National Perspective**

- 2.1 In July 2024, the LGSCO published the Annual Review of Complaints for 2023/24. Nationally, the review highlighted a rise in the number of complaints reaching the LGSCO, and upheld decisions.
- 2.2 Nationally, the number of complaints the LGSCO received increased from 15,488 in 2022/23 to 17,937 in 2023/24.
- 2.3 The LGSCO completed 4,003 investigations and upheld 3215 in 2023/24. This compares to 4,089 investigations and 3,035 upheld decisions in 2022/23.
- 2.4 Nationally, the upheld rate for similar authorities to Oldham Council increased to 80%.
- 2.5 The LGSCO highlighted 3 key areas; Education and Children's Services, which made up 26% of all complaints and enquiries received, Housing, which made up 14% of complaints and enquiries received and Adult Social Care, which made up 14% of complaints and enquiries received.
- 2.6 92% of Education complaints were upheld. The key issues highlighted were failures by Councils to carry out Education, Health and Care (EHC) Plan assessments and reviews in good time, not providing the support stated in EHC Plans and parents not receiving adequate information about what is happening to provide for their child's needs.
- 2.7 84% of complaints about Housing were upheld. The key issues highlighted were residents being denied access to housing registers, incorrect bandings, delays in reviewing and assessing housing needs, failure to accept duties in respect of homelessness, suitability

of temporary accommodation and delays in Councils responding to issues when they are raised.

- 2.8 In respect of Adult Social Care, 80% of complaints were upheld. The key issues were delays in the assessment of residents' needs, a failure to put the individual at the heart of the process and in communicating with them, and their families, effectively.
- 2.9 The LGSCO published 27 Public Interest Reports in 2023/24, none of which were in relation to Oldham Council.
- 2.10 In addition to the Annual Review of Complaints, the LGSCO writes to each Local Authority's Chief Executive every year to set out the Council's annual performance in handling complaints. This is a useful starting point for Members to scrutinise performance. An interactive map setting out each Council's performance is also available on the LGSCO website. The letter sent to Oldham's Chief Executive is attached at Appendix 1. In addition, annual letters to the Chief Executive and details of the Council's performance can be found on the LGSCO website at <https://www.lgo.org.uk/your-councils-performance>.
- 2.11 The LGSCO is clear that the number of complaints and enquiries received should not be taken in isolation when reviewing a Local Authority's performance as this number can be affected by factors such as demographics, local conditions, the expectations of residents and the quality of signposting.
- 2.12 The upheld rate (i.e. how often fault is found when a complaint is investigated), the proportion of suitable remedies identified and compliance rates are all factors to take into consideration.

Regional Perspective

- 2.13 Table 1 compares the number of complaints and enquiries received by the LGSCO relating to Oldham Council to that of the other Greater Manchester (GM) Authorities in 2023/24 and 2022/23.
- 2.14 Tables 2 and 3 show a comparison of the number of upheld complaints and upheld rates for GM Authorities.

Table 1 – GM Authorities - Total complaints and enquiries received by the LGSCO 2023/24 and 2022/23

Authority	Complaints and enquiries 2023/24	Complaints and enquiries 2022/23	2 year average complaints and enquiries
Tameside	55	63	59
Bolton	59	64	62
Rochdale	60	54	57
Wigan	63	62	63
Trafford	69	60	65
Oldham	71	59	65
Stockport	75	65	70
Salford	75	78	77
Bury	78	72	75
Manchester	163	148	156

Total	768	725	747
Average	76.8	73	75

Table 2 – GM Authorities - Upheld cases 2023/24

Authority	Number Investigated	Number of Cases Not Upheld	Number of Cases Upheld
Rochdale	6	1	5
Wigan	8	0	8
Trafford	13	4	9
Bolton	10	1	9
Tameside	12	2	10
Salford	11	0	11
Stockport	16	5	11
Oldham	14	2	12
Bury	26	3	23
Manchester	31	7	24
Total	147	25	122
Average	15	3	12

Table 3 – GM Authorities - Upheld rates 2023/24 and 2 year averages

Authority	2023/24 uphold rate (%)	2 year average uphold rate (%)	2023/24 upheld cases per 100,000 people	2 year average upheld cases per 100,000 people
Trafford	69%	68%	3.9	4.9
Stockport	69%	78%	3.7	5.1
Manchester	77%	69%	4.2	4.1
Rochdale	83%	61%	2.2	1.8
Tameside	83%	81%	4.3	5.4
Oldham	86%	60%	4.9	2.9
Bury	88%	88%	11.8	11.6
Bolton	90%	92%	3	4.4
Wigan	100%	90%	2.4	3
Salford	100%	89%	4	3.3
Average	85%	78%	4.44	4.65

2.15 Seven of the ten GM Authorities saw an increase in the number of complaints and enquiries made to the LGSCO.

-
- 2.16 The LGSCO receives and decides some cases in different business years; as such, the decisions issued in 2023/24 will relate to some complaints the LGSCO received in 2023/24 and some it received in previous years.
- 2.17 Five of the ten GM Authorities saw an increase in the number of upheld cases in 2023/24 and six saw an increase in the percentage of cases being upheld following detailed investigation by the LGSCO.
- 2.18 The average upheld rate for Greater Manchester authorities was 85%.
- 2.19 The LGSCO has released a new statistic as part of this year's annual review. It is a measure of the number of upheld cases per 100,000 people. The average was 4.44 upheld cases per 100,000 across Greater Manchester for 2023/24.

