

BABERGH DISTRICT COUNCIL

FROM: Director of Corporate Services and
Director of Finance

REPORT NUMBER: **H143**

TO: Overview & Scrutiny (Stewardship)
Committee

DATE OF MEETING: 18 November 2008

FINANCE AND PERFORMANCE MANAGEMENT – QUARTERLY MONITORING REPORT

1. PURPOSE OF REPORT

- 1.1 This monitoring report provides an integrated picture of financial and performance management information for the second quarter of the 2008/09 reporting year.
- 1.2 The format follows that of the new Strategic Plan for 2008/18 and shows the linkages to the council's new corporate priorities.

2. RECOMMENDATIONS

- 2.1 That Members note the key points relating to variations against the 2008/09 Budget, National Indicators (NIs), former Best Value Performance Indicators (BVPIs) and Local Performance Indicators (LPIs).
- 2.2 That the issues set out in section 8 of this report be considered further by the relevant Overview and Scrutiny Committee, by reports at the next meeting cycle.

3. FINANCIAL IMPLICATIONS

- 3.1 The second quarter's financial monitoring runs alongside the Council's Strategic and Financial Planning process during which the current year's operational activities are assessed and the current year's budget is revised accordingly.
- 3.2 The mid-year review of the Revenue Budget indicates some notable potential variations to the original budget:
 - The overall General Fund (GF) revenue position shows a potential favourable variance of around £500K for the year compared to the Budget. This results from forecast higher levels income of £64K overall, despite the impact of the economic downturn on planning and land charge fees and, more significantly, the likelihood of lower net expenditure of £434K in a number of areas. Further details are provided in sections 6.3 to 6.9 of the report and Appendix A.
 - It would not, at this stage of the year, be prudent to assume that this will be the final position at the end of the year. However, it would be reasonable to assume that there will be a fairly significant overall net saving for the year. This could then be available to support the Council's spending priorities and the 2009/10 Budget that is currently being worked up by the Strategic Financial Planning Task Group
 - On the capital programme, good progress is being made in most areas. Further details are provided in sections 6.12 to 6.18 of the report and in Appendix B.

- On the Housing Revenue Account (HRA) there is a potential favourable variance of around £100k. Some of this will be needed, however, in 2009/10. Further details are provided in section 6.10 and 6.11 of the report and Appendix C.

4. **RISK MANAGEMENT**

4.1 This report links to Corporate Business Risk No.7 – Finance, Performance & Risk Management. Key risks are seen as:

Risk Description	Likelihood	Seriousness or Impact	Mitigation Measures
NI, BVPI and LPI performance does not improve compared to previous years and LAs nationally	To be determined	Marginal	Regular monitoring to identify key variations and poor performance.
Budgets are overspent, depleting reserves or requiring savings in other areas	Low	Critical	Regular monitoring at officer & Member level with actions agreed to remedy the situation.
Budgets are underspent or savings made	High	Marginal/Critical	As above. Actions can be taken in relation to these as a result of Member scrutiny.

5. **KEY INFORMATION**

Overall Context

5.1 Performance indicator targets for 2008/09 were formally approved by Strategy Committee at their 19 June meeting, following consideration of the outcomes of a joint Overview and Scrutiny Committee working group. This group met in April to consider in detail all the indicator targets proposed by officers. Targets were developed in line with specified criteria. They are set to be achievable but stretching based on the available evidence, including current performance level, trend data, benchmarking (where relevant) and Babergh's quartile position among shire district councils nationally.

5.2 Since the 2008/09 Quarter 1 report was published there have been a number of developments which impact upon this report:

- In order to reduce double-handling of information between the two Overview and Scrutiny committees, and to improve the effectiveness of scrutiny the Overview and Scrutiny (Stewardship) Committee will receive a report setting out the key financial and performance information, areas where performance has deteriorated based on the performance indicators and financial information, and details of what can be done to improve performance in these areas.
- Each Overview and Scrutiny Committee will receive for any area under their remit where performance has deteriorated, an update setting out whether performance has been improved, can be improved and how. This will be done through the next meeting cycle.

- Baseline data has now been collected for some (but not all) of the new National Indicators. However it is anticipated that we will have a full set of data by the end of the financial year once the relevant surveys have been carried out. For example, work has already started on the Tenants' Survey and the Place Survey, and the results are expected in February 2009.
- A new five-year target (covering the period 1 April 2009 to 31 March 2014) has been proposed for the Affordable Development Programme. This will be considered by the Housing Panel on 31 October, after which a report will be submitted to the Overview and Scrutiny (Committee Services) Committee.
- All indicators continue to be monitored (i.e. non-basket PIs) and the criteria for exceptions (i.e. any areas where performance has deteriorated or significantly improved from the year end 2007/08, or where current performance varies significantly from the target set for this year).

6. **FINANCIAL INFORMATION**

- 6.1 Appendix A sets out potential variations on key General Fund revenue budget income and expenditure areas for the year.
- 6.2 The Q1 report referred to the impacts of the economic downturn, inflationary pressures and LGR on this and next year's budget. Based on a careful assessment of the latest position at the end of September there are now clear signs of these affecting some of the Council's income and costs in key areas.

Income

- 6.3 Income overall is forecast to be around £60K more than allowed for in the budget, despite significant reductions in income levels for land charges and planning fees of around £220K. This is mainly due to additional Investment income, higher waste and recycling income and variations in other areas totalling £280K. In addition, it had already been envisaged in the Budget that £100K relating to additional recycling income would be received, but this was put aside into a reserve, pending a decision on the Third Bin project.

