

<b>SECTION 1 – CONTEXT</b>
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**1.1. Introduction**

The Resources Portfolio is largely responsible for providing financial, legal, performance management, procurement, property, personnel, ICT, democratic and internal corporate communications services to other parts of the Council. In addition the portfolio is also responsible for “front line” services in the form of collection of revenues, Customer Services and external corporate communications.

The foregoing services are required to operate within a framework of legislation and professional guidance but must also be highly responsive to their internal customers needs.

The portfolio contributes to the shared vision for Salisbury and South Wiltshire by supporting and delivering excellent service across the Council through the most effective use of all resources, be they people, money, land, assets or information.”

**1.2. Strategic objectives for the portfolio**

- To maximise the value (both financially and to the community) of the assets owned by the Council.
- To support services in the delivery of their business objectives whilst ensuring that the Council operates within the law, corporate guidance and good practice.
- To deliver excellent Customer Services.
- To maximise the contribution of the staff to the Council’s aims and priorities.
- To support Councillors in their role as community leaders.
- To lead the review and improvement of services through procurement and performance management.
- To champion e-Government as a means of improving customer services and community access, improving performance and reducing costs.
- To reflect the Council's core values, aims and objectives through the council's corporate identity and external, internal and media communication, ensuring there is fair access for all to appropriate, up-to-date information, relevant to peoples' needs.

**1.3. Service Priorities**

The Cabinet has reviewed the prioritisation system. The revised categories and how they relate to the Resources Portfolio are:

Category 1 Services

- Customer Contact Centre

Category 2 Services

- Accountancy and Audit \*\*
- Corporate Management \*
- Democracy (Area and Scrutiny support)

- Democracy (Elections) \*\*\*
- Democracy (Member Support)
- IT Services \*
- Legal Services
- Corporate Communications
- Procurement
- Recruitment and Retention \*
- Training (Staff)

Category 3 Services

- Council Tax and NNDR collection \*\*\*
- Exchequer Services \*\*
- Property Management \*
- Payroll
- Training (Members)

**1.4. Partnership Contribution**

1.4.1. The priorities for the South Wiltshire Strategic Alliance and examples of how this portfolio contributes to these priorities are outlined below:

- Affordable housing.
  - Facilitate the provision of more affordable housing through the prudent use of the council's landholdings and allocation of capital receipts.
  - Supporting the development of planning guidance for more affordable housing.
  - Securing provision of affordable housing through planning agreements.
  - Raising awareness through the council's residents' magazine, the South Wilts Citizen.
- Access to services (including rural transport, shared services and better information for young people).
  - Supporting the development of shared service centres for local communities.
  - Developing disabled access improvements.
  - Introducing a home service in 3 of the 5 community areas, aimed at customers who would otherwise find it hard to access council services.
  - Raising awareness through the council's residents' magazine, the South Wilts Citizen.
  - The development of the South Wiltshire Community Web.
  - Introducing a weekly Customer Service Surgery in Downton.
- Crime and anti social behaviour
  - Taking legal action where appropriate.
- Alliance employers as exemplars of good practice.
  - Improving basic skills.
  - Developing healthy workforce initiatives.

1.4.2. Community Plan Aspirations

Each of the six community areas renewed its plans in 2005/06. This Portfolio is contributing to meet the aspirations set out in the Community Plans by:

<b>Community Plan Aspiration</b>	<b>Actions to meet the aspiration</b>
Local people to be involved in the future of the old swimming pool site, by Dec 2005.	Approval given by Cabinet for preparation of development brief 26 <sup>th</sup> June 06. Public consultation on draft development brief 11 <sup>th</sup> Sept 06 to 23 <sup>rd</sup> Oct 06. Development Brief adopted by Cabinet Nov 06.
For weekenders buying second homes – increase council tax to 90% for second homes.	562 second homes were charged 90% council tax during 2006/07.
SDC provides up to 100% relief on business rates to general stores, post offices and petrol filling stations in rural settlements where the population is less than 3,000.	100% relief granted to: <ul style="list-style-type: none"> <li>- 52 village shops / post offices</li> <li>- 8 petrol stations</li> <li>- 16 public houses</li> </ul>

**SECTION 2 – PROGRESS AGAINST EXISTING PLANS**

This section reports on the council's achievements in 2006/07, with particular emphasis on comparing the delivery of services with commitments made in the 2006/07 portfolio plan.