Local Perspective

- 2.20 The number of enquiries/ complaints received by the LGSCO regarding Oldham Council has increased since 2022/23, as is the case with most GM Authorities.
- 2.21 The majority of contacts regarding Oldham Council related to Education and Children's Services (18 contacts) and Adult Social Care (15 contacts).
- 2.22 There were increases in contacts about Education and Children's Services (increase from 15 to 18), Benefits and Tax (increase from 4 to 8), Housing (increase from 4 to 7), Corporate Services (increase from 3 to 6), Highways and Transport (increase from 4 to 5) and Planning and Development (increase from 4 to 5).
- 2.23 Oldham Council saw both an increase in the number of upheld decisions and upheld rate when compared with 2022/23. However, there were several decisions that were issued in April 2024, relating to investigations that commenced in the financial year 2022/23. This means a lower upheld rate for 2022/23 and a higher rate for 2023/24. When looking at the 2 year average, Oldham Council has the second lowest number of upheld decisions (14 decisions) and the lowest upheld rate out of the Greater Manchester authorities (60%).
- 2.24 Oldham Council's rate of upheld decisions per 100,000 people was 4.9 for 2023/24 but its 2 year average is 2.9, compared to an average of 4.65 across GM Authorities.
- 2.25 The LGSCO also monitors the proportion of upheld cases whereby Local Authorities have already identified suitable outcomes/ remedies as part of their own complaint processes. In 42% of the upheld cases decided by the Ombudsman in 2023/24, Oldham Council had already identified a suitable outcome/ remedy. This is the highest rate across GM Authorities and compares to a national average of 14% and GM average of 16%.
- 2.26 The Council works hard to resolve complaints at an early stage in the complaints process to avoid the need for residents to pursue issues further. The lower percentage of complaints that go onto be investigated and upheld by the LGSCO, when compared to the number of complaints received by the Council, and the proportion of cases whereby a suitable remedy has already been offered before the case reaching the LGSCO, suggests that Oldham Council is willing to take responsibility when things go wrong and work with residents to resolve the issue appropriately.
- 2.27 Table 4 below shows the services against which decisions were issued following detailed investigation by the LGSCO.

Table 4 – Oldham Council investigations and upheld cases 2023/24

Service	Number of investigations	Number of cases upheld	Number of cases not upheld
Adult Social Care	5	5	0
Revenues	2	2	0
Children's Services	2	1	1
Highways	2	1	1
Housing	1	1	0
Environmental Health	1	1	0
Planning	1	1	0
Total	14	12	2

2.28 There has been an increase in the number of investigations and upheld cases against Adult Social Care (an increase from 1 upheld decision to 5). Increases can also be seen regarding Revenues (increase from 0 upheld decisions to 2), Highways (increase from 0 upheld decisions to 1), Environmental Health (increase from 0 upheld decisions to 1) and Planning (increase from 0 upheld decisions to 1).

2.29 Further information on the upheld cases can be found in the table below.

Table 5 – Issues identified as part of LGSCO investigations

Service	Outcome	Summary of identified issue
Adult Social Care	Upheld	Regarding a fall at a residential home
Adult Social Care	Upheld	Regarding a financial assessment and delay in updating a resident's care and support plan
Adult Social Care	Upheld	Regarding a financial assessment
Adult Social Care	Upheld	Regarding an Approved Mental Health Practitioner assessment
Adult Social Care	Upheld (already remedied)	Regarding a delay in obtaining information from a third-party organisation, as agreed with a resident

Children's Social Care	Upheld	Regarding signposting to Stage 2 of the statutory Children's Social Care complaints process
Environmental Health	Upheld (already remedied)	Regarding the content of an email sent to a resident
Highways	Upheld (already remedied)	Regarding delays in communication
Housing	Upheld	Regarding delays in considering a prosecution under the Protection from Eviction Act
Planning	Upheld	Regarding consideration of a planning application
Revenues	Upheld (already remedied)	Regarding procedural issues in relation to debt collection
Revenues	Upheld (already remedied)	Regarding delays in processing information and lack of clarity in written correspondence

2.30 The LGSCO made recommendations in respect of 5 cases and is satisfied that the Council implemented all recommendations put forward. However, it has highlighted that in 4 cases, the recommendations were made outside of the stipulated timeframe.

2.31 Through the Council's own complaints process, and following the outcomes of the LGSCO's investigations, the following actions have been taken, or are in progress, to help reduce the risk of the issues complained of occurring again in the future:

- The findings of LGSCO decisions have been shared with management from relevant services in order learning can be considered and shared.
- A review of the non-residential charging policy and accompanying staff guidance within Adult Social Care is ongoing.
- A range of booklets providing information on Adult Social Care charges has been produced.
- The local policy for Approved Mental Health Practitioners has been reviewed and training has been provided to relevant staff.
- The s117 policy has been reviewed alongside colleagues from Pennine Care NHS Foundation Trust.
- The Revenues service has ensured that relevant staff are aware of when to accept payment arrangements and signpost for additional support.
- Staff within the Revenues service have also been reminded of the process to follow when residents request that their call is escalated.
- The Housing service has refreshed training to ensure staff are aware of relevant policies, procedures and timescales.
- The Revenues service has revised wording in standard correspondence to provide greater clarity regarding the cancellation of summons costs.

2.32 Table 6 sets out the total number of complaints received by Oldham Council and the number of complaints and enquiries that were received by the LGSCO in 2023/24. It should be noted that not all complaints and enquiries received by the LGSCO progressed to the detailed investigation stage.

