

## RESOURCES AND PERFORMANCE SELECT COMMITTEE ACTIONS AND RECOMMENDATIONS TRACKER

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<b>KEY</b>			
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Date of meeting	Item	Recommendations/Actions	Responsible Officer/Member	Update/Response
17 December 2021	2022/23 Draft Budget Report and Medium - Term Financial Strategy - to 2026/2027	<p><u>Recommendations:</u> Select Committee recommends that:</p> <ol style="list-style-type: none"> <li>1. As a matter of agreed budget setting process every year, following the details of the Local Government Finance Settlement in usually mid-December, the Section 151 Officer provide a written briefing note to all Members with details of any impact on the Surrey County Council finances, service delivery and effect on its residents.</li> <li>2. The Cabinet is requested to ensure that a comprehensive, truly representative and early budget consultation with residents and key stakeholders should form an integral part of the Council's budget setting process each year with findings communicated to all Members and made available to Select Committees with draft budget papers. The initial budget consultation process should conclude first before a draft</li> </ol>	<p>Becky Rush, Cabinet Member for Finance and Resources</p> <p>Leigh Whitehouse, Deputy Chief Executive</p>	The requests have been sent to the Deputy Chief Executive for information and response

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		<p>budget is presented to the Council's Select Committees. The deadline for the current call for evidence be extended from 28 December 2021 to allow residents and stakeholders more time to comment and engage after the festive and the New Year period.</p> <p>3. From the Council's borrowing cost point of view, the Cabinet should carefully examine to ensure</p> <p>4. that the effect of borrowing result in a real return, particularly any commercial borrowing ought to cover return on its investment</p> <p>5. The Cabinet to ensure that an assessment is undertaken of all Surrey's Borough and District Council's Local Council Tax Support to ensure any increase in Surrey County Council's share of Council Tax is affordable to all residents.</p>		
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		<p>6. To further support collaborative working, to avoid any silos and to ensure proper oversight and effective budget scrutiny next year, the Cabinet is requested to ensure that the Resources and Performance Select Committee and its Budget Task Group (with all Select Committee representation) will be provided with:</p> <ul style="list-style-type: none"> <li>a. Regular in-year up-to-date finance monitoring updates throughout the year – particularly when there are significant and material changes – to be assured that assumptions made and expectations derived from the budget 2022-23 and MTFs 2026-27 (where relevant) will be met in practice;</li> <li>b. Early communication and understanding of 2023-24 draft budget with high-level assessment of effect on residents;</li> <li>c. Meaningful details about the budget efficiencies with overarching Budget</li> </ul>		
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		<p>Impact Assessments (including any impact on service delivery, residents, corporate and organisational priorities, ED&amp;I and staffing etc.) be provided to Select Committees and Budget Task Group where appropriate before the draft budget is formally presented to all Select Committees. This should happen earlier than November to ensure Members have sufficient time to understand, make further enquires and add real value to the scrutiny process;</p> <p>d. Commentary and comparison of corporate costs of the Council with similar authorities;</p>		
17 December 2021	Property Programme Update	<p><u>Recommendations:</u> The Resources and Performance Select Committee recommends that Cabinet Member for Property and Waste ensures that appropriate maintenance and repairs to the</p>	Leigh Whitehouse, Deputy Chief Executive	The request has been sent to the Deputy Chief Executive for information and response

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		County Council owned properties are not deferred.		
17 September 2021	Cabinet Member Priorities Update – Tim Oliver	<p><u>Recommendations:</u> The Select Committee recommends that:</p> <ol style="list-style-type: none"> <li>1. Cabinet is to consider how Surrey County Council engages with organisations that undertake political lobbying and/or are involved in matters that some might consider controversial;</li> <li>2. Surrey County Council should ensure that any impact on other protected characteristic groups are identified and carefully taken into consideration before finalising the Trans at Work policy;</li> <li>3. The Trans at Work policy is to be presented to the Select Committee prior to being finalised;</li> <li>4. More focus is to be given to the range of topics covered in internal</li> </ol>	<p>Leader of the Council</p> <p>Leader of the Council</p> <p>Leader of the Council</p> <p>Leader of the Council</p>	<ol style="list-style-type: none"> <li>1. The Leader’s office has informed the Leader and it is now under consideration.</li> <li>2. The Leader’s office has informed the relevant team.</li> <li>3. The Leader’s office has alerted the relevant team.</li> </ol>