**2.1. Integrated Improvement Programme**

Actions agreed in 2006/07 Portfolio Plan	Progress Report
<p><b>Office Centralisation</b></p> <ul style="list-style-type: none"> <li>• Seek planning permission – Jan 06</li> <li>• Consider pre-construction designs – Spring/Summer 06</li> <li>• Await planning determination – Summer 06</li> <li>• Advertise tenders for building demolition and construction – Summer/Autumn 06</li> <li>• Decant staff – Autumn 06</li> <li>• Select contractors – Autumn 06</li> <li>• Demolish Victorian extension – Winter 06</li> </ul>	<ul style="list-style-type: none"> <li>• Submitted</li> <li>• Agreed</li> <li>• Determined – May 06</li> <li>• Advertised – Autumn 06</li> <li>• Completed</li> <li>• Full Council decision – Dec 06</li> <li>• On schedule – Jan 07</li> </ul>
<p><b>Improving Customer Services</b></p> <ul style="list-style-type: none"> <li>• Reduce duplication of information, improve customer information and provide seamless access to service through integration of customer data using CRM</li> <li>• Implement e-forms and self-service in CRM to develop web-based service delivery so that customers do not need to visit or telephone the council offices</li> <li>• Integrate additional 10 customer facing services to CSU to improve seamless service delivery</li> <li>• Publicise new “golden numbers” to reduce customer confusion (Phase One)</li> <li>• Review and rationalise key publicly accessible offices to broaden range of services available at key locations</li> <li>• Set up Customer Forum to improve feedback to the council on their experience of services</li> <li>• Develop arrangements for out of hours service provision to customers</li> <li>• Identify opportunities for sharing services with other councils through the Customer First Partnership which either enhance quality or reduce cost</li> <li>• Implement appointment and booking service for customers who are visited</li> </ul>	<ul style="list-style-type: none"> <li>• Environmental Services, Council Tax, Wise Card and General Enquiries scripted in CRM</li> <li>• E-forms for 9 Environmental Service requests complete</li> <li>• Delayed until 2007/08 due to need to consolidate telephony system</li> <li>• Golden Numbers yet to be obtained from BT</li> <li>• Review complete, access to service to be extended at PFH during decant</li> <li>• Use of council's consultation system to develop customer feedback. This will be included in the VOICE&amp;CHOICE panel work programme as set out in the councils review of consultation (adopted by Cabinet 06)</li> <li>• Extended opening hours in Amesbury</li> <li>• Co-location of rural clinic in Downton library</li> <li>• Requires further work with units</li> </ul>

<ul style="list-style-type: none"> <li>• Develop and publish comprehensive customer satisfaction information</li> </ul>	<ul style="list-style-type: none"> <li>• Improved customer statistics recording using council's performance management system</li> <li>• Improved customer feedback via new Passport to Improved Service</li> </ul>
<p><b>E-Government implementation</b></p> <ul style="list-style-type: none"> <li>• Review ICT Strategy and supporting project plan annually</li> <li>• Add GIS facilities to website to enable customers to access map based information</li> <li>• Implement remote working ICT arrangements to enhance customer service</li> <li>• Implement home working ICT arrangements to enhance work/life balance and reduce costs of office accommodation</li> <li>• Implement Govt Connect to enable the public to authenticate personal information over the website</li> <li>• Implement ICT Disaster Recovery programme so that services are not disrupted in the event of failure</li> <li>• Manage the council's on-line information effectively and efficiently</li> <li>• Extend the integration of CRM with back office systems</li> <li>• Investigate the use of Smartcards to enable customers to electronically access services</li> <li>• Purchase ICT commodities with partners to save cost</li> <li>• Implement media interactive resource on website to enable customers to view future projects</li> <li>• Implement electronic ordering to save time and money</li> <li>• Implement revised financial management system (Agresso 5.5) to enable effective budgetary management</li> <li>• Implement PARIS Browser payments on Agresso to enable council facilities to take credit card payments via the corporate income system</li> <li>• Implement Web enquiries on Agresso to enable budget managers to view budget reports on-line</li> <li>• Implement Housing Benefit System Link to Agresso to enable Benefit claimants enquiries on-line</li> <li>• Implement performance management system link to Agresso in order to enable</li> </ul>	<ul style="list-style-type: none"> <li>• Completed</li> <li>• Completed</li> <li>• Completed</li> <li>• Completed</li> <li>• Govt Connect unavailable – have implemented Academy Direct instead</li> <li>• Completed</li> <li>• Ongoing</li> <li>• Ongoing</li> <li>• Ongoing</li> <li>• Completed as stage 1 of shared services</li> <li>• Completed</li> <li>• Completed</li> <li>• Not completed – delayed to 2007/08</li> <li>• Completed</li> <li>• Completed</li> <li>• Completed</li> <li>• Completed</li> </ul>

