



monmouthshire  
sir fynwy

# Monmouthshire County Council Panel Performance Assessment (PPA)

February 2026



## 1.0 Introduction and Background

- 1.1 In accordance with the performance duties under the Local Government and Elections (Wales) Act 2021, Monmouthshire County Council (Cyngor Sir Fynwy) commissioned a Panel Performance Assessment (PPA) via the Welsh Local Government Association (WLGA).
- 1.2 The onsite assessment was completed over a four-day period concluding on 27<sup>th</sup> February 2026 with a feedback presentation provided to the Council outlining the key findings detailed within this report.
- 1.3 The assessment was undertaken based on the Council's agreed scoping document and the WLGA's PPA methodology, which was developed with the sector. The PPA methodology provides an overarching framework: the lines of enquiry are not prescriptive but provide guidance to the Panel on the areas that could be explored to meet the statutory duty. However, the extent to which the Panel explores those areas should be proportionate to the Council's scope but sufficient to enable the Panel to form a conclusion.
- 1.4 In accordance with the statutory guidance the PPA is not an audit or an inspection and does not seek to duplicate work undertaken by regulators and other bodies. Whilst the Panel has undertaken a corporate assessment, this assessment was not in-depth and should be considered alongside other sources of assurance such as the Council's own self-assessment, internal audit reviews, external audit, and regulatory reviews.
- 1.5 In preparing for the PPA, the Council scoped their requirements to maximise the value and impact of the assessment to the Council. The specific areas of focus identified by the Council are reflected in paragraph 3.2.
- 1.6 This report provides a summary overview of the conclusions of the Panel reported by exception.

## 2.0 Peer Team

- 2.1 The following Peers were commissioned by the WLGA to undertake the assessment. Selection of the Peers was agreed and at the discretion of the Council, based on suitability of skills and experience.
  - Independent Chair: Beverley (Bev) Smith, Former Chief Executive of Mansfield, Nottinghamshire and North West Leicestershire, former Chair of the Democracy and Boundary Commission Cymru and current Chair of the Local Boundary Commission for England.
  - Senior Member Peer: Cllr Darren Price, serving Councillor and former Leader of Carmarthenshire County Council.
  - Serving Local Government Senior Officer: Louise Davies, Director of Community Services, Rhondda Cynon Taf County Borough Council.
  - Peer from the wider public, private, voluntary sector: Chris Naylor, Consultant, Managing Director and former Chief Executive of the London Borough of Barking and Dagenham.

2.2 The Panel was supported by, Cerith Thomas, Senior Policy Officer (Improvement – Democratic Services) and Sarah Evans, Senior Support Officer (Improvement) from the WLGA's Improvement Team.

### 3. Scope and Approach

3.1 The Panel is required to assess the extent to which the Council:

- Is exercising its functions effectively.
- Is using its resources economically, efficiently, and effectively; and
- Has effective governance in place for securing the above.

3.2 The Council identified the following three areas where peer insight would be valued as part of the Panel assessment:

- **Area of local Focus 1** - How well does the Council align across directorates to optimise delivery of the priorities set out in the Community and Corporate Plan.
- **Area of local Focus 2** - What opportunities are there to further develop the Council's emerging person-centred and preventative approaches to working with its communities, local businesses and other stakeholders, (including Town & Community Councils).
- **Area of local Focus 3** - How well is the Council able to demonstrate the intended outcomes and emerging impacts of its Community and Corporate Plan and, how well does it communicate them to Councillors, residents and other stakeholders, including Town and Community Councils and local businesses.

3.3 To prepare for the onsite assessment, the Panel first conducted a desktop review of Council documentation, data, external reports, and other relevant intelligence. The Peers also participated in preliminary online meetings.

3.4 The desktop review also included analysis of recent staff and resident survey results, which provided valuable insight into organisational culture, staff engagement and public perception. These positive survey findings offered an additional evidence base that complemented the document review and the views gathered through interviews and focus groups, further strengthening the triangulation of the Panel's assessment.

3.5 The Panel spent approximately 240 hours plus, during the onsite stage of the review involving a series of individual meetings and focus groups with the following stakeholders:

- Leader of the Council
- Chief Executive Officer
- Combined Strategic Leadership Team and Cabinet (Opening and Closing sessions)
- The Cabinet – Focus Group
- Deputy Leader and Cabinet Member for Planning and Economic Development
- Leader of the Opposition Group
- Group Leader, Green Independents

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- Group Leader, Independent
- Elected Members - non-executive – Focus Group
- Scrutiny Chairs – Focus Group
- Independent Chair of the Governance and Audit Committee
- Independent Chair of the Standards Committee
- Strategic Leadership Team – Focus Group
- Deputy Chief Executive & Strategic Director - Resources (Section 151 Officer)
- Chief Officer - People, Performance and Partnership
- Chief Officer Place and Community Wellbeing
- Chief Officer Law and Governance (Monitoring Officer)
- Chief Officer Infrastructure
- Strategic Director - Children, Learning, Skills & Economy
- Strategic Director - Social Care & Safeguarding
- Chief Internal Auditor
- Head of Customer, Communication & Engagement
- Head of Strategic Change, Partnerships & Procurement
- Local Democracy Manager
- Heads of Service - Staff Focus Group
- Middle Managers - Staff Focus Group
- Frontline/Operational staff – Focus Group
- Youth Council Representatives – Focus Group
- Chief Constable of Gwent Police
- Leader of neighbouring Local Authority – Torfaen County Borough Council
- Leader of neighbouring Local Authority – Caerphilly County Borough Council
- Leader of neighbouring Local Authority – Newport City Council
- Chief Executive Officer of neighbouring Local Authorities – Torfaen and Blaenau Gwent County Borough Councils
- Chief Executive Officer of neighbouring Local Authority - Caerphilly County Borough Council
- Executive Director of Public Health and Strategic Partnership at Aneurin Bevan University Health Board and President of the Faculty of Public Health
- Town and Community Councils – Focus Group

