

Progress Assessment Report

March 2006



Progress Assessment

Mid Devon District Council

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Progress assessments

In 2002, Comprehensive Performance Assessment (CPA) was introduced at single tier and county councils (ST&CCs) and at district councils in 2003/04, as a way of supporting councils to deliver improvements in services to local people. CPA brought together existing information on service performance in councils with a corporate assessment of each council's ability to improve. This was used to reach an overall conclusion about whether a council was 'excellent', 'good', 'fair', 'weak' or 'poor'.

Councils have prepared improvement plans following CPA and those councils classified as 'under performing' have received annual progress assessments by the Audit Commission. Those cases giving most cause for concern have also been the subject of formal engagement by the Office of the Deputy Prime Minister (ODPM). Through its network of relationship managers, the Commission worked closely with lead officials assigned by the ODPM in developing an appropriate monitoring programme.

Audit Commission progress assessment work has sought to measure the impact and sustainability of improvement activity. The progress assessment work has been tailored to local circumstances to provide appropriate public assurance and to contribute to improvement reporting. It involved an evidence-based judgement on progress against the original corporate assessment criteria, but without producing a score.

The progress assessment is part of the Commission's commitment to helping ensure continuous improvement to services for local people. It does this in the context of its strategic regulation principles, which look to minimise the burden of regulation at the same time as maximising its impact. We are committed to working in partnership with other regulators and the ODPM in this aim.

Introduction

- 1 In October 2003 the Audit Commission published a CPA category for Mid Devon District Council. This assessment categorised the Council as 'weak'. The key strengths and weaknesses from the corporate assessment are set out in Appendix 2.
- 2 In January 2005 the Audit Commission published a progress assessment report, commenting on the progress since the original CPA report. This report stated that the Council had been slow to react and address the findings of CPA and that it had only recently taken any significant steps towards improvement.
- 3 This report presents an analysis of the Council's progress to date based on the Council's implementation of its improvement and recovery plan and comparison with the baseline position of the Comprehensive Performance Assessment.

Summary

- 4 Mid Devon District Council still faces significant problems but has made progress in some areas. Without addressing these problems, the Council's progress is threatened.
- 5 The progress assessment last year criticised the Council's leadership, stating that it lacked a clear direction. Although the new corporate plan provides a clearer direction for the Council, there remain other significant weaknesses in leadership. There is a lack of trust and confidence at senior councillor and officer levels and this is affecting the work of the Council. In addition, roles and responsibilities are not clearly defined and there is a lack of accountability. In the absence of effective leadership, officers are having to assume responsibility for key initiatives or functions and this is creating further pressure.
- 6 Some progress has been made in terms of clarifying the priorities for the district. The corporate plan, whilst lacking clarity on longer term outcomes is providing a clearer framework for Council business. Importantly, it receives universal support from officers and across political parties.
- 7 Capacity remains stretched in relation to the financial resources available and the clarity of roles and responsibilities. The Council is beginning to increase skills through the provision of training and development opportunities for staff and councillors and by adopting a more proactive approach to monitoring sickness levels. Corporate performance management remains a weakness and limits the ability of the Council to determine if it is achieving value for money.
- 8 The Council has delivered successful work in a number of areas, most notably in relation to the improvement in planning performance in the last six months, the delivery of affordable homes and in cultural activities aimed at promoting a healthy lifestyle. Audited figures for 2004/05 indicate areas of concern relating to progress towards the Council's recycling target and the percentage of the population served by kerbside recycling collection. However, they also highlight that 58 per cent of indicators are above average when compared to other councils and 36 per cent are comparable to the top 25 per cent of council performance. Since 2002/03 and 2004/05, 43 per cent of indicators have improved.
- 9 The Council has built on the investments reported in the last progress assessment. It now has improved internal communications and achieved level one of the Equalities Standard for Local Government. Procurement and risk management have improved and these should provide a firm basis for future improvement. In addition, there is a stronger approach to the provision of training which staff and councillors find useful and is tailored to business needs.
- 10 Despite the efforts made by managers to deliver services at a reasonable level, these improvements are at risk of being undermined by the significant difficulties within the Council. The goodwill and commitment of staff and managers is being tested by the lack of effective leadership. This calls into question the sustainability of improvement.