Table 6 - The number of LGSCO enquiries and Oldham Council complaints 2023/24

Oldham Council complaints	Complaints received by Oldham Council in 2023/24	Complaints/enquiries received by the LGSCO
Number	398	71
Percentage	100%	18%

2.33 A snapshot of the decisions made by the LGSCO in respect of Oldham Council is set out at Table 7.

Table 7 - LGSCO decisions made concerning Oldham Council

Invalid or incomplete	Advice given	Referred back for local resolution	Closed after initial enquiries	Not upheld	Upheld	Total	Upheld rate (%)	Average upheld rate (%) of similar Authorities (nationally)
2	1	31	24	2	12	72	86%	80%

2.34 All customer feedback is important to the Council as part of our commitment to work with a resident focus. In addition to 543 complaints, the Council’s Complaints Team also recorded 175 compliments.

2.35 Furthermore, the Complaints Team recorded 1,760 service requests, 89 Children’s Services representations and 1 safety/ safeguarding concern; the Complaints Team works with services to help resolve such contacts to customers’ satisfaction at the earliest opportunity to prevent escalation.

Improvements

2.36 The Complaints Team has recently undergone a service review during summer 2024 to help ensure the team, and the services it supports, are best able to work with a resident focus. As a result of this, a number of potential changes to processes and systems have been recommended, with new processes to be implemented during quarter 3 of 2024/25.

2.37 The Complaints Team has worked closely with the Customer Support Centre to identify ways in which the non-complaint related contact it receives can be re-directed to the most appropriate place. This piece of work is ongoing and it is hoped that this will free-up capacity within the Complaints Team in order it can focus on complaint related tasks.

2.38 Training on investigating and responding to complaints has been delivered and continues to be rolled out across services. The training now includes a section on what is expected in terms of LGSCO responses in order to help ensure timely responses and remedy completion.

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- 2.39 The frequency of complaint progress reports has increased from monthly to weekly to ensure services have an increased understanding of the complaints that have been received and outstanding actions.
 - 2.40 Work is ongoing with Strategy and Performance to implement a complaints dashboard to identify trends and to highlight the timeliness of responses.
 - 2.41 Quality checks of responses drafted by services continue to be undertaken and feedback provided.
 - 2.42 Representatives from the Complaints Team continue to attend the North West Complaints Forum where good practice is shared.
 - 2.43 Representatives from the Complaints Team continue to attend available workshops and conferences organised by the LGSCO to ensure we remain up to date with policy and guidance.
 - 2.44 Representatives from the Complaints Team attend Quality Improvement Group meetings for Children's Social Care and Customer Experience meetings for Adult Social Care.

Further information

- 2.45 The LGSCO has moved away from a focus on the volume of complaints and pays more attention to the lessons that can be learned from complaints and the wider improvements that can be achieved for residents and this is now more widely publicised.
- 2.46 The LGSCO is keen that scrutiny Members play an active role in holding their Local Authority to account on complaints and has created a wide range of information to support scrutiny Members to carry out the scrutiny function for complaints handling. This can be found at <https://www.lgo.org.uk/for-advisors/scrutiny>.

Conclusion

- 2.47 Although there has been an increase in the number and proportion of upheld complaints, there were a number of cases which crossed over into the 2023/24 period, meaning a lower rate for 2022/23 and higher rate for 2023/24. When looking at the 2 year average, Oldham Council is performing well and figures indicate that it is receptive of feedback and willing to put things right where issues arise.
- 2.48 The Complaints Team will continue to work with services in order to progress the recommended improvements to processes in order to ensure a high-quality complaints service is provided to the residents of Oldham.

Recommendation

- 2.49 It is recommended that Governance, Strategy and Resources Scrutiny Committee considers the report and comments as appropriate.

3 Appendices



17 July 2024

By email

Mr Catherall
Chief Executive
Oldham Metropolitan Borough Council

Dear Mr Catherall

Annual Review letter 2023-24

I write to you with your annual summary of complaint statistics from the Local Government and Social Care Ombudsman for the year ending 31 March 2024. The information offers valuable insight about your organisation's approach to complaints, and I know you will consider it as part of your corporate governance processes. As such, I have sought to share this letter with the Leader of your Council and Chair of the appropriate Scrutiny Committee, to ensure effective ownership and oversight of complaint outcomes, which offer valuable opportunities to learn and improve. In addition, this year, we have encouraged Monitoring Officers to register to receive the letter directly, supporting their role to report the decisions we uphold to their council.

For most of the reporting year, Paul Najsarek steered the organisation during his tenure as interim Ombudsman, and I was delighted to take up the role of Ombudsman in February 2024. I look forward to working with you and colleagues across the local government sector to ensure we continue to harness the value of individual complaints and drive and promote systemic change and improvement across the local government landscape.

While I know this ambition will align with your own, I am aware of the difficult financial circumstances and service demands that make continuous improvement a challenging focus for the sector. However, we will continue to hold organisations to account through our investigations and recommend proportionate actions to remedy injustice. Despite the challenges, I have great confidence that you recognise the valuable contribution and insight complaints, and their swift resolution, offer to improve services for the public.

Complaint statistics

Our statistics focus on three key areas that help to assess your organisation's commitment to putting things right when they go wrong:

Complaints upheld - We uphold complaints when we find fault in an organisation's actions, including where the organisation accepted fault before we investigated. We include the total number of investigations completed to provide important context for the statistic. This year, we also provide the number of upheld complaints per 100,000 population.