<p>one-stop performance management enquiries</p> <ul style="list-style-type: none"><li>• Implement CRM link to Agresso to integrate with Customer Services systems</li><li>• Run projects to enhance skills in use of computers for socially excluded groups</li><li>• Achieve 'transactional' status for website (national standard)</li></ul>	<ul style="list-style-type: none"><li>• Not completed – delayed to 2007/08</li><li>• ICT Social Inclusion Strategy currently in draft</li><li>• Completed</li></ul>
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<p><b>Improving the Performance of the Council</b></p> <ul style="list-style-type: none"> <li>• Produce Environmental Purchasing Guide to assist managers in making procurement decisions</li> <li>• Implement projects to support Customer First Partnership Shared Services programme aimed at improving quality and reducing costs</li> <li>• Revise project management guidance to reflect Audit Commission recommendations</li> <li>• Review use of national e standards for ICT, property, customer services and HR</li> <li>• Develop further the Performance Management System to enable monitoring of projects and additional live links from feeder systems</li> </ul> <ul style="list-style-type: none"> <li>• Undertake statutory Best Value Performance Indicator surveys with the public about council services</li> <li>• Develop 2<sup>nd</sup> statutory Annual Efficiency Statement</li> <li>• Implement action plan to increase scores on the use of resources (CPA) Audit Commission Review</li> <li>• Implement and review Procurement Strategy</li> <li>• Improve the performance management of LSPs and councillor development based on bid to ODPM Capacity Building Fund</li> <li>• Implement outcome of the Facilities Management Review aimed at improved service and reduced cost</li> <li>• Review effectiveness of Contract Guidance</li> <li>• Review effectiveness of Consultation Strategy</li> </ul>	<ul style="list-style-type: none"> <li>• Drafted to Cabinet by Mar 07</li> <li>• First phase completed (payroll, external legal call off contract, joint building control)</li> <li>• Completed. Recommendations from Internal Audit to be actioned</li> <li>• To be completed by Mar 07</li> <li>• Completed for former system, Agresso and Fast Plan. Future links depend on interest from Service Units. Infrastructure exists for the monitoring of projects, PACE already handles the council's Major Capital Projects and its Efficiency Programme. Also includes measures on the Improving Customer Services Programme and MED&amp;T projects.</li> <li>• Completed. Results awaited</li> <li>• Completed</li> <li>• Completed</li> <li>• Completed</li> <li>• On track</li> <li>• First phase completed. Second phase – 2007/08</li> <li>• Updated contract regulations and Procurement Strategy Action Plan</li> <li>• Cabinet approved an action plan aimed at improving consultation, including:       <ul style="list-style-type: none"> <li>- establishing an online consultative panel. The VOICE&amp;CHOICE panel of 3,250 local residents</li> <li>- establishing a consultation calendar</li> <li>- publishing the results of consultation online</li> <li>- improving consultation with harder to reach groups: a two stage engagement strategy has been developed with the agreement of the council's equalities and diversity</li> </ul> </li> </ul>
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<ul style="list-style-type: none"><li>• Review of capacity of Print Unit to supply external organisations to enable reduced running costs</li></ul>	<p>group</p> <ul style="list-style-type: none"><li>• Print Unit have produced a marketing leaflet aimed at external customers and to date (Nov 06) have achieved 50% of the income target set by Cabinet. The new promotional campaign should ensure the Unit come close to or exceeds target. In addition an internal print and design policy leaflet is being prepared jointly with MEDT to ensure that all council printing – including that undertaken on behalf of the council by partner organisations and consultants is offered to the Print Unit in the first instance</li></ul>
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<p><b>Meeting the Financial Challenge</b></p> <ul style="list-style-type: none"> <li>• Implement measures contained in the Medium Term Financial Strategy for 2006</li> <li>• Review Medium Term Financial Strategy annually to ensure the budget supports priorities</li> <li>• Review Asset Management Plan/Capital Strategy annually to ensure our assets are maximised and capital projects support our priorities</li> <li>• Review corporate governance arrangements annually to ensure the council operates to the legal requirements</li> <li>• Undertake consultation on the budget with the public annually to help inform decision making</li> <li>• Submit Value for Money Self Assessment to the Audit Commission annually as part of Comprehensive Performance Assessment</li> <li>• Implement CIPFA FM model to undertake a self assessment of the council's financial management, track progress and codify improvements</li> <li>• Review District/Parish Area Committee spending</li> <li>• Develop incentive schemes aimed at increasing productivity or reducing costs</li> <li>• Review impact on council's finances in the event of large scale voluntary transfer of the housing stock</li> <li>• Review impact on council's finances in the event of transferring leisure facilities to a trust</li> <li>• Review to determine whether discounts can be offered to those paying bills via the web</li> </ul>	<ul style="list-style-type: none"> <li>• The savings identified for 2006/07 have been substantially made, however, progress in reducing premium payments has been slow</li> <li>• Strategy revised in Nov 06</li> <li>• Strategies revised in Sept 06</li> <li>• Completed</li> <li>• Completed</li> <li>• Submitted in Sept 06. Results due early 07.</li> <li>• Completed (by an internal audit of financial management and a self assessment and review by the Audit Commission as part of the Use of Resources judgement)</li> <li>• Completed and reported to Cabinet</li> <li>• Pilot successfully implemented in Planning</li> <li>• Completed</li> <li>• Completed</li> <li>• Not completed – delayed to 2007/08</li> </ul>
<p><b>Building Organisational Capacity</b></p> <ul style="list-style-type: none"> <li>• Implement corporate change management strategy</li> <li>• Reduce sickness absence levels to maximise productivity</li> <li>• Identify and implement a Workforce Development Plan to ensure suitably</li> </ul>	<ul style="list-style-type: none"> <li>• Change management strategies have been or continue to be implemented as required. Examples include: Customer Services HR Strategy, Innovative Ways of Working, the Housing Stock issues, the Employee Development Framework</li> <li>• Sickness absence levels have continued to decline (at Quarter 2 it equated to 5 days – well within the upper quartile) to the extent that SDC is being used as a benchmark of good practice nationally</li> <li>• A comprehensive Workforce Development Plan is being implemented. An</li> </ul>