Recommendations

- 11 It is recommended that the Council:
- actively and promptly shares the findings of this progress assessment with staff;
 - takes it to an appropriate public committee meeting; and
 - uses the key findings as the basis for revising the improvement plan.

Context

The locality

- 12 Mid Devon is a largely rural district in Devon. It covers approximately 913 square kilometres and has three main towns, Tiverton, Cullompton and Crediton. It has a population of 72,400 largely centred around the three main towns but with scattered communities between each town.

The Council

- 13 Since the previous progress assessment, there has been a change in Leader of the Council. The Council is comprised of 20 independent councillors, 13 Conservatives, 8 Liberal Democrats and one Green councillor. The Leader is an independent councillor but the independents have not formed a group. Mid Devon is a 'fourth option' council, meaning that it has chosen to maintain a committee structure with scrutiny. These factors present particular challenges in decision making.
- 14 The draft corporate plan, referred to in the last progress assessment report, has now been agreed by Council and sets out corporate priorities for the next five years.

What is the Council trying to achieve?

- 15 Leadership within the Council is weak. Despite this, the Council is beginning to set out a clearer direction for the future.
- 16 There is a lack of mutual confidence and trust between senior politicians and management and this is increasingly affecting the business of the Council. The recent proposal to transfer the housing stock to a registered social landlord is one example. The Council carried out a telephone survey of tenants in late 2005 to determine their views on transfer. This showed that half of respondents stated that they were unsure how they would vote, with a quarter saying they would vote for transfer and a quarter voting against. In view of this survey, officers, the Government Office for the South West, and the Council's own consultant advised the Council to delay the vote, due in late January, pending further work to provide information to tenants. Despite this advice, councillors decided against such a delay and the ballot results showed 76 per cent of tenants were against transfer. The Council now faces finding over £0.5 million from general funds as well as the cost of ensuring that its homes meet the decent homes standard by 2010. The basis for the decision to continue with the ballot against all advice remains unclear.
- 17 The corporate plan still lacks clear priorities, and long term, specific targets across all areas. Whilst some, for example relating to affordable housing, have such targets many other areas lack a clear indication of what the Council plans to deliver in the longer term. Councillors and managers state that gaining consensus on this, the first corporate plan, was to allow some level of ambiguity and plan to tighten descriptions of priorities and targets in subsequent drafts. At the moment however, there is a lack of clarity about what is a lower priority and this allows extended political debate. In the absence of strong prioritisation by councillors, officers are being left to determine areas of lower priority.
- 18 The corporate plan now provides a clearer direction for the Council and represents an integrated approach to strategic planning. It reflects consultation and the needs of the community and aligns with the community plan. The Council is providing community leadership on some issues in line with this strategy. Business plans support the corporate plan and outline the activities that will be undertaken to deliver priorities. Staff are now aware of the broad priorities and understand the role they play in delivering them. The Council is also beginning to allocate resources to their priority areas, for example in affordable housing and make decisions which begin to describe the relative priority of activities undertaken. These represent significant steps forward for the Council, which previously did not regard such a plan as necessary.
- 19 The Council has strengthened its approach to equality and diversity. The Council has now achieved level one of the Equalities Standard and now uses a representative from a local organisation concerned with equalities issues to challenge practices within the Council. This has led to service related improvements, for example in relation to accessibility of play areas.

10 Progress Assessment | What is the Council trying to achieve?

Business plans are also required to address diversity and equal access and this forms part of the challenge process. The strengthened approach is beginning to ensure that people from across the community can access the services they need.

- 20 The Council has also improved its focus on key issues. Mechanisms to support a stronger focus on priorities are developing, with joint officer and councillor monitoring of the improvement and corporate plans. An example of sustained focus is affordable housing, where the Council is exceeding its targets. By sustaining a focus on what is important locally, the Council is beginning to improve delivery.

How has the Council set about delivering its priorities?