- Trade Unions – Focus Group
- Business Community – Focus Group
- Voluntary Sector – Focus Group
- Older People - Stakeholder Focus Group
- Visit to Abergavenny Town Hall – Community Hub

#### **4. Overall Conclusion**

- 4.1 The Panel concluded that Monmouthshire is an ambitious, well-run Council with communities at its heart and a reach that transcends boundaries.
- 4.2 This conclusion is based on a comprehensive and triangulated assessment process, drawing on multiple sources of evidence. The Panel reviewed extensive documentation provided by the Council, including strategic plans, performance data, financial information and external audit findings, surveys, alongside insights gathered through the wide-ranging programme of interviews, focus groups and engagement sessions with internal and external stakeholders. This included elected members, senior officers, frontline staff, partners, community representatives, local businesses and Town and Community Councils. The breadth and consistency of feedback across these groups provided a robust foundation for the Panel's judgement and offered strong assurance of the reliability and validity of the findings.

#### **5. Local Context (Source: PPA Scoping Document)**

##### **Overview of Place**

- 5.1 Located in South-East Wales, Monmouthshire is strategically positioned between major centres in Wales and England. It covers around 880 km<sup>2</sup>, with only 3% classed as built on land. It borders several Welsh and English authorities and contains four primary settlements - Abergavenny, Monmouth, Caldicot and Chepstow - along with the towns of Usk and Magor with Undy. These settlements serve as historic market towns with strong links to their surrounding rural areas.
- 5.2 The county's population is 92,961, with an older age profile than the Welsh average. Around 26% of residents are over 65, and the proportion of older age groups is growing more quickly than across Wales. The demographic challenge of retaining and attracting younger people is a key issue identified in the replacement Local Development Plan.
- 5.3 Economically, Monmouthshire benefits from strong transport connections and proximity to Cardiff, Bristol and the Midlands. It has one of the most competitive economies in Wales, a highly qualified workforce, strong economic activity levels, and the highest rate of active enterprises per 10,000 population in Wales. Limited developed space for economic activity is a growing constraint.
- 5.4 Housing affordability is a significant local challenge, with some of the highest house prices in Wales - averaging 8.5 times local incomes. High costs drive outward migration, and more than 3,800 people are on the housing register, including over 2,000 identified as needing affordable housing.

## Political and Organisational Leadership

### Political Representation

- 5.5 Monmouthshire has 46 councillors representing 39 electoral divisions. The political representation is:
- Labour: 21
  - Conservative: 19
  - Independent Group: 4
  - Green Independent Group: 2 (one Green, one aligned independent)
- 5.6 The local government elections of May 2022 resulted in no political party having overall control of the Council. The Labour party was the largest party and formed a new cabinet without an overall majority. A coalition agreement was subsequently reached between the Labour group and the Green Councillor. This means some decisions at full Council may be decided by the chair's casting vote. The scrutiny call-in process ensures checks and balances in the democratic process and has been used a number of times during this electoral term.
- 5.7 The Council uses a Leader and Cabinet (Executive) governance model. The Council appoints the Leader of the Council annually. The Leader of the Council is Councillor Mary Ann Brocklesby, and the Deputy Leader is Councillor Paul Griffiths. The Leader decides the size and membership of the Cabinet i.e. the role of individual members of the Cabinet and arrangements for the exercise and delegation of Executive Functions. The Cabinet is comprised of 8 elected members, 7 Labour Group Councillors and 1 Green Independent Group councillor, who each have lead responsibility for an area of the Council's business, including the Leader. Cabinet members and their portfolios are:
- Cllr Mary Ann Brocklesby – Council Leader
  - Cllr Paul Griffiths – Deputy Leader and Cabinet Member for Planning and Economic Development
  - Cllr Ben Callard - Cabinet Member for Resources
  - Cllr Laura Wright - Cabinet Member for Education
  - Cllr Ian Chandler - Cabinet Member for Social Care, Safeguarding and Accessible Health Services
  - Cllr Catrin Maby - Cabinet Member for Climate Change and the Environment
  - Cllr Angela Sandles - Cabinet Member for Equalities and Engagement
  - Cllr Sara Burch - Cabinet Member for Rural Affairs, Housing & Tourism
- 5.8 The Cabinet have invested a tremendous amount of time in their own team development. Informal cabinet business meetings where things are shared openly and early take place every week, as do briefing sessions with the strategic leadership team. This ensures direct and appropriate conversations take place on a regular basis as part of an engaged and proactive political leadership model.
- 5.9 The Council has four main scrutiny committees:
- People Scrutiny Committee – Chair, Cllr Jackie Strong
  - Place Scrutiny Committee – Chair, Cllr Jane Lucas
  - Performance and Overview Scrutiny Committee – Chair, Cllr Alistair Neill
  - Public Services Scrutiny Committee – Chair, Cllr Armand Watts

- 5.10 At the time of the assessment, more detailed information on Cabinet members and their areas of responsibility was available on the Council's website.
- 5.11 The Council determines the Authority's policy framework and budget and other constitutional functions. Below Cabinet and at Council level there are a number of committees and panels that fulfil various scrutiny, statutory oversight and regulatory functions.

#### **Officer Strategic Leadership Team (SLT)**

- 5.12 The Cabinet and elected members are supported by the Strategic Leadership Team (SLT), comprising 8 officers, which is led by the Chief Executive, Paul Mathews. The Deputy Chief Executive is Peter Davies. For management purposes the Council's operations are organised into service areas each of which is headed by a Strategic Director or Chief Officer reporting to the Chief Executive.

