

Well-being Objective Setting Examination – Monmouthshire County Council

Audit year: 2022-23

Date issued: August 2023

Document reference: 3723A2023

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Background: Our examinations of the setting of well-being objectives

- 1 The Well-being of Future Generations (Wales) Act 2015 (the Act) places a ‘well-being duty’ on 48 public bodies. The duty requires those bodies to set and publish ‘well-being objectives’ that are designed to maximise their contribution to achieving each of the Act’s seven national well-being goals¹. They must also take all reasonable steps, in exercising their functions, to meet those objectives.
- 2 The Auditor General must carry out examinations to assess the extent to which public bodies have acted in accordance with the sustainable development principle when setting their well-being objectives². We are carrying out a rolling programme of these examinations, up to early 2025³.
- 3 To do something in accordance with the sustainable development principle means acting ‘in a manner which seeks to ensure that the needs of the present are met without compromising the ability of future generations to meet their own needs’. To achieve this, a public body must take account of the five ways of working: long term, integration, involvement, collaboration, and prevention⁴.
- 4 We designed an assessment framework to enable us to assess the extent to which public bodies have applied the sustainable development principle when setting their well-being objectives. **Appendix 1** sets out further information on our approach, including a set of ‘positive indicators’ that illustrate what good could look like.
- 5 In designing our approach, we considered what we could reasonably expect from public bodies at this point in time. Public bodies should now be familiar with the sustainable development principle and ways of working and be seeking to apply them in a meaningful way. At the same time, we appreciate that public bodies are still developing their experience in applying the sustainable development principle when setting well-being objectives. Therefore, the examinations include consideration of how public bodies are applying their learning and how they can improve in future.

¹ The seven national well-being goals are: a prosperous Wales, a resilient Wales, a healthier Wales, a more equal Wales, a Wales of cohesive communities, a Wales of vibrant culture and thriving Welsh language, and a globally responsible Wales.

² Section 15 (1) (a) Well-being of Future Generations (Wales) Act 2015

³ The Auditor General must carry out examinations over the period set out in the Act, which begins one year before a Senedd election and ends one year and one day before the following Senedd election.

⁴ Section 5 Well-being of Future Generations (Wales) Act 2015

Carrying out our examination at Monmouthshire County Council

- 6 The aim of this examination was to:
 - explain how the Council applied the sustainable development principle at key points in the process of setting its well-being objectives;
 - provide assurance on the extent that the Council applied the sustainable development principle when setting its well-being objectives; and
 - identify opportunities for the Council to further embed the sustainable development principle when setting well-being objectives in future.
- 7 We set out to answer the overall question ‘to what extent has the Council acted in accordance with the sustainable development principle when setting its new well-being objectives’. We did this by exploring the following questions:
 - Was the process the Council put in place to set its well-being objectives underpinned by the sustainable development principle?
 - Has the Council considered how it will make sure it can deliver its well-being objectives in line with the sustainable development principle?
 - Has the Council put in place arrangements to monitor progress and improve how it applies the sustainable development principle when setting its well-being objectives?
- 8 We discussed the timing of the examination with the Council and we tailored the delivery to reflect its specific circumstances.
- 9 We gathered our evidence in the following ways:
 - reviewing key documents; and
 - running a workshop with key people who were involved with setting the well-being objectives.

How and when the Council set its well-being objectives

- 10 The Council commenced work on setting new well-being objectives during 2022 and the new objectives were approved by full Council in April 2023. **Exhibit 1** sets out those well-being objectives.
- 11 The Council published its well-being objectives as part of its Community and Corporate Plan, which included its well-being statement that is required under the Act. The [Community and Corporate Plan](#) can be viewed on the Council’s website.

Exhibit 1: Well-being Objective Setting Examination

A fair place to live where the effects of inequality and poverty have been reduced.

A green place to live and work, with reduced carbon emissions, and making a positive contribution to addressing the climate and nature emergency.

A thriving and ambitious place, where there are vibrant town centres, where businesses can grow and develop.

A safe place to live where people have a home and community where they feel secure.

A connected place where people feel part of a community and are valued.

A learning place where everybody has the opportunity to reach their potential.

What we found

The Council has set its well-being objectives in accordance with the sustainable development principle and is aligning its key strategies and business plans to support their delivery, but it could further strengthen its approach by increasing the diversity of citizen involvement in future

Findings

- 12 We found that the process the Council put in place to set its well-being objectives was underpinned by the sustainable development principle. The Council's well-being objectives are informed by a good understanding of current and future needs, risks and opportunities drawn from a wide range of data sources. However, cabinet members expressed frustration at a lack of national disaggregated data that would provide further insight into inequality amongst different groups of people. Members should work with officers to establish what further data they require and whether this can be acquired.