- 21 Senior management have not addressed some long standing issues which inhibits the Council's progress. The Council still does not use resources effectively to deliver in some areas. The Council is taking steps to address sickness levels and increase skills. Corporate performance management remains a weakness.
- 22 Political and managerial leadership is weak. The ineffective working relationships that exist are illustrated by the proposed restructuring of officer posts planned to address capacity issues. The chief executive and senior councillors worked together on proposals for a new structure. However, when a report purporting to represent the outcome of this work was presented by the chief executive to full Council, it was voted down by councillors, including those who had assisted in the process leading to its preparation. This has undermined the role of the chief executive and further delayed the changes to the officer structure which had previously been deemed as necessary to increase corporate capacity.
- 23 The lack of leadership at a senior level means that the Council relies on individuals assuming responsibility and driving forward initiatives rather than there being a shared understanding of clear roles and responsibilities within the management team. As a result, officers can not be effectively called to account either by their line manager or, in the case of the chief executive, by politicians.
- 24 Resources remain stretched within the Council. Despite previous efforts to address it, audited figures show that the Council is among the worst 25 per cent of councils in the country for levels of sickness absence. Again the Council reports that recent work is beginning to reduce levels, but these figures have yet to be audited. Progress on some areas of work has stalled until recently due to a lack of staff availability, for example in relation to asset management. The proposed restructuring, designed to increase corporate capacity and relieve pressure on managers has still to be delivered.
- 25 The Council is now faced with finding over £0.5 million in light of the decision by tenants to vote against the housing stock transfer. The Council has set a balanced budget for 2006/07. However, future decisions on how this will be achieved are reliant on officer led fundamental reviews of all aspects of council business. The medium term financial plan does not provide a strategy for how the potential budget gap of £1.1 million over the next four years will be met. There is no clear prioritisation of the review programme and the level of involvement of councillors is unclear. As a result, officers will in effect be determining the priorities of the Council. The Council lacks effective arrangements to determine whether it is providing value for money.

12 Progress Assessment | How has the Council set about delivering its priorities?

- 26 The Council has built some areas of capacity. The Council has strengthened human resources (HR) procedures further and this appears to be beginning to reduce sickness levels, address competency issues and deal with grievances raised. A training officer has been appointed and this has facilitated an increase in both the quality and amount of training available for staff and councillors.
- 27 The Council has not successfully resolved the confusion about the role of the management team meetings. Whilst the corporate management and strategic management teams now meet jointly, there is no clarity about the terms of reference of this revised group. The group are also unclear about what is planned in terms of restructuring after the original proposal was rejected. This continued lack of clarity is causing frustration and delaying progress.
- 28 The corporate approach to performance management remains weak. The corporate plan does not provide a clear means by which the public can judge progress. There is an inconsistent approach to developing service standards and there is limited use of benchmarking information to determine comparative performance levels. Financial reporting is separate from performance reporting, and this separation, and the nature of the performance information available, limits the ability to forecast clearly the implications of future service pressures on budgets. The quality of business plans varies despite the challenge process being applied with some setting clear and measurable objectives and others not. A balanced scorecard has been developed, but the principle is not widely understood and it is not being used. The lack of capacity at the corporate centre has restricted the effectiveness of performance management.
- 29 A useful development has been the increase in the number of joint officer/councillor working groups which are strengthening many areas including the approach to setting the 2006/07 budget. Where previously it has been difficult to identify examples of effective scrutiny, within the last year work has been carried out on social deprivation which has delivered a partnership approach to increasing skills within the community.
- 30 The Council is taking a more active approach to monitoring delivery of priorities now. It has decided to join up monitoring of the corporate plan and the improvement plan so that both are scrutinised at a suitable level. Also the approach to business planning is being reviewed by officers and the corporate plan is the subject of a review aimed at providing greater clarity on priorities and longer term targets. By keeping plans under review, the Council will be able to refocus as circumstances dictate.
- 31 Some services continue to demonstrate effective performance management. The planning service continues to monitor its performance closely and this has demonstrated a significant increase in performance. In addition, it is developing a stronger approach to sharing and benchmarking information in order to learn from other organisations. The Council has purchased and implemented a new computer based means of collecting performance information and this should support further improvement. However, it is at the early stages of implementation currently.

What has the Council achieved/not achieved to date?