- Deputy Chief Executive and Strategic Director- Resources, Peter Davies
- Strategic Director- Social Care, Safeguarding and Health Jane, Rodgers
- Strategic Director – Children, Learning, Skills and Economy, Will McLean
- Chief Officer - Law and Governance, James Williams
- Chief Officer - People, Performance and Partnerships, Matthew Gatehouse
- Chief Officer – Infrastructure, Debra Hill-Howells
- Chief Officer - Place and Community Wellbeing, Craig O'Connor

- 5.13 Following the departure of the Chief Officer for Communities and Place in September 2024, a decision was made to introduce an interim officer leadership structure to ensure continuity whilst giving the Leader and Chief Executive time to reflect on the best configuration going forward. This coincided with the short-term medical absence of the Chief Executive and subsequent departure of the Chief Officer for Customer, Culture and Wellbeing in March 2025.
- 5.14 In June 2025 the Chief Executive set out a refreshed permanent Strategic Leadership Team design and organisation structure. This aims to improve the operational and delivery capability of the organisation through a clear, permanent design that aligns accountability and responsibility within balanced directorate portfolios that lend themselves well to officer development opportunity across the Council without compromising current delivery. All posts in the established structure have subsequently been filled.
- 5.15 At the time of the assessment more detailed information on the Council's organisational structure, including Cabinet and senior leadership arrangements, was available on the Council's website.

#### **Workforce**

- 5.16 The Council employs over 4,100 individuals (2,895 FTE), with payroll costs making up almost half of the revenue budget. People are the Council's most important asset. A healthy and effective organisational culture is essential for it to succeed in delivering their strategies and achieving their purpose.
- 5.17 The People Strategy was approved by Cabinet in May 2024 following engagement with the workforce on what they need to help them succeed in the workplace. This strategy recognises both where the Council wants to be but also the challenges, they face in recruiting new staff, retaining current staff and planning for the future. The results of the staff survey showed high levels of satisfaction and

engagement with 82% of colleagues saying they would recommend the Council as an employer to friends and family and 89% of people saying that they understand the authority's purpose and their contribution to it.

- 5.18 There are positive working relationships with trade unions, with a formal Joint Advisory Group playing a key role in involving the unions in workforce and wider matters. This relationship means the organisation is well placed to deliver the aspirations of the Social Partnership Duty.

## **6. Strengths and Areas of Innovation**

- 6.1 Monmouthshire County Council demonstrates strong, visible leadership with a clear passion for tackling inequality and improving outcomes for communities. The Council is viewed as ambitious, consistently looking beyond its boundaries to secure wider opportunities for residents and businesses. It has developed well established strategic partnerships, recognised regionally and nationally for their effectiveness and collaborative ambition. Elected members bring a diverse array of skills and experiences that, when fully utilised through scrutiny and executive roles, can further strengthen delivery. The county's communities show a strong sense of independence and willingness to work with the Council, presenting an opportunity for deeper collaboration. Staff are seen as loyal, committed, and integral to the Council's culture and delivery model. Staff also reflected on the high level of empowerment they experience, commenting *"I don't have to fit into a box - I am allowed to be different"* and *"we employ adults here!"* reflecting a culture built on trust, maturity and autonomy.
- 6.2 The Council has a deep understanding of its communities and uses this knowledge effectively. It takes a person-centred approach, with a strong commitment to prevention and early intervention, aligned with regional partners. Monmouthshire has in place the building blocks and ethos (For Purpose-On-Purpose, F-POP) needed to respond to future challenges and pivot organisationally as needed.
- 6.3 Staff are one of the Council's greatest assets, demonstrating loyalty and a strong sense of organisational identity. Staff consistently expressed a strong sense of organisational identity and belonging, with one colleague noting that *"we are part of something really special."* Others highlighted the importance of values, describing it as *"rare to have kindness in values"* and emphasising that this ethos shapes how the organisation works with communities.
- 6.4 The Council also shows a clear commitment to effective communication and engagement with its communities.

## **7. Local and National Challenges**

### **7.1 Financial Overview – Summary**

- 7.1.1 Monmouthshire County Council ended 2024/25 with a small year-end revenue surplus, supported in part by Welsh Government funding. This positive position reflects the Council's continued focus on careful financial management during a challenging period for local government.
- 7.1.2 Like many councils across Wales, Monmouthshire continues to face pressures in key service areas such as Social Care, schools, Additional Learning Needs (ALN), Waste, Transport and Homelessness. School budgets, in particular, are under strain, with overall deficits increasing. However, there is a strong and shared commitment across the Council

and schools to tackle these pressures and put plans in place that support long-term financial sustainability.

- 7.1.3 While the delivery of savings in 2024/25 fell short in some areas, important progress has been made through improved financial controls, increased external income, and careful use of capitalisation where appropriate. The 2025/26 budget had been set on a balanced footing, and in year monitoring shows encouraging signs of stability.
- 7.1.4 Looking ahead, the draft 2026/27 budget proposes targeted investment in essential services alongside responsible council tax planning. A funding gap remains, but the Council has a clear approach for addressing this as part of its ongoing medium-term financial planning.
- 7.1.5 The medium-term outlook continues to be challenging, with projected budget gaps through to 2029/30. However, the Council has strengthened its long-term planning, and Audit Wales has recognised the positive direction of travel. Work is already underway to accelerate improvement plans, sharpen financial modelling and ensure that decisions are informed by the best available evidence.
- 7.1.6 Reserves remain lower than average in Wales, which is a known risk. The Council is therefore taking a proactive approach to strengthening financial resilience wherever possible, supported by clear leadership and an organisation-wide commitment to managing resources well.
- 7.1.7 Overall, while significant challenges remain, the Council has shown real determination in stabilising its financial position and is taking purposeful steps to ensure services can continue to meet community needs in a sustainable way.
- 7.1.8 In 2024 Audit Wales highlighted improved long-term planning but a lack of identified solutions to close the funding gap. Recommendations focus on accelerating the Change & Improvement Plan (F-POP), strengthening modelling and reporting impacts more clearly.

