



**Committee:** BUDGET AND PERFORMANCE PANEL

**Date:** TUESDAY, 29 APRIL 2008

**Venue:** LANCASTER TOWN HALL

**Time:** 4.30 P.M.

Councillors are reminded that as Members of Overview and Scrutiny they may not be subjected to the Party Whip, which is prohibited under the Lancaster City Council Constitution.

## **A G E N D A**

**1. Apologies for absence**

**2. Declaration of Interests**

**3. Minutes**

Minutes of the Meeting held on 26<sup>th</sup> February 2008 (previously circulated)

**4. Items of Urgent Business authorised by the Chairman**

**5. Scrutiny of Funding to the Duke's Theatre (Pages 1 - 12)**

Report of Head of Cultural Services and presentation by the Director of Duke's Theatre

**6. BVPI Comparison - Exeter Benchmarking Group (Pages 13 - 55)**

Report of Corporate Performance Manager

**7. Work Programme Report (Pages 56 - 60)**

Report of Head of Democratic Services

## **ADMINISTRATIVE ARRANGEMENTS**

**(i) Membership**

Councillors Jim Blakely (Chairman), Tina Clifford, Jean Dent, Keran Farrow, Sarah Fishwick, Mike Greenall, Ian McCulloch, John Whitelegg and Peter Williamson

**(ii) Substitute Membership**

Councillors Chris Coates, Roger Dennison, Rebekah Gerrard, Emily Heath,  
Karen Leytham, Roger Plumb and Sylvia Rogerson

**(iii) Queries regarding this Agenda**

Please contact Jon Stark, Democratic Services - telephone (01524) 582132 or email  
jstark@lancaster.gov.uk.

**(iv) Changes to Membership, substitutions or apologies**

Please contact Members' Secretary, telephone 582170, or alternatively email  
memberservices@lancaster.gov.uk.

MARK CULLINAN,  
CHIEF EXECUTIVE,  
TOWN HALL,  
DALTON SQUARE,  
LANCASTER LA1 1PJ

Published on Friday, 18<sup>th</sup> April 2008

**BUDGET & PERFORMANCE PANEL****29<sup>th</sup> April 2008****Dukes Theatre****Report of the Head of Cultural Services****PURPOSE OF REPORT**

To provide the Panel with background information in respect of the Dukes Theatre.

This report is public

**RECOMMENDATIONS**

(1) That the Panel note the report.

**1.0 Introduction**

1.1 In December 2007, the Head of Cultural Services submitted a report to Cabinet outlining a Revised Business Model for the Dukes Theatre. The situation arose from notification given by Arts Council England, North West (ACE - NW) of a reduction in revenue funding with effect from 2008/2009. The above was taken within a context of a funding review by Art Council England (ACE) to reflect their own position with regards to the impact of the Government's Comprehensive Spending Review (CSR) and a benchmarking evaluation by ACE – NW of Theatre funding support. The report went on to explain the funding arrangements for the Dukes Theatre, as well as options available to Cabinet, which included;-

- To reduce or withdraw the City Council's funding support to the Dukes Theatre.
- To continue supporting the Dukes Theatre's transition to a Revised Business Model.

1.2 Ultimately, at its meeting on the 11<sup>th</sup> December 2007, Cabinet resolved;-

- (1) That Cabinet note the progress with respect to the Dukes Theatre Revised Business Model.
- (2) That the City Council, via the Officer Development Team, continues to support the Dukes Theatre's transition to a Revised Business Model.

**2.0 Current position**

**2.1** The primary revenue funders are;- Arts Council England (ACE), Lancashire County Council, Lancaster City Council, and North West Vision. In 2007/2008, out of a total income budget of £1,387,700 (based on the Dukes Business Plan), those funding contributions amounted to;-

• Arts Council England (ACE)	£521,400
• Lancashire County Council	£171,600
• Lancaster City Council	£162,300
• North West Vision	<u>£ 18,000</u>
<b>Total</b>	<b>£873,300</b>

**2.2** In response to the above the Dukes Theatre appointed a Change Project Team from among its Board of Trustee, supported by specialist consultants, management and staff from within the Dukes, and input from its primary funders (ACE, Lancashire County Council & Lancaster City Council).

**2.3** Following the announcement by ACE, the position of the other two funding support organisations (i.e., Lancashire County Council and North West Vision) is that for 2008/2009, both declared their respective revenue support at the current level plus inflation.

**2.4** For Lancaster City Council, the 2007/208 funding allocation of £162,300 to the Dukes is made up of £13,500 rent and £148,800 revenue support. The latter is subject to a Service Level Agreement, aligned to the Cultural Services Business Plan and the Council's Corporate Objectives (see Appendix A attached).

**2.5** The impact of the above on the Dukes Theatre and the challenges arising are significant.

Background;-

- 50% reduction in Arts Council England (ACE) funding

Summary:-

- Change Project Team – supported by funders (ACE, Lancashire County Council & Lancaster City Council)
- New Business Model;-
  - Governance & Management (Leadership)
  - Staffing
  - Business & Marketing Plans
  - Activity
  - Audience
  - Premise – capital works

**2.6** In terms of governance the Dukes Theatre has reviewed and revised its Board membership, with the appointment of a new Chair and governors with a background in finance and business skills. The Dukes Theatre is currently constituted as a Joint Local Authority Controlled Company (under the terms of the Local Government & Housing Act 1989), with the current City Council and County Council combined representation accounting for more than 50% of the overall board numbers.

**2.7** Since the period of the Cabinet report presented in December 2007, the Dukes Board have appointed a new Chief Executive – Mr Joe Sumpson. Mr Sumpson will be present at the Budget and Performance Panel and will give Members a brief presentation on the Dukes Theatre and be available to respond to any questions.

**2.8** The Dukes Theatre's Business and Marketing Plan reflects a new model of delivery for the organisation in terms of Activity and Audience;-

#### Business/Marketing Plan

- Earning more at the Box Office through increased levels of activity
- Earning more from the creative learning programme and projects
- Attracting new projects and programme funds
- Earning more ancillary income from advertising and rentals
- Recovering costs from other users of Dukes facilities
- Reducing expenditure – reducing direct production costs, reducing staffing levels, operational costs and marketing costs
- Adopting a more commercial approach

#### New Model of Activity/Audience

- Extended and diversified programme including music
- Extended partnerships
- Continuation of Park and Christmas shows
- Season of produced work in a refreshed studio
- Extended engagement of people throughout Lancashire
- New audiences

**2.9** The revised business model has also highlighted to the Change Project Team how the physical configuration of the Dukes limits audience capacity within the venue. As a result of the internal layout, the main auditorium and the studio cannot operate concurrently, which clearly impacts on the Dukes' income generation.

**2.10** As part of the revised business model the Change Project Team commissioned a specialist theatre architect to undertake a venue remodelling appraisal as part of the business plan.

**2.11** The outcome of the above is scheme that would allow;-

- Remodelling of the Studio
- Sound separation between the Studio and the End Stage Auditorium

**2.12** Following consultation with the other two primary revenue funders (ACE, and Lancashire County Council), the above has been the subject of a Development Team meeting (comprising Officers from;- Cultural Services, Property Services, Economic Development & Tourism Services, and Planning Services/Building Control) who advised on technical, professional and external funding issues. The Change Project Team sought and secured external funding in respect of the project development cost.

**2.13** In aligning the above to the Revised Business Model (including Business Plan) the Change Project Team timetabled the remodelling capital works as follows;-

- October/December – short-term project development

- February/May – installation/construction period
- July – work to be completed for Dukes to check operations
- September – open to the public

**2.14** The above is seen as a short/medium-term project and does not affect any long-term proposals that may or may not emerge as a consequence of the Centros Miller development proposals.

### **3.0 Conclusion**

**3.1** The Panel is asked to receive the report and to satisfy themselves that the financial assistance provided offers value for money and has been expended in contributing to Lancaster City Council's Corporate Priorities.