- 32 The Council has maintained its level of performance in key areas and is putting in place the building blocks that will help it to sustain improvement.
- 33 Audited performance indicators for 2004/05 show that 58 per cent are above average, with 36 per cent comparable to the top performing councils in the country. Forty three per cent of indicators are improving. The proportion of indicators which are above average and those which are improving are broadly the same as those reported for 2003/04. Performance in priority areas show the same picture - 56 per cent of national indicators used to monitor progress on priorities are above average and 43 per cent have improved since 2002/03.
- 34 The Council is securing a high level of performance in some areas. One example is in delivering affordable homes where the Council is exceeding its own annual targets and has delivered over 60 units so far this year. In relation to planning, recent figures for 2005/06 to date show a significant and sustained improvement in processing planning applications. The Council has gained Charter Mark status for its benefits service and has high levels of customer satisfaction with waste collection, leisure and recycling. The Council has also worked successfully in partnership with the health sector in relation to cultural and health activities. Some areas remain to be addressed - these include recycling and sickness levels.
- 35 Some internal processes to support improvement are now in place. The development of communications, risk management, diversity and a corporate procurement unit are all beginning to provide an infrastructure for Council business. These processes are starting to have an impact. For example, internal communications is now viewed by staff as effective and the central procurement unit has already achieved £50,000 of savings through changes in practices. Managers are more aware of risk and business plans reflect that. Weaknesses still exist, for example the Council has not introduced a consistent corporate approach to procurement and has not developed systems to ensure that the processes developed for risk management are effective but the development of these building blocks is a tangible first step towards improvement.
- 36 The Council has improved training and development. Appraisals are used to determine staff training needs in line with the needs of the Council and a wider programme of development has been introduced through joint work with another local council. The Council created a new training officer post to facilitate this work. Councillors are also being offered a wider range of training and development opportunities. By equipping staff and councillors with a wider range of skills, the Council is building additional flexibility into its workforce.

In the light of what the Council has learned to date, what does it plan to do next?

- 37 The Council lacks comprehensive plans which outline how it will face all of the significant challenges ahead.
- 38 The Council lacks clear plans outlining how it will achieve its savings targets. It plans to carry out a series of service reviews to identify how they can be delivered in a more efficient way. These reviews are to be carried out by officers. There is no clear timetable and the reviews have not been set into a priority order. Although there are plans to involve councillors in the review programme, it is too early to be able to determine how a strategic approach to identifying areas of lower priority will be adopted.
- 39 There are not well developed plans in place which outline how the Council will continue to maintain its housing stock and meet the decent homes standard. The Council has not yet set out a clear business plan of how it will meet the challenges it now faces in maintaining its stock. These challenges include developing reliable information on the proportion of homes that have been made decent and that are becoming non decent.
- 40 Some Council plans lack a clear means of monitoring achievement. The corporate plan does not outline what the milestones against which progress can be measured are, and the target dates for these milestones are unclear. The improvement plan projects lack outcome focused measures which demonstrate that the activities have had the desired impact. As such, the public can not hold the Council to account for progress against its objectives.
- 41 The Council has not learnt from previous assessments or addressed all identified weaknesses. Whilst the Council currently is delivering services at a reasonable level, this is unlikely to be sustainable given the weaknesses in leadership. The lack of clear roles and responsibilities and the consequent reliance on people assuming responsibilities has stretched senior management capacity. The limited performance information available restricts the ability of the Council to produce comprehensive financial forecasts. This combined with the ambiguous nature of some corporate priorities means that resources are not consistently being directed to what is important. There is now a clearer acceptance of the messages of the original CPA. However the Council has still to address key cultural issues. There remains a lack of accountability throughout the organisation. In some areas a culture of blame is developing.
- 42 The Council now has an integrated approach to strategic planning. The corporate plan is aligned with the community strategy, developing medium term financial plan and is supported by business plans. Despite its weaknesses, it represents the first common agenda which is unanimously supported across the Council and provides a clearer future direction.

- 43** Plans for delivery of affordable housing are well developed. The Council has developed guidance on affordable homes for developers, it now has a fit for purpose housing strategy and has set out clear plans to deliver 300 units by 2010.
- 44** There is a more proactive approach to learning on specific subjects or services within the Council now. The Council actively seeks to learn from the experience of other councils and is beginning to share learning throughout the organisation through its developing approach to internal communications. It has also hosted a conference on scrutiny in 'fourth option' councils, which was well received by attendees. These experiences are helping to shape the Council's approach to improvement.

