

Birmingham City Council

Report to City Corporate and Finance Overview and Scrutiny Committee

27 September 2024



Title:	REPORT OF THE INFORMATION TASK AND FINISH GROUP
Lead Cabinet Portfolio:	Councillor Rob Pocock, Cabinet Member for Transformation, Governance and HR
Relevant Overview and Scrutiny Committee:	Corporate and Finance Overview and Scrutiny Committee
Report Author:	Angela Storer, Head of Corporate Performance Strategy, Equality and Partnerships Directorate Angela.storer@birmingham.gov.uk
Authorised by:	Richard Brooks, Director Strategy, Equality and Partnerships Directorate
Is this a Key Decision?	No
If this is a Key Decision, is this decision listed on the Forward Plan?	Not applicable
Reason(s) why not included on the Forward Plan:	Not applicable
Is this a Late Report?	No
Reason(s) why Late:	Not Applicable
Is this decision eligible for 'call in?'	No
If not eligible, please provide reason(s):	Not applicable
Wards:	All

Does this report contain exempt or confidential information? No

Has this decision been included on the Notification of Intention to consider Matters in Private? No

Reasons why not included on the Notification: Not applicable

1 EXECUTIVE SUMMARY

1.1 This report concludes the work of the Information Task and Finish Group, commissioned by the Corporate and Finance Overview and Scrutiny Committee.

1.2 The report:

- Provides a proposed model for improving access to information relating to delivery, performance and risk, to support the work of Overview and Scrutiny Committees (OSCs).
- Outlines, at appendix 1, the current state of the monitoring and reporting arrangements for delivery, performance and risk information at BCC as of August 2024.

2 COMMISSIONERS' REVIEW

2.1 Commissioners support the recommendations

3 RECOMMENDATIONS

That the Committee:

3.1 Approve the proposed model for improving access to information relating to delivery, performance and risk, to support the work of Overview and Scrutiny Committees (OSCs). The proposed model is set out in section 4.7 – 4.13 of this paper.

4 KEY INFORMATION

Context

4.1 Since October 2023, the Council has been under Government Intervention. As part of this, the Council has recently approved an Improvement and Recovery Plan (IRP) which is the key delivery plan for the organisation. The findings and recommendations from the Independent Governance Review of the Council produced by the Centre for Governance Scrutiny (CfGS) were incorporated into the IRP.

4.2 Like all parts of the Council, OSCs will play an important role in driving corporate improvements across the Council. To do this effectively, OSCs will need to be focused on the right things and deliver them in the right way. This will ensure that OSCs will add value and not duplicate existing activity. This is essential given the scope of change required across the Council, and the pace at which it will need to be delivered.

4.2 Initial discussions with the Centre for Governance and Scrutiny identified the importance of improving members' understanding of the Council's change and

improvement plans and working towards a sustainable approach to information sharing which gives members confidence that they can maintain a watching brief over emerging issues.

- 4.3 As a result, the Information Task and Finish group was established to move towards a more helpful and sustainable model for information sharing. Terms of reference for the group were agreed at the meeting of the Coordinating OSC in May. These are provided at Appendix 2.
- 4.4 Following agreement of the terms of reference, an initial report was presented to the 28th June meeting of the Task and Finish group. This report provided detail on the current state of the monitoring and reporting arrangements for delivery, performance and risk information at BCC. It also set out an initial proposal for how issues relating to the access to information for OSCs might be addressed.
- 4.5 A final meeting of the Task and Finish group took place on 22nd July, where a prototype portal for information sharing was demonstrated. Consideration was also given to the support Members might need in accessing and using the information. It was also recognised that it was important to agree when it is possible to release each of the information types to OSCs.