- 13 The Council also drew on data from existing engagement activity, including views gathered during the 2022 local government election process and consultation for the Public Services Board's (PSB) well-being assessment, to understand what was important for citizens. To build on the data and develop the well-being objectives, the Council then held a series of workshops involving a range of stakeholders. Following the workshops, the Council also sought the views of some service users. For example, visiting schools to get pupils' views on areas of discussion at the education and learning themed workshop.
- 14 But it is not clear from the documentation we saw to what extent the Council considered whether the secondary engagement data was representative of the full population and covered the necessary breadth of issues. Nor if subsequent engagement at workshops and with service users widened the diversity of involvement in the well-being setting process. The Council acknowledges that it needs to do more to increase the diversity of people involved, but it should also consider how it can evidence this. For example, by documenting its consideration of the completeness of engagement activity, how that engagement has helped shape the well-being objectives, and identifying those sections of the population where further work is needed.
- 15 Whilst the well-being objectives are set in the context of a Five-year Plan, the Council recognises the need to look beyond political cycles and the objectives are designed to improve Monmouthshire over the longer term.
- 16 The well-being objectives are cross-cutting in nature and are designed to drive activity across the organisation. The commitments underlying the objectives are also interconnected. This integrated approach encourages shared ownership of the objectives and requires directorates to work together to deliver them.
- 17 There is a high-level understanding of how the well-being objectives relate to what other public bodies are seeking to achieve and of further opportunities to work together. For example, the Council developed its objectives so that they align with and help contribute to the Gwent PSB draft well-being objectives. PSB partners will need to collaborate to deliver the region's collective aims. At the time of writing, the Gwent PSB had not yet published its well-being plan, but the shared focus and policy framework it provides should strengthen the opportunity for collaborative working and learning. A local delivery group is in place to develop and coordinate actions towards cross-cutting objectives in Monmouthshire.
- 18 The Council's well-being objectives also align with the national well-being goals and the 'Marmot Principles', a set of guiding principles that form a framework for reducing health inequalities, which the Gwent PSB and its member bodies have adopted. Understanding and tackling the root causes of inequality are fundamental to the Marmot Principles. This commitment to early intervention and prevention is reflected in the Community and Corporate Plan, with a range of actions designed to address short-term need whilst also seeking to prevent future issues. For example, actions related to supporting pupils from low-income families to achieve

their full potential. The 2023-24 budget also includes examples of the Council funding preventative services.

- 19 Although Cabinet sought to develop its Community and Corporate Plan and 2023-24 budget in tandem, delays securing Council's approval of the Plan meant the Medium Term Financial Plan (MTFP) and budget were set prior to adoption of its new well-being objectives. The Council is now reviewing its MTFP to ensure it aligns to the commitments set out in the Community and Corporate Plan. Work is also underway to update supporting strategies and service business plans to reflect and support delivery of the new objectives.
- 20 The Council recognises the challenges of delivering the Plan in the context of current economic uncertainty. Demand for services is increasing yet significant savings are needed over the term of the MTFP – this will impact on the resources the Council has available to deliver its well-being objectives. Budget monitoring reports and updates to the MTFP should consider the ongoing impact of the Council's financial position on the well-being objectives so the Council can prioritise its resources accordingly.
- 21 The Council has a range of measures and milestones to monitor progress against its Community and Corporate Plan. The measurement framework which accompanies the Plan includes baseline data and medium-term targets and interim targets are currently in development. These interim targets will be incorporated into service business plans to allow the Council to track progress towards its medium-term targets. The actions in the Community and Corporate Plan currently lack timescales so it is not clear when the Council intends to complete these by. But we would expect further detail on timescales to be reflected in updated business plans.
- 22 Further work is planned to disaggregate some of the measures so that the Council can better understand impact on specific groups of people and target future actions appropriately. The framework also includes other measures which the Council does not directly influence, but which are linked to the objectives, eg healthy life expectancy. Monitoring these measures will provide insight into whether actions being taken by the Council and other bodies are having a broad and positive impact.
- 23 The Council has arrangements in place to monitor its corporate plan and well-being objectives through its annual self-assessment process and business plan monitoring. A Community and Corporate Plan dashboard enables this process. We will be undertaking work later this year to assess the effectiveness of the Council's business planning and performance management arrangements.
- 24 The Council has identified some areas where it could further strengthen the way it sets well-being objectives in future. For example, improving how it involves a greater diversity of the population and allowing additional time for some aspects of the process. The Council would benefit from documenting this learning so it can be used to inform future rounds of well-being objective setting.