Appendix 1 – Progress monitoring against the findings of the Comprehensive Performance Assessment

- 1 The original comprehensive performance assessment was carried out under the Local Government Act 1999 and published in 2003/04.
- 2 Under section 3 of the Local Government Act 1999 ('the Act'), best value authorities have a duty to make arrangements to secure continuous improvement in the exercise of their functions, having regard to the principles of economy, efficiency and effectiveness. By virtue of sections 10 and 13 of the Act the Audit Commission may carry out inspection activity to ensure that a best value authority is complying with this duty, and may issue a report as to its findings. This progress monitoring activity and reporting to assess improvement falls within sections 3, 10 and 13.
- 3 The main elements of this progress monitoring report were collation and analysis of evidence from:
 - self-assessments of progress made, completed by the Council;
 - appointed auditor evidence from performance and financial audit activity;
 - audited performance indicators, inspection reports and plan assessments;
 - reviews of key corporate documents including performance reports, committee papers and management reports; and
 - observations, interviews and focus groups with managers, staff, customers and partner organisations.
- 4 This progress monitoring report for Mid Devon District Council was collated by the Audit Commission and reflects evidence gathered over the period from January 2005 to February 2006.
- 5 This report has been discussed with the Council, which has been given the opportunity to examine the Audit Commission's assessment. This report will be used as the basis for reporting progress and updating and improving the Improvement Plan as appropriate.

Appendix 2 – Summary of theme scores and strengths/weaknesses as reported in the Comprehensive Performance Assessment in 2003

Table 1

| Theme | Grade | Strengths | Weaknesses |
|----------|-------|---|--|
| Ambition | 2 | <p>Clear and broad based aims with supporting priorities.</p> <p>Aims based on community plan.</p> <p>Developed in consultation with some stakeholders.</p> <p>Effective corporate management and leadership.</p> | <p>No specific and time-bound long-term vision.</p> <p>Aims and priorities lack clear outcomes for local people, and it is unclear what the council will actually do.</p> <p>No link to resources and therefore may not be realistic.</p> <p>Political leadership has been weak.</p> <p>Inconsistent approach to community leadership.</p> |
| Focus | 2 | <p>Sustained focus on some large initiatives and some service areas.</p> <p>Staff restructuring to service areas.</p> | <p>Lack of effective systems to sustain focus on all areas.</p> <p>Focus on operational priorities of service managers, not corporate priorities.</p> <p>Tendency to shift focus from one area to another.</p> <p>Committee management not effective to help sustain focus.</p> <p>Narrow forward planning of decisions and actions.</p> |

18 Progress Assessment | Appendix 2 – Summary of theme scores and strengths/weaknesses as reported in the Comprehensive Performance Assessment in 2003

| Theme | Grade | Strengths | Weaknesses |
|----------------|--------------|---|---|
| Prioritisation | 2 | <p>Prioritised aims based on a reasonable range of information.</p> <p>Budget setting consultation.</p> <p>Alignment of budgets to services and priorities has commenced.</p> | <p>Limited involvement of residents and business community.</p> <p>Variable support and commitment to some priorities.</p> <p>No corporate balance between national and local priorities.</p> <p>Non-priorities not identified.</p> <p>Priorities not reflected in service planning and staff appraisals.</p> <p>Priorities not resourced or outcome-focused.</p> |
| Capacity | 2 | <p>New operational management skills.</p> <p>Additional staff resources through joint appointments.</p> <p>Councillor training.</p> <p>New constitution to clarify roles and responsibilities.</p> <p>Partnerships with statutory and voluntary sector.</p> <p>High staff morale and low staff sickness and turnover.</p> | <p>Weak human resource management.</p> <p>Lack of strategic focus from councillors.</p> <p>Some departmentalism remains, leading to a lack of communication and joint working.</p> <p>Committee management not assisting effective decision making.</p> <p>Lack of integrated IT systems.</p> <p>Weak approach to procurement and little exploration of alternative methods of service delivery.</p> <p>Limited financial capacity.</p> |

Progress Assessment | Appendix 2 – Summary of theme scores and strengths/weaknesses as reported in the Comprehensive Performance Assessment in 2003 **19**

| Theme | Grade | Strengths | Weaknesses |
|------------------------|-------|--|--|
| Performance management | 1 | <p>Collection and use of performance information by many service managers.</p> <p>Adequate financial management.</p> | <p>Lack of corporate performance management framework.</p> <p>Service planning underdeveloped.</p> <p>Limited standard setting and management controls.</p> <p>Underdeveloped staff performance appraisal system.</p> <p>No value for money assessment of services.</p> <p>Weak risk management.</p> |