<p>trained staff for the future</p> <ul style="list-style-type: none"> <li>• Seek Cabinet approval for HR Strategy to ensure the council meets HR standards</li> <li>• Improve HR recording, monitoring and reporting processes and systems to ensure efficiency</li> <li>• Progress the 'Innovative Ways of Working' project to enhance work/life balance and reduce expensive office accommodation</li> <li>• Implement Staff Survey proposals</li> <li>• Implement Training and Development Plan (including councillor development) annually to ensure suitable skills for the future</li> <li>• Prepare induction programme for new councillors joining in 2007</li> </ul> <ul style="list-style-type: none"> <li>• Early retirement requests</li> <li>• Early retirement – the granting of added years</li> <li>• Exit interview questionnaire</li> <li>• LG Pension Scheme Employers' Discretion Policy Statement</li> <li>• Retirement awards</li> <li>• Security of Employment and Redundancy Procedure</li> <li>• Sickness Absence Policy and Procedure</li> <li>• Sickness Absence Guidance for Managers</li> <li>• Corporate Diversity and Equalities in Employment Policy</li> <li>• Flexible and Additional Working Hours Scheme</li> <li>• Home Working Policy</li> <li>• Occupational health Referral</li> </ul>	<p>overarching document has been formulated and is subject to the policy introduction procedure</p> <ul style="list-style-type: none"> <li>• Completed (although it did not require Cabinet approval)</li> <li>• First phase completed (a new HR Systems Officer, robust Establishment List, recruitment and retention recording and reporting)</li> <li>• First phase completed (10% of workforce are undertaking some form of innovation in working arrangements). Work is continuing to embed into the culture of the organisation</li> <li>• Completed (Service Unit Action Plans in place). A Corporate Action Plan is due to be published by Dec 2006</li> <li>• Completed</li> </ul> <ul style="list-style-type: none"> <li>• The new Councillors Development and Training Programme adopted in 2006 (to be launched in May 2007) incorporates:       <ul style="list-style-type: none"> <li>- A Councillor Development and Training Steering Group</li> <li>- Comprehensive induction programme for new councillors</li> <li>- Personal Development Plans for all councillors</li> <li>- A 'bite-sized' modular supported training programme</li> <li>- Extended learning opportunities through the Leadership Academy. (Improvement and Development Agency)</li> </ul> </li> <li>• All remaining items listed here are subject to action plans detailed in the Employee Relations Review and the recent Resources Scrutiny Review of Recruitment and Retention. All are on target according to the provisions of the relevant Action Plan.</li> </ul>
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<ul style="list-style-type: none"> <li>• Flexible and additional working hours scheme</li> <li>• Leave</li> <li>• Organisational and Unit Restructuring procedure</li> <li>• Career Grades</li> <li>• Green Travel Plan</li> <li>• Job Review Factor Plan and Guidance Booklet</li> <li>• Job Review Guidance</li> <li>• Market Forces Supplement Scheme</li> <li>• Premium and Overtime Payments Guidelines</li> <li>• Progressive Employee Guidance Notes, Competencies, Appraisal Form</li> <li>• Essential Motor Vehicle Users Policy</li> <li>• Use of Private cars for business use</li> <li>• Child Protection Policy</li> <li>• Employment of casual employees and engagement of self employed persons</li> <li>• Mortgage Assistance Scheme for new employees</li> <li>• Prior Consideration Policy</li> <li>• Re-deployment Policy</li> <li>• Relocation Expenses Scheme</li> </ul>	
<p><b>Corporate Communications</b></p> <ul style="list-style-type: none"> <li>• Develop Intranet to enhance internal communication</li> <li>• Develop external e-newsletters to enhance communications with partners</li> <li>• Develop SMS texting to enhance communication with target groups e.g. young people</li> <li>• Develop corporate approach to sponsorship and media campaigns to reduce costs and maximise communication</li> <li>• Implement eGov take up campaign</li> </ul>	<ul style="list-style-type: none"> <li>• New Intranet to be launched by Christmas 2006. Further work on developing functionality to continue into 2007/08</li> <li>• External e-newsletter template developed and 2 e-newsletters in operation – Salisbury Vision and Tourism E-courier. E-newsletters in preparation for businesses and for SWEP and under consideration in a number of other areas</li> <li>• Completed and available to all units</li> <li>• Employee recruited and plan to be developed</li> <li>• Marketing plan in operation; activity includes regular articles in the Citizen, personal computer 'cards', advertisements in local directories, inclusion of the council's web address on all publications and in all advertisements</li> </ul>

## 2.2. External Validation

Accreditation or validation relevant to the portfolio is set out below:

### External Accreditation/Validation Programme

Service	Award	Year	Outcome
Website	To continue to achieve 'A A' accessibility standard.	Ongoing	Achieved in 2006. Consideration to be given to external audit in 2007
Customer Service	Chartermark	2007/08	
South Wilts Citizen	Chartered Institute of Public Relations Excellence Awards	2008	Runner up in 2005. Application to be made again following incorporation of results of review being carried out of Citizen
Inspection of accounts	Audit Commission	Annual	Unqualified opinion
HM Revenue and Customs VAT inspection	N/A	Annual	Minimal assessment for VAT due
Office Project	4Ps Gateway Review	2005-2008	Gateways 0 & 1 undertaken successfully in 2005. Gateway 2 undertaken successfully in Nov 2006
Use of Resources Assessment and Audit of performance indicators	Contributes to future CPA	Annual	Anticipated result Mar 2007
All	Investors in People Accreditation	Every 3 years	Third application to be made Mar 2007
Consultation	Accreditation by Market Research Society and compliance with MRS Code	2007/08	Consultation staff pursuing qualification

## 2.3. Inspections and Scrutiny Reviews

The Resources Scrutiny Panel will continue to monitor the following major projects:

- Medium Term Financial Strategy – The Panel will continue to monitor the Strategy.
- Office Centralisation project – The Panel will focus its work on ensuring that contractual and budget issues are properly addressed during the build phase.
- Customer Services – The Panel will monitor the implementation of the council's customer service programme focusing on the achievement of project outcomes and returns on planned investments.
- Councillor Training – The Panel will oversee the implementation of the revised member training programme and the delivery of the training programme approved following the scrutiny review completed in 2006.