Compliance with recommendations - We recommend ways for organisations to put things right when faults have caused injustice and monitor their compliance with our recommendations. Failure to comply is rare and a compliance rate below 100% is a cause for concern.

Satisfactory remedy provided by the authority - In these cases, the organisation upheld the complaint and we agreed with how it offered to put things right. We encourage the early resolution of complaints and give credit to organisations that accept fault and find appropriate ways to put things right.

Finally, we compare the three key annual statistics for your organisation with similar authorities to provide an average marker of performance. We do this for County Councils, District Councils, Metropolitan Boroughs, Unitary Councils, and London Boroughs.

Your annual data, and a copy of this letter, will be uploaded to our interactive map, [Your council's performance](#), on 24 July 2024. This useful tool places all our data and information about councils in one place. You can find the detail of the decisions we have made about your Council, read the public reports we have issued, and view the service improvements your Council has agreed to make as a result of our investigations, as well as previous annual review letters.

Your organisation's performance

I welcome that your Council agreed to, and implemented, the recommendations we made in five cases during the year. However, it is disappointing that in four of those cases recommendations were not completed within the agreed timescales.

While I acknowledge the pressures councils are under, delays only add to complainants' frustration and, where service improvements remain outstanding, the risk of others being affected by the same fault remains. We share recommendations at the draft decision stage of our process and often propose a time period within which we expect any actions to be completed. It is important your Council engages fully with that process and is realistic in either confirming or seeking to negotiate the timeframe required to complete the actions.

I invite the Council to consider how it might reduce delays in complying with agreed recommendations in the current year.

Supporting complaint and service improvement

In February, following a period of consultation, we launched the [Complaint Handling Code](#) for councils, setting out a clear process for responding to complaints effectively and fairly. It is aligned with the Code issued to housing authorities and landlords by the Housing Ombudsman Service and we encourage you to adopt the Code without undue delay. Twenty councils have volunteered to take part in an implementation pilot over the next two years that will develop further guidance and best practice.

The Code is issued to councils under our powers to provide guidance about good administrative practice. We expect councils to carefully consider the Code when developing policies and procedures and will begin considering it as part of our processes from April 2026 at the earliest.

The Code is considered good practice for all organisations we investigate (except where there are statutory complaint handling processes in place), and we may decide to issue it as guidance to other organisations in future.

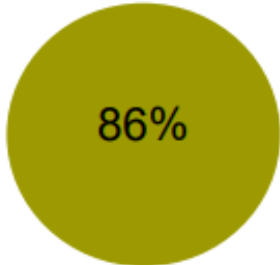
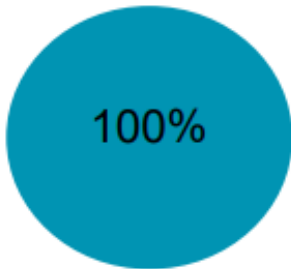
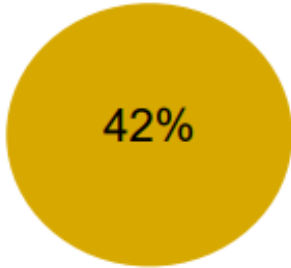
Our successful complaint handling training programme continues to develop with new modules in Adult Social Care and Children's Services complaint handling available soon. All our courses include practical interactive workshops that help participants develop their complaint handling skills. We delivered 126 online workshops during the year, reaching more than 1,700 people. To find out more visit www.lgo.org.uk/training or get in touch at training@lgo.org.uk.

Returning to the theme of continuous improvement, we recognise the importance of reflecting on our own performance. With that in mind I encourage you to share your view of our organisation via this survey: <https://www.smartsurvey.co.uk/s/ombudsman/>. Your responses will help us to assess our impact and improve our offer to you. We want to gather a range of views and welcome multiple responses from organisations, so please do share the link with relevant colleagues.

Yours sincerely,



Amerdeep Somal
Local Government and Social Care Ombudsman
Chair, Commission for Local Administration in England

Complaints upheld		
	<p>86% of complaints we investigated were upheld.</p> <p>This compares to an average of 80% in similar organisations.</p>	<p>12 upheld decisions</p> <p>This is 4.9 upheld decisions per 100,000 residents.</p> <p>The average for authorities of this type is 4.4 upheld decisions per 100,000 residents.</p> <p>Statistics are based on a total of 14 investigations for the period between 1 April 2023 to 31 March 2024</p>
Compliance with Ombudsman recommendations		
	<p>In 100% of cases we were satisfied the organisation had successfully implemented our recommendations.</p> <p>This compares to an average of 99% in similar organisations.</p>	<p>Statistics are based on a total of 5 compliance outcomes for the period between 1 April 2023 to 31 March 2024</p>
<ul style="list-style-type: none">• Failure to comply with our recommendations is rare. An organisation with a compliance rate below 100% should scrutinise those complaints where it failed to comply and identify any learning.		
Satisfactory remedy provided by the organisation		
	<p>In 42% of upheld cases we found the organisation had provided a satisfactory remedy before the complaint reached the Ombudsman.</p> <p>This compares to an average of 14% in similar organisations.</p>	<p>5 satisfactory remedy decisions</p> <p>Statistics are based on a total of 12 upheld decisions for the period between 1 April 2023 to 31 March 2024</p>

