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The Chair and Members of Overview
and Performance Scrutiny Forum

Dear Councillor,

AGENDA SUPPLEMENT

Please see attached the documents for the agenda item(s) listed below for the meeting of the OVERVIEW AND PERFORMANCE SCRUTINY FORUM to be held on TUESDAY, 10 JANUARY 2017, the agenda for which has already been published.

5. Scrutiny Project Group Progress Updates (Pages 3 - 8)
 - *Evaluation of Concessions on Fees and Charges Scrutiny Project Group (Report to follow)*

6:20pm

Yours sincerely,

Local Government and Regulatory Law Manager and Monitoring Officer

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For publication

Review and Evaluation of the Scrutiny Project Group on Concessions on Fees and Charges

Meeting: Overview and Performance Scrutiny Forum

Date: 10 January, 2017

Report by: Committee and Scrutiny Coordinator

For publication

1.0 Purpose of report

1.1 To provide a review and evaluation of the Scrutiny Project Group review on Concessions on Fees and Charges.

2.0 Recommendations

2.1 That Members note the review and evaluation of the Scrutiny Project Group review on Concessions on Fees and Charges.

2.2 That Members consider how lessons learnt from how the review was conducted could be used to inform the processes and procedures for the conduct of future scrutiny reviews.

3.0 Report details

Original objectives of the project group

3.1 The project group on Concessions on Fees and Charges was established under by the Overview and Performance Scrutiny Forum, and at its outset set the following objectives:

- To produce recommendations and guidance that would contribute to the development of a clear corporate policy on setting concessions that ensured equality of access to services but which also did not harm the financial position of the Council.
- To ensure that services used a consistent approach to setting concessions on fees and charges.
- To ensure equality of access to Council services to all residents and visitors.
- For any policy on concessions and fees and charges to be informed by, and to reflect the changes to benefits happening with the introduction of Universal Credit in Chesterfield.

Group recommendations

3.2 The project group's report was considered by Cabinet on 12 January, 2016 where it recommended:

- i. That concessions made on fees and charges should be used as part of a dynamic and agile pricing approach for services, where the overall objective is that total costs are covered.
- ii. That the concession on bulky waste and pest control services be reduced from 50% to 20%.
- iii. That the cost of providing concessions along with the provision of less popular or costly services should be supported by higher demand and popular services, along with revenue generated from services paid for at the full rate.
- iv. That Leisure Services and Theatres should continue to have the freedom to vary the rate of concessions offered to manage demand. The project groups notes with approval the approach taken by these services to offering concessions and their focus on the overall cost of providing all services.

- v. That services should establish the unit cost of providing a service before setting a price. The costing of services should include all possible applicable costs, both fixed and variable involved in delivering a service such as buildings, staff, materials and IT.
- vi. That where appropriate, services should only advertise that concessions are available rather than listing all concessionary categories at the point of a service being enquired about. Also, that those services should only grant concessions after entitlement of eligibility has been confirmed.
- vii. That the concessionary categories for all services should be updated to include the categories of:
 - I. Universal credit, with no earned income
 - II. Universal Credit with a housing element included
 to reflect the changes to benefit delivery created by the introduction of Universal Credit.
- viii. That the Sports and Leisure Manager should review the published list of categories giving entitlement to concessionary rates so that the list is shorter, clearer and easier to understand by service users.
- ix. That concessions should not be offered on the basis of being aged 60 or over. The project group notes that in the current climate of local government cuts, this category of concession is neither sustainable nor fair. Anyone who is financially disadvantaged who is 60 or over would still receive a concession based on one of the other concessionary categories.
- x. That a member and officer working group be established to develop a corporate policy on concessions.

Implementation of the recommendations

- 3.3 Cabinet approved all of the group's recommendations with the caveat "**that before the implementation of any resolution that could have a financial implication to the Council, further investigation on the impact is**

carried out by officers and brought to Cabinet for consideration.”

- 3.4 In May 2016 an officer and member working group was established to devise a corporate concessions policy. The policy drafted by the group included all of the recommendations made by the project group except recommendation **ii**, which had already been implemented in April, 2016.
- 3.5 After further consideration by the policy working group of the equalities impact of the review recommendations, it was agreed that concessionary rates (where given) should be made available to people who had reached State Retirement Pension age.
- 3.6 The corporate concessions policy was approved by Cabinet in November, 2016. As a result of the policy being adopted **all of the project group’s recommendations have now been implemented.**

How the project group worked

- 3.7 The review was wide ranging in its scope, requiring the group to work with departments from right across the council. The project group started its work in July, 2015 and its report was approved, as scheduled by the Overview and Performance Scrutiny Forum in December, 2015.
- 3.8 The way in which the project group worked throughout the project was instrumental in the timely manner in which the review was completed.

The factors which enabled this to happen included:

- The project linked directly to the council’s priorities and vision, notably **“Our priority: to provide value for money services. To deliver this, we will focus on a single objective: To become financially self-sufficient by 2020, so we can continue to deliver the services our communities need.”**

- The project group was results focussed. Members could clearly see from the outset how their work would be contributing towards the achievement of the council's key priorities.
- The clearly defined project scope was referred back to throughout the review to ensure that the group did not deviate from their original objectives.
- Ensuring that all of the objectives set out in the initial project scope were "SMART".
- Having the research activity workload evenly distributed between all members of the project group.
- Fortnightly project group meetings enabled the project to move forwards as scheduled. Regular meetings also allowed members to share their findings and to discuss any issues that the findings had raised.
- Project group meetings were focussed on achieving objectives. Each meeting had set objectives that were always completed by the end of the meeting.
- The relevant Cabinet members were involved from the outset in discussing services and service needs with the project group. Cabinet members were also given the opportunity to comment on the group's final report.
- Effective organisational and time management skills of the project group lead and project group members.
- Good communication between the group members, the project group lead, and officers.
- Good communication between the project group lead, the Committee and Scrutiny Coordinator and the Policy and Scrutiny Officer during the report writing and decision making process.

- There being dedicated officer support available to the project group throughout the entire process in areas including; organising and recording details of project group meetings, assisting and carrying out research, report writing and guiding the report through the decision making process.

4.0 Recommendations

- 4.1 That Members note the review and evaluation of the Scrutiny Project Group on Concessions on Fees and Charges.
- 4.2 That Members consider how lessons learnt from how the review was conducted could be used to inform the processes and procedures for the conduct of future scrutiny reviews.

Document information

Report author	Contact number/email
Martin Elliott	Tel: 01246 345236 email: martin.elliott@chesterfield.gov.uk
Background documents	
These are unpublished works which have been relied on to a material extent when the report was prepared.	
None	