

AGENDA ITEM: 7

OVERVIEW AND SCRUTINY BOARD

7 April 2009

STRATEGIC PLAN 2008-2011 – 2009/2010 REVISION

KAREN ROBINSON – HEAD OF CORPORATE PERFORMANCE

PURPOSE OF REPORT

1. To advise OSB of the agreed structure and outline timetable for the 2009/2010 revision of the Council's Strategic Plan 2008-2011.

BACKGROUND

2. From April 2008, a new performance framework for local government and its partners was introduced, focusing on wellbeing in local areas, and based on a new National Indicator Set (NIS). The NIS informs the development of Sustainable Community Strategies and Local Area Agreements and will be at the centre of Comprehensive Area Assessment (introduced from April 2009), which evaluates the impact of joint working in the area on outcomes for local communities.
3. In response to the new performance framework, in 2008 the Council revised its first Strategic Plan one year ahead of schedule and developed a new plan for the period 2008-2011. The aims of the Strategic Plan are to: -
 - identify and prioritise the Council's contribution to delivering the Sustainable Community Strategy and the Local Area Agreement outcomes in the medium-term
 - provide a strategic overview that brings clarity of purpose to the organisation and provides a coherent framework for financial and delivery planning and performance management
 - communicate the Council's improvement agenda to all stakeholders.
4. The 2008-2011 Strategic Plan was structured and published in four separate parts, as follows: -

Part I Corporate Overview
Part II A Achievements in 2007/2008

Part II B	Action Plan for 2008/2009
Part III	Supporting documentation

5. It was agreed at that time that as Part I provided a three-year overview, it would not be revised/republished in that period, Part II A would be published once only, and that Part II B and Part III would be revised and republished annually, in line with the minimum standard for performance management.
6. However, a proposal to fully revise the Strategic Plan for 2009/2010 and for it to be published as a single document, rather than in separate parts, was agreed by the Deputy Mayor on 19 March 2009. The rationale for this decision and the key issues to be considered during the review of the Strategic Plan are set out below.

RATIONALE FOR CHANGE

7. Publishing the Strategic Plan in separate sections is no longer an appropriate option, as the ongoing refinement of the new national performance framework and resulting local changes (such as the annual refresh of the LAA) has meant that all sections of the plan are likely to be subject to some sort of modification on an annual basis. Issues emerging from the new national performance framework that are specific to Middlesbrough are as follows:

Sustainable Community Strategy/refreshed Local Area Agreement

8. The draft Sustainable Community Strategy (SCS) for Middlesbrough is currently under revision in line with statutory guidance for publication in June 2009 and the annual refresh of the 2008-2011 Local Area Agreement will be completed for April 2009.
9. The final SCS will include a revised vision for Middlesbrough. In addition, some discussion has been devoted at the quarter three performance clinics to the possibility of revising the strategic priorities supporting the themes of the SCS, so that they provide a clearer framework for strategic planning.
10. Potential changes such as these will necessitate the revision of the current Part I of the Strategic Plan, so that the 'golden thread' of objectives is clear. The timetables for the SCS and the Strategic Plan have been aligned to allow the links between the two documents to be fully explored and articulated.

Revised 'Fit for purpose' priorities

11. Similarly, the supporting priorities of the Council's crosscutting 'Fit for purpose' theme have been revised in line with the themes of the Organisational Assessment element of Comprehensive Area Assessment. A revised 'Fit for purpose' section will be included in the first section of the revised plan.

Response to CPA and Comprehensive Area Assessment

12. The Strategic Plan revision will address key findings from audit and inspection over the last year and resulting action plans, including the post-CPA Action Plan.

13. In addition, the structure of the revised plan should fully address issues identified through the Council's performance clinics that will be critical to the forthcoming Comprehensive Area Assessment, specifically: -
- clear identification of how the Council's actions will help achieve the SCS and LAA targets
 - data quality and target setting issues
 - risk management improvements.

STRUCTURE OF THE PLAN AND TIMETABLE

14. In line with the points above, it has been agreed that the Strategic Plan will be fully revised and republished as a single document, so that it remains fit for purpose.
15. The 2008/2009 revision was in effect transitional, bridging the BVPI and National Indicator regimes. The 2009/2010 revision will build on the previous year – streamlining the format, integrating previously disparate information and joining up action plans.
16. It has been agreed that the plan will be structured to 'answer' (from the Council's perspective) the key questions of the CAA Area Assessment: -

Area Assessment question	Strategic Plan section
How well do local priorities express community needs and aspirations?	Overview – outlines how shared priorities were developed, delivery through the partnership framework and how the Council will contribute.
How well are the outcomes and improvements needed being delivered?	Performance Review 2008/2009 – provides a 'backward looking' evaluation of performance.
What are the prospects for future improvement?	Performance Targets And Action Plan 2009/2010 Onwards – provides the 'forward look', outlining plans for the future and how these will be resourced.