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		<p>communications in the daily media email update to Members. In particular, all references articles in the daily media briefing to be made accessible to all Members;</p> <p style="background-color: yellow;">5. A report on digital exclusion is to be provided to this Select Committee at a future meeting.</p> <p><u>Actions:</u></p> <p>1. Deputy Cabinet Member to the Leader to provide more information on how the Council trains and monitors officers carrying out recruitment interviews to ensure they have EDI awareness and adhere to best practice;</p> <p>2. Democratic Services officers to share councillor diversity analysis conducted after the May 2021 election with the Select Committee;</p> <p>3. Executive Director of Resources to provide information on how the Council is</p>	<p>Leader of the Council/Scrutiny Officer</p> <p>Deputy Cabinet Member to the Leader</p> <p>Scrutiny Officer</p> <p>Executive Director of Resources</p>	<p style="background-color: lightgreen;">4. The Communication team has provided a response.</p> <p style="background-color: yellow;">5. This will be added to the Select Committee's forward plan in future.</p> <p style="background-color: lightgreen;">1. A service response has been provided.</p> <p style="background-color: lightgreen;">2. This information has been shared with the Select Committee</p> <p style="background-color: lightgreen;">3. The Executive Director's team has been contacted.</p>
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		addressing resource concerns and how it is taking this into account for the future.		
17 September 2021	Cabinet Member Priorities Update – Becky Rush	<u>Recommendation:</u> The Select Committee recommends that Surrey County Council actively involves residents in the budget setting process and carefully takes into account relevant feedback, observing the ethos of participatory budgeting.	Cabinet Member for Finance and Resources	This is being progressed as part of budget consultation process.
17 September 2021	Cabinet Member Priorities Update – Mark Nuti	<u>Recommendations:</u> The Select Committee recommends that: <ol style="list-style-type: none"><li>1. Consideration be given to the customer services team providing relevant information and data, based on the calls received by them, to the respective elected representatives about their wards/divisions;</li><li>2. Careful consideration be given to ensuring that the roll-out of chatbots does not result in a negative impact on digitally excluded and elderly residents;</li><li>3. An opportunity to visit the customer services contact centre be offered to</li></ol>	Cabinet Member for Communities  Cabinet Member for Communities  Executive Director of Customer and Communities	1 & 2. Cabinet Member and Executive Director have been informed.          The Executive Director has offered visits to Members.

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		Members by the service at an appropriate time.		
		<u>Action:</u> Executive Director of Customer and Communities to provide information on the level of traffic on the Esendex system.	Marie Snelling, Executive Director of Customer and Communities	Service Directorate is working on this.
23 June 2021	Informal Induction Session	<u>Actions:</u> <ol style="list-style-type: none"> <li>1. Cabinet Member for Communities to give figures on the chatbot for circulation to the Select Committee</li> <li>2. Director of HR&amp;OD to provide information on apprenticeship levies and how these can be used more effectively</li> <li>3. Head of Business Intelligence to explore the possibility of contacting the LGA about obtaining benchmarking information on other councils</li> </ol>	Cabinet Member for Communities  Director of HR&OD  Head of Business Intelligence	<ol style="list-style-type: none"> <li>1. The Cabinet Member's response has been sent to the Chairman and is <a href="#">annexed</a> to this tracker.</li> <li>2. Response: "What is your strategy to make sure that we don't have to return so much of the levy money in the future?"               <ul style="list-style-type: none"> <li>• Developed system to forecast levy transfer spend and plan funds available</li> </ul> </li> </ol>



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				<p>for transfer accurately</p> <ul style="list-style-type: none"> <li>• Developed Levy Transfer Guiding Principles for 21/22 to formalise process for levy transfers and target priority groups</li> <li>• Supported launch of Transfer to Transform with £100k pledge of unused levy funds - £57,000 has so far been committed to Surrey organisations through this initiative and we have the option to pledge further funds if available</li> <li>• Promoted levy transfers at the Surrey Charities</li> </ul>
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				<p>Forum in April 2021 which has so far resulted in committing levy transfers of £49,000 to support 3 Surrey charities with apprenticeships</p> <ul style="list-style-type: none"> <li>• Current levy transfer forecast for 21/22 c.£160k</li> <li>• Current levy transfer forecast for 22/23 c.£120k</li> <li>• Recruited Talent and Apprenticeship Adviser to support Surrey schools to access and spend levy funds</li> <li>• Promotion of apprenticeships to hiring managers and existing employees”</li> </ul>
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				<p>3. The possibility of obtaining benchmarking information from the LGA was explored and it was concluded that it would not be practical to provide LGA benchmarking data, given that the data available relates largely to service areas outside of this Select Committee's remit (e.g. Adult Social Care, Fire and Rescue). However, a wider benchmarking report is currently being compiled by the Business Intelligence team, and this will be</p>
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				shared with the Select Committee once ready and signed off by the Corporate Leadership Team, and will continue to be shared with the Select Committee on an annual basis.
18 March 2021	Digital Business and Insights Update	<u>Actions:</u> 1. The DB&I Programme Director to include an update on the delivery of DB&I programme benefits in the next DB&I report to the Select Committee;  2. The DB&I Programme Director to raise integration of the upgraded pensions service and the DB&I programme with the integration lead and confirm to the Select Committee that these are integrated.	DB&I Programme Director	1. The Programme Director has been made aware of this, and it will be included in the future report request.  2. The Programme Director's response has been circulated to the Select Committee, confirming that the full scope of