## **7.2 Financial Performance – Against its 2024/25 Budget**

- 7.2.1 The Council marginally outperformed its 2024/25 revenue budget, achieving a £1.239m gross surplus and a £497k final surplus after reserve movements, largely supported by a one off £1.19m Welsh Government grant. Despite this positive outturn, significant structural pressures remain across Social Care, Additional Learning Needs (ALN), Waste, Passenger Transport and Homelessness, with combined service overspends of £4.6m. School finances continue to deteriorate, with reserves moving to a £4.09m deficit and 15 schools in deficit, reflecting ongoing structural budget challenges.
- 7.2.2 Savings delivery remained below target, with 81.6% of the £10.94m requirement achieved, continuing a multi-year pattern of partial delivery. This position was cushioned by £3.68m of eligible costs funded through capitalisation, staff vacancies, and increased external income.
- 7.2.3 For 2025/26, the Council set a balanced budget following a £5.1m increase in core funding, supported by a guaranteed 3.8% funding floor. Mid-year monitoring shows an improving position, shifting from a forecast overspend to a small £29k underspend, driven largely by maximising grant funding in Social Care. However, significant risks persist in high cost, demand-led services, and schools' reserves are forecast to worsen to a £7.06m deficit, with 18 schools in deficit.

- 7.2.4 Projected savings delivery in 2025/26 is stronger at 90.4%, though shortfalls remain in Social Care and Infrastructure. Service-specific pressures continue across Early Years, school transport, homelessness provision and Adult and Children's Social Care, reflecting demand volatility.
- 7.2.5 Overall, while short-term financial control has improved, the Council continues to face substantial underlying budget pressures requiring sustained recovery planning and strengthened longer-term financial management.

### **7.3 Medium Term Financial Strategy**

- 7.3.1 The Council's Medium-Term Financial Strategy (MTFS) sets out a rolling four-year financial plan designed to respond to increasing service pressures, national economic conditions and uncertainty in future funding. The latest update forecasts a budget shortfall of £11.5m in 2026/27, rising to a cumulative £37.4m by 2029/30, despite improvements from previous projections.
- 7.3.2 These gaps are driven by rising pay and non-pay inflation, demand led- pressures in social care, and recurrent service cost increases. The Council recognises that its low level of usable reserves constrains financial resilience and limits flexibility in managing volatility. However, the MTFS and resultant budget strategies have allowed for a £1m contingency base budget to be established to allow for partial mitigation against financial and budgetary risks, along with outperformance of recent budgets allowing for modest and targeted replenishment of some reserves.

### **7.4 Financial Overview – Conclusions**

- 7.4.1 The Council's short-term financial management has stabilised, with improved in-year control and a surplus in 2024/25, but this position is significantly supported by one-off funding and does not address underlying structural pressures across Social Care, ALN, Waste, Passenger Transport and Homelessness.
- 7.4.2 Savings delivery is improving, rising from 81.6% in 2024/25 to a projected 90.4% in 2025/26, yet persistent under delivery continues to widen medium-term financial gaps. School finances remain a major and escalating risk, with deficits forecast to reach £7.06m in 2025/26 and nearly half of schools expected to be in deficit. School recovery planning and £1m of increased investment beyond pay related increases into school in 25/26 and 26/27 have allowed for the pace of increase in deficits to be reduced as recovery plans take effect.
- 7.4.3 The draft 2026/27 budget appropriately reflects major service pressures and realistic assumptions but retains a funding gap that must be closed before final approval. Medium-term forecasts show a cumulative shortfall of £37.4m by 2029/30, signalling the need for accelerated transformation, demand management and service redesign.
- 7.4.4 The Council's very low reserve levels constrain financial resilience, heightening exposure to risk. Audit Wales acknowledges improved strategic intent but stresses the need for faster implementation of the financial strategy, stronger modelling, and clearer reporting on the impact of financial decisions.
- 7.4.5 Overall, while short-term pressures are being managed, the Council faces significant medium to long-term challenges that require a shift from planning to delivery to secure sustainable financial stability.

## 8.0 Overview of Findings

This section outlines the three areas of local focus identified by the Council for the assessment, together with the Panel's accompanying findings, observations and insights.

### 8.1 Area of local Focus 1 – How well does the Council align across directorates to optimise delivery of the priorities set out in the Community and Corporate Plan.

#### Cross-Directorate Alignment and Collaborative Working

- 8.1.1 Monmouthshire County Council demonstrates a strong organisational ethos of networking, collaboration and shared accountability, supported by structures that promote cross-directorate working. This was reflected in staff feedback, and we heard, *“our networking is strong - it doesn't matter where I sit in the organisation.”* This reinforces the Panel's view that internal collaboration is a strength and is enabling more joined up practice. The Council has several examples where alignment is working effectively both conceptually and in practice - particularly in Children, Learning, Skills and Economy - helping to drive innovation and coherent strategic planning. New service alignments are improving the visibility of vulnerable groups and enhancing synergy across person-focused services.
- 8.1.2 The organisation is largely avoiding the pitfalls of silo working, with new ways of working enabling greater staff empowerment *“we employ adults here!”* and improved customer-centred approaches. The relocation of customer services is highlighted as a positive cultural signal, placing customers *“at the heart of the organisation.”* Cabinet thematic portfolios further reinforce cohesion and collective strategic focus.