Revenue Expenditure

- 6.4 Salary savings of about £150K compared to budget are anticipated, mainly due to the senior management restructuring, but also due to not filling a number of vacant posts. The position could change in the second half of the year and the Council will need to monitor this in terms of maintaining or increasing capacity. Lower borrowing costs are also expected (potentially £70K but further assessment of this is required depending on revisions to capital receipts forecasts).
- 6.5 It appears that the cost of the Concessionary Bus Fare scheme is likely to be well below budget. This is because the additional budget provision, including a contingency provision that was made in 2007/08 and the current year to fund potential additional costs, is unlikely to be needed in full. It is possible, therefore, that actual costs at the end of this year could be around £200K lower than budget. Some of this could, however, be needed next year if there are further increases in take-up and/or Government grant is reduced.

- 6.6 Most of the budget for Hadleigh Pool repairs and maintenance of £85K available for this year will be spent, leaving a sum of £25K to be carried forward to next year, which will be spent in a way that is co-ordinated with the new Hadleigh Community Facilities in order to achieve the best value for money.
- 6.7 Additional Specialist Legal Fees of around £50k have arisen in relation to an ongoing legal case.
- 6.8 Additional costs of around £60k have also arisen on the Grounds Maintenance Contract, mainly due to higher inflation indices (particularly fuel) than originally allowed, which came into force on the 1st November 2008. These could be offset by savings elsewhere on the contract.
- 6.9 CAST (see section 6.17 also) - Members have already approved a carry forward of £40K to 2009/10 for Organisational Development work. In addition, there will be an anticipated saving of £77K on the approved budget, some of which may be needed depending on the LGR position.
- 6.10 Appendix C shows the key HRA budget areas. On this, £88K will be saved on the pre-paint and painting contracts, largely as a result of extending the cycle from 5 to 6 years, but most of this will be needed to fund 'Babergh Standard' decoration grants for the elderly next year. Rent income will be higher due to the improvement in void losses following the BPR review.
- 6.11 HRA energy costs are potentially likely to exceed budget by around £50K. Further consideration of this is needed in relation to the charges made to residents in sheltered accommodation.

Capital Programme

- 6.12 Appendix B gives an overview of the key areas of the capital budget.
- 6.13 Most areas of the General Fund Capital programme are expected to meet the 89% target for the year. This would exceed the performance in previous years. There will be savings in certain areas and some spending that will be delayed to 2009/10, details of which are highlighted below. The HRA capital programme is expected to meet the 97% target.
- 6.14 The main project that will not proceed this year is the enhancement of the Kingfisher Leisure Centre (budget provision of £1M). Given other commitments on key projects, the Business Case for this will not now be developed until 2009/10 at the earliest, in conjunction with SSL.
- 6.15 The provision for a fund to undertake Compulsory Purchasing Orders in relation to Private Sector Housing of £150K is now not considered to be of the benefit originally anticipated and should be removed from the capital programme.
- 6.16 Spending on grants to Housing Associations for Affordable Housing could be £120k less than the budget due to schemes that are in the pipeline but which may not be completed until next year.

- 6.17 There is likely to be a saving of around £100K relating to the CAST capital budget. This, along with the revenue position referred to above, will be considered by the CAST Board and reported to the Strategy Committee. The final position on both revenue and capital will be assessed in April 2009.
- 6.18 The percentage of capital expenditure achieved on Council Housing (BV12a) of 44% is an increase of 8% compared to the same time last year. It is anticipated that the 97% target for the year on the Capital Programme will be met. This would result in just over a £100K saving/carry forward to next year. Improved budget profiling will be put in place for the next quarter to further support monitoring arrangements.
- 6.19 Some issues highlighted in this section will be considered further through the current strategic and financial planning process, together with the issues identified in the State of the District Debate. In addition, rigorous monitoring of the following key areas will be undertaken by officers:
- Concessionary Fares
 - Energy costs
 - The capital programme
- 6.20 Reports will be submitted to Members as appropriate.

7. **PERFORMANCE INFORMATION - GENERAL**

- 7.1 Highlights from the basket of key performance indicators (KPIs) and analysis of performance exceptions are outlined below. Full details on the KPI basket can be found in Appendix D and exceptions in Appendix E.

Direction of Travel analysis

- 7.2 Table 1 below shows the direction of travel for the KPIs at the end of the second quarter for 2008/09, based on the position year to date versus the 2007/08 year end position (or, where appropriate, the position at the equivalent period last year). There is a positive direction of travel for 14 of the 20 PIs (70%) where comparison is possible.
- 7.3 The one PI where “no data” is recorded is because the PI is new and data monitoring has only just commenced.

Table 1

	↑ Improving	↔ Unchanged	↓ Deteriorating	Contextual PI	No data	No previous comparison	Totals
NI	4	0	0	0	1	1	6
BVPI	4	1	2	0	0	0	7
LPI	6	1	2	1	0	1	11
Totals	14	2	4	1	1	2	24

Actual v Target analysis

- 7.4 Table 2 shows the quarter 2 position for key performance indicators against the target agreed by Strategy Committee on 19 June. 16 of the 22 PIs (73%) where targets have been set are on track to reach or exceed the target set.

Table 2

	↑ On or exceeding target	↔ Below target	Contextual	No data	Totals
NI	4	1	0	1	6
BVPI	4	3	0	0	7
LPI	8	2	1	0	11
Totals	16	6	1	1	24

- 7.5 Table 3 summarises the direction of travel for Babergh's basket of KPIs since 1st of April 2008.