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				integration requirements for pensions are included in the DB&I programme's delivery plan.
18 March 2021	IT and Digital Update	<p><u>Recommendations:</u> The Select Committee recommends that:</p> <ol style="list-style-type: none"> <li>The Select Committee is involved in the development of performance monitoring arrangements, where relevant, in the IT&amp;D service;</li> <li>The next IT&amp;D update includes more information about the Happy Signals platform.</li> </ol>	<p>Head of Business Intelligence</p> <p>Chief Information Officer</p>	<ol style="list-style-type: none"> <li>The Head of Business Intelligence has stated that this recommendation will be included as part of the wider corporate performance review for 2021/22, and that an update would be shared at a later date.</li> <li>The Chief Information Officer has been notified about this and a reminder will be</li> </ol>

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		<p>3. The IT&amp;D service is to arrange a private briefing for the Select Committee on the cyber threat.</p>		<p>included in the next report request.</p> <p>3. A briefing has been organised for 8 November 2021.</p>
18 March 2021	Property Programme Update	<p><u>Recommendations:</u> The Select Committee recommends that:</p> <p>1. An update report be provided at its September or December 2021 meeting;</p> <p>2. Local/Joint Committees have a standing property scrutiny [information] item at their informal/private meetings, to ensure that councillors and the Council's Land and Property service exchange information on local property</p>	<p>Director of Land and Property</p> <p>Head of Community Partnerships and Engagement</p>	<p>1. The Land and Property team have been made aware of this and the report request will be sent out in due course for the December 2021 meeting.</p> <p>2. Information sharing between the Land and Property service and councillors directly is an important principle,</p>

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		<p>projects, requirements and opportunities for development and disposals, to achieve the best outcomes for residents.</p> <p><u>Action:</u> The Director of Land and Property to ensure the list of properties for each Member's division has been sent to all Members and to resend if necessary.</p>		<p>in order to increase openness and accessibility of information for Members. The Director of Land and Property will ensure that property information is shared with divisional Members on a quarterly basis, as noted in the response to the 18 December 2020 action for the Draft Budget item (see below).</p> <p><u>Action:</u> As 18 December 2020 action for the Draft Budget item (below), the Director of Land and Property is to ensure a list is sent to every</p>
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				Member as part of the quarterly property update, and confirm to Democratic Services once this is complete.
21 January 2021	Final 2021/22 Budget	<u>Recommendation:</u> The Select Committee recommends that a report on the budget consultation is presented to the Budget Task Group early in the consultation process, and that Members' views are taken into account when conducting the consultation.	Director of Insight, Analytics and Intelligence	Information on the budget consultation will be presented to the Budget Task Group in September 2021.
18 December 2020	Scrutiny of 2021/22 Draft Budget and Medium-Term Financial Strategy to 2025/26	<u>Action:</u> The Strategic Finance Business Partner to request that local divisional Members are in future advised of property proposals in advance of changes. [It was agreed after the meeting that the Director of Land and Property is in fact the responsible officer for this action.]	Director of Land & Property	An officer in Land and Property will send a list of key properties in each division and advise of any updates in advance of changes as requested. This will be sent directly from the Land and Property team to the individual Member every quarter. The quarterly update will not include details on every property related activity within the division, but will include key