17. The content will essentially cover the same ground as the 2008/2009 version of the Plan, but will be reorganised as set out in the outline structure at Appendix A.
18. The timetable for the development of the 2009/2010 Strategic Plan is at Appendix B.
19. Scrutiny Panels will consider the draft content of the thematic sections of the Strategic Plan in March-April 2009. A draft of the Strategic Plan will be submitted to OSB for consideration and comment at its meeting of 5 May 2009, before endorsement and approval is sought through Executive and Council in June 2009.

RECOMMENDATION

20. That Overview and Scrutiny Board notes the content of this report.

Author: Paul Stephens, Corporate Performance Team Leader, Tel: 729223

Appendix A
Strategic Plan 2008-2011
Outline structure of the 2009/2010 revision

Section 1 – Strategic Plan Overview	
Sub-section	Content summary
Foreword by the Mayor and Chief Executive	<ul style="list-style-type: none"> • Introduces and commends plan to its audience
Introduction	<ul style="list-style-type: none"> • Sets out the background, purpose, objectives and scope of the Plan and outlines its structure
Middlesbrough – profile of the area	<ul style="list-style-type: none"> • Profile of Middlesbrough, its key strengths and its challenges (aligned with SCS and LAA Story of Place)
Middlesbrough Council	<ul style="list-style-type: none"> • Profile of the Council, including structure and the parameters within which the Council works (legislation, financial restrictions, global factors, LSP etc.) • Crosscutting principles
The vision for Middlesbrough's future	<ul style="list-style-type: none"> • Vision from finalised Sustainable Community Strategy • SCS themes • Mayor's Raising Hope and Reduction agendas • Assessing the Council's contribution to the SCS themes
How this plan has been developed	<ul style="list-style-type: none"> • Key drivers of the Strategic Plan • Strategic planning framework, including MTFP/budgeting • Community involvement • Risk management • Statement on Data Quality
How this plan will be monitored	<ul style="list-style-type: none"> • Corporate arrangements to manage and communicate performance • Audit and inspection arrangements, including Comprehensive Area Assessment
The Council's contribution to the vision	<ul style="list-style-type: none"> • Aims and objectives under SCS themes and summary of plans under each, with priorities highlighted • Fit for purpose – new priorities reflecting CAA Organisational Assessment
Glossary	<ul style="list-style-type: none"> • Definitions of key terms and acronyms

Section 2 – Performance Review 2008/2009	
Sub-section	Content summary
Evaluation of the Council's performance in 2008/2009	<ul style="list-style-type: none"> • Audit and inspection findings (CPA Corporate Assessment, Direction of Travel etc.) • LAA performance • Overall PI performance • Key achievements and impact on outcomes • Strategic risks position statement • Expenditure • Annual Efficiency Statement and VFM reviews • Statement on contracts • Headline customer satisfaction performance • Key issues arising from the above data
Progress by theme and aim	<ul style="list-style-type: none"> • PI performance • Key achievements/reviews and impact on outcomes • Risk update and analysis • Customer satisfaction performance • Audit and inspection findings • Progress evaluation
Section 3 – Performance Targets And Action Plan 2009/2010 Onwards	
Sub-section	Content summary
Performance targets by theme and aim	<ul style="list-style-type: none"> • Full list of indicators and future targets, including LAA • Comparisons where available
Action Plan by theme and aim	<ul style="list-style-type: none"> • Disaggregated by SCS themes/supporting aims • Corporate DAP within 'Fit for Purpose' theme • Lists key actions and deadlines • Cross-referenced with PIs and strategic risks
Strategic Risk Register	<ul style="list-style-type: none"> • Disaggregated by SCS themes/supporting aims
Annual Financial Information	<ul style="list-style-type: none"> • 2009/2010 Budget – Revenue and Capital • Predicted Efficiency Savings (from AES)
Impact assessment	<ul style="list-style-type: none"> • Overview of integrated impact assessment of Plan

Appendix B
Strategic Plan 2008-2011
Timetable for development

Action	Date
Draft Service Plans received by Corporate Performance Team	20 February 2009
Service Plan Editorial Board meetings	03-11 March 2009
CMT report on proposal for Strategic Plan revision	05 March 2009
Single Member Executive report on proposal for Strategic Plan revision	Early March 2009
Community Safety and Leisure Scrutiny Panel	18 March 2009
Health Scrutiny Panel	19 March 2009
Economic Regeneration and Transport Scrutiny Panel	23 March 2009
Environment Scrutiny Panel	30 March 2009
OSB report on Strategic Plan revision	07 April 2009
Children and Learning Scrutiny Panel	14 April 2009
Social Care and Adult Services Panel	15 April 2009
Draft Strategic Plan to CMT for information and comment	23 April 2009
Service Plans finalised	30 April 2009
Design and print of Strategic Plan begins	04 May 2009
Proofing of Strategic Plan	04 May-29 June 2009
Draft Strategic Plan to OSB for information and comment	05 May 2009
Draft Strategic Plan to partners for comment	04-15 May 2009
Final Strategic Plan to CMT	21 May 2009
Final Strategic Plan to Executive	02 June 2009 (TBA)
Final Strategic Plan to Council	17 June 2009
PDF of Strategic Plan published on website	30 June 2009
Hard copies distributed	July 2009