Table 3

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BV2a The level of the Equality Standard for Local Government to which the authority conforms
LPI 12a % of capital expenditure achieved on the Housing Revenue Account
LPI 18 Percentage of telephone calls answered where enquiry is resolved at point of contact
BV 64 Private dwellings returned to occupation
NI 157 Processing of planning applications as measured against targets of "Large scale Major", "Small scale Major", "Minor" and "all county matter" applications
LPI 44 Local authority housing - repairs and maintenance - proportion of urgent repairs to non-urgent repairs
LPI 43 Local authority housing - repairs and maintenance service - proportion of planned repairs to responsive maintenance
NI 158 % non decent council homes
BV212 Average time to relet local authority housing

4

BV 84 Number of kilograms of household waste collected per head
LPI 9 Number of homes adapted to meet the needs of older people or disabled people
BVPI 10 The % of Non Domestic Rates collected in the year
New LPI % of planning decisions determined as delegated items
Deteriorating

2

LPI 80 Customer satisfaction - telephone service
BV 63 Energy efficiency of local housing stock
Unchanged

LPI 41b The cumulative total number of affordable units of accommodation in the affordable housing delivery pipeline between 2004 and 2009
LPI 15 Number of affordable rent agreements secured
BV218b % of abandoned vehicles removed within 24 hours
NI 195 Local street and environmental cleanliness
NI 192 The % of total tonnage of waste arising which has been recycled + the % of total tonnage of waste arising which has been sent for composting
Improving

A greener cleaner Babergh

- 7.6 The combined recycling rate for waste and compost (NI 192) has risen slightly since quarter 1, and this represents a 1.78% increase on the 2007/08 figure. More garden waste is now being collected per head of population and whilst this has had a positive effect on NI 192, there are concerns that BV84a (the total number of kilograms of household waste collected per head) may not meet the target set for this year because of this. Garden waste being recycling is an initiative the Council is keen to promote, so Members are asked to note the position and no further action is proposed.
- 7.7 The combined recycling rate for trade waste is currently very low compared to the target. Whilst there are indications of a significant demand for this service, an additional collection vehicle is needed if the Council is to achieve a higher recycling rate. A bid for additional funding has been submitted via the SFP process and Members are asked to note the position.
- 7.8 A recent survey of local street and environmental cleanliness (NI 195) shows that we are currently exceeding our targets in all measures (litter, detritus, graffiti and fly posting). This is an indication of the effectiveness of new contract arrangements. A further 2 surveys are planned, which will capture any seasonal variations.
- 7.9 The percentage of abandoned vehicles removed within 24 hours (BV218b) is 10% above the target at 90%. There has been a significant reduction in the numbers of abandoned vehicles due to an increase in scrap values. If this trend continues it may no longer be cost effective to deliver a 24 hour response time. Vehicle collections may need to be batched.

Quality homes people can afford

- 7.10 This area has been subject to a recent BPR review. The average time to re-let council properties (BV212) is currently 22 days, a slight increase on quarter 1, but within the target of 25 days.

- 7.11 The proportion of planned to responsive repairs to council properties (LPI 43) has decreased slightly to 87% since quarter 1, but this is still 14% above the target. The proportion of urgent to non urgent repairs is 11% (LPI 44), which is also above target.
- 7.12 The new NI 157 for planning applications, though similar, is not exactly the same as the old BVPI 109 a to c. There are clear linkages, and that is why a direction of travel and comparison to target analysis is possible. All types of application (major large scale, major small scale, minor development and other) continue to show a positive direction of travel, with major applications currently on target. However the number of planning applications being received is down and there is a fall in planning application income.
- 7.13 The percentage of planning decisions determined as delegated items is currently 88.2% (88 out of a total of 746 decisions were not delegated). This is slightly below the target, but within acceptable bounds. No further action is required.
- 7.14 With regard to BV 63, the current SAP rating (Standard Assessment Procedure – an index of the annual cost of heating a dwelling) of council properties is 64 and the target is 66. It is anticipated that the heat pump contract will result in the SAP rating increasing to 65 by the end of the financial year, but it is unlikely that the target will be met. Strategy Committee have approved a reallocation of £230K of the current year's capital programme into this to help with fuel poverty issues and improve performance against this target.
- 7.15 14 private sector affordable rent agreements have been secured so far this year (LPI 15) and this indicator is currently on target. Also, 5 private dwellings have been returned to occupation through improved use of grant aid (BV64).
- 7.16 LPI 6, the number of private sector homes improved to meet the decent homes standard, is not a key indicator but has been reported as an exception this quarter. 7 homes have been improved to date against the target of 40. A change to the improvement grant / loan policy was approved in September, so this will help to improve the take up, but there will be a time lag. The current economic situation may also slow the take up.
- 7.17 192 new homes (net) have been built in the Babergh area since 1 April 2008 (NI 154). This is 40% above the target mid-way through the financial year. The end of year target is expected to be reached, even taking into account seasonal variations.
- 7.18 The Affordable Housing Programme continues to progress well. 83 new affordable units have been completed since the start of this financial year (NI 155) and 755 new units have been added to the affordable housing delivery pipeline since 1 April 2004. The five-year target of 700 has already been exceeded and a new target will be used from 1 April 2009.
- 7.19 There have been 40 homelessness presentations so far this year (LPI 42). This is lower than expected (the estimate for the whole year is 130), but it is anticipated that homelessness levels will continue to rise due to the instability of the economic markets. Indeed, the Homelessness Team has prevented 46 households from becoming homeless so far this year, through early intervention (BV213). Two homelessness posts have been filled recently and officers will continue to monitor the situation and present a report setting out the position if indicators do show signs of deterioration.