<b>SECTION 151 OFFICER'S COMMENTS</b>		
The S151 Officer has been consulted and has no further comment.		
<b>MONITORING OFFICER'S COMMENTS</b>		
The Monitoring Officer has been consulted and has no further comment.		
<table border="1"><tr><td><b>BACKGROUND PAPERS</b> Current Service Level Agreement with Dukes Theatre</td><td><b>Contact Officer:</b> David Owen <b>Telephone:</b> 01524 582820 <b>E-mail:</b> downen@lancaster.gov.uk <b>Ref:</b> DO/HCS</td></tr></table>	<b>BACKGROUND PAPERS</b> Current Service Level Agreement with Dukes Theatre	<b>Contact Officer:</b> David Owen <b>Telephone:</b> 01524 582820 <b>E-mail:</b> downen@lancaster.gov.uk <b>Ref:</b> DO/HCS
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**LANCASTER CITY COUNCIL  
SERVICE LEVEL AGREEMENT**

**BETWEEN**

**CULTURAL SERVICES**

**- and -**

**DUKES THEATRE**

**1. PARTIES**

This is an agreement between Lancaster City Council (hereinafter called "the Council") and the Dukes Theatre. (hereinafter called "the Dukes")

Lancaster City Council agrees funding for the provision of services by the Dukes, as set out in Parts 1-4 of this Agreement.

**CONTENTS:**

**Part 1 - General conditions**

**Part 2 - Service objectives and specification**

**Part 3 - Financial and resource arrangements**

**Part 4 - Monitoring arrangements**

**Part 5 - Declaration**

**PART 1 - GENERAL CONDITIONS**

**1.1 OBJECT OF AGREEMENT**

The Council wishes to support the services of the Dukes as by doing so, it will achieve a number of its corporate and cultural service objectives (see also Service Objectives and Specifications 2)

**1.2 PERIOD OF THE AGREEMENT**

The agreement will commence on 1<sup>st</sup> April 2008 and continue until 31<sup>st</sup> March 2009, unless it is terminated under 1.15.

**1.3 THE PARTIES' OBLIGATIONS**

- a) The Dukes agrees to provide the services specified in Part 2 of this Agreement (Service Objectives and Specifications).
- b) The Council agrees to make the grant payments specified in Part 3 of this Agreement (Financial and resource arrangements).

**1.4 STATUS OF AGREEMENT**

It is the intention of both parties that this Agreement shall be legally binding. The Council reserves the right to reclaim all/part of the funding provided if it is not used for the agreed purposes set out in this agreement.

## 1.5 STATUS OF SERVICE PROVIDER

In carrying out this agreement, the Dukes is acting in its own right as an independent organisation, and not as agents of the council.

## 1.6 MANAGEMENT

Responsibility for the management of the Dukes is vested in its Board of Trustees, the membership and operation of which is laid down by a constitution of the Dukes.

## 1.7 PARTIES' REPRESENTATIVES

The Council and the Dukes will each appoint a contact officer.

- a) The role of the Council's contact officer is to:
  - Be the initial point of contact within the Council for the Dukes
  - Inform the Dukes of any issues which may have an effect on the implementation of the service provision in this Agreement
  - Provide information, advice and support to the Dukes as reasonably required
  - Set up quarterly monitoring meetings with the Dukes contact officer to consider the information set out in Part 4 of this Agreement
  - Inform Dukes of any change in the Council's contact officer
- b) The role of the Dukes contact officer is to provide the information required in Part 4 of this Agreement and to inform the Council's contact officer, in writing, if there is:
  - a proposal by the Dukes to change or reduce the services set out in Part 2 of this Agreement
  - a major change to the Dukes financial budget
  - a change to the Dukes constitution
  - a change in the Dukes contact officer

The parties' contact officer will be the Cultural Development Manager of the Council and the Director of the Dukes.

## 1.8 CONFIDENTIALITY

The Council accepts that some of the services the Dukes offers are confidential and that all matters raised by individuals are kept confidential.

The Council expects that the Dukes will not share the contents of this agreement with anyone who is not either a member of the Board of Trustees and who is not an employee of the Dukes, unless formally requested to do so under the freedom of information act.

## 1.9 STAFFING

- a) The Dukes will be responsible for recruiting and training all staff and volunteers
- b) The Dukes will be responsible for managing all staff and volunteers
- c) All staff and volunteers will hold suitable qualifications/experience for their position
- d) All staff and volunteers will undergo a CRB check (at enhanced level), where required

## 1.10 HEALTH AND SAFETY

The Dukes shall have regard to the requirements of the Health and Safety at Work Act, 1974 and any other Acts, Regulations, Directives or Orders etc about health and safety, including:

- a) Normal operating procedures
- b) Emergency operating procedures
- c) Risk Assessments
- d) Child Protection Policy (if applicable)
- e) Staff qualifications (including all staff CRB checks at enhanced level, where required)
- f) Suitable staff to client ratios on and off site
- g) Lone working – Risk assessments in place (including a response plan, who to contact)



## 1.11 INSURANCES

The Dukes will provide proof of adequate public liability Insurance's (Minimum of £5,000,000) to cover such liabilities as may arise in the course of the services provided by the Dukes and will also provide adequate Building and Contents Insurance.

## 1.12 DISPUTE RESOLUTION

If either party considers the other to be in breach of their duties under this agreement or has a grievance about some aspect of the agreement's operation, the parties shall make every effort to resolve the issue through joint discussions. Where this fails:

- the party wishing to make the complaint should provide the other with written details, including proposals for resolving it
- a written response should be sent to the initiating party within 14 days
- If the response is not considered to resolve the issue, the initiating party may request in writing to the contact officer, a meeting of the authorised signatories (or their successor)
- where possible the meeting should be held within 14 days of the contact officer receiving the request;
- If either party is dissatisfied with the outcome as notified to it in writing within seven days of the meeting, arbitration can be requested and this will take place with a mutually acceptable external party

## 1.13 REVIEW

- a) Any required amendments will need to be negotiated and agreed in writing by both parties.
- b) The mechanism used for determining the grant set out in 3.1 cannot be the subject of an amendment under a).
- c) An annual review of the level of services specified in 2.2 will be under taken.

## 1.14 RENEWAL

This entire agreement shall be subject to a formal review beginning in January 2009.

## 1.15 TERMINATION

- a) This Agreement can be terminated by either party giving the other party six months notice in writing
- b) Notice can be served if delivered, posted or faxed to the contact officer

# PART 2 - SERVICE OBJECTIVES AND SPECIFICATIONS

## 2.1 PRINCIPLES UNDER WHICH THE SERVICES ARE PROVIDED

- a) By working in partnership with the Dukes, the Council will achieve a number of its corporate & cultural service objectives.

### **Corporate Objectives 2008-09:**

- Deliver cost effective services that provide value for money
- Provide customer focused, accessible services
- Make our district a cleaner and healthier place
- Contribute to a safer society
- Lead the regeneration of our District
- Support sustainable communities and action on climate change
- Ensure that local communities have more influence and involvement in the way services are delivered and decisions that affect them are made

## **Cultural Services Objectives for this SLA:**

- Use the Council's funding as leverage for securing external funding into the arts
- Contribute to the development of an arts strategy for Lancaster District.
- Support the development of Creative Industries
- Use the arts as a way to link to wider agendas such as health & wellbeing, reducing crime and the fear of crime and tourism & regeneration
- To work with the following priority groups e.g. women, people with a disability, people from an ethnic minority background, older people, young people and specifically young people at risk
- To work in priority communities e.g. West End of Morecambe, Poulton, Ryelands, Skerton, Vale, Ridge, and the Marsh

## **Dukes Objectives for this SLA (must link to some/all the above) and Dukes Key Performance Indicators for this SLA (must link to your objectives above):**

The Dukes overall objectives will be driven by its newly adopted Artistic Policy (attached). 2008 will see the continuation of major change within the organisation. We will publish a comprehensive Business Plan, Dukes 2012, in the autumn. At this stage it is possible to outline a number of strategic priorities for 08/09, including:

- Partnership development: regional
- Up-grading and opening the studio
- Completing the staffing re-structure
- Producing high quality productions
- Programming, delivering and marketing a mixed events programme
- Producing a Marketing Strategy
- Creation of a new website
- Re-positioning creative learning, including schools audience development
- One company: integration of DT3/young people into the whole
- Thriving bar
- New income streams
- Effective management of core grants
- Producing a Communications Strategy
- Commissioning new work
- Managing Centros
- Managing risk.