#### Values, Workforce and Enablers for Delivery

- 8.1.3 The Council's values strongly underpin and support its delivery model, and the F-POP framework acts as a unifying mechanism for coherent cross-organisational working and change. Integration with community hubs provides a vital link to local communities, improving visibility and connections that support delivery.
- 8.1.4 The workforce is recognised as a critical enabler of organisational priorities, with the People Strategy providing a clear platform for strengthening capacity. Current work on identifying skills gaps will help shape future workforce capabilities and ensure the organisation remains resilient and adaptive. We heard a comment that *“it's rare to have kindness in values.”* The Panel emphasise that addressing workforce challenges now will:
- retain critical knowledge,
  - reduce single points of failure,
  - support innovation and skills growth, and
  - diversify leadership to maintain future resilience.

### 8.2 Area of local Focus 2 – What opportunities are there to further develop the Council's emerging person-centred and preventative approaches to working with its communities, local businesses and other stakeholders, (including Town & Community Councils).

#### Embedding Prevention across the organisation

- 8.2.1 Monmouthshire County Council has a clear and coherent strategic intent for its person-centred and preventative ambitions, grounded in both regional alignment and strong local relevance. The Council's values driven approach was also evident in staff perspectives,

with comments such as *“we are able to apply kindness to our communities,”* highlighting how the prevention ethos translates into day-to-day practice

The Council’s Living Well Strategy provides a well-articulated framework that recognises prevention as a long-term continuum and as a “point in time” document there is commitment to ensure this strategic intent continues to evolve, reflecting emerging learning and community insight. This is consistent with the Panel’s finding that the strategy is evidence-informed, shaped by environmental and cultural factors, and supported by strong regional partnerships.

- 8.2.2 Prevention is firmly embedded within the Council’s organisational ethos and is seen internally as giving “legitimacy and power” to a whole Council focus on early intervention. This is supported by emerging but sound cross-directorate governance arrangements, which demonstrate strong organisational commitment to systemwide delivery approaches. The Council’s focus on targeted populations, underpinned by a more data-driven approach, will build on shared needs assessments across Gwent Public Services Board (PSB) partners and the wider regional footprint. This provides a strong platform for further development.
- 8.2.3 A significant opportunity relates to the wider research and intelligence capacity available through strategic partners. The Panel heard consistently that partners - across public health, local authorities, voluntary sector organisations and others - are “ready and willing” to support Monmouthshire with research, evaluative capacity and insight. The strength of relationships across the region places the Council in a strong position to maximise this support more systematically, complementing its emerging internal analytical strengths.

#### **Community resilience and primary prevention**

- 8.2.4 The Council’s approach to prevention would be further strengthened by ensuring that community resilience work is developed in parallel with targeted population level interventions. It is important to recognise that populations are not homogenous the Council should ensure it understands the characteristics of different groups of people, including age and gender, and targets its prevention work taking these differences into account. While the current Living Well strategy acknowledges the role of community resilience, the Panel considers that it must be recognised by the whole organisation as a foundational layer of primary prevention. This means articulating more clearly what community resilience means in the Monmouthshire context and developing a shared baseline to enable progress to be understood over time, the absence of which is currently a limitation. Emerging national research can assist, but this work will need to be co-developed with communities and local stakeholders to ensure legitimacy and relevance.

#### **Engagement, co-production and social capital**

- 8.2.5 Stakeholders - including Town and Community Councils, local businesses, voluntary groups and residents - expressed strong willingness to be more involved in prevention, and the Council already benefits from substantial social capital across its communities. However, feedback also highlighted mixed experiences with engagement, with some groups finding it difficult to understand how to contribute to or influence the Council’s work. The Panel suggests that Monmouthshire’s traditionally outward facing partnership strengths should now be more deliberately channelled inward, ensuring co-production becomes the default approach where appropriate.

### **Place-based opportunities and equity considerations**

- 8.2.6 The Council's placemaking plans, developed through co-production, are strong and supported by clear delivery structures. There is recognised opportunity to extend place-based approaches across both rural and urban communities, ensuring that implementation aligns with the Council's equity ambitions. Many communities face barriers to accessing services and balancing the placemaking programme with these equity considerations will be essential to ensuring that benefits are distributed fairly and effectively.
- 8.2.7 Finally, while stakeholders identified significant opportunities to do things differently, the Panel emphasises the importance of ensuring that approaches intended to "create the right environment," enable "organic" community development or adopt a facilitative role are sufficiently purposeful to drive meaningful change. Given capacity constraints, the Council must channel all available talent - internally and externally - into clearly prioritised, intentional interventions that can deliver the equity and prevention outcomes it seeks.

### **8.3 Area of local Focus 3 - How well is the Council able to demonstrate the intended outcomes and emerging impacts of its Community and Corporate Plan and, how well does it communicate them to Councillors, residents and other stakeholders, including Town and Community Councils and local businesses.**

#### **Outcomes Framework, Long-Term Focus and Communicating Strategic Intent**

- 8.3.1 Monmouthshire County Council has developed a refined and clearer measurement framework that strengthens the alignment between strategic priorities, key outcome measures and the delivery of the Community and Corporate Plan. This sharpening of focus is important given the breadth of commitments within the Plan and the need to concentrate organisational attention on what matters most. Evidence from Education and Social Care demonstrates strong impacts and outcomes, with findings supported by external audit commentary.
- 8.3.2 A major strength is the Council's long-term focus, shared with regional partners, which frames how progress and impact should be understood. While long-term outcomes are well defined, the Panel recognises that evidence for short and medium-term progress remains more challenging. There are known system level issues with some national and regional metrics, which are outside the Council's direct control. In this context, the Panel encourages the Council to carefully consider the use of proxy measures and their limitations, and to complement quantitative performance data with qualitative evidence, including lived experience and case studies, to help illustrate the "so what" of interventions. This should form part of the Council's wider commitment to evidence-based practice and its openness to learning from others.
- #### **Articulating strategic intent**
- 8.3.3 The Panel considers that clearer articulation of the Council's strategic intent - whether in relation to economy, community or prevention - would strengthen both internal and external understanding of the outcomes the Council is trying to achieve. Staff fed back that, at times, it can be difficult to "see *the wood from the trees*." The recent organisational realignment is helping the Strategic Leadership Team identify cross-cutting themes that could be drawn together into stronger strategic narratives, but further clarification will assist stakeholders and communities in understanding the rationale and the impacts and outcomes the council is seeking to deliver.