Vibrant places and strong communities

- 7.20 LPI 18, the percentage of telephone calls answered where the enquiry is resolved at the point of contact, has been split by service area to allow for a more detailed scrutiny. The overall rate is currently 84.4%, which is above the target and an improvement on quarter 1. The response rates for calls relating to Money Matters, planning and general enquiries are all above target. Housing calls stand at 78.8% which, although below target, represents an improvement of 5% since last quarter. This increase is due to improved filtering of calls to officers working in the back office or off site. No further action is required at this stage.
- 7.21 Non-domestic rates collected (BV10) is down 0.8% compared with the same period last year, and the projected outturn is slightly below target. The shortfall is due to rate payers not paying, or resisting paying, the new unoccupied property charge introduced on 1 April 2008 (300 properties have liability for first time). The credit crunch may also be having an effect on collection rates.
- 7.22 16 homes have been adapted to meet the needs of older or disabled people (LPI 9) since the start of the year. Although this is slightly down on the position at Q2 last year (18 homes), the indicator is currently on target. However because there are concerns that available funding may limit numbers, this indicator has been treated as one with a deteriorating direction of travel. Additional funding has been requested from Government.

A safer and healthier Babergh

- 7.23 Many of the remaining indicators that are monitored under this priority are new NIs that will be collected via the Place Survey. The questionnaires for this survey were sent to a sample of Babergh residents in September and the results are expected to be finalised in February 2009.
- 7.24 A set of key performance indicators has recently been agreed with South Suffolk Leisure and data collection started at the beginning of October. Some of these could be added to the basket of KPIs and incorporated into this quarterly performance monitoring report. Further information will be included in a report to O&S (CS) in November (Developing Babergh's Monitoring Framework for South Suffolk Leisure).

A strong and sustainable Babergh economy

- 7.25 All of the indicators that are monitored under this priority are new NIs or LPIs for which we currently have little data. The majority are reported by other organisations, and so the data will not be available until the end of the financial year. The medium-term action plans are currently being prepared and are looking at the effects of the economic downturn, so no further action is required by the Overview and Scrutiny Committees at this time.

How we will deliver (enabling measures) - Indicators listed here are overarching and do not sit under one priority.

- 7.26 The Council has self-assessed at Level 2 of the Local Government Equality Standard (BV2a), thus meeting the target for this year. This follows the adoption of a new Equalities Policy and a new Single Equality Scheme and Action Plan, and the completion and publication of a programme of Equality Impact Assessments for all council services. All of the above has is funded through existing budgets, but a bid for additional funding to support progress to Level 3 has been submitted through the SFP process.
- 7.27 Estimated cashable efficiency savings of nearly £800K for 2008/09 have been submitted to the Government (for the purposes of NI 179), around half of which relates to 'excess' savings in the previous three-year period – the total is well in excess of the Government's 3% cashable efficiencies target of around £420K for Babergh for the year.

8. **NEXT STEPS**

- 8.1 Performance indicators and the financial information are showing good performance in the majority of areas. However we are all aware of the economic downturn and the State of the District Debate highlighted areas of particular concern. This has been taken into account in considering the next steps to ensure we are preparing for the future.

Land charges

- 8.2 Land charge income has fallen significantly. A report will be presented setting out the position and detailing any steps that can be or are being taken to manage this issue.

Abandoned vehicles

- 8.3 There has been a significant reduction in the numbers of abandoned vehicles due to an increase in scrap values. If this trend continues it may no longer be cost effective to deliver a 24-hour response time. Consideration will be given to whether vehicle collections should be batched.

Planning applications

- 8.4 The determination of both large and small-scale major applications against both the national and local targets remains ahead of target. The determination of minor applications against the relevant indicators continues to be a source of concern. Measures have however been put in place to monitor these applications, including the regular review of cases, progress chasing and the early completion of legal agreements if required. Performance on other applications is broadly in line with the national target. The use of the same measures employed to secure improved performance on applications in the minor category should see improvement towards the achievement of the stretched target for cases in the other category by the end of the year.
- 8.5 The economic downturn has seen a significant fall in the number of planning applications being received, and hence a fall in income. A report will be presented setting out the position on all the above planning matters and detailing any steps that are being taken to manage this issue.

The % of Non Domestic Rates collected in the year

- 8.6 Current performance (61.26%) is slightly below target. This is due to unoccupied properties now being liable due to recent legislative changes. Although insolvency levels have not changed, it is felt that the credit crunch is starting to have to impact. Some ratepayers have requested to defer payments, but they have had to be refused. Officers continue to monitor and work together to resolve these situations within the Council's policy framework and a report will be presented setting out the position and detailing any steps that can be or are being taken to manage this issue.

Number of private sector homes improved to meet the decent homes standard

- 8.7 So far this year 7 homes have been improved against the target of 40. The change to the improvement grant / loan policy made in September might help to improve take up. A report will be presented setting out the position and detailing any steps that can be or are being taken to manage this issue.

Homes adapted to meet the needs of older or disabled people

- 8.8 As set out in paragraph 7.22, because there are concerns that available funding may limit numbers, this indicator has been treated as one with a deteriorating direction of travel. Additional funding has been requested from Government. A report will be presented setting out the position and detailing any steps that can be or are being taken to manage this situation.