Recommendations

Exhibit 2: recommendations

Building on progress to date

- R1 The Council should build on the progress it has made in applying the sustainable development principle in the setting of its well-being objectives by:
- drawing on the views of the full diversity of the population to inform the objectives and being able to demonstrate more clearly how stakeholder involvement has helped shape the well-being objectives;
 - completing work currently underway to align the MTFP, strategies and business plans to the Community and Corporate Plan so they support delivery of the well-being objectives; and
 - ensuring there is clarity about how savings targets and increased demand for services might affect the delivery of well-being objectives through regular budget monitoring reports and MTFP updates.

Appendix 1

Key questions and what we looked for

The table below sets out the question we sought to answer in carrying out this examination, along with some sub-questions to guide our evidence gathering. They are based on the positive indicators we have previously used in our sustainable development principle examinations, which were developed through engagement with public bodies and informed by advice and guidance from the Future Generations Commissioner for Wales. This list is not a checklist, but rather an illustrative set of characteristics that describe what good could look like.

Exhibit 3: key questions and what we looked for

To what extent has the body acted in accordance with the sustainable development principle when setting its new well-being objectives?

Planning: Was the process the body put in place to set its well-being objectives underpinned by the sustainable development principle?

<p>Has the body used data and other intelligence to understand need, risks and opportunities and how they might change over time?</p>	<ul style="list-style-type: none"> • The body has a clear and balanced assessment of progress against previous well-being objectives that has been used to inform the body's understanding of the 'as is'/ short-term need. • The body has set well-being objectives based on a good understanding of current and future need, risk and opportunities, including analysis of future trends. This is likely to be drawn from a range of local and national sources, such as: <ul style="list-style-type: none"> – Public Services Boards' well-being assessments – Regional Partnership Boards' population assessments – The results of local involvement/consultation exercises – Service monitoring and complaints – Future Trends report – Natural Resources Wales' State of Natural Resources Report (SoNaRR) for Wales and Area Based Assessments • The body has sought to understand the root causes of problems so that it can address negative cycles and intergenerational challenges through its well-being objectives.
<p>Has the body involved others in developing its well-being objectives?</p>	<ul style="list-style-type: none"> • The body uses the results of involvement to help select its well-being objectives. That involvement – whether primary, secondary or a combination – reflects the full diversity of the population. • Involvement reflects good practice and advice from the Future Generations Commissioner.
<p>Has the body considered how the objectives can improve well-being and have a broad impact?</p>	<ul style="list-style-type: none"> • The well-being objectives have been designed to improve well-being in the broadest sense and make a contribution across the seven national well-being goals. • The well-being objectives have been designed to reflect and capitalise on the connections between different areas of work. • There is a well-developed understanding of how the well-being objectives impact on/relate to what other public bodies are trying to achieve and opportunities to work together.

<p>Has the body designed the objectives to deliver longer-term benefits, balanced with meeting short-term needs?</p>	<ul style="list-style-type: none"> • The body has set objectives that are sufficiently ambitious and have been designed to drive activity across the organisation. • The objectives are designed to meet short and longer-term need. Where objectives are set over a short to medium timeframe, they are set in the context of longer-term considerations or ambitions.
<p>Resourcing and delivery: Has the body considered how it will make sure it can deliver its well-being objectives in line with the sustainable development principle?</p>	
<p>Has the body considered how it can resource the well-being objectives?</p>	<ul style="list-style-type: none"> • Resources have been allocated to ensure the objectives can be delivered over the short and medium-term, but the body has also considered longer-term resources, risks and/or how it can resource longer-term objectives. • The body has allocated resources to deliver preventative benefits, where these are described in its well-being objectives.
<p>Has the body considered how it can work with others to deliver their objectives?</p>	<ul style="list-style-type: none"> • The body is drawing on its knowledge of partners' objectives/activity, its relationships and collaborative arrangements to make sure it can deliver on cross-cutting ambitions.

Monitor and review: Has the body put in place arrangements to monitor progress and improve how it applies the sustainable development principle when setting its well-being objectives?

Has the body developed appropriate measures and monitoring arrangements?

- Performance measures are designed to reflect the sustainable development principle, eg by focusing on outcomes that cut across departmental/organisational boundaries and deliver multiple (including preventative) benefits over the longer term.
- There is a 'golden thread' that will allow the body to clearly and transparently report on progress to meeting the objectives.

Is the body seeking to learn from and improve how it has applied the sustainable development principle to setting its well-being objectives?

- The body shows self-awareness and a commitment to improving how it applies the sustainable development principle so that it can do so in a meaningful and impactful way.
- The body has learnt from setting previous well-being objectives and from applying the sustainable development principle more generally and has improved the process for setting its new well-being objectives.
- The body has or plans to reflect on how it has applied the sustainable development principle in this round of setting well-being objectives.



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