### **Stakeholder involvement and co-production in understanding impact**

- 8.3.4 Stakeholders, including communities, businesses, voluntary sector partners and Town and Community Councils, should be involved earlier and more consistently in helping shape the Council's approach to evaluating impact. Their insight can strengthen the continuing development of the measurement framework and help ensure that outcomes reflect what matters most to residents. The Panel highlights the importance of co-production as a principle and the need to make full use of the significant social capital that exists across the county. Ensuring clarity on shared ambitions with key partners will support the Council's preventative ambitions and its wider community resilience work.

### **Capturing the story of progress**

- 8.3.5 While purposeful storytelling is recognised within the Council, its use remains inconsistent, with stronger practice more evident in areas such as social care. The Panel encourages the Council to embed a more systematic, organisation wide approach to capturing the journey towards long-term outcomes. This should maximise the use of lived experience, case studies and qualitative evidence, aligning storytelling with the Council's change programme, strategic priorities and what matters to residents and stakeholders. Strengthening this approach will help provide assurance that the Council is on the right trajectory and enable more compelling communication of progress and impact.

### **Communication, Engagement and Advocacy**

- 8.3.6 The Council's response to Storm Claudia demonstrated exemplary crisis communication practice, marked by clear, timely and proactive public messaging. The coordination between political leadership, operational teams and communications staff enabled residents to receive accurate updates quickly, while the organisation showed strong capacity for rapid organisational learning during and after the event. One comment captured this approach by describing the Council's style as "*chatting not talking*," reflecting a communication method that is conversational, accessible and grounded in trust.

## **9 Statutory performance requirements considered by the Panel.**

The following section examines the three statutory performance areas that form the core of the Panel's duty under the legislation. For each area, the Panel sets out its findings, observations and insights, offering an evidence-based assessment of how well the Council is discharging its statutory responsibilities.

### **9.1 The extent to which the Council is exercising its functions effectively**

#### **Strategic Leadership, Planning and Vision**

- 9.1.1 The Council demonstrates strong ambition with the capability to become "great," a view reinforced by external regulators. Corporate and service planning reflect key national frameworks, including the Wellbeing of Future Generations Act and Welsh Government Net Zero 2030 commitments, supported by a (Replacement) Local Development Plan and a cohesive, values driven leadership team that prioritises tackling inequality. The Chief Executive and Leader maintain an effective, honest working relationship, fostering a culture of collaboration and delivery across the strategic leadership team.

#### **Member - Officer Relations and External Insights**

- 9.1.2 Relationships between elected members and officers are described as effective, with members bringing diverse backgrounds and adapting well to their roles. The organisation is characterised as a "family," where individuals' journeys are recognised and valued.

However, businesses expressed a desire for improved engagement and raised concerns about the local planning process, citing it as a barrier to economic growth due to issues with communication, timeliness and customer care during planning interactions.

### **Performance Management, Workforce and Communication**

- 9.1.3 The Council has robust mechanisms for managing and monitoring service performance, including dashboards, trend analysis and RAG ratings accessible to staff and members. However, performance measures relating to outcomes and impact are less mature, and staff and members do not consistently understand how to use available performance information effectively.
- 9.1.4 The Council has invested significantly in staff communication and engagement, contributing to strong staff morale - "*Staff love working here!*" - and constructive trade union relationships. A People Strategy is in place, though the completion of the workforce plan remains an outstanding requirement.
- 9.1.5 There is also recognition of the need to enhance the use of storytelling and multimedia approaches to communicate outcomes more clearly to all communities particularly young people, building on existing positive shifts in communication and engagement practice. Several focus groups also highlighted the need for a clearer feedback loop, noting that while communication with the Council is regular and constructive, it is not always evident what actions are taken in response.

### **Strategic Partnerships**

- 9.1.6 Monmouthshire County Council has collaboration and partnership working embedded in its organisational culture, described as part of the Council's "DNA". Successive administrations have consistently valued and developed strong strategic partnerships to benefit Monmouthshire's communities. The Leader and Chief Executive are respected for bringing intellectual rigour, constructive challenge, and a strong advocacy role across regional forums.
- 9.1.7 The Council works effectively with neighbouring authorities and plays leading roles in key partnerships such as the South East Wales Corporate Joint Committee (CJC) and the Marches Forward Partnership, the latter focusing on cross-border connectivity, food, and the rural economy. Partnerships are built on shared values, and Monmouthshire is seen as a partner others want to work with. While the Council's ethos has been to "*offer more than we ask,*" the Panel highlights that now is the time to build on this investment and begin realising tangible returns, supported by sensitive and valued leadership.