20 Progress Assessment | Appendix 2 – Summary of theme scores and strengths/weaknesses as reported in the Comprehensive Performance Assessment in 2003

| Theme | Grade | Strengths | Weaknesses |
|-------------|-------|--|--|
| Achievement | 3 | <p>Above average public satisfaction with waste, benefits, housing, recycling and public space.</p> <p>Performance against 63 per cent of indicators is above average or in best 25 per cent.</p> <p>Low crime levels, and CSP is among the best performing nationally.</p> <p>Public spaces reasonably well managed.</p> <p>Seventy per cent of housing stock meets the decent homes standard.</p> <p>Effective housing service with positive customer satisfaction.</p> <p>Good, two-star ratings, for waste and car park services.</p> <p>Local improvement schemes helping to enhance the environment.</p> <p>Above average performance for benefits service.</p> <p>Wide range of activities and initiatives for young people.</p> <p>Efficient and effective payment and collection systems.</p> | <p>Fifty-two per cent of performance targets not met.</p> <p>Below average public satisfaction with overall council services, particularly with parks and open spaces, leisure and planning.</p> <p>Poor performance for planning and amount of waste collected.</p> <p>Disabled access to public areas not good.</p> <p>Affordable housing targets not being met.</p> |

| Theme | Grade | Strengths | Weaknesses |
|----------------------------|-------|---|--|
| Achievement of improvement | 2 | <p>Reducing crime and community safety initiatives introduced.</p> <p>Improvements in elements of the street scene environment.</p> <p>Benefits service improving.</p> <p>New leisure centre built.</p> <p>Improved facilities for younger people.</p> <p>Payment and collection systems improving.</p> | <p>No consistent and sustained improvements across all council priorities.</p> <p>No long-term trend of improvement of performance indicators.</p> <p>Poor level of improvement in processing planning applications from a low base, despite external intervention.</p> <p>Marginal improvements in recycling and increasing waste collection costs.</p> <p>Removal of abandoned cars not improving.</p> <p>Marginal reduction in number of homes not meeting the decent homes standard last year, but overall numbers risen since 2001.</p> <p>Rising homelessness and increasing bed and breakfast usage with increased costs.</p> |

22 Progress Assessment | Appendix 2 – Summary of theme scores and strengths/weaknesses as reported in the Comprehensive Performance Assessment in 2003

| Theme | Grade | Strengths | Weaknesses |
|------------|-------|---|--|
| Investment | 3 | <p>Investment in performance management, staff appraisal, Devon-wide portal for e-government, health and ICT developments.</p> <p>Investment in staff and councillors.</p> <p>New offices, which will be DDA-compliant.</p> <p>Investments to increase capacity – joint appointments and new HR strategies.</p> <p>Improved prioritisation of aims.</p> <p>Revised local plan policies.</p> <p>Initiatives to improve residents' quality of life.</p> | <p>Lack of sufficient investment to address weak financial position, and no medium-term financial plan.</p> <p>Limited investment in communication, procurement and risk management.</p> <p>Inconsistent response to external challenge.</p> |
| Learning | 2 | <p>Open to change from new staff.</p> <p>Isolated example of proactive learning in housing.</p> <p>Task-specific working groups to seek out good practice.</p> | <p>Good practice and experience not routinely shared across the council.</p> <p>Inconsistent approach to internal communication of actions and learning.</p> <p>Reactive rather than proactively seeking out learning.</p> |

| Theme | Grade | Strengths | Weaknesses |
|--------------|--------------|---|--|
| Future Plans | 1 | <p>Range of plans present with appropriate issues covered.</p> <p>Many plans developed with residents and stakeholders.</p> | <p>Lack of robust plans to deliver statutory targets.</p> <p>Plans are short-term and not robust, and not all are reviewed and co-ordinated.</p> <p>Plans not available for all areas of weakness, such as longer-term financial plans and to meet all priorities.</p> |

Scoring key:

- 1 - Weak
- 2 - Weaknesses outweigh strengths
- 3 - Strengths outweigh weaknesses
- 4 - Strong