In addition the Panel will undertake an in-depth review of the use of consultants within the council.

The Audit Commission carried out the first annual assessment of the council's Use of Resources. This looks at how financial management is integrated with strategy and corporate management, supports council priorities and delivers value for money. The Audit Commission concluded that the council was performing well and was consistently above the minimum requirements in many areas. The Annual Audit and Inspection Letter from the Audit Commission also noted many positive improvements in the 'direction of travel' report covering the council's priority objectives.

**SECTION 3 – LOOKING FORWARD**

**3.1. Pressures**

3.1.1. Changing Legislation

What	When	Impact
Consultation on Local Land Charges		Not known until consultation concluded
Disability Discrimination Act/Regs	04 12 06	New duty to promote disability equality. Disability Equality scheme to be in place. Consultation ends Dec 06 – full impact not yet known
Work and Families Act	Various	Extension of paid maternity leave
Information and Consultation of Employees Regulations	06 04 07	Mandatory procedure for businesses with 100+ employees
Equality Act	01 04 07	New gender duty for public authorities. Extension of unlawful discrimination
Data Protection Act	24 10 07	Fully in force
Commons Act	Unknown	New right to object to development of land in use for 20 years
Corporate Manslaughter and Corporate Homicide Act	Unknown	Criminal liability for senior managers if gross mismanagement causes death
Council Tax (New Valuation Lists for England) Act	Unknown	No revaluation for council tax on 01 04 07
Electoral Administration Act	Various	Wide ranging changes
Health Act	Various	Smoke free public and work places
Local Government White Paper	Estimate end 2007 / various	Measures proposed to: - increase strength of local strategic leadership - improve local partnership working and make efficiency gains - give more information to local people to better meet their needs - consult and involve community more

3.1.2. National Factors

- Likely new relationship between central/local government responsibilities in light of the White Paper
- Comprehensive Spending Review
- Lyons Review

3.1.3. Local Factors

- Continuing financial pressure
- Rising public expectations
- Increasing partnership working
- Increasing Polish population

3.1.4. Growth or Change to Customer Base

- None anticipated

3.1.5. Best Value Review Programme 2007/08

- The Audit Commission have confirmed that given the review programme already in place it is not necessary to conduct any Statutory Best Value Reviews in 2007/08

3.1.6. Scrutiny Review Programme 2007/08

- The Scrutiny Panels will be invited to submit their annual scrutiny review programmes in May 2007

3.1.7. Workforce Planning Issues

- Managing workforce issues as a result of the Business Support Team project and the increasing shared services agenda in the region

3.1.8. Major Procurement

<b>Procurement Project</b>	<b>Timetable</b>
Bulk purchase legal services	In place
Golden Numbers and Telephony procurement	2007/08
Shared Service Advertising Contract	Completed
Shared Service Temporary Agency Contract	Completed

**3.2. Summary of Key Drivers for Change**

- New legislation, particularly White Paper
- Increased customer expectation
- Partnership working
- Financial constraints and requirement to do more for less

### 3.3. Integrated Improvement Programme

Key milestones for each of the priorities are outlined below:

#### Office Centralisation

2007/08	2008/09	2009/10
<ul style="list-style-type: none"> <li>• Build new extension and refurbish Council House</li> <li>• Commence disposal of surplus assets</li> </ul>	<ul style="list-style-type: none"> <li>• Complete construction</li> <li>• Decant all units into Bourne Hill</li> <li>• Continue disposal of surplus assets</li> <li>• Review Travel Plan</li> <li>• Review FM arrangements</li> <li>• Open Bourne Hill to public</li> </ul>	<ul style="list-style-type: none"> <li>• Deal with any issues relating to the Defects Liability Period and Retention</li> </ul>

#### Improving Customer Services

2007/08	2008/09	2009/10
Implement actions from review of peripatetic service (Wilton, Downton and Tisbury)	Review and develop required integration between Customer Service and Housing Management following conclusion of Stock Options so there is clarity for customers	Review customer demand by channel type to encourage e-take-up
Introduce extended opening hours of the telephone contact centre to enable flexibility for customers	Review demand for extended opening hours	
Integrate additional 10 customer facing services to CSU to improve seamless service delivery	Integrate additional 8 customer facing services to CSU to improve seamless service delivery	Integrate additional 8 customer facing services to CSU to improve seamless service delivery
Publicise new “golden numbers” to reduce customer confusion (Phase Two)	Revise Customer Access Strategy fit for centralised offices	
Review and develop required integration with leisure facilities to improve bookings and ticketing	Review and develop seamless customer information in key service areas by volume	
Implement shared services with other councils	Implement shared services with other councils	
Implement additional CRM workflow to support 80% query resolution at first point of contact	Implement additional CRM workflow to support 80% query resolution at first point of contact for new services	
Implement electronic link for customers to “meet” professional and technical staff to enhance services provided in remote locations		
Review effectiveness of Customer Access Strategy, Passport to Improved		



Services, great expectations and the Customer Care Charter		
Review and implement telephony solution to enable home and remote working to meet consistent service delivery standards for customers		
Undertake and utilise feedback from customer consultation to improve service	Undertake and utilise feedback from customer consultation to improve service	Undertake and utilise feedback from customer consultation to improve service