More specifically related to LCC priorities.....

- Use the Council's funding as leverage for securing external funding into the arts

### **Dukes Objectives**

- to prioritise and consolidate relationships with key core funders – ACE (£260k p.a.), Lancashire County Council (£170k p.a.) and North West Vision (£18k p.a.)
- to generate new investment from new funding streams

### **Dukes KPIs**

- stabilised relationships with core funders with no reduction of income
  - generate new investment for capital works from North West Development Agency (£237k) and ACE (£99k)
  - increased investment from new public sector funding streams
  - increased investment from new private sector funding streams (including £5k sponsorship target)
- Contribute to the development of an arts strategy for Lancaster District.

### **Dukes Objectives**

- to place the Dukes at the centre of arts thinking and strategies of Lancaster City Council, for the benefit of the people of the Lancaster District and the company itself

## Dukes KPIs

- to be represented by and reflected in the Lancaster District Arts Strategy

- Support the development of Creative Industries

## Dukes Objectives

- to actively connect with and support (where possible) local and regional creative industries
- to develop and enhance partnerships with local arts organisations, including Ludus Dance, More Music in Morecambe, Litfest, Storey Gallery, Nuffield Theatre, encouraging them to reach further and achieve more by working with the Dukes
- to actively encourage young people to develop skills which equip them to go on to careers within the creative industries
- to encourage a broad understanding of the Dukes as an originator of and venue for creative enterprises

## Dukes KPIs

- liaison with and offering of subsidised venue support for Grow Creative
- liaison with and offering of subsidised venue support for Creative Lancashire
- enhanced partnership working with Ludus Dance, including planning for a large-scale dance festival of regional and national significance
- enhanced partnership working with Litfest and the Storey Gallery, including discussion and possible delivery of shared events
- enhanced partnership working with MMM, including exploration of (and if applicable planning for) major alternative choirs festival and a performance co-production for 2010
- new partnership working with the Nuffield, including discussion (and possible delivery of) of shared events
- development of a formal partnership, expressed through a Memorandum of Understanding, with at least one of the above organisations
- to develop and deliver a wide range of young people's projects focussed on skills development in drama and theatre, music, technical theatre (lighting and sound) and film-making
- re-positioning of the Dukes as a unique cultural centre for Lancashire through promotional materials.

- Use the arts as a way to link to wider agendas such as health & wellbeing, reducing crime and the fear of crime and tourism & regeneration

## Dukes Objectives

- The Dukes is inclusive in outlook; we believe that theatre, film and the performing arts have the power to change people's lives for the better. The Dukes will actively look for ways to deliver on this.

## Dukes KPIs

In partnership with Lancashire County Council Integrated Youth Service we will:

- run at least six young people's projects designed to increase their skills, health and wellbeing
- offer at least one creative project to young people at risk and in so doing offer diversionary activities away from crime.
- we will actively promote the vitality and achievements of local young people, providing positive examples of young people's worth and thus reducing people's tendency to demonise and be afraid of young people
- we will also create and open a new studio theatre and associated front of house facilities, increasing the quality and breadth of our culture and tourism offer
- we will seek to attract at least 65,131 attendees across our whole programme, of which we aim to attract 68% (44,289) attendees from outside the district. These figures are informed estimates, based upon 07/08 box office data which shows that, of the attendees whom we have data on, 68% are visitors to the district.
- we will actively engage with the Centros development, designed in part to regenerate the city; we will engage to try to ensure that this development benefits rather than threatens the regeneration of the city.

- To work with the following priority groups e.g. women, people with a disability, people from an ethnic minority background, older people, young people and specifically young people at risk

#### Dukes Objectives

- The Dukes understands and celebrates the power of the arts to engage and reflect the wide range of communities we serve.

#### Dukes KPIs

- The Dukes will programme and promote at least one event and/or participatory work aimed at each of the following groups - women, people with a disability, people from an ethnic minority background, older people, young people and specifically young people at risk
- The Dukes will create an audience development strategy for its film programme which will actively seek to increase the number of young audiences for film.

- To work in priority communities e.g. West End of Morecambe, Poulton, Ryelands, Skerton, Vale, Ridge, and the Marsh

#### Dukes Objectives

- The Dukes will aim to, funding permitting, run a comprehensive audience and participation survey in order to gain detailed information on who our audiences are and also where our participants live. This information will inform the development of the company marketing and education strategies.

#### Dukes KPIs

- Survey to be completed.

## **2.2 SERVICES FUNDED UNDER THIS AGREEMENT (Please list what the funding will be used for e.g. to employ a full-time member of staff, to deliver a specific programme(s) or event(s).**

- Staffing
- Equipment
- Materials
- Marketing and Promotion
- Programming

## **2.3 MEANS OF ACCESSING THE SERVICE**

The Dukes is to use local, regional and national media to promote itself and its services.

## **2.4 SERVICE DEVELOPMENT AND IMPROVEMENT**

The "partners" ("Lancaster City Council's Cultural Services" and the "Dukes") will work together for the joint aim of enhanced service development and improvement.

## **2.5 USER FEEDBACK AND INVOLVEMENT**

- a) Litfest will operate a procedure for representations and complaints about the service.
- b) The Board of Trustees is to be constituted in such a way as to encourage representation from as wide a range of people as possible.

# **PART 3 - FINANCIAL AND RESOURCING ARRANGEMENTS**

## **3.1 The Council agrees to make provision within its revenue budget for the payment of a grant to the Dukes for the financial year 2008/09 subject to:-**

- a) An agreed and signed SLA

- b) Payment of the grant will be given every quarter in advance, based on submission of a satisfactory report and a invoice
- c) LCC will expect that external funding will be sought

For the financial year beginning April 2008, the Council has agreed that the grant to be paid to the Dukes shall be £151,800 (£37,950 per quarter), for such items as:

- a) Staffing
- b) Equipment
- c) Materials
- d) Marketing and promotion
- e) Programming

For the financial year beginning April 2008, the Dukes must provide the Council (if requested) with a pricing policy to include:-

- a) Commercial fees and charges and what this covers and who that would apply to
- b) Discounted fees and charges and what this covers and who that would apply to
- c) Agree free use by the Council
- d) Income targets
- e) Fund raising/Accessing external funding

- 3.2** The Dukes agrees to submit, to the Council at the end of the year of this Agreement, a copy of its audited accounts (if requested).
- 3.3** Where the Dukes gains a surplus of income from grants, fundraising or other sources in this year, the Council will not seek repayment of any part of the grant. The Dukes will maintain a level of reserves appropriate to meet its financial responsibilities.

## **PART 4 - MONITORING & PERFORMANCE ARRANGEMENTS**

- 4.1** Cultural Services will monitor and evaluate the implementation of the Service Level Agreement and how it performs against corporate & cultural service objectives, on a quarterly basis.
- 4.2** The Dukes will provide a copy of the Annual Report to the Council.
- 4.3** The Dukes will provide information reasonably required by the Council, subject to those requirements not being in breach of clients' confidentiality. Information will not be required more frequently than at quarterly intervals and must include audience feedback, throughput figures and updates on events/programmes.
- 4.4** These monitoring arrangements can be amended by agreement between the council and the Dukes to reflect changes in service practice, for example data collection.
- 4.5** Cultural Services expect that audience registers etc will be produced from every event/programme.
- 4.6** Cultural Services expect that the contact officer for the Dukes will attend regular meetings and if they can not attend then they will send a representative.
- 4.7** The Dukes agrees to include the Lancaster City Council logo on all its marketing, and to add that The Dukes receives funding/support from Lancaster City Council on all website, marketing and press releases.
- 4.8** Cultural Services expect that if any events/programmes are stopped they will be informed immediately.