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GOVERNANCE, STRATEGY AND RESOURCES SCRUTINY BOARD

WORK PROGRAMME 2024/2025

Agenda item	Purpose	Portfolio lead & officer lead	Method of scrutiny	Additional information
Wednesday 19th June 2024				
Workforce strategy update	To scrutinise last financial years workforce performance and get insight into forward years plan.	Portfolio – Finance and Corporate Resources Assistant Chief Executive / AD: HR & OD	Service performance reporting	
Review of Oldham Community Leisure and the operation of the Leisure Contract	Scrutiny of OCL and their key performance indicators	Portfolio – Culture and Communities Deputy Chief Executive. Neil Consterdine, Assistant Director Youth, Leisure and Communities	Scrutiny of performance as presented in the Annual Report	
Revenue Monitor and Capital Investment Programme 2024/25 Mth 2	To scrutinise the Council's financial performance against the agreed Budget.	Portfolio – Finance and Corporate Services Sarah Johnston, Director of Finance.	Budget performance reporting	
Wednesday 31st July 2024				

Corporate Health and Safety Policy	To scrutinise the Council's health and safety arrangements	Portfolio – Culture and Communities Deputy Chief Executive. Neil Consterdine, Assistant Director Youth, Leisure and Communities Nasir Dad, Director of Environment	Service performance reporting.	
Performance Report Quarter 4 – 2023/24	To scrutinise the Council's performance against agreed performance measures	Portfolio – Leader of the Council. Assistant Chief Executive.	Service performance reporting	
Local Government Ombudsman – Annual Report (initial draft)	To scrutinise the Council's position regarding complaints and complaints pursued through to the Ombudsman.	Portfolio – Finance and Corporate Resources Assistant Chief Executive.	Consideration of initial draft of Annual Report	
Draft 2023/24 Annual Statement of Accounts	To scrutinise the Council's Draft Annual Accounts for 2023/24	Portfolio – Finance and Corporate Resources Sarah Johnston, Director of Finance	Scrutiny of annual report	
Wednesday, 9th October 2024				
Performance Report – Quarter 1, 2024/25	To scrutinise the Council's performance against agreed performance measures	Portfolio – Leader of the Council. Assistant Chief Executive.	Service performance reporting	
Revenue Monitor and Capital Investment Programme 2024/25 Month 4	To scrutinise the Council's financial performance against the agreed Budget.	Portfolio – Finance and Corporate Services Sarah Johnston, Director of Finance.	Budget performance reporting	
Local Government Ombudsman – Annual Report (final draft)	To scrutinise the Council's position regarding complaints and complaints pursued through to the Ombudsman.	Portfolio – Finance and Corporate Resources Assistant Chief Executive.	Consideration of Annual Report	

Wednesday 4th December 2024				
Performance report – Month 6, 2024/25	To scrutinise Council performance against agreed performance measures.	Portfolio – Leader of the Council. Assistant Chief Executive.	Service performance reporting	
Miocare Group – Annual report	To scrutinise the performance of the MioCare Group	Portfolio – Health and Social Care Rob Jackson, Managing Director, MioCare Group	Annual Report consideration/service performance reporting	
Revenue Monitor and Capital Investment Programme 2024/25 Quarter 2	To scrutinise the Council's financial performance against the agreed Budget.	Portfolio – Finance and Corporate Resources Sarah Johnston, Director of Finance.	budget performance reporting	
Partnership Risk Dashboard	To assess the overall risk on partnerships to the Council.	Portfolio – Finance and Corporate Resources. Sarah Johnston, Director of Finance.	Budget performance reporting	
Wednesday 29th January 2025 (Administration Budget)				
Revenue, Monitor and Capital Investment Programme	To scrutinise the Council's financial performance and proposals	Sarah Johnston, Director of Finance.		
Revenue Budget report 2025/26 and Medium Term Financial Strategy	To scrutinise the Council's financial performance and proposals	Sarah Johnston, Director of Finance.		
Capital Strategy and Capital Programme	To scrutinise the Council's financial performance and proposals	Sarah Johnston, Director of Finance.		
Treasury Management Strategy 2025/26	To scrutinise the Council's financial performance and proposals	Sarah Johnston, Director of Finance.		
Housing Revenue Account	To scrutinise the Council's financial performance and proposals	Sarah Johnston, Director of Finance.		
Thursday 6th February 2025				

Opposition Budget	To scrutinise the opposition budget proposals for the coming financial year	Sarah Johnston, Director of Finance		
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Tuesday 25th March 2025

Performance report Quarter 3, 2024/25	To scrutinise Council performance against agreed performance measures	Portfolio – Leader of the Council. Assistant Chief Executive.	Service performance reporting.	
Revenue Monitor and Capital Investment Programme 2024/25 Month 10	To scrutinise the Council’s financial performance against the agreed Budget.	Portfolio – Finance and Corporate Resources Sarah Johnston, Director of Finance.	Budget performance reporting	
Poverty Truth Commission	To examine progress with the work of the Commission	Portfolio - Health and Social Care Amanda Richardson	Service Performance reporting	

Task and finish group deep dives:

Deep dive area:	Expanded proposal:
Communicating with customers and Customer experience of the council.	Given the council focus on residents, this task and finish group will explore how the council currently communicates with residents and will interrogate how customers feel about their contact experiences with customers

TO BE SCHEDULED (additional session)

TO BE SCHEDULED (additional session)				
TBC	The impact of the proposed health integration on the Council and its future operations.	To be confirmed	Budget and Performance Monitoring.	
TBC	Employment and Skills – draft action plan	Possibly October or December 2023	Scrutiny of action plan. Jon Bloor – Assistant Director (Economic Growth)	