### E-government Implementation

2007/08	2008/09	2009/10
Review ICT Strategy and supporting project plan. Consider implications of annual project plan, supported by a bi-annual review of strategy in future	Annual as 2007/08	Annual as 2007/08
Review Information Management practices and where necessary policies		
Plan ICT requirements for the new offices	Implement ICT requirements for the new offices	
In conjunction with Financial Services and introduction of Agresso 5.5, introduce advanced workflow to enable on-line authorisation and tracking within all modules		
In conjunction with Financial Services and introduction of Agresso 5.5, implement e-Sales invoicing to enable input of sales invoices over the web		
In conjunction with Financial Services and introduction of Agresso 5.5, revise bank reconciliation module to implement advanced monitoring of bank accounts		
Review structure, look, feel and quality of website		
Consider introduction of increased leased line capacity to allow relevant staff controlled access to 'streaming media'		
Continue to encourage, lead,	Annual as 2007/08	Annual as 2007/08

advise and motivate organisation towards better utilisation of ICT resources, particularly from point of view of development of web based services initiative		
In conjunction with Customer Services & Democratic Services determine strategy for future provision and support of corporate telephone system	Implement revised telephony	
Assuming successful 'wave 2' funding from the Home Office, deliver Single Non Emergency Number		
Determine likely future support requirements for Internet and Intranet development programme		
Complete Information Security Policy and High Level Guidelines for users		
Continue partnership work on ICT shared services		

#### Improving the Performance of the Council

2007/08	2008/09	2009/10
Determine whether the council has improved sufficiently to undergo a further Comprehensive Performance Assessment (CPA)	Implement outcomes of CPA. Prepare for revised CPA – likely to be called Comprehensive Area Assessment	
	Review effectiveness of Internal Energy Policy	
	Review effectiveness of Project Management Guidance	
Develop 3 <sup>rd</sup> statutory Annual Efficiency Statement		
Implement and review Procurement Strategy	Implement and review Procurement Strategy	
Corporate Governance Review	Annual as 2007/08	Annual as 2007/08

#### Meeting the Financial Challenge

2007/08	2008/09	2009/10
Review Medium Term Financial Strategy annually to ensure the budget supports priorities	Annual as 2007/08	Annual as 2007/08
Review Asset Management Plan/Capital Strategy	Annual as 2007/08	Annual as 2007/08

annually to ensure our assets are maximised and capital projects support our priorities		
Review corporate governance arrangements annually to ensure the council operates to the legal requirements	Review corporate governance arrangements annually to ensure the council operates to the legal requirements	Review corporate governance arrangements annually to ensure the council operates to the legal requirements
Implement actions arising from previous years governance review	Implement actions arising from previous years governance review	Implement actions arising from previous years governance review
Undertake consultation on the budget with the public annually to help inform decision making	Annual as 2007/08	Annual as 2007/08
Submit Value for Money Self Assessment to the Audit Commission annually as part of Comprehensive Performance Assessment	Annual as 2007/08	Annual as 2007/08
Implement decisions from 2006/07 review for District/Parish over 3 years	Annual as 2007/08	Annual as 2007/08

**Building Organisational Capacity**

2007/08	2008/09	2009/10
Reduce sickness absence levels to maximise productivity	Annual as 2007/08	Annual as 2007/08
Undertake bi-annual staff survey to gauge views of staff and implement constructive proposals	Implement new plan based on results of 2007/08 survey	Undertake bi-annual staff survey to gauge views of staff and implement constructive proposals
Implement HR Strategy to ensure the council meets HR standards	Annual as 2007/08	Revise HR Strategy
Implement organisation and efficiency programmes	Annual as 2007/08	Annual as 2007/08
Review innovative ways of working to enhance work/life balance and reduce expensive office accommodation	Embed innovative ways of working throughout the organisation	Maintain a culture of innovative ways of working throughout the organisation. Continue to monitor and review periodically
Implement Training and Development Plan (including councillor development) annually to ensure suitable skills for the future	Evaluate and revise Training and Development Plan (including councillor development) annually to ensure suitable skills for the future	Evaluate and revise latest Training and Development Plan (including councillor development) annually to ensure suitable skills for the future
Guidance on the termination of temporary and fixed term contracts	Dealing with Violence and Aggressive Behaviour	Review/develop and implement employment policies and procedures according to the annually prepared Employee

		Relations Review and Plan
Alcohol and Drugs at Work	Domestic Abuse Awareness in the workplace	
Whistle-blowing Policy	Adoption Leave Policy	
Job Share Scheme	Attendance at work during exceptional circumstances	
Smoking Policy	Special Leave	
Stress Management Policy and Guidelines	Maternity Leave	
Use of Mobile phones whilst driving	Maternity Support Leave	
Guidelines for determining employment status	Parental Leave Policy and Procedures	
Overtime for senior staff	Paternity Leave	
Pay and Benefits Policy	Staffing arrangements during major incidents	
Corporate Training and Development	Discretionary Additional Payments Policy	
Professional Vocational Qualifications	Injury Allowances Payment Scheme	
	Standby and Call Out Procedures	
	Travel and Subsistence Policy	
	Recruitment Guide	