## **PART 5 - DECLARATION**

On behalf of the Council I confirm that I have read the Agreement as set out above and the Council will comply with the terms and conditions contained within.

Signed: \_\_\_\_\_

(Authorised signatory for Lancaster City Council)

Date: \_\_\_\_\_

Name of authorised signatory: \_\_\_\_\_

Address to which communications relating to this agreement should be sent:

Cultural Services  
Cultural Development Manager  
Lancaster City Council  
Town Hall  
Morecambe  
LA4 5AF

On behalf of the Dukes I confirm that I have read the agreement as set out above and the Dukes will comply with the terms and conditions contained within

Signed: \_\_\_\_\_

(Authorised signatory for Dukes)

Date: \_\_\_\_\_

Name of authorised signatory: \_\_\_\_\_

Address of Dukes Theatre:

Dukes Theatre  
Moor Lane  
Lancaster  
LA1 1QE  
01524 598502

## **Budget & Performance Panel**

### **BVPI Comparison Exeter Benchmarking Group**

**29<sup>th</sup> April 2008**

### **Report of Corporate Performance Manager**

#### **PURPOSE OF REPORT**

**To provide Members with a comparison of the Council's performance against statutory Performance Indicators in relation to a number of similar local authorities.**

**This report is public**

#### **1. RECOMMENDATIONS**

That Members should note this report and may also wish to keep this information to hand for future reference when considering council's performance.

#### **2. Background**

Within the terms of the Local Government Act 1999 the Council has a duty to seek to continuously improve its services to the local community and to manage its performance to support that improvement.

Informed comparison is the basis of performance management. Authorities are required to set targets against all national and local indicators that allow for comparison nationally, performance indicators are a good starting point for comparison work.

Lancaster City Council is a member of the Exeter Benchmarking Group, (sometimes called the Historic Towns Group). This is an established network of District authorities who have a similar profile based on, size, demographic and budget. Each year a detailed comparison report of authority performance based on statutory BVPI's is produced. This report is used to help other authorities seek out best practice in similar organisations.

Members may find this comparison interesting, however as it is based on the most recently available **audited** performance information for the financial year 2006/07 it is now a year out of date.

Additional information which will enable Members to place this information into context will be provided via the Escendency system at the meeting.

The comparison document is attached at **Appendix A**.

<b>FINANCIAL IMPLICATIONS</b>  None	
<b>SECTION 151 OFFICER'S COMMENTS</b>  The Section 151 Officer has been consulted and has no further comments.	
<b>LEGAL IMPLICATIONS</b>  The Council has a duty to continuously improve within the terms of the Local Government Act 1999 (the duty of Best Value). Legal Services have been consulted and have no further comments.	
<b>MONITORING OFFICER'S COMMENTS</b>  The Monitoring Officer has been consulted and has no further comments.	
<b>BACKGROUND PAPERS</b>  None	<b>Contact Officer: Liz Stokes</b> <b>Telephone: 582150</b> <b>E-mail:</b> <a href="mailto:Lstokes@lancaster.gov.uk">Lstokes@lancaster.gov.uk</a>



## Statutory Performance Indicator Results

### 2006-07

### Lancaster compared with benchmarking group

#### How to use graphs

The graphs are arranged so that councils with good comparative performance are always on the left side of the graph.

The symbols below show Lancaster's performance in relation to the national district quartile position (i.e. all 238 district councils):

④ ③ ② ①	National Top Quartile
④ ③ ② ①	National Third Quartile
④ ③ ② ①	National Second Quartile
④ ③ ② ①	National Bottom Quartile

#### Benchmarking Group

Bedford  
 Canterbury  
 Carlisle  
 Cheltenham  
 Chester  
 Dover  
 Eastbourne  
 Exeter  
 Gloucester  
 Ipswich  
 Lancaster  
 Lincoln  
 Oxford  
 Shrewsbury and Atcham  
 Worcester  
 Worthing

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1.4 Percentage of Council Tax collected (BVPI 9)	2
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1.6 The percentage of top 5% of earners that are women (BVPI 11a)	2
1.7 The percentage of top 5% of earners from minority ethnic communities (BVPI 11b)	3
1.8 The percentage of top 5% of staff who have a disability(BVPI 11c)	3
1.9 The number of working days lost due to sickness absence (BVPI 12)	3
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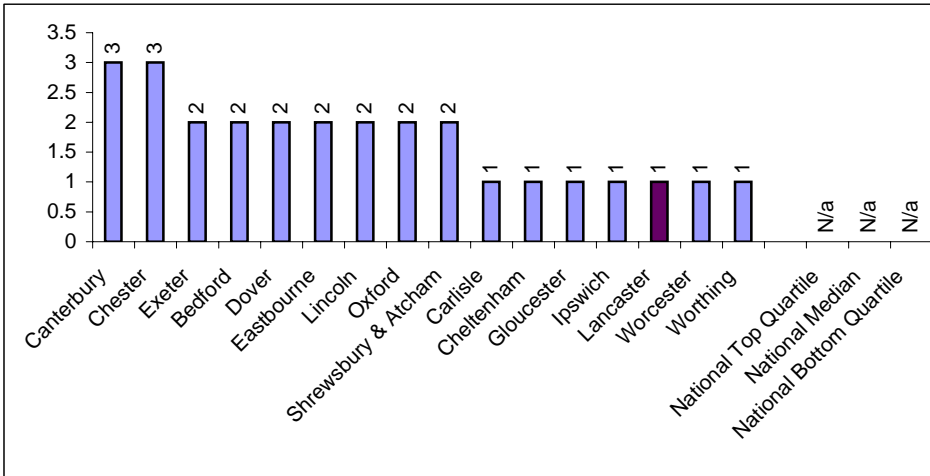
For further information about performance indicator results please contact Liz Stokes in the Corporate Strategy.

Telephone: 01524 582150

Email: [stokes@lancaster.gov.uk](mailto:stokes@lancaster.gov.uk)