### **Reputation, Credibility and Forward Momentum**

- 9.1.8 Monmouthshire is regarded by partners as credible, creative, innovative, agile and pragmatic in how it engages with joint working arrangements. There is a strong mutual understanding between the Council and its partners around the challenges each faces, alongside respect for Monmouthshire's collaborative approach.
- 9.1.9 The Council is now at a point where it must bring greater pace and focus to partnership activity to ensure that the strong foundations already established deliver greater benefits, impact and measurable outcomes for communities. Doing so will require sufficient capacity and sustained organisational focus to convert well-regarded partnerships into greater practical value for Monmouthshire residents.

## **9.2 The extent to which the Council is using its resources economically, efficiently, and Effectively**

### **Financial Context, Stability and Stewardship**

9.2.1 Monmouthshire County Council operates within the same challenging financial context faced by local government nationally, but has responded with a clear Medium-Term Financial Strategy, strong engagement across the organisation, and a shared understanding of both pressures and opportunities. The Council has a proven track record of delivering efficiencies, stabilising reserves, and strengthening financial discipline, including focused recovery plans for school deficits. Senior officers, including the Section 151 Officer and Children, Learning, Skills and Economy Leads, demonstrate a strong grasp of areas of financial concern.

### **Governance, Oversight and Data-led Decision-Making**

9.2.2 The Council benefits from robust committee oversight, particularly through the Performance and Overview Committee and the Governance and Audit Committee, both of which provide constructive challenge. There is an established approach to benefits realisation and return on investment assessments, supporting more rigorous decision making. The organisation recognises the importance of data and intelligence and is developing its work to quantify preventative spend. Budget development is increasingly treated as a continuous process, improving strategic alignment and organisational responsiveness.

### **Digital Enablement and Change Management:**

9.2.3 The Council has made good progress against its digital roadmap and strategy, using digital transformation as a key enabler for innovation and improved service delivery. However, there is a need for strong alignment between digital work and the wider change programme, ensuring consistent evaluation, effective project management, and adequate capacity and capability to deliver organisational change at the required scale.

### **Ambition, Opportunity and Organisational Capability**

9.2.4 Monmouthshire is ambitious about seizing opportunities to deliver better outcomes at lower cost, drawing on external best practice and building on what already works well locally. Senior officers have a comprehensive grasp of their operational and financial pressures, supporting sound decision-making. This reflects a wider organisational confidence in its ability to identify and act upon opportunities for improvement.

### **For Purpose On Purpose - F-POP as an Organisational Framework for Improvement**

9.2.5 The Council's F-POP approach provides a strong foundation for identifying improvement opportunities and establishing the conditions required to deliver them. The framework empowers leaders and teams to:

- Identify and scope opportunities
- Build and leverage the right internal and external relationships
- Work within a light-touch, proportionate Project Monitoring Office (PMO), avoiding duplication
- Draw on enabling services such as Shared Resource Service (SRS), Estates and HR

9.2.5.1 This creates a “can-do,” cross organisational culture that supports collaboration, ownership of change, and effective delivery. Senior officers again demonstrate strong understanding of key areas of risk, including in finance and education.

#### Opportunity Framework and Risks

9.2.5.2 The Council fosters a “can-do” culture that supports cross-organisation working, builds consensus, and avoids unnecessary “transformation theatre.” However, the intended end state for delivering major opportunities is unclear, and the process for determining this remains insufficiently defined, creating risks of sub-optimal outcomes.

#### Opportunity, Time and Capacity

9.2.5.3 The panel reinforce the message that the Council has significant opportunities to improve outcomes and efficiency, but that realising these opportunities will require time, organisational focus, and expanded capacity. There is a need to reinforce the theme of needing more intent and pace to deliver change.

#### Scale of Opportunity

9.2.5.4 The Panel noted that while there is significant potential for organisational improvement, any early estimates of scale are illustrative at this stage. A more detailed and evidence-based assessment will be needed to determine the realistic benefits that can be achieved. The Council must quantify, prioritise and plan the opportunities rigorously to unlock their value.

#### Refining Opportunity Estimates

9.2.5.5 To realise the potential for significant opportunities, the Council will need structured methods to turn broad, high-level estimates into actionable programmes supported by evidence-based projections of financial and outcome benefits.

#### Opportunity Pipeline and Delivery Stages

9.2.5.6 While the path from idea to delivery can vary it typically involves a progression through discovery, prioritisation, and design. Integrating case development and return on Investment analysis into this journey ensures that the implementation is backed by a robust strategic rationale.

9.2.5.7 These stages of the Improvement Framework highlight the need for a disciplined, structured approach to realising opportunities at scale. There is a strong understanding of key risks held by all accountable officers.

#### Timescales and Ambition

9.2.5.8 Indicative timelines illustrated to the Council during the feedback presentation underline that the transformation required is a long-term commitment, with full benefits likely to emerge towards 2029/30. However, the Panel emphasises that meaningful progress depends on the Council putting the necessary foundations in place now. Early measures introduced during 2026/27 will be critical in initiating the change process and positioning the organisation to sustain momentum. These timelines reinforce both the scale of the ambition and the level of organisational commitment needed to deliver transformation over multiple years.

#### Continued Emphasis on Long-Term Delivery

9.2.5.9 The Panel emphasises the importance of maintaining a long-term focus in planning and decision making. Achieving the scale of change identified will require sustained organisational commitment, clear sequencing, and ongoing horizon scanning to ensure the Council remains prepared for future challenges and opportunities.

### Aligning End-State Ambition with Organisational Reality

9.2.5.10 Delivering meaningful long-term change requires clarity about the desired end-state, realistic pacing, and an honest assessment of organisational capacity. Without a clearly defined destination and the conditions needed for success, opportunities may not translate into sustainable improvements.

#### Key Questions for Change

9.2.5.11 To support effective long-term transformation, the Council will benefit from exploring the core themes of purpose, delivery, and impact. This involves considering the rationale for change, the conditions required for success, and, critically, what the future state will look like for both residents and staff.