Proposal and Reasons for Recommendations

- 4.6 As part of strengthening the Council's governance arrangements, revised approaches to corporate, delivery, performance and risk monitoring are already being implemented. The work of the Information Task and Finish Group provides an opportunity for using these key information sets in a way that meets the needs of OSCs. This should allow OSCs access to a more regular, appropriate, and timely set of information to inform their work programmes and identify areas that require deeper investigation in line with the overall approach of the scrutiny function.
- 4.7 It is therefore proposed that a phased approach is taken to developing a single point of access for OSC members, that contains a suite of the latest performance, delivery and risk information, with the same information available consistently to multiple audiences.
- 4.8 Alongside the development of the single site, there will be a need to ensure the outputs meet member needs and that appropriate support is provided to members to ensure understanding of the information provided and how that might translate into scrutiny work. Furthermore, consideration will need to be given to how the Cabinet, Audit Committee and Overview and Scrutiny can use this information appropriately, without duplicating existing or emerging oversight and assurance arrangements, will need to be achieved as part of implementing the proposed arrangements below.

4.9 Table 1 – Proposal and timeline

Phase	Recommendation	Timeline	Reason
Phase 1	<p>Phase 1 would not deliver a single integrated product, but it would bring together the key information sets in one more easily accessible place.</p> <ul style="list-style-type: none"> • Develop a single online site where the latest delivery, risk and performance reports can be accessed easily by OSCs and the Scrutiny Team. • Initial engagement by CfGS with OSCs on the use of this information. • Review how the information is being used and seek feedback from members to inform phase 2. 	<p>Implement by 30 September 2024.</p> <p>To be confirmed (Autumn 2024)</p> <p>Review - March 2025.</p>	<p>The delivery and risk information sets are being transitioned to new software packages over the coming months.</p> <p>Further, there is not yet a fully established reporting regime for either information set currently.</p> <p>Integrating and creating a single dashboard based on the current data infrastructure would lead to duplication and rework once new systems are implemented.</p> <p>OSCs should receive practical support to use the information most effectively. It maybe that part of the CfGS offer to BCC could incorporate data literacy and skills for both members and support officers, as well as support around effective questioning.</p> <p>A review would take place after 6 months to seek feedback and input to a more integrated product as part of phase 2.</p>
Phase 2	<ul style="list-style-type: none"> • Work towards a single dashboard that pulls out key summary information from each of the individual reports in a more integrated manner. 	<p>April 2025 – June 2025</p>	<p>By this point, reporting regimes will be well established and new software packages implemented.</p> <p>The dashboard would allow for greater interrogation of the data and potentially to drill down into levels of detail beneath the summary information (for example,</p>

			graphs showing trends over time).
--	--	--	-----------------------------------

- 4.10 Feedback on the proposal from the initial meeting of the Task and Finish group highlighted the need to ensure the greatest possible clarity and simplicity of presentation, and the avoidance of acronyms and jargon in the reports, to support understanding and use of the data. This is something that can be implemented from phase 1. As the reports develop, it may be possible to generate useful visualisations to further aid the understanding of the data and trends over time. A prototype of the single portal is available here (internal BCC access only) [Overview and Scrutiny Information Hub - Home \(sharepoint.com\)](#).
- 4.11 Training and development for OSC members in the use of the information would need to be provided. It is proposed that the Centre for Governance and Scrutiny (CfGS) supports this work to ensure that it is in alignment with the Governance Review recommendations. Members of the Task and Finish Group agreed that there would also need to be support in understanding the data, in particular the extent to which it reports judgements rather than measured data. The processes of assuring and benchmarking the data will be crucial to presenting as accurate and objective a picture as possible.
- 4.12 Timeliness of the release of information to OSCs via the single portal has been a key consideration for the group. It is important to balance information governance and security with ensuring access for Scrutiny in a useful and timely manner. As agreed with the Monitoring Officer in September 2024, the portal will be updated for each information type as follows:

Information type	Frequency of update	Internal Governance ahead of OSC access via the single portal
Delivery (IRP and Savings)	Every 2 months	CLT > EMT > upload to OSC portal following EMT
Performance	Quarterly	CLT > Cabinet > and upload to OSC portal at the same point that papers are published on CMIS
Risk	Monthly	CLT > upload principal risks to OSC portal

- 4.13 Benefits of this proposal include:
- The phased approach to implementation of a single portal allows members to pilot a new way of accessing information relatively quickly, before testing and committing to further significant technical product development work. This means the initial site could be produced more quickly and the phase 2 product could be developed based on informed feedback from phase 1.