TBC	Update on contract monitoring within the Council for a selected operational area	Appropriate Portfolio Holder and Director responsible for the Service.	Issues and scheduling to be determined by the Committee	
TBC	Update on contract monitoring within the Council for a selected operational area (report on the performance of E-on)	To scrutinise the Council's health and safety arrangements	Scrutiny of the street lighting contract that the Council has with Eon – Director of Environment/Cabinet Member for Neighbourhoods	
REMOVED				

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KEY DECISION DOCUMENT – COVERING DECISIONS TO BE TAKEN FROM 14 OCTOBER 2024

Key Decision Reference	Subject Area For Decision	Led By	Decision Date	Decision Taker
FCR-12-24	Council Tax Reduction Scheme 2025/26	Director of Finance	14 th October 2024	Cabinet
<p>Description: To determine the Council Tax Reduction Scheme for 2025/26 Document(s) to be considered in public or private: Proposed Report Title: Council Tax Reduction Scheme 2025/26</p> <p>Background Documents: Appendices – Various</p> <p>Report to be considered in Public</p>				
FCR-13-24	Treasury Management 2024/25 – Quarter 1 Report	Director of Finance	14 th October 2024	Cabinet
<p>Description: The Quarter 1 review of Treasury Management activity during the first Quarter of 2024/25. Document(s) to be considered in public or private: Proposed Report Title: Treasury Management Review 2024/25 – Quarter 1 Report</p> <p>Background Documents: Appendices</p> <p>Report to be considered in Public</p>				
ESR-18-24	Approval of draft Greater Manchester Local Nature Recovery Strategy for consultation	Director of Economy	14 th October 2024	Cabinet

KEY DECISION DOCUMENT – COVERING DECISIONS TO BE TAKEN FROM 14 OCTOBER 2024

Key Decision Reference	Subject Area For Decision	Led By	Decision Date	Decision Taker
Description: Approval of the draft Greater Manchester Local Nature Recovery Strategy for consultation Document(s) to be considered in public or private: Report to be considered in public				
New! ESR-10-24	Approval of draft South Pennines Mitigation Supplementary Planning Document for consultation	Director of Economy	14 TH October 2024	Cabinet
Description: Approval of draft South Pennines Mitigation Supplementary Planning Document for consultation Document(s) to be considered in public or private: Report to be considered in public				
New! ESR-11-24	Approval of draft Holcroft Moss Planning Obligations Supplementary Planning Document	Director of Economy	14 TH October 2024	Cabinet
Description: To approve the draft Holcroft Moss Planning Obligations Supplementary Planning Document (SPD) (Appendix 1) and supporting documents (Appendices 2, 3 and 4) for a six-week public consultation commencing not earlier than 1 November 2024. This will enable stakeholders to have the opportunity to provide comments on the Holcroft Moss Planning Obligations SPD before it is formally adopted. Document(s) to be considered in public or private: Report to be considered in public				
New! HL-04-24	Local Authority Housing Fund	Director of Economy	14 TH October 2024	Cabinet

KEY DECISION DOCUMENT – COVERING DECISIONS TO BE TAKEN FROM 14 OCTOBER 2024

Key Decision Reference	Subject Area For Decision	Led By	Decision Date	Decision Taker
<p>Description: Acceptance of grant and allocation of council resources to aid project viability.</p> <p>Document(s) to be considered in public or private: Private - NOT FOR PUBLICATION by virtue of Paragraph 3 of Part 1 of Schedule 12A of the Local Government Act 1972 and it is not in the public interest to disclose the information because it relates to the financial or business affairs of the Council and a third party</p>				
<p>New! HL-05-24</p>	<p>Selection of Preferred Developer for Southlink</p>	<p>Deputy Chief Executive</p>	<p>14TH October 2024</p>	<p>Cabinet</p>
<p>Description: Document(s) to be considered in public or private:</p>				
<p>New! ESR-20-24</p>	<p>Eton Star - A New School in Oldham Town Centre</p>	<p>Deputy Chief Executive</p>	<p>14TH October 2024</p>	<p>Cabinet</p>
<p>Description: Proposals for a new education facility in Oldham</p> <p>Document(s) to be considered in public or private: Private - NOT FOR PUBLICATION by virtue of Paragraph 3 of Part 1 of Schedule 12A of the Local Government Act 1972 and it is not in the public interest to disclose the information because it relates to the financial or business affairs of the Council and a third party</p>				
<p>New! EE-03-24</p>	<p>Oldham MBC Charging Policy</p>	<p>Deputy Chief Executive -</p>	<p>14TH October 2024</p>	<p>Cabinet</p>