9.2.5.12 These questions highlight the need for a coherent narrative, clear design principles, and robust evaluation frameworks to support whole-system transformation.

## **9.3 The extent to which the Council has effective Governance in place.**

### **Effective Governance & Member Development**

9.3.1 The Panel were assured that effective governance arrangements are in place, as evidenced through regulatory reports, the Annual Governance Statement and confirmed during the onsite interviews. The Panel also consider that there remains scope to further strengthen aspects of the existing framework, and these areas for improvement are set out in the sections that follow, reflecting opportunities to build on a strong foundation and enhance the Council's overall governance effectiveness.

### **Strengths in Governance and Leadership**

9.3.2 Monmouthshire County Council demonstrates strong and effective leadership, with clear understanding of respective member and officer roles and a culture of transparency and accountability across the organisation. Members are described as well-connected to their communities, responsive, and valued for their insight, while scrutiny chairs and non-executive members show strong commitment and passion for contributing to the Council's work. Committees are characterised as inclusive and well chaired, supporting constructive democratic governance.

### **Scrutiny Arrangements**

9.3.3 Scrutiny work programmes are in place and there is good use of pre-decision scrutiny, helping strengthen informed decision-making. However, members report that scrutiny views are not always sufficiently valued, with limited feedback following reports to Cabinet. The timeliness of the Cabinet forward plan can also hinder scrutiny's effectiveness. There is a lack of clarity around how members can deploy "deep dive" approaches within task and finish methodologies, suggesting further support and clearer frameworks are needed.

### **Full Council Effectiveness and Use of Time**

9.3.4 Full Council meetings are described as well-informed with robust debate, reflecting active democratic engagement. However, the lengthy duration of meetings is unusual, consideration should be given whether the constitution best enables councillors to focus time on the most strategic issues. The structure of meetings should be reviewed to better utilise the wide range of skills and experience that members bring.

**Member Development, Training and Support Tools**

9.3.5 A comprehensive Member Training Programme is in place, including a strong induction offer for new members and ongoing improvements led by the Democratic Services Committee. E-learning enhances flexibility and accessibility. However, individual Personal Development Plans (PDPs) are not yet in place, limiting tailored development. The “My Monmouthshire” system provides a platform for managing casework, though members report functionality limitations that affect usability and create frustration.

**10 Opportunities for Improvement – Recommendations.**

10.1 We have carefully considered the three required performance areas and the additional three areas identified by the Council for local consideration as part of the assessment process. This report contains a number of observations and comments about the Council’s performance in each of these areas. They should be considered along with the summary of recommendations set out in the table below.

**10.2 Table 1 - Summary of recommendations.**

<b>1</b>	<p><b>Prioritising major opportunities to deliver better outcomes for residents at lower costs.</b></p> <p>The Panel recommends that the Council focus and prioritise major opportunities that will deliver better outcomes for residents at a lower cost. The Council must establish a clear mechanism to identify, assess and exploit these opportunities, supported by a structured plan to be completed by the end of 2026/27.</p> <p>The plan should include:</p> <ul style="list-style-type: none"> <li>• A robust assessment of the investment required;</li> <li>• Consideration of organisational capacity to deliver;</li> <li>• Expected returns, including both financial savings and improved outcomes;</li> <li>• Alignment with the Medium-Term Financial Plan (MTFP).</li> </ul> <p>Realising these opportunities requires discipline, sequencing and a strong organisational narrative linking change to outcomes and financial resilience.</p>
<b>2</b>	<p><b>Strengthening Community Resilience and Shared Understanding.</b></p> <p>The Panel recommends that the Council works with communities and partners to develop a shared understanding of “community resilience” within the Monmouthshire context. This shared definition will enable better measurement of impact and help clarify the difference the Council and its partners aim to make.</p> <p>Key points include:</p> <ul style="list-style-type: none"> <li>• Using community insight to understand impact and well-being outcomes;</li> <li>• Ensuring prevention plans maximise social capital, which stakeholders identified as a major strength;</li> <li>• Strengthening purposeful communication and engagement with communities, drawing on the placemaking model;</li> <li>• Ensuring all communities - particularly in a geographically large county - have a voice in shaping local priorities.</li> </ul> <p>Stakeholders are ready and willing to work with the Council and that co-design is essential for meaningful progress.</p>

<b>3</b>	<b>Workforce and Succession Planning</b> <p>The Panel recommends that the Council complete the development and implementation of its workforce and succession plan to underpin future delivery and organisational resilience.</p> <p>The emphasis is on:</p> <ul style="list-style-type: none"><li>• Ensuring the Council has the skills and capabilities required for future challenges;</li><li>• Addressing identified workforce gaps;</li><li>• Supporting leadership development and retention of critical knowledge;</li><li>• Strengthening organisational capacity to deliver its priorities.</li></ul> <p>Workforce planning is essential to sustaining improvement, reducing single points of failure, and supporting innovation.</p>
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10.3 Collectively, these recommendations set out the priority areas for strengthening performance and governance and provide a basis for the Council's ongoing improvement journey.

## **11 Improvement Support**

If you would like to discuss any further improvement support, please contact Jo Hendy, WLGA Chief Officer Improvement

## **12 Acknowledgements**

The Panel and the WLGA would like to extend their thanks to the Council for its engagement throughout the PPA and we especially appreciate the support and openness from the Leader, Councillor Mary Ann Brocklesby and Chief Executive, Paul Matthews. Our thanks and appreciation also go to Matthew Gatehouse - Chief Officer - People, Performance and Partnerships, Carly Rogers, Hannah Carter and Richard Jones for their invaluable support in coordinating documentation requests, responding to queries, arranging meetings and workshops, and providing onsite assistance.