9. APPENDICES

Appendix A – Quarter 2 key budget areas – General Fund
Appendix B – Quarter 2 key budget areas – capital programme
Appendix C – Quarter 2 key budget areas – HRA (Council Housing)
Appendix D – Quarter 2 basket of Key Performance Indicators (KPIs)
Appendix E – Quarter 2 performance exceptions

10. BACKGROUND PAPERS REFERRED TO:

None.

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Key Budget Areas - General Fund

Appendix A

General Fund	HoS	Lead Manager	2007-08 Outturn	2008-09 Budget	2007-08 Cfwd	2008-09 Budget Inc cfwd	Q 1	Q 2	Potential outturn variation
Key income Streams			£'000	£'000	£'000	£'000	£'000	£'000	£'000
Investment Income	BH	HJ	-693	-530	0	-530	-95	-202	-100
Land Charges income	AH	CR	-269	-292	0	-292	-53	-91	110
HB/CTB	BS	AW	-557	-490	0	-490	-123	-245	-15
Council Tax summons costs income	BS	AW	-95	-85	0	-85	-31	-43	0
Industrial / Starter Units rent income	CF	NH	-59	-52	0	-52	-17	-31	-6
Planning Fees	MF	NW	-395	-454	0	-454	-107	-169	110
Building Control Fees	MF	GS	-364	-419	0	-419	-218	-327	0
SCC contribution(Twin Bin scheme - Green waste -Recycling Strategy)	MF	PG	-630	-475	0	-575	0	-155	-88
Trade Waste Fees	MF	PG	-354	-356	0	-356	-363	-363	-9
Green Waste Fees	MF	PG	-203	-200	0	-200	-201	-218	-20
Licensing Income	MF	JR	-139	-141	0	-141	-25	-61	-4
Other Income	RJ	RJ	-15	-30	0	-30	-3	-28	-42
			-3,773	-3,524	0	-3,524	-1,236	-1,933	-64
Key Expenditures									
Salaries (net of savings contingency - £251k)	ALL	All	8,806	9,360	0	9,360	2,531	4,802	-150
ICT (Business Unit) Supplies & Services costs	AH	RL	298	351	6	357	213	251	0
Corporate Training	AH	JB	40	35	35	70	25	25	0
Recruitment Costs	AH	JB	32	80	20	100	12	20	-10
Specialist Legal Expenses	AH	KS	25	12		12	3	43	48
Specialist Legal Expenses (Dev Control)	AH/MF	KS	25	12	46	58	3	16	-22
Training Costs within other Business Units/Services (Excluding Corp Training)	All	All	124	142	36	178	34	65	-30
Borrowing costs	BH	HJ	41	113	0	113	0	13	-70
Concessionary Fares - payment to SCC	BS	DW	774	900	120	1,020	175	291	-200
Business Rates	BS	AW	191	204	0	204	62	124	3
Discretionary Rate Relief	BS	AW	109	114	0	114	29	57	-14

Key Budget Areas - General Fund

General Fund	HoS	Lead Manager	2007-08 Outturn	2008-09 Budget	2007-08 Cfwd	2008-09 Budget Inc cfwd	Q 1	Q 2	Potential outturn variation
Economic Development (excluding Rents)	CF	NH	79	72	6	78	7	9	0
Leisure Promotion / Sports & Recreation Grants	CF	PL	24	22	0	22	4	18	0
Central Grants Pot (Revenue)	CF	NH	0	427	17	444	125	192	0
Kingfisher Leisure Pool Repairs & Maintenance	RJ	PL	18	22	5	27	10	12	0
Hadleigh Pool Repairs & Maintenance	RJ	RJ/PL	5	40	45	85	0	4	-55
Planning Policy / LDF	MF	RC	45	30	94	124	15	36	0
Waste Contract	RJ	PG	1,480	1,572	0	1,572	242	605	0
Grounds Maintenance Contract	RJ	RJ	596	605	0	605	123	238	59
Street Cleansing Contract	RJ	RJ	475	495	0	495	119	158	-6
Energy Costs	RJ	RJ	246	245	0	245	50	112	20
CAST	BS	BS	160	196	87	283	TBC	TBC	-77
			13,593	15,049	516	15,565	3,782	7,091	-504

Key Budget Areas - Capital

	HoS	Lead Manager	2008-09 Budget	2007-08 Cfwd	2008-09 Budget Inc cfwd	Potential outturn variation
Capital Programme			£'000	£'000	£'000	£'000
Total Contract & Asset Management	RJ	RJ	431	61	492	-32
Total ICT	AH	RL	823	110	933	68
Total Community Development	RJ/CF	RJ/CF	1,454		1,454	-1,000
Total Others	MF/CF	JK/ IT	859	33	892	-270
					0	
Total General Fund Programme	RJ	RJ	3,567	204	3,771	-1,234
Total Council Housing Programme	RJ	RJ	3,136	581	3,717	-110

Key Budget Areas - HRA

	HoS	Lead Manager	2007-08 Outturn	2008-09 Budget	2007-08 Cfwd	2008-09 Budget Inc cfwd	Q 1	Q 2	Potential outturn variation
HRA			£'000	£'000	£'000	£'000	£'000	£'000	£'000
Rents/ Charges / voids etc	CF	IT/DC	-11,784	-12,183	0	-12,183	-2,759	-6,311	-78
Tenancy changes (Voids)	RJ	IT/GF	344	348	0	348	56	136	0
Repair Request from tenants	CF/RJ	RJ	858	838	11	849	148	360	0
Painting and Pre-paint repairs	CF/RJ	RJ	216	329	151	480	61	125	-88
Sheltered Scheme Salaries (re single status review)	CF	IT/DC	233	231	0	231	65	119	9
Energy costs - Budget and actuals included in GF energy costs									54
Babergh Response (new contract)	CF	IT/DC	27	30	0	30	9	9	0
Total			-10,106	-10,407	162	-10,245	-2,420	-5,562	-103