KEY DECISION DOCUMENT – COVERING DECISIONS TO BE TAKEN FROM 14 OCTOBER 2024

Key Decision Reference	Subject Area For Decision	Led By	Decision Date	Decision Taker
<p>Description: a report proposing a new charging policy for the Borough</p> <p>Document(s) to be considered in public or private: Private - NOT FOR PUBLICATION by virtue of Paragraph 3 of Part 1 of Schedule 12A of the Local Government Act 1972 and it is not in the public interest to disclose the information because it relates to the financial or business affairs of the Council and a third party</p>				
<p>New! ECR-17-24</p>	<p>Oldham Community Leisure (OCLL) Buildings Capital Requirements</p>	<p>Deputy Chief Executive/Director of Communities</p>	<p>14TH October 2024</p>	<p>Cabinet</p>
<p>Description: Proposals for the development of OCLL infrastructure.</p> <p>Document(s) to be considered in public or private: Private - NOT FOR PUBLICATION by virtue of Paragraph 3 of Part 1 of Schedule 12A of the Local Government Act 1972 and it is not in the public interest to disclose the information because it relates to the financial or business affairs of the Council and a third party</p>				
<p>New! FCR-17-24</p>	<p>Utilities Procurement 2024 - 2028</p>	<p>Deputy Chief Executive -</p>	<p>14TH October 2024</p>	<p>Cabinet</p>
<p>Description: a report detailing a plans for procuring utilities over a four year period starting in 2024/25</p> <p>Document(s) to be considered in public or private: Private - NOT FOR PUBLICATION by virtue of Paragraph 3 of Part 1 of Schedule 12A of the Local Government Act 1972 and it is not in the public interest to disclose the information because it relates to the financial or business affairs of the Council and a third party</p>				
<p>New! CHS-06-24</p>	<p>Additional UKSPF Skills Funding Allocations</p>	<p>Director of Education, Skills & Early Years</p>	<p>14TH October 2024</p>	<p>Cabinet</p>

KEY DECISION DOCUMENT – COVERING DECISIONS TO BE TAKEN FROM 14 OCTOBER 2024

Key Decision Reference	Subject Area For Decision	Led By	Decision Date	Decision Taker
<p>Description: a report detailing options for additional sources of UKSPF Skills Funding</p> <p>Document(s) to be considered in public or private: Private - NOT FOR PUBLICATION by virtue of Paragraph 3 of Part 1 of Schedule 12A of the Local Government Act 1972 and it is not in the public interest to disclose the information because it relates to the financial or business affairs of the Council and a third party</p>				
NEI-04-24	Street Lighting Attachments Policy	Director of Environment	14 TH October 2024	Cabinet
<p>Description: To ask Cabinet to formulate and agree a Streetlighting attachments policy.</p> <p>Document(s) to be considered in public or private: Private - NOT FOR PUBLICATION by virtue of Paragraph 3 of Part 1 of Schedule 12A of the Local Government Act 1972 and it is not in the public interest to disclose the information because it relates to the financial or business affairs of the Council and a third party</p>				
New! EDS-06-24	Greater Manchester Work Well Partnership – Oldham’s Local Delivery	Director of Education, Skills & Early Years	14 TH October 2024	Cabinet
<p>Description: a report detailing Oldham’s contribution to the Greater Manchester wide ‘Work Well’ Scheme.</p> <p>Document(s) to be considered in public or private: Private - NOT FOR PUBLICATION by virtue of Paragraph 3 of Part 1 of Schedule 12A of the Local Government Act 1972 and it is not in the public interest to disclose the information because it relates to the financial or business affairs of the Council and a third party</p>				
New! EDS-07-24	Music Hub Partnership Agreement	Director of Education, Skills & Early Years	14 TH October 2024	Cabinet

KEY DECISION DOCUMENT – COVERING DECISIONS TO BE TAKEN FROM 14 OCTOBER 2024

Key Decision Reference	Subject Area For Decision	Led By	Decision Date	Decision Taker
<p>Description: a report detailing a Music Hub Partnership.</p> <p>Document(s) to be considered in public or private: Private - NOT FOR PUBLICATION by virtue of Paragraph 3 of Part 1 of Schedule 12A of the Local Government Act 1972 and it is not in the public interest to disclose the information because it relates to the financial or business affairs of the Council and a third party</p>				
FCR-18-24	Financial Update and working capital requirements for 2024/25 – Oldham Total Care	Director of Adults Social Care (DASS)	18 TH November 2024	Cabinet
<p>Description: a report providing a Financial Update Report to be considered in Public</p>				
NEI-12-24	Parking Service Review and Contract	Director of Environment	18 TH November 2024	Cabinet
<p>Description: Review of Parking in the Borough</p> <p>Document(s) to be considered in public or private: public</p>				
New! FCR-19-24	Treasury Management Strategy Mid -Year Review 2024/25	Director of Finance	18 TH November 2024	Cabinet
<p>Description: Review of the performance for the first half of the financial year in relation to the Treasury Management Strategy for 2023/24. Document(s) to be considered in public or private: Proposed Report Title: Treasury Management Strategy Mid -Year Review 2024/25</p> <p>Background Documents: Appendices</p> <p>Report to be considered in Public</p>				

KEY DECISION DOCUMENT – COVERING DECISIONS TO BE TAKEN FROM 14 OCTOBER 2024

Key Decision Reference	Subject Area For Decision	Led By	Decision Date	Decision Taker
New! FCR-20-24	Revenue Monitor and Capital Investment Programme 2024/25 Quarter 2	Director of Finance	18 TH November 2024	Cabinet
<p>Description: The report provides an update on the Council’s 2024/25 forecast revenue budget position and the financial position of the capital programme as at the period ending 30 September 2024 (Quarter 2) Document(s) to be considered in public or private: Proposed Report Title: Revenue Monitor and Capital Investment Programme 2024/25 Quarter 2 Background Documents: Appendices – Various Report to be considered in Public</p>				

Key:

New! - indicates an item that has been added this month.

Notes:

1. The procedure for requesting details of documents listed to be submitted to decision takers for consideration is to contact the Contact Officer contained within the Key Decision Sheet for that item. The contact address for documents is Oldham Council, Civic Centre, West Street, Oldham, OL1 1UH. Other documents relevant to those matters may be submitted to the decision maker.