# 1. Corporate Health

## 1.1 Equality Standard for Local Government (BVPI 2a)



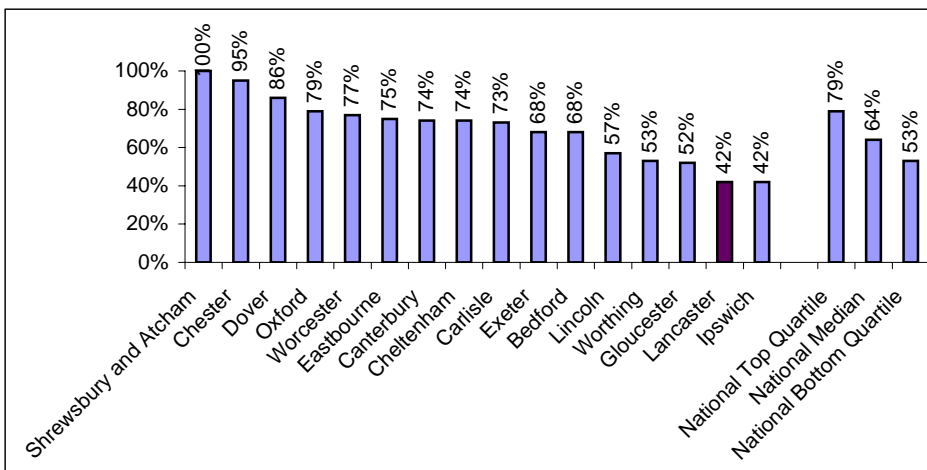
National Top Quartile= N/a

National Median= N/a

National Bottom Quartile= N/a

**N/a**

## 1.2 The duty to promote race equality (BVPI 2b)



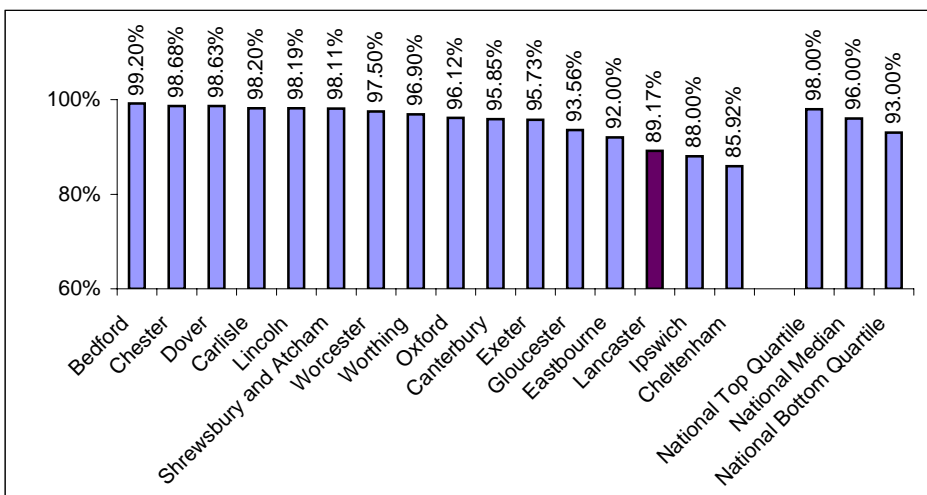
National Top Quartile= 79%

National Median= 64%

National Bottom Quartile= 53%



## 1.3 The percentage of undisputed invoices paid on time (BVPI 8)



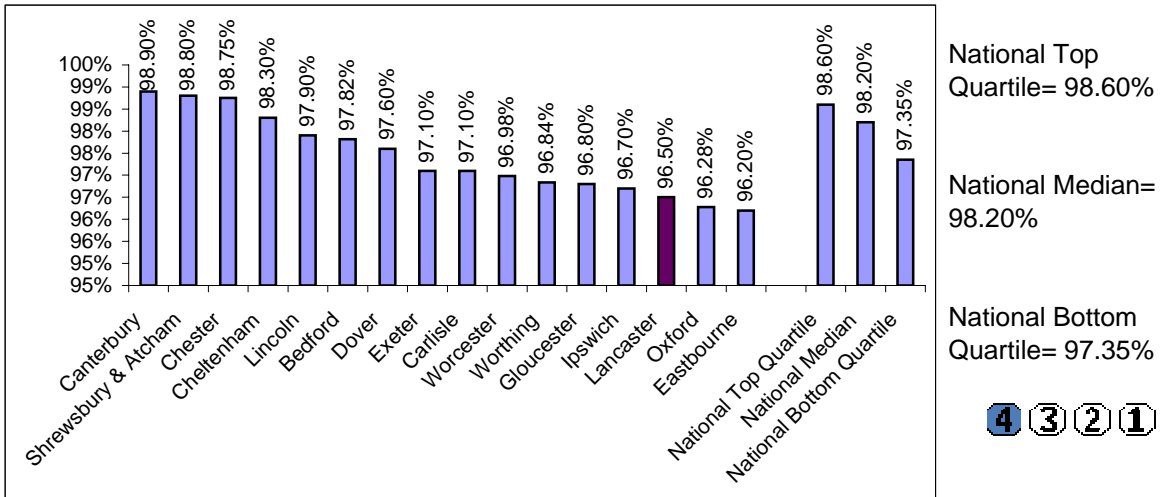
National Top Quartile= 98.00%

National Median= 96.00%

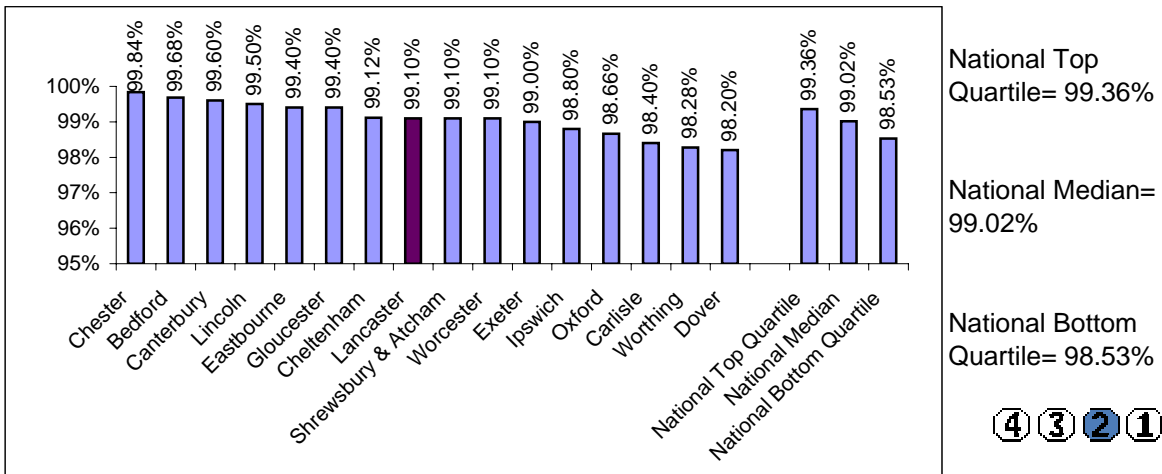
National Bottom Quartile= 93.00%



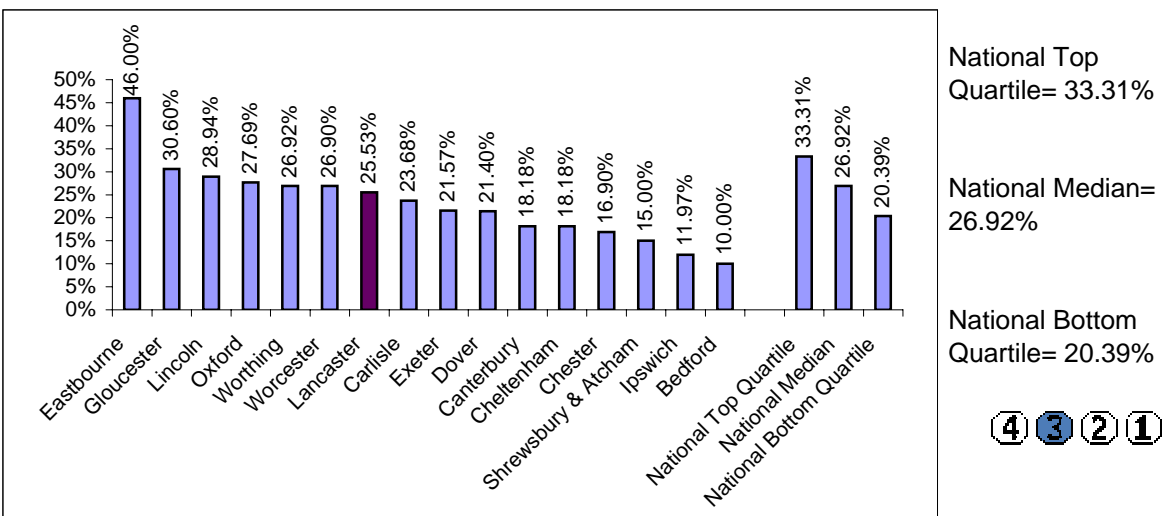
1.4 Percentage of council tax collected (BVPI 9)