### Corporate Communications

2007/08	2008/09	2009/10
Develop new Communication Strategy	Brand the customer contact centre to reflect the council's corporate identity and image	Review corporate identity protocol
Set up corporate visual image library for internal and external use	Implementation of communications strategy objectives – details to come from new strategy	Implementation of communications strategy objectives – details to come from new strategy
Review Media Protocol and Media Relations Policy	Brand signage to reflect the council's corporate identity	
Review editorial policy for the Citizen		
Develop stage 2 of corporate identity protocol		
Improve communication with councillors		
Achieve Plain English 'Crystal Mark' for Citizen and for major corporate publications		
Implement Intranet Action Plan		
Produce A-Z of council services and distribute to every household		
Complete Phase 1 of consultation with hard to	Continue Phase 2 and publish early results	Evaluate success of programme and review

reach groups (engaging umbrella groups) and proceed with Phase 2 – working directly with support groups		equalities impact assessments based on results
VOICE&CHOICE Panel: Commence rolling programme of customer and community feedback surveys		
Implement Electronic Consultation Management System (eCMS) system for consultation and research	Evaluate the eForum module for the eCMS system to give residents the opportunity to take part in moderated discussions on topical local issues and scrutiny reviews	

### 3.4. Partnership Contribution

The portfolio will support the South Wiltshire Strategic Alliance Community Strategy and the Wiltshire Strategic Board's priorities in the following way:

2007/08	2008/09	2009/10
Wiltshire Improvement Partnership: Councillor Development Programme (this will deliver resources to support the development of the councils own programme)		
Develop and implement Customer First: Shared Services Phase 2 programme		

### 3.5. Resources

#### 3.5.1. Unavoidable Costs

The unavoidable costs faced by the portfolio are:

	Unavoidable Costs		
	Revenue Recurring	Revenue Non Recurring	Capital
	£'000	£'000	£'000
<b>Unavoidable Costs</b>			
Pay award @ 2.5%	425		
Pensions backfunding	125		
Inflation – contracts	100		
Inflation – services	150		
Capital financing	175		
Election costs		105	
<b>Savings/Extra Income</b>			
Restructure Legal & Property Svcs	(47)		
Additional income corporate target	(180)		
Premium payments	(135)		
Restructure Management Team	(80)		
Cash collection contracts	(13)		

Recruitment advertising	(10)		
Relocation expenses	(10)		
District Area Grants	(25)		
District Parish split	(50)		
City Area / District split	(48)		
Fraud costs	(15)		
<b>Growth items</b>			
Customer Services - base budget	137		
- migration plan		194	
External Funding Officer*	35		
Customer Services – expansion of contact centre system			51
Manager Training		20	
Replacement telephone system**			250

\* = post included in Resources as this post is a corporate support to the whole council and community

\*\* = an external review of the options for the future delivery of telephony will be commissioned early in 2007. The outcomes of the review may include replacing existing telephony, which is likely to require capital funding. The sum is highlighted as a potential growth item and would be subject to Cabinet consideration following analysis of the review recommendations.

### 3.5.2. Efficiencies

The proposed efficiency savings (other than those shown above that directly affect the budget) will be identified by the final portfolio plans and submitted to DCLG with the Annual Efficiency Statement in April 2007.

**SECTION 4 – CONTINUOUS IMPROVEMENT**

**4.1. Performance Monitoring**

<b>Performance Indicator</b>	<b>Current Performance</b>	<b>2006/07 Target</b>	<b>2007/08 Target</b>	<b>2008/09 Target</b>	<b>National District Council Top 25% Performance</b>
The proportion of working days/shifts lost to sickness absence BVPI	5.05 days	7 days	7 days	7 days	8.48 days
Percentage of service enquiries resolved at first point of contact Local PI	99.69%	80.00%	80.00%	80.00%	Common standard in local govt – 80%
Number of formal complaints per quarter received by Customer Services Local PI	37	85	110	110	N/A
Average combined District and Parish Council Tax in lower quartile nationally Local PI	Yes	Yes	Yes	Yes	N/A
Percentage of the Council's Strategic Suite of performance indicators in upper quartile Local PI	44.44%	75.00%	75.00%	75.00%	N/A
Percentage of the Council's performance indicators showing an improvement on the previous year Local PI	50.41%	45.00%	50.00%	55.00%	N/A
Percentage of performance indicators meeting or exceeding targets Local PI	55.32%	60.00%	60.00%	60.00%	N/A
Amount of Annual Efficiencies achieved Local PI	£1.125m*	£432,000	£432,000	N/A	N/A
Corporate net spend outturn to forecast Local PI	-1.8%	1.00%	1.00%	1.00%	N/A
Corporate capital spend outturn to forecast Local PI	13.60%	10.00%	10.00%	10.00%	N/A

\*2005/06 achievement

**4.2. Marketing of Services**

The corporate communications team have a major role to play in assisting all service units with the marketing of their services. They are also responsible for devising communications plans and for implementing marketing campaigns for major corporate initiatives and projects. All service units are required to provide the corporate communications team with details of their communications requirements in the form of a PR and marketing calendar.