- Having one place to access the information would remove the need for separate reports to Committees, increasing efficiency for members and officers.
- It would streamline access to information. Instead of being provided with three discrete reports by email at different frequencies, the information would be housed in a single location.
- Access to a single site would enable access to the latest available information that has been through the relevant organisational governance processes, ensuring quality and consistency of information presented.
- Although there will continue to be different reporting frequencies for different elements of the overall information set, there would not be the need to add additional burden or reporting timescales to create a new product. The dashboard could pull through the latest available, verified data from all the sources at the point of access.
- Members could be supported to use the information to identify exceptions or areas where a more detailed piece of scrutiny work might be beneficial.

4.14 Appendix 1 sets out detail on the research undertaken to outline the current state of deliver, performance and risk information at BCC. This research was used to inform the proposal and its feasibility.

5 CONSULTATION

5.1 Heads of Service responsible corporately for the respective information types in scope for this work have been consulted and actively contributed to the development of this paper. The Centre for Governance and Scrutiny have also contributed to the work of the group and the formation of the final recommendations.

6 MEMBER ENGAGEMENT

Ward Councillor(s)

6.1 Not applicable.

Overview and Scrutiny

6.2 Councillors Albert Bore, Morriam Jan, Ewan Mackey and Katherine Iroh have represented the Corporate and Finance OSC on the Task and Finish group.

Other

6.3 Not applicable.

7 IMPACT AND IMPLICATIONS

Finance

7.1 Savings delivery, as part of the IRP Programme delivery information will be shared with OSCs as part of this work, once it has been signed off by CLT and EMT.

7.2 There are no further financial implications.

Legal

7.3 The Local Authorities (Executive Arrangements) (Meetings and Access to Information) (England) Regulations 2012 provide procedures to be followed prior to public meetings and private meetings including publication of information. The regulations also provide additional rights of access to documents for members of overview and scrutiny committees.

7.4 Part B 1.2 of the Council's constitution sets out the rights and duties of elected members in relation to information:

a) Councillors will have rights of access to such documents, information, land and buildings of the Council as are necessary for the proper discharge of their functions and in accordance with the law.

b) Councillors will not publicise information which is confidential or exempt without the consent of the Council or divulge information given in confidence to anyone other than a councillor or officer entitled to know.

c) For these purposes, "confidential" and "exempt" information are defined in Part C2 of the Constitution: Access to Information or as advised by the City Solicitor.

7.5 The Council's constitution contains at Part C2 Meetings and Access to Information Rules. These rules outline the process for sharing information including confidential and exempt information in meetings. Further, the rules outline the rights of elected members to access information and the additional rights of access for scrutiny members.

7.6 The proposed recommendation seeks to improve access to information relating to delivery, performance and risk, to support the work of Overview and Scrutiny Committees (OSCs). This is consistent with legislation and the Council's constitution.

Equalities

7.7 There are no direct equalities implications arising from this report.

Procurement

7.8 There are no direct procurement implications arising from this report.

People Services

7.9 There are no direct people services implications arising from this report.

Climate Change, Nature and Net Zero

- 7.10 There are no direct climate change, nature and net zero implications arising from this report.

Corporate Parenting

- 7.11 There are no direct corporate parenting implications arising from this report.

Other

- 7.12 There are no other implications arising from this report.

8 APPENDICES

- 8.1 Appendix 1 – Current state of delivery, performance and risk information at Birmingham City Council as of August 2024.
- 8.2 Appendix 2- Terms of reference for the Information Task and Finish Group, May 2024.

9 BACKGROUND PAPERS

- 9.1 Centre for Governance and Scrutiny Independent Review of Governance, accepted by Cabinet on 12 December 2023.