Key Performance Indicator basket

Priority	Division	PI	BVPI Description	2006/07				2007/08		Current Year - 2008/09				Comments
				Actual 2006/07	2006/07 Babergh Quartile [SPARSE]	2006/07 Babergh Quartile [Districts]	2006/07 District Council Top Quartile	Target 2007/08	Actual 2007/08	Target 2008/09	Q2 Actual 2008/09	Actual v Target	Direction of Travel	
A greener and cleaner Babergh														
A greener and cleaner Babergh	Natural and Built Environment	NI 192 (formerly BV82ai + BV82bi)	The % of total tonnage of waste arising which has been recycled The % of total tonnage of waste arising which has been sent for composting	82ai = 28.63% 82bi = 7.83%	82ai = TQ 82bi = 3Q	82ai = TQ 82bi = 3Q	82ai = 24.19% 82bi = 17.97%	42% [32% Recycled; 10% Composted]	39.2% [30.60% Recycled; 8.62% Composted]	40%	40.98% [28.04% Recycled; 12.94% Composted]	↑	↑	This equates to a total waste figure of 17187.17 tonnes. Of this 4819.74 tonnes (28.04%) has been recycled and 2223.50 tonnes (12.94%) has been composted. There has been an increase in the amount of garden waste composted.
A greener and cleaner Babergh	Natural and Built Environment	BV 84a	Number of kilograms of household waste collected per head	404.4kg	2nd Q	2nd Q	380.8kg	409kg	387.7kg	390kg	197.85kg	↓	↓	Slight increase over the quarter 2 figure for 2007/08. May not meet the target. The increase is due to more garden waste being collected per head of population. Whilst this has had a negative impact on this performance indicator, it has contributed to the improved direction of travel for NI 192.
A greener and cleaner Babergh	Natural and Built Environment	NI 195 (formerly 199a/b/c)	Proportion that falls below acceptable level: a) Litter b) Detritus c) Graffiti d) Fly posting	19% litter and detritus	no comparison data	BQ litter and detritus	6% litter and detritus	12% litter and detritus	15% litter and detritus	5% litter 29% detritus	0% litter 14% detritus	↑	↑	Expect to meet the target. Only 1 tranche completed so far (This Indicator works on a 3 tranche basis, rather than a quarterly basis). HoS comment: Indication of effectiveness of new contract arrangements. However there are strong seasonal variations.
A greener and cleaner Babergh	Natural and Built Environment	BV 218b	% of abandoned vehicles removed within 24 hours	80%	no comparison data	3rd Q	97.76%	80%	80%	80%	90%	↑	↑	9 out of the 10 vehicles removed were removed within 24 hours of Notice expiration. Expect to meet target. HoS Comment: Significant downturn in numbers of abandoned vehicles. This makes a 24hr response less efficient across a large rural district - it is better to batch up collections.
A greener and cleaner Babergh	Natural and Built Environment	New LPI	% Trade waste recycled or composted							15%	1%	↓	Not available	Additional collection vehicle needed. May not be available until 2009/10 (SFP). HoS comment: Early indication of a significant market - however will require capital investment to achieve success.
Quality homes local people can afford														
Quality homes local people can afford	Community Development	LPI 41	The cumulative total number of affordable units of accommodation in the affordable housing programme between 2004 and 2009: (a) completed units (b) total number of units in the affordable housing delivery pipeline	No data				700 in the affordable housing delivery pipeline by 31st March 2009	(a) = 304 (b) = 737	700 in the affordable housing delivery pipeline by 31st March 2009	(a) = 386 (b) = 755	↑	↑	The number of units under construction has fallen this quarter, as units that were expected to be built are now on hold due to the financial crisis. 83 new affordable units have been completed since the start of this financial year (NI 155) NB. The target relates to LPI 41b and has already been exceeded. This includes the total number of completed units, units in development and units with planning permission since 1 April 2004. A new target will be introduced in 2009/10. There is currently no target for completed units only, as the Council has limited control over this.
Quality homes local people can afford	Community Development	LPI 42	The number of formal homelessness presentations	63				[80] Contextual estimate	79	[130] Contextual estimate	40	Contextual	Contextual	The estimated number of formal homelessness presentations for the whole year is 80. This contextual indicator is currently showing lower homelessness levels than expected. However, evidence from other local authorities within the Eastern Region suggests that homelessness levels are set to rise due to a number of factors, but particularly the instability with the economic markets. Repossessions are expected to rise significantly and this will also impact on the private rented market. Officers will continue to monitor and report any upward trends.
Quality homes local people can afford	Community Development	BV 212	Average time to relet local authority housing	47 days	no comparison data	BQ	25 days	35 days	38 days	25 days	22 days	↑	↑	The average void period for properties let during the period 1 April to 30 September 2008 is 22 days. This includes general needs, sheltered and homeless properties. 81 of the 116 properties (70%) met the target of 25 days.
Quality homes local people can afford	Contract and Asset Management	NI 158	% non decent council homes	12%	no comparison data	2nd Q	10%	8%	11%	4%	9%	↑	↑	320 non-decent properties out of a total stock of 3525.
Quality homes local people can afford	Contract and Asset Management	BV 63	Energy efficiency of local housing stock	63	no comparison data	BQ	72	65	64	66	64	↓	↔	No change from 2007/08. Expect to reach 65 by the end of the year. HoS Comment: Anticipated change in final quarter when heat pumps contract is underway.
Quality homes local people can afford	Contract and Asset Management	LPI 43	Local authority housing - repairs and maintenance service - proportion of planned repairs to responsive maintenance	81%				70%	78%	73%	87%	↑	↑	Performance is currently exceeding the target.
Quality homes local people can afford	Contract and Asset Management	LPI 44 (formerly BV211a)	Local authority housing - repairs and maintenance - proportion of urgent repairs to non-urgent repairs	20%				15%	16%	15%	11%	↑	↑	Data gathering has improved for this PI. Definition for BV211a being used for the calculation of this indicator.