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				useful information such as developments and disposals, wherever possible, in order to increase openness and accessibility of information for Members.
18 December 2020	Broadband in Surrey	<p><u>Recommendation:</u> The Select Committee recommends that it receives the Digital Infrastructure Strategy, before the strategy is finalised, for scrutiny at a future meeting.</p> <p><u>Action:</u> The Engagement Manager to work in partnership with the communications team to provide materials that Members can use on their social media, newsletters or email signatures to promote the broadband programme and community fibre partnerships.</p>	<p>Michael Coughlin, Director of Economic Growth and Prosperity</p> <p>Dawn Redpath?, Project Manager – Superfast Surrey Broadband Programme (formerly Engagement Manager)</p>	<p><u>Recommendation:</u> The strategy will be presented to the Select Committee prior to being taken to Cabinet for decision making in due course.</p> <p>A briefing note providing an update on Digital Infrastructure was sent to all Members on 17 August 2021, which can be found</p> <div style="text-align: center;">  <p>Digital Infrastructure Briefing Note 130821</p> </div> <p>here:</p>

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				<p>The relevant Cabinet Member also sent a note to the Committee with details about the Gigabit Voucher Campaign Information.</p> <p>The status of the Strategy continues to be monitored, and a date has not yet been set for it to go to Cabinet.</p> <p><u>Action:</u> Response as of July 2021: “In April 2021, the Government launched a new Gigabit Broadband Voucher Scheme. Whilst the value (£1,500 per residential premises and £3,500 per business premises) of the vouchers remained the same as the previous scheme, the Government revised the number of postcodes that</p>
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				<p>are eligible for this scheme, basing its decision on Ofcom's Area 3 designation.</p> <p>We planned to launch a new campaign in June to target eligible postcodes but before this could happen, Openreach made several major announcements about their future rollout plans. These included many exchanges that covered the same Area 3 postcodes that were eligible for Government voucher funding.</p> <p>Whilst residents have still continued to investigate the scheme, we have held off or the moment from doing any significant communication activities around it. It is believed that by October</p>
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				<p>there will be sufficient clarity for SCC to undertake a campaign to premises in eligible postcodes. At this time, we will be providing Members with publicity materials to promote the Gigabit voucher scheme.</p> <p>In the meantime, SCC's Digital Infrastructure webpage (<a href="#">Digital infrastructure coverage in Surrey - Surrey County Council (surreycc.gov.uk)</a>) is highlighted to Members. This provides a summary of current publicly announced plans and schemes and it is updated on a regular basis." The action will be followed up in October 2021.</p>
8 October 2020	Property Programme Update	<p><u>Action:</u> The Director of Strategic Land and Property Assets to provide detail of contingency plans in</p>	Simon Crowther, Director of Land and Property	This will be included in the Property report to the Select

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		the next property programme update to the Select Committee.		Committee at its December 2021 meeting.
18 October 2019	Quarterly Performance Report (Q1 2019/20)	<u>Recommendation:</u> The Select Committee is to receive on an annual basis information on how Surrey County Council's performance compares with other councils.	Director of Intelligence, Analytics and Insight/Head of Business Intelligence	As of September 2021, a benchmarking report is being prepared and will be shared with the Select Committee once it has been signed off by officers.

### Annex 1: Information on the chatbot

#### **What is the chatbot?**

**Sur-i** is our digital assistant for School Admissions!

In technical terms, it's a conversational Artificial Intelligence (AI) platform we have used on the council's website to provide a more personalised online experience for parents and carers who have a question or want to find out information about school admissions.

**Sur-i** helps residents navigate our website and signposts them to relevant information. For more complex queries, it can also hand a person over to an agent for a live web chat.

Essentially, we are making it easier for parents/carers to find the information they need!

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The chatbot runs 24/7 and means people can contact us at a time and place that suits them, giving our residents the ability to self-serve more easily.

This was a proof of concept and part of our efforts to trial new technologies to improve the overall Digital Customer Experience for our residents, creating a more personalised experience online. It was a fantastic team effort - a collaboration between our Digital, Customer Service and Education Teams, all working together to find new and innovative ways to deliver services to our customers. It went live in November 2020.

### **Why School Admissions?**

We receive lots of enquiries about school admissions, which is not surprising as it can be a source of worry for parents who are keen to get their child into the school of their choice!

Last year we received over 1.2 million web visits to the Education & School pages of our website and almost 40,000 calls to our contact centre. These calls were centred at peak times of the school year, creating high demand which meant that parents could experience longer waiting times to get their enquiries answered.

We wanted to make it as easy as possible for parents and carers to find information online, get their questions answered quickly and reduce the need for them to have to call us if they didn't need to.

### **How has it been working?**

We've had a fantastic response to the prototype. In the first few months of operation, we had over 20,000 unique conversations with the chatbot, with each user asking an average of 7 to 8 questions. We also currently have a 95% customer satisfaction rate!