

SUBJECT: Self-Assessment 2023/24

MEETING: County Council

DATE: 19th September 2024

DIVISION/WARDS AFFECTED: All

1 PURPOSE:

- 1.1 To seek Council approval of the self-assessment report 2023/24 to ensure that members have a clear and transparent assessment of the authority's performance during the year ending 31 March 2024 in line with requirements outlined in the Local Government and Elections (Wales) Act 2021.

2 RECOMMENDATIONS:

- 2.1 That the self-assessment for 2023/24 be approved.

3. KEY ISSUES:

- 3.1 Self-assessment is a vital part of our performance management arrangements. It's a way of evaluating, critically and honestly how well the authority is delivering the objectives set in the Community and Corporate Plan and the effectiveness of our supporting arrangement such as finance, workforce and asset management.
- 3.2 The first years of activity set out in the Community and Corporate Plan included work to develop new strategies. With the majority of these now in place it should be anticipated that future years will see more progress being made against delivery. An evaluation score of between 1 (unsatisfactory) and 6 (excellent) has been applied to each of the council's six objectives for the year ending March 2024. Five of these have been assessed as level 4 (good) and one as level 3 (adequate). The report also describes the progress that has been made following the recommendations made in last years' evaluation as well as highlighting future areas of development.
- 3.3 As well as being an incredibly useful tool for councillors and officers, the production of a self-assessment report is a legal requirement under the Local Government and Elections (Wales) Act 2021. The Act requires each local authority in Wales to keep under review the extent to which it is meeting the 'performance requirements' defined in the Act. This means the extent to which: it is exercising its functions effectively; is using its resources economically, efficiently and effectively and its governance is effective for securing these.
- 3.4 The Act creates a duty to publish a report setting out the conclusions of the self-assessment once in respect of every financial year. This informs decisions on how to secure improvement for the future. The self-assessment process has been embedded as part of the council's performance management framework (appendix 1 of the assessment). This ensures it can help the council continually learn and achieve sustainable improvement and better outcomes for citizens, service users and its own workforce. Our self-assessment began with a desk-based evaluation of available evidence. The initial findings were tested refined through a series of workshops with Directorate Management Teams before being subject to challenge by Strategic Leadership Team and Cabinet and then presented to Performance and Overview Scrutiny Committee and Governance and Audit Committee.

- 3.5 The financial year 2023/24 saw a continuation of numerous wider pressures that are resulting in challenges for many local authorities. Monmouthshire is no exception. The council is facing rising costs, alongside increasingly complex demand pressures. The objectives set out in the Community and Corporate Plan strive to address complex issues within an increasingly uncertain environment. The ambition outlined in the document looks to the long-term and is focused on the well-being of current and future generations.
- 3.6 As mentioned above, the self-assessment report evaluates the council's performance under each of the six Well-being Objectives set out in the Community and Corporate Plan, and the programme of work that supports their delivery. The report focusses on the 'what we want to achieve' outcome statements that are each underpinned by specific actions for each objective.
- 3.7 To support the delivery of the objectives, it's important that all teams are working efficiently and effectively. The report assesses the effectiveness of the enabling functions that support front line delivery to meet changing demands and ensure their sustainability. These include corporate planning, performance and risk management, financial planning, workforce planning, procurement, assets, digital and data.
- 3.8 Alongside the assessment of the delivery of our objectives, the report assesses how well we have achieved the areas for development identified in the 2022/23 self-assessment report. This can be found in the 'our actions' section. This section also sets out additional areas for development that have been identified as part of the 2023/24 assessment.
- 3.9 The self-assessment report demonstrates the progress the council has made in achieving its intended outcomes and identifies any further areas for development to be addressed in 2024/25. These include:
- We have continued to support those on low-income and address inequality in the county through working with partners to provide cost-of-living support sessions across Monmouthshire and implementing universal free school meals for all primary school pupils. We need to develop a joined-up whole-authority approach to sustain the impacts of our interventions.
 - We have shown our commitment to reducing our impact on the planet through developing a refreshed Climate and Nature Emergency Strategy, underpinned by four delivery plans which set out the action we will take. However, we recognise these are complex challenges and unless there is an increase in the public finances available for this, the evidence that we are gathering suggests that reaching our net-zero ambitions will be extremely challenging.
 - Through Rapid Rehousing we are preventing an increasing number of households from becoming homeless and are decreasing the number of homeless households in costly B&B accommodation. We have begun the process of acquiring properties to transform into temporary accommodation to address the issue of limited availability.
 - We are focused on understanding barriers to learning, particularly for vulnerable pupils, and ensuring suitable wellbeing support is available. We are facing challenges in returning attendance figures to pre-pandemic levels, and are seeing an increase in behaviours that challenge.
 - We are developing a Medium-Term Financial Strategy. The financial strategy is key to realising the aims and ambitions set out in the Community and Corporate Plan. The strategy explains how the council will respond to the challenges ahead, and the principles that will be adopted in managing and using financial resources.