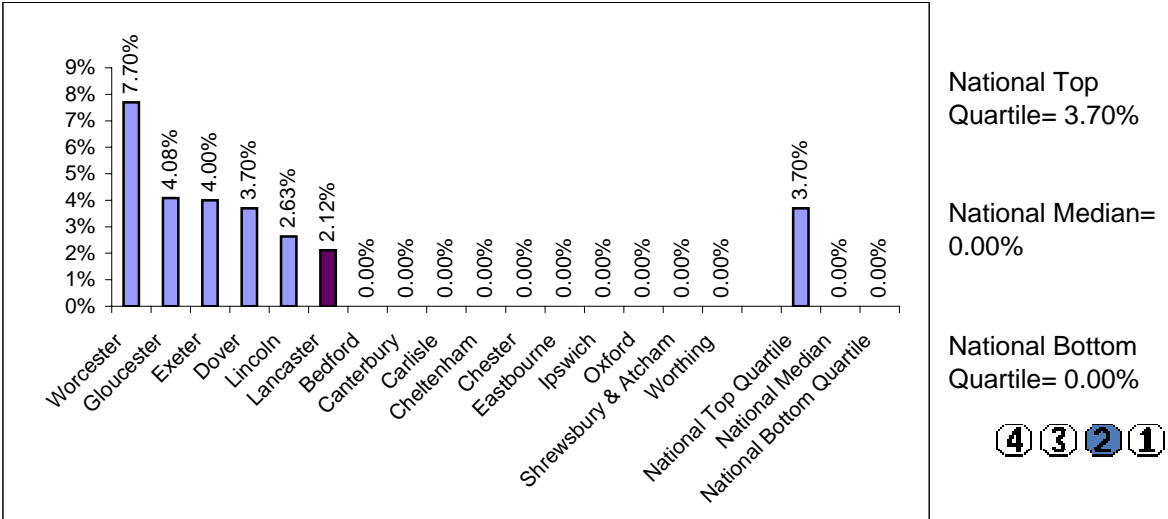
1.5 The percentage of non-domestic rates collected (BVPI 10)



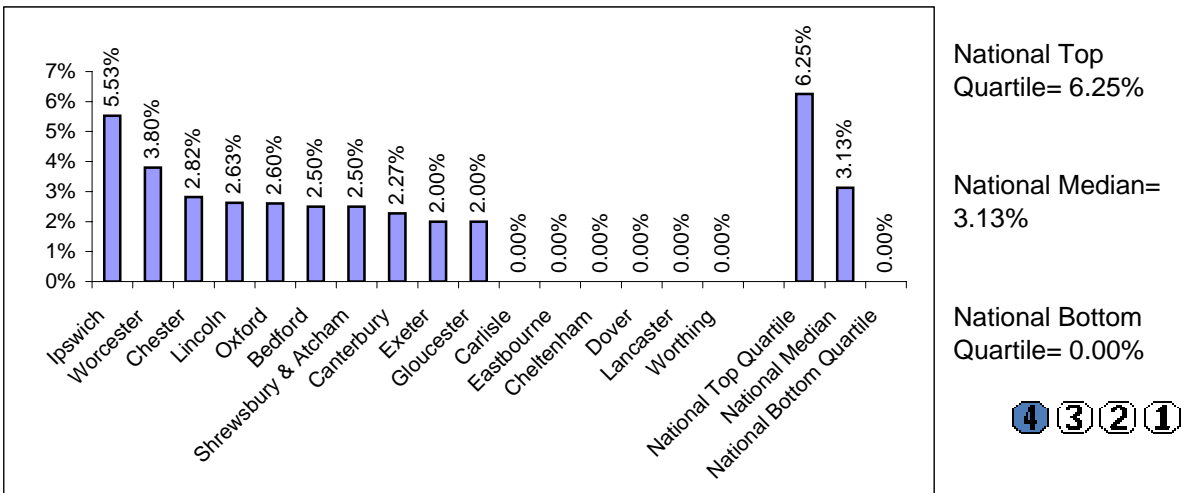
1.6 The percentage of top 5% of earners that are women (BVPI 11a)



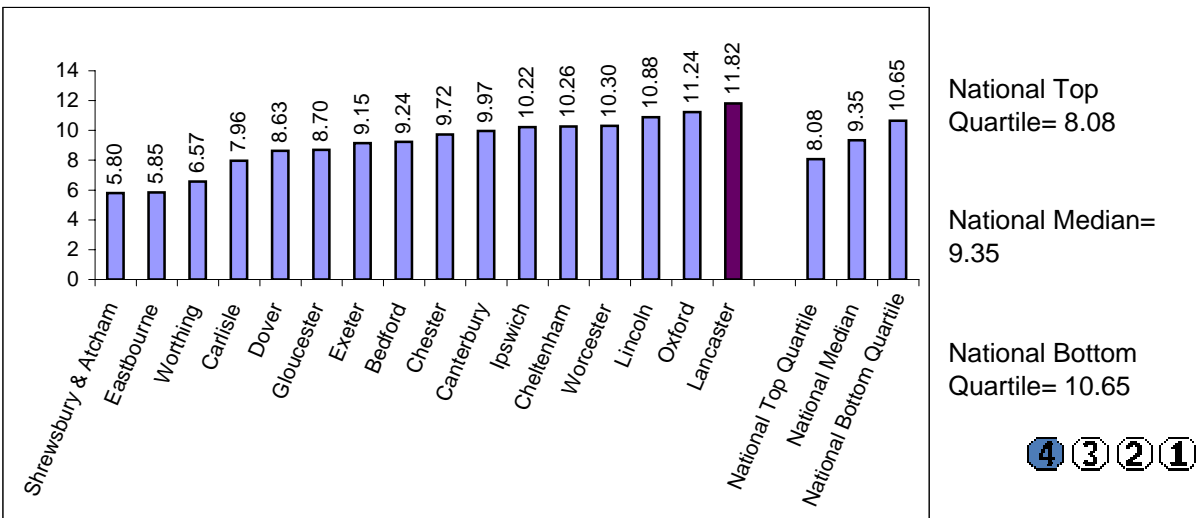
1.7 The percentage of top 5% of earners from minority ethnic communities (BVPI 11b)