KEY DECISION DOCUMENT – COVERING DECISIONS TO BE TAKEN FROM 14 OCTOBER 2024

Key Decision Reference	Subject Area For Decision	Led By	Decision Date	Decision Taker
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2. Where on a Key Decision Sheet the Decision Taker is Cabinet, the list of its members are detailed on the Council’s website
3. Full Key Decision details (including documents to be submitted to the decision maker for consideration, specific contact officer details and notification on if a report is likely to be considered in private) can be found via the online published plan at:
<http://committees.oldham.gov.uk/mgListPlans.aspx?RPId=144&RD=0>

Notice of Private Reports

(In accordance with Part 2 of the Local Authorities (Executive Arrangements) Meetings and Access to Information) (England) Regulations 2012)

Oldham Borough Council intends to hold a private meeting (or part thereof) of the Cabinet on Monday, 14th October 2024

Decision to be taken (Agenda Item) Decisions proposed to be taken in private at Cabinet on 14th October 2024:

a. Local Authority Housing Fund

Reason:

The meeting (or part thereof) will be held in exempt session on the grounds that the reports and background papers will contain the likely disclosure of exempt information as defined in paragraph 3 of Schedule 12A of the Local Government Act 1972 (as amended) – information relating to the financial or business affairs of the Council and a third party.

a. Wireless Infrastructure Upgrade

Reason:

The meeting (or part thereof) will be held in exempt session on the grounds that the reports and background papers will contain the likely disclosure of exempt information as defined in paragraph 3 of Schedule 12A of the Local Government Act 1972 (as amended) – information relating to the financial or business affairs of the Council and a third party.

b. Selection of Preferred Developer for Southlink

Reason:

KEY DECISION DOCUMENT – COVERING DECISIONS TO BE TAKEN FROM 14 OCTOBER 2024

Key Decision Reference	Subject Area For Decision	Led By	Decision Date	Decision Taker
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The meeting (or part thereof) will be held in exempt session on the grounds that the reports and background papers will contain the likely disclosure of exempt information as defined in paragraph 3 of Schedule 12A of the Local Government Act 1972 (as amended) – information relating to the financial or business affairs of the Council and a third party.

c. Eton Star - A New School in Oldham Town Centre

Reason:

The meeting (or part thereof) will be held in exempt session on the grounds that the reports and background papers will contain the likely disclosure of exempt information as defined in paragraph 3 of Schedule 12A of the Local Government Act 1972 (as amended) – information relating to the financial or business affairs of the Council and a third party.

d. Oldham MBC Charging Policy

Reason:

The meeting (or part thereof) will be held in exempt session on the grounds that the reports and background papers will contain the likely disclosure of exempt information as defined in paragraph 3 of Schedule 12A of the Local Government Act 1972 (as amended) – information relating to the financial or business affairs of the Council and a third party.

e. Oldham Community Leisure (OCLL) Buildings Capital Requirements

Reason:

The meeting (or part thereof) will be held in exempt session on the grounds that the reports and background papers will contain the likely disclosure of exempt information as defined in paragraph 3 of Schedule 12A of the Local Government Act 1972 (as amended) – information relating to the financial or business affairs of the Council and a third party.

f. Utilities Procurement 2024 - 2028

Reason:

The meeting (or part thereof) will be held in exempt session on the grounds that the reports and background papers will contain the likely disclosure of exempt information as defined in paragraph 3 of Schedule 12A of the Local Government Act 1972 (as amended) – information relating to the financial or business affairs of the Council and a third party.

KEY DECISION DOCUMENT – COVERING DECISIONS TO BE TAKEN FROM 14 OCTOBER 2024

Key Decision Reference	Subject Area For Decision	Led By	Decision Date	Decision Taker
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g. Additional UKSPF Skills Funding Allocations

Reason:

The meeting (or part thereof) will be held in exempt session on the grounds that the reports and background papers will contain the likely disclosure of exempt information as defined in paragraph 3 of Schedule 12A of the Local Government Act 1972 (as amended) – information relating to the financial or business affairs of the Council and a third party.

h. Street Lighting Attachments Policy

Reason:

The meeting (or part thereof) will be held in exempt session on the grounds that the reports and background papers will contain the likely disclosure of exempt information as defined in paragraph 3 of Schedule 12A of the Local Government Act 1972 (as amended) – information relating to the financial or business affairs of the Council and a third party.

i. Greater Manchester Work Well Partnership – Oldham’s Local Delivery

Reason:

The meeting (or part thereof) will be held in exempt session on the grounds that the reports and background papers will contain the likely disclosure of exempt information as defined in paragraph 3 of Schedule 12A of the Local Government Act 1972 (as amended) – information relating to the financial or business affairs of the Council and a third party.

j. Music Hub Partnership Agreement

Reason:

The meeting (or part thereof) will be held in exempt session on the grounds that the reports and background papers will contain the likely disclosure of exempt information as defined in paragraph 3 of Schedule 12A of the Local Government Act 1972 (as amended) – information relating to the financial or business affairs of the Council and a third party.

KEY DECISION DOCUMENT – COVERING DECISIONS TO BE TAKEN FROM 14 OCTOBER 2024

Key Decision Reference	Subject Area For Decision	Led By	Decision Date	Decision Taker
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Representations:

If you wish to make representations against the intention to hold a private meeting, please send these to Constitutional Services, Level 3, Civic Centre, Oldham, OL1 1UL or email: constitutional.services@oldham.gov.uk

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