Priority	Division	PI	BVPI Description	2006/07				2007/08		Current Year - 2008/09				Comments
				Actual 2006/07	2006/07 Babergh Quartile [SPARSE]	2006/07 Babergh Quartile [Districts]	2006/07 District Council Top Quartile	Target 2007/08	Actual 2007/08	Target 2008/09	Q2 Actual 2008/09	Actual v Target	Direction of Travel	
Quality homes local people can afford	Natural and Built Environment	NI 157 (Based on 109a to c but not directly comparable)	Processing of planning applications as measured against targets of:											<p>These percentages equate to the following number of applications: Large scale major = 4 out of 4 [these are proposed developments in excess of 99 properties] Small scale major = 26 out of 35 [developments of 9 to 99 properties] Minor = 98 out of 162 Other = 440 out of 545</p> <p>The 2008/09 targets are stretched local targets and have been set at 7% above the Government's recommended levels. Performance against the national target for the determination of minor applications is showing modest signs of improvement. H of S Comment: Q1 and Q2 show impact of national validation process that came into effect on 7 April and consequent backlog of applications. Procedural changes and intensive effort by staff is now showing a positive direction of travel. Q3 will demonstrate how successful these measures have been.</p>
			Large scale major applications	109a = 61.76%	109a = BQ	109a = BQ	109a = 80.71%	109a = 65%	109a = 71%	Major = 60% Stretched Major (combined) = 67%	Large scale major = 100%	↓ (Except major)	↑	
			Small scale major applications							Minor = 65% Stretched Minor = 72%	Small scale major = 74.29%			
			Minor applications	109b = 59.66%	109b = BQ	109b = BQ	109b = 83.66%	109b = 75%	109b = 57%	Other = 80% Stretched Other = 87%	Minor = 60.49%			
Other applications	109c = 76.70%	109c = BQ	109c = BQ	109c = 92.57%	109c = 85%	109c = 75.59%		Other = 80.73%						
Quality homes local people can afford	Natural and Built Environment	NI 154	Net additional homes provided	No data				N/A	N/A	285 additional homes p/a	192	↑	Not available	HoS Comment. Very good performance at almost 40% above delivery of 140 units required for 1st & 2nd quarters, (but may reflect seasonal considerations) (280 is actually annual requirement, 285 refers to LAA target)
Quality homes local people can afford	Natural and Built Environment	New LPI based on BV 64	Private dwellings returned to occupation	5	no comparison data	3rd Q	55	12	0	12	5	↑	↑	5 properties have been returned to occupation so far this financial year. The figure for this quarter reflects properties improved with grant aid. Babergh has written to the owners of all properties that have been empty for 6 months or more (400 properties) outlining the options available to return them to use.
Quality homes local people can afford	Natural and Built Environment	LPI 15	Number of affordable rent agreements secured	11				15	5	30	14	↑	↑	Private sector leasing scheme only launched at end of June so this figure really represents 3 months. 14 families housed from our housing needs register at no capital cost to Council. Likely to meet the target. HoS Comment: Limiting factor may be the number of individuals on the Housing Needs Register who prefer to wait for a Council property rather than occupy a private one under the Private Sector Leasing Scheme.
Quality homes local people can afford	Natural and Built Environment	New LPI	% of planning decisions determined as delegated items	86.0%				No target set	91%	90%	88.20%	↓	↓	The percentage equates to the following totals: 658 delegated items and 746 total applications. HoS Comment: The number of delegated decisions as a % of all decisions has shown a very modest reduction but it is still within acceptable bounds.
Vibrant places and strong communities														
Vibrant places and strong communities	Natural and Built Environment	LPI 9	Number of homes adapted to meet the needs of older people or disabled people	28				29	30	30	16	↑	↓	On target although funding may limit numbers. Likely to meet target. Current performance slightly down on quarter 2 07/08 figure of 18. HoS Comment: Increased maximum grant for Disabled Facilities Grants and changes in Means Test rules has resulted in increased budget for these grants. Additional funding requested from Government.
Vibrant places and strong communities	Customer Services	LPI 18	Percentage of telephone calls answered where enquiry is resolved at point of contact:-											<p>Higher level of performance is being maintained. Car park enquiries following receipt of Excess Charge Notices accounted for a significant number of calls during the latter part of this quarter. HoS Comment: The increase in car park enquiries reflects the changes made to car parking in Sudbury. That is not unexpected and should stabilise in the 3rd quarter.</p> <p>Continue to have back office phones diverted to the team, which has had effect on overall performance. But now managing the situation and starting to see an increase in the resolution rate this quarter. HoS comment: Call resolution is recovering as officers gain more experience in filtering call to officers working in the back office or off site.</p> <p>Depth of knowledge of front office staff has increased and calls are handled more effectively. Increase in resolution rate improved as a result. HoS comment: Call resolution is recovering as officers gain more experience in filtering call to officers working in the back office or off site.</p> <p>Continued high performance on resolution, even though new starters and training being undertaken. Staff commencing cross skilling on back office duties. Good Team management has ensured that service levels have been maintained throughout the transitional period. HoS comment: Staff turnover is stretching the team at times. Moving resources between front facing and back office duties has minimised the impact. Cross skilling programme will aid that process.</p> <p>All Teams have benefited from refresher training in the application of Wrap Codes to ensure consistent use of the codes, in preparation for individual Wrap Codes per Team to be introduced mid October. Consequently confidence in the consistency across the teams has increased. Trend: Performance is improving or being sustained across the 4 service areas. HoS Comment: The introduction of more detailed wrap codes will increase the depth of information on call traffic.</p>
			(a) General enquiries	No data				n/a	80.98%	81%	88.75%	↑	↑	
			(b) Housing enquiries	No data				n/a	91.05%	91%	78.81%	↓	↓	
			(c) Planning enquiries	No data				n/a	76.48%	75%	75.02%	↑	↓	
			(d) Money Matters	No data				n/a	90.88%	91%	95.03%	↑	↑	
(e) Overall	No data					60%	81%	80%	84.40%	↑	↑			