1.8 The percentage of top 5% of staff who have a disability (BVPI 11c)

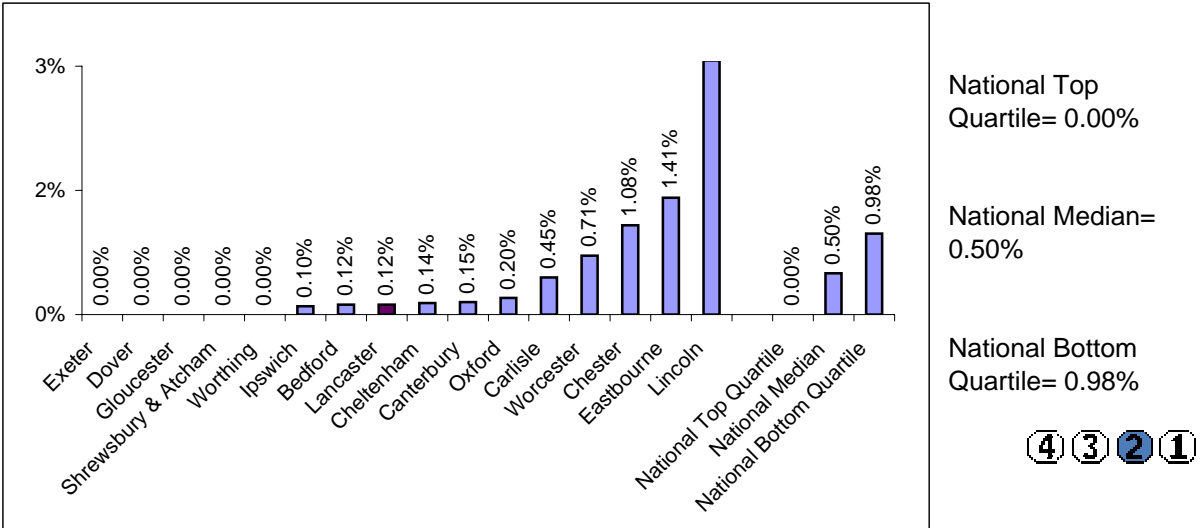


1.9 The number of working days lost due to sickness absence (BVPI 12)

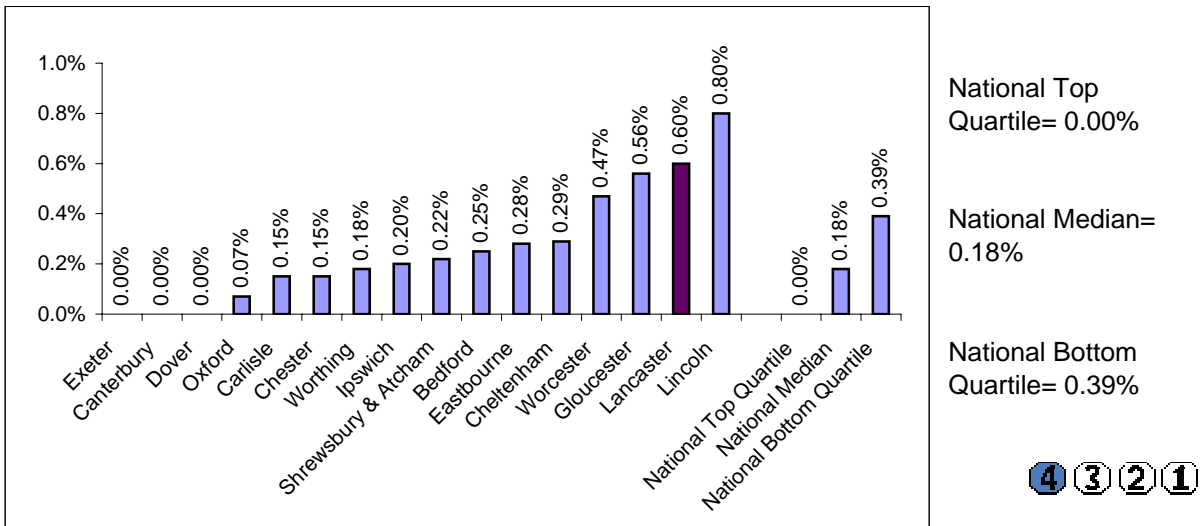




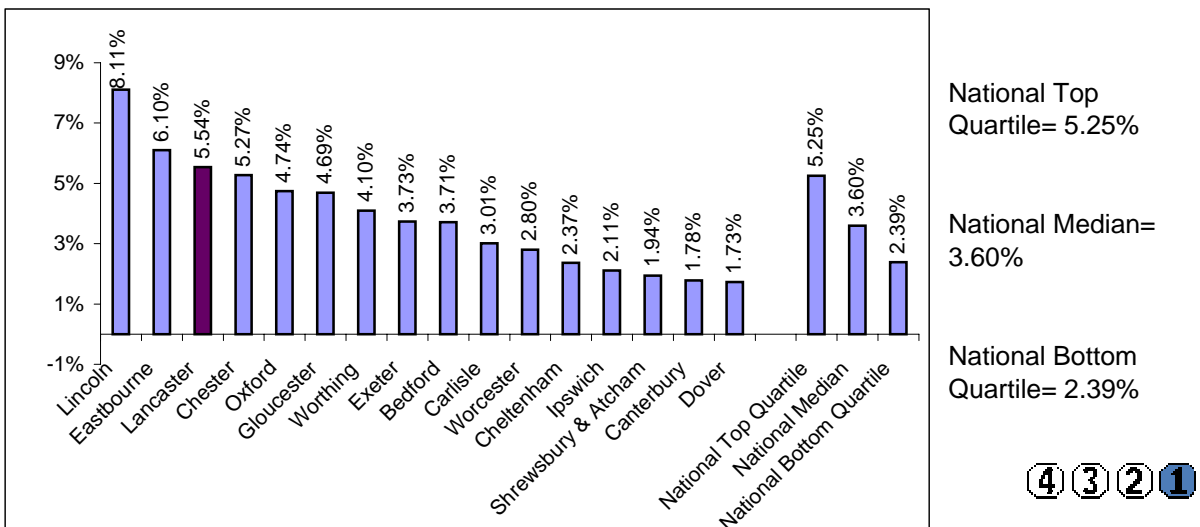
1.10 Percentage of employees retiring early, excluding ill-health retirements (BVPI 14)



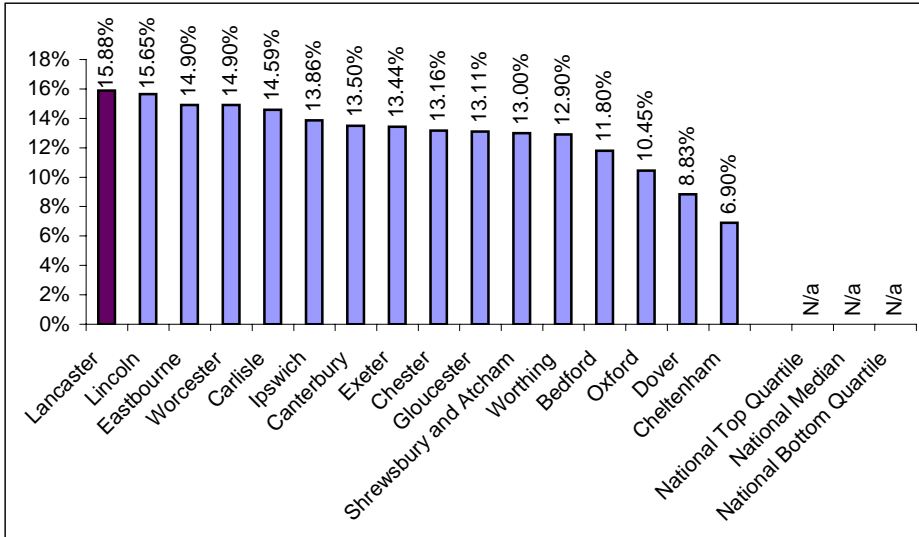
1.11 Percentage of employees retiring on the grounds of ill health (BVPI 15)