<b>Service Unit</b>	<b>Marketing Activity</b>	<b>Target Date - Qtr</b>
<b>Customer Services</b>	Golden Numbers & opening hours promotion	4 <sup>th</sup> Qtr
	Access Channel promotion	4 <sup>th</sup> Qtr
<b>Financial Services</b> Accountancy Services Payroll Services	Customer satisfaction survey	2 <sup>nd</sup> Qtr
	Customer satisfaction survey	3 <sup>rd</sup> Qtr
<b>MED&amp;T</b>	Advertising and sponsorship opportunities with the council	1 <sup>st</sup> Qtr
	Internal marketing of corporate communications service	1 <sup>st</sup> Qtr
<b>Democratic Services</b>	Promotion of elections with radio and newspaper 'job advert' campaign	1 <sup>st</sup> Qtr
	VOICE&CHOICE additional promotion when eCMS comes on line	2 <sup>nd</sup> Qtr
	Revised scrutiny arrangements – Community Call for Action	Subject to White Paper
<b>ICT Services</b>	Awareness raising – greater use of web to access services	Ongoing
	Marketing of new services available via web	Ongoing
<b>People and Organisational Development Services</b>	Support for Innovative Ways of Working	On-going (Link-up)
	Roll out of new/revised policies and procedures	On-going (Link-up)
	Possible assistance with roll out of regular 'Employment News' updates	1 <sup>st</sup> or 2 <sup>nd</sup> Qtr
<b>Revenues &amp; Benefits</b>	Payment by direct debit (leaflets and the Citizen, plus viewing council tax account on line)	

**4.3. Consultation**

Democratic Services have a role to play in advising and assisting all service units with consultation and for ensuring a corporate approach. All service units are required to outline their proposed consultation for the year.



Service Unit	Consultation	Target Date - Qtr
<b>Customer Services</b>	Customer Forum	Annual consultation – 2 <sup>nd</sup> Qtr
	E-consultation	Quarterly
	Mystery shopping	Annual – 3 <sup>rd</sup> Qtr
<b>MED&amp;T</b>	Communications Strategy	1 <sup>st</sup> Qtr
	New Citizen	2 <sup>nd</sup> Qtr
	Communication with councilors	1 <sup>st</sup> Qtr
<b>Democratic Services</b>	8-10 VOICE&CHOICE consultations each year	1 <sup>st</sup> , 2 <sup>nd</sup> , 3 <sup>rd</sup> & 4 <sup>th</sup> Qtr
	Budget consultation	3 <sup>rd</sup> Qtr
	Tomorrow's Voice – 2 consultations with young people	2 <sup>nd</sup> & 4 <sup>th</sup> Qtr
	Review need for continued participation with Peoples' Voice	2 <sup>nd</sup> Qtr
<b>Legal &amp; Property</b>	Satisfaction surveys	1 <sup>st</sup> Qtr
<b>ICT Services</b>	Monthly user questionnaires to continue via 'Snap' system. Results to be discussed at Service Unit Management Team and used to profile future services where appropriate	Monthly, ongoing

### Risk Assessment

An assessment of the strategic risks faced by the portfolio is attached as Appendix 1.

#### **4.4. Diversity**

4.4.1. Initial Equality Impact Assessments have been carried out for service functions. Any resulting actions that can be easily implemented will be. The summary findings from the assessments identified the following issues to be a priority which has an impact for the Portfolio's delivery of services:

- Rural isolation
- Internet access take-up lower with elderly residents
- Need for translation services for residents where English is not their first language
- Increasing Polish community

The council is intending to consult with representative groups and individuals in the New Year. Any amendments to the corporate action plan will be reported back to Cabinet and actioned corporately.

4.4.2. Following completion of equalities impact assessments for all services in 2006, there is a need to ensure that groups affected are consulted on the actions proposed to address concerns highlighted. This is both

desirable and necessary to achieve Level 3 of the Equalities Standard. In order to achieve this level of involvement, the following programme has been designed to support the work of all four portfolios.

The aim of the programme will be to gain the views of all sections of the community on the way the council delivers its services; in order to assess the impact of those services and made such changes as may be required.

The Diversity Working Group recognise that the programme:

- is complex
- that there are a number of groups to be engaged
- that there is a risk of appearing tokenistic
- that there is a risk of not engaging all target groups
- that there are limited resources available to support the programme

4.4.3. The council wishes to:

- Engage with all sections of the community
- Establish a coordinated and consistent corporate approach to consulting harder to reach groups - driven by the council's adopted consultation strategy
- Ensure that this intelligence informs:
  - services
  - strategies, policies and portfolio plans
  - staff and councillor training
  - bids for external funding

4.4.4. As a first stage the council will work in partnership with the principal umbrella groups - South Wiltshire Action Against Poverty (SWAAP) and the South Wiltshire Diversity Group (SWDG). These groups will be asked to coordinate consultation with their constituent members. This will ensure the council does not influence the results. The umbrella groups will be asked to prepare a report back to the council. To facilitate this work, the council will provide each group with a small grant so that they can respond in a given timeframe (by Apr 2007). The council will support and assist by preparing consultative materials.

It is considered that this approach will have the following outcomes:

- Partnerships fully engaged and owning the process
- Initial consultation response highlighting main problem areas - which can focus phase 2 work
- Equalities Standard Level 3 satisfied

4.4.5. While Phase 1 of the programme gets underway, the council will provide small grants to individual user groups - representing disabled, elderly, young people, for example - to undertake their own consultation on council services and to feedback their views in whatever form they choose (this work may be undertaken with partner organisations through the South Wiltshire Strategic Alliance and cover bother key public services such as education, health and policing).

It is considered that this approach will have the following outcomes:

- Hard to reach groups fully engaged and owning the process
- Detailed consultation highlighting detailed problem areas for specific groups - which can focus action plans and funding bids
- A sustainable process for engaging hard to reach groups

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RESOURCES PORTFOLIO PLAN 2007/08