Priority	Division	PI	BVPI Description	2006/07			2007/08		Current Year - 2008/09					
				Actual 2006/07	2006/07 Babergh Quartile [SPARSE]	2006/07 Babergh Quartile [Districts]	2006/07 District Council Top Quartile	Target 2007/08	Actual 2007/08	Target 2008/09	Q2 Actual 2008/09	Actual v Target	Direction of Travel	Comments
Vibrant places and strong communities	Customer Services	LPI 80	Customer satisfaction - telephone service	No data				To establish baseline	98%	98%	90%	↑	↑	Insufficient size of sample to draw any meaningful conclusions. Sampling is undertaken by identifying customers willing to participate in a survey and an independent officer calling them back. When call backs are made some customers no longer wish to participate, some prove difficult to contact. Trend: Customer satisfaction remains at a high level. HoS comment: Alternative sampling methodologies will be considered and trialled during Q3 to avoid a reoccurrence of the problem. Having reviewed the feedback from the latest survey I do not believe customer satisfaction has declined. Comments captured are all positive. Residents who were feeding back a degree of dissatisfaction nevertheless felt the service given was better than other organisations.
Vibrant places and strong communities	Customer Services	BV 10	The % of Non Domestic Rates collected in the year	98.89%	3rd Q	3rd Q	99.36%	99%	99.05%	99.2%	61.26%	↓	↓	Projected outturn 1.42% down on target (£280,000). 0.81% down on Q2 for 2007/08. Shortfall is due to the number of ratepayers not paying or resisting payment of unoccupied property rates following legislative changes effective from the 1/4/08. 300 properties have liability for the first time. New assessments coming into the list have also increased debit (one alone raised £58k for 2008/09). Trend: Possibility that the "credit crunch" is having some impact is beginning to emerge. Although insolvency appears to be unchanged (12 cases to date compared with 23 in total for 2007), requests to defer payment pending an known upturn in in the business have been received and refused. Ratepayers struggling to let or sell unoccupied premises are looking at radical options to relieve themselves of that liability. Officers are monitoring and working together to resolve those situations within the Council's policy framework.
How we will deliver (enabling measures)														
How we will deliver (enabling measures)	Contract and Asset Management	LPI 12a	% of capital expenditure achieved on the Housing Revenue Account	101%				97%	81%	97%	44%	↑	↑	No areas of concern, a slight increase over same period last year (36%) Expect to meet the target.
How we will deliver (enabling measures)	Corporate Services	BV 2a	The level of the Equality Standard for Local Government to which the authority conforms	1	no comparison data	n/a	n/a	level 2	level 1	level 2	level 2	↑	↑	The following work has been completed in 2007/08 and the first two quarters of this year: A new Equalities Policy, a new Single Equality Scheme and Action Plan, and a programme of Equality Impact Assessments have been completed. We are now in a position to self-assess under the Local Government Equality Standard as Level 2.
How we will deliver (enabling measures)	Finance	NI 179	Value for Money – total net value of ongoing cash-releasing value for money gains that have impacted since the start of the 2008/09 financial year	N/A				N/A	N/A	£400,000	See comment	N/A	N/A	Estimated cashable efficiency savings of nearly £800K for 2008/09 have been submitted to the Government (for the purposes of NI 179), around half of which relates to 'excess' savings in the previous three-year period – the total is well in excess of the Government's 3% cashable efficiencies target of around £420K for Babergh for the year.

CORPORATE PLAN MONITORING - 2008/09
 Exceptions Quarter 2

Priority	Division	PI	BVPI Description	2006/07			2007/08		Current Year - 2008/09					
				Actual 2006/07	2006/07 Babergh Quartile [SPARSE]	2006/07 Babergh Quartile [Districts]	2006/07 District Council Top Quartile	Target 2007/08	Actual 2007/08	Target 2008/09	Q2 Actual 2008/09	Actual v Target	Direction of Travel	Comments
Quality homes local people can afford	Natural and Built Environment	LPI 6	No. of homes (private sector) improved to meet the decent homes standard					15	27	40	7	↓	↓	Change in Grant/loan policy approved in September to encourage take up of finance to address non decent homes. Unlikely to meet annual target or exceed last years figure. HoS comment: Change in policy should enable improved take up of finance but inevitable lead in time will delay improved figures for this indicator. Economic situation may well reduce activity.