- 3.10 This report is primarily an evaluation of what did in 2023/24. It informs our future work but it does not purport to set out detailed action or delivery plans. That work sits elsewhere, including in the service business plans that are produced annually by teams across the authority. Nor does not cover the authority's budget position which is considered in more detail in financial monitoring reports.
- 3.11 A draft of the self-assessment report was provided to Performance and Overview Scrutiny Committee, who used the report to scrutinise the council's performance during 2023/24. The committee provided helpful feedback, emphasising the importance of using a range of evidence to assess the impact of our actions. The report has been developed to set out the conclusions drawn from the work of regulators in the year and consultation and engagement undertaken. Next year's assessment will be able to use evidence gathered from a survey that is being run to gain a further understanding of residents' views of their local place and council services. Several other areas for improvement were identified such as the inclusion of more performance comparisons and clarifying or amending parts of the assessment. Feedback has been used to refine the current assessment where feasible with other comments being used to improve the process for future years. There was also a discussion about the transformation of services to meet budget challenges. The committee was reminded that this formed part of the planning being developed following the recent agreement of the Council's Medium Term Financial Strategy.
- 3.12 The draft self-assessment report was also presented to Governance and Audit Committee, which has a statutory role to review the final draft of the assessment. The report was used by the committee to seek assurance on the effectiveness of the council's governance and assurance arrangements. Governance and Audit Committee are also able to make recommendations for changes to the conclusions or actions the council intends to take as set out in paragraph 2.40 of the statutory guidance. The committee reviewed the report and concluded... (to be added following the committee meeting on 5th September)
- 3.13 The self-assessment is a public document and should be accessible to a wide audience. Once approved the assessment and summary will be published on the council's website and shared with key partners in accordance with paragraph 2.42 of the statutory guidance.
- 3.14 The annual self-assessment report is, by its very nature, carried out by local authority officers drawing on a range of evidence including reports produced by external organisations like regulators. Once every five years, the Local Government and Elections Act requires us to conduct a panel performance assessment which will be chaired and conducted by external peers including an independently appointed chair. Our Improvement work is also examined by Audit Wales who undertake audits of our performance management work. The findings of these are reported to the Governance and Audit Committee who use them to seek assurance about the effectiveness of our arrangements.

4. EQUALITY AND FUTURE GENERATIONS EVALUATION (INCLUDES SAFEGUARDING AND CORPORATE PARENTING):

- 4.1 This report is an evaluation of previous commitments and is not seeking a decision that would have an impact on these areas. The progress the council has made on the Well-being of Future Generations Act, equalities and safeguarding is set out in the report. Any action the Council takes that requires further decision will be evaluated in line with the decision-making process.

5. OPTIONS APPRAISAL

- 5.1 The self-assessment report is an evaluation of previous commitments and is not seeking a decision on a future policy direction. The report provides an analysis, using a range of information, on the council's performance in 2023/24. The structure of the report has been informed by the legislation it is required to meet.

6. EVALUATION CRITERIA

- 6.1 The report provides a comprehensive evaluation of the performance of the council in 2023/24 using a range of performance information and evidence.

7. REASONS:

- 7.1 To ensure that the council can be held to account for performance and can demonstrate progress towards delivering better outcomes for citizens.
- 7.2 To comply with the Well-being of Future Generations (Wales) Act and the Local Government and Elections (Wales) Act 2021.

8. RESOURCE IMPLICATIONS:

- 8.1 This report is a review of performance in 2023/24. This report does not commit the council to any explicit actions which result in additional resource commitments. Any resource implications of action the Council takes in future in response to the assessment will be dealt with in accordance with the usual decision-making rules.

9. CONSULTEES:

Directorate Management Teams
Strategic Leadership Team
Cabinet

The draft self-assessment report has been scrutinised by Performance & Overview Scrutiny Committee and reviewed by Governance & Audit Committee. The feedback from the committees is set out in this report.

10. BACKGROUND PAPERS:

Local Government and Elections (Wales) Act 2021

Performance and governance of local authorities: statutory guidance

Community and Corporate Plan 2022-28

Self-assessment Report 2022/23

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Appendix 1

Performance Management Framework

Our performance management framework makes sure that everyone is pulling in the same direction to deliver real and tangible outcomes.

Building a zero-carbon county, supporting well-being, health and dignity for everyone at every stage of life is the unifying purpose of the diverse range of services for which we are responsible. We are a partner in the Public Service Board, which is responsible for setting well-being objectives for the county. The council's own well-being objectives are set by Council and form the backbone of our Community and Corporate Plan. Each of our teams has a service business plan that aligns to these objectives. We have a range of performance measures that we use to keep track of our progress. Our risk management policy enables us to manage strategic risks to our delivery. Our employee aims and objectives show the contributions that individual colleagues make to these objectives and delivering our vision in accordance with our values.