1.12 The percentage of local authority employees with a disability (BVPI 16a)



1.13 Percentage of economically active population with a disability (BVPI 16b)



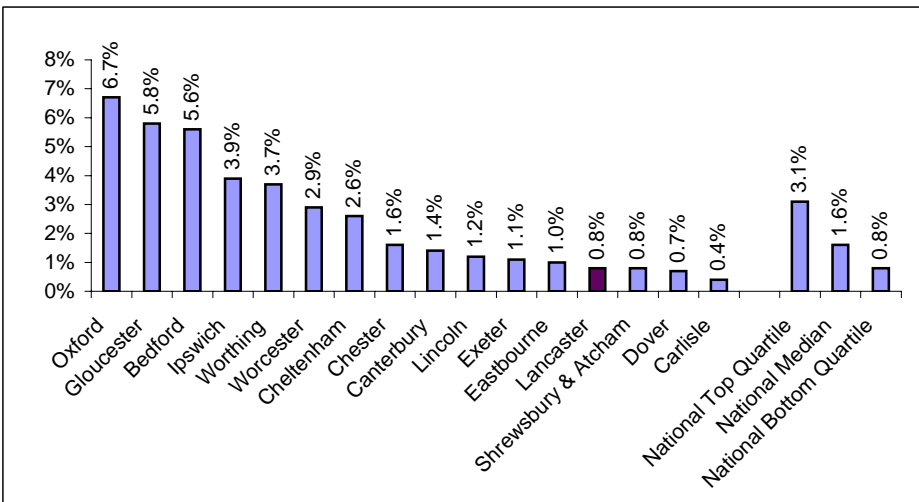
National Top Quartile= N/a

National Median= N/a

National Bottom Quartile= N/a

**N/a**

1.14 Proportion of local authority employees from minority ethnic communities (BVPI 17a)



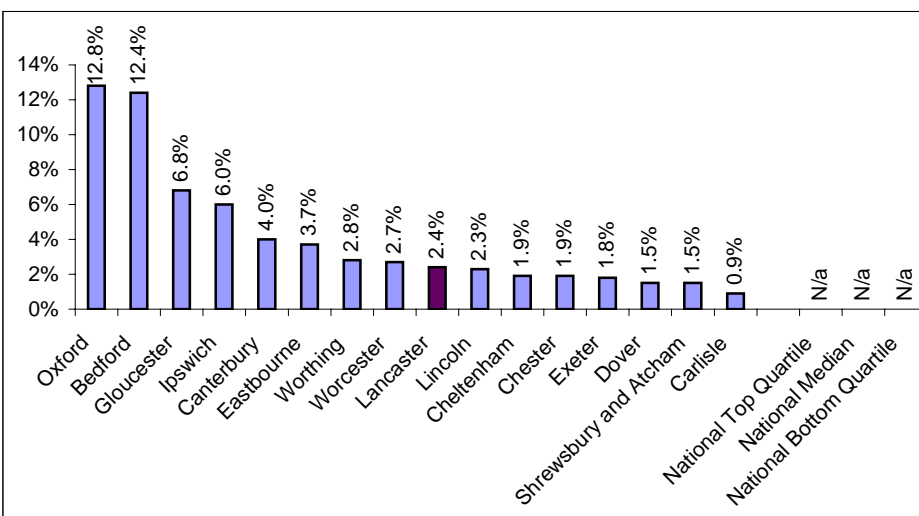
National Top Quartile= 3.1%

National Median= 1.6%

National Bottom Quartile= 0.8%

**4 3 2 1**

1.15 Percentage of the economically active population from ethnic minority communities (BVPI 17b)



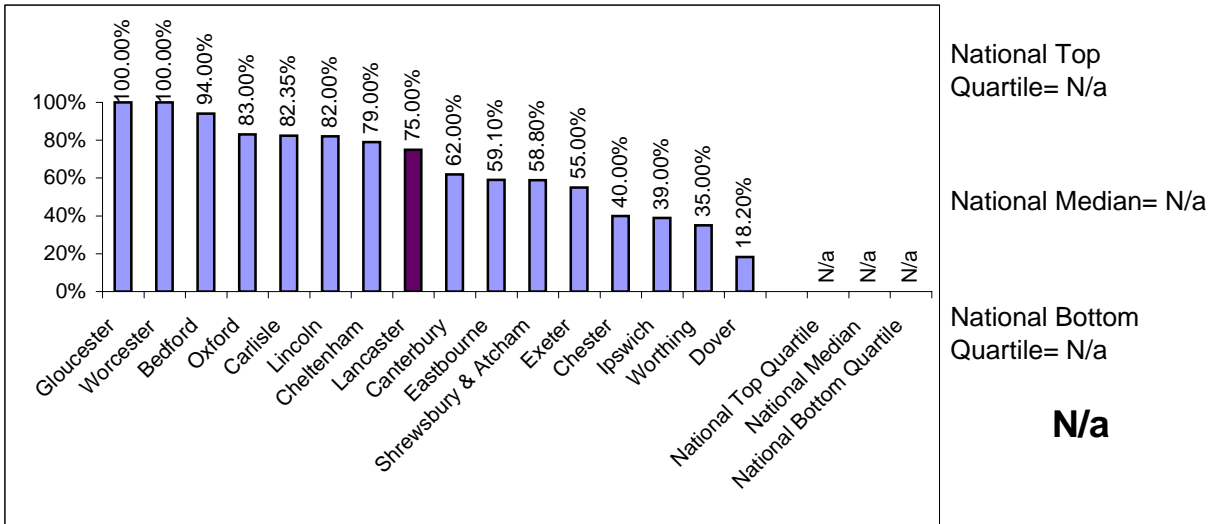
National Top Quartile= N/a

National Median= N/a

National Bottom Quartile= N/a

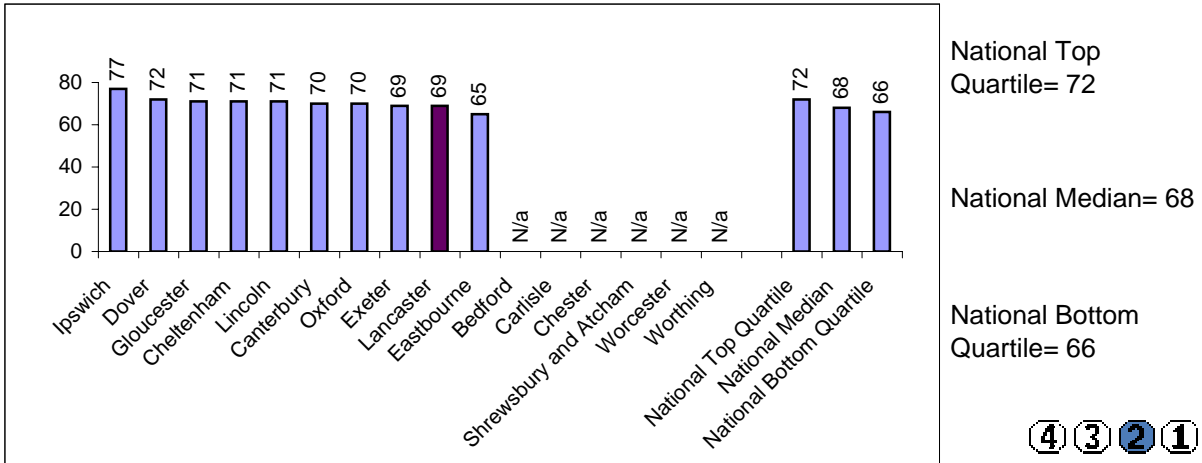
**N/a**

1.16 Percentage of authority buildings which are accessible to people with a disability (BVPI 156)

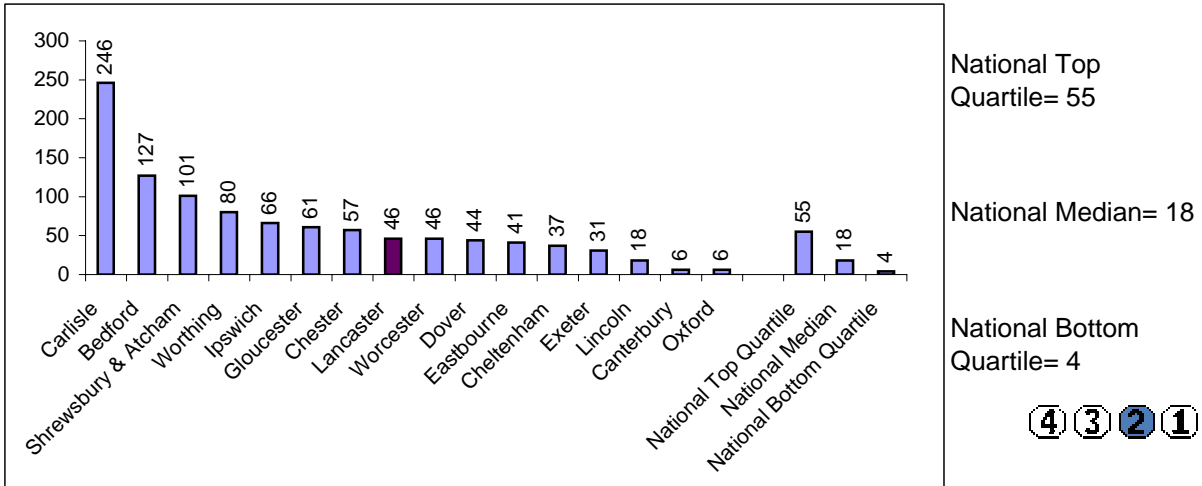


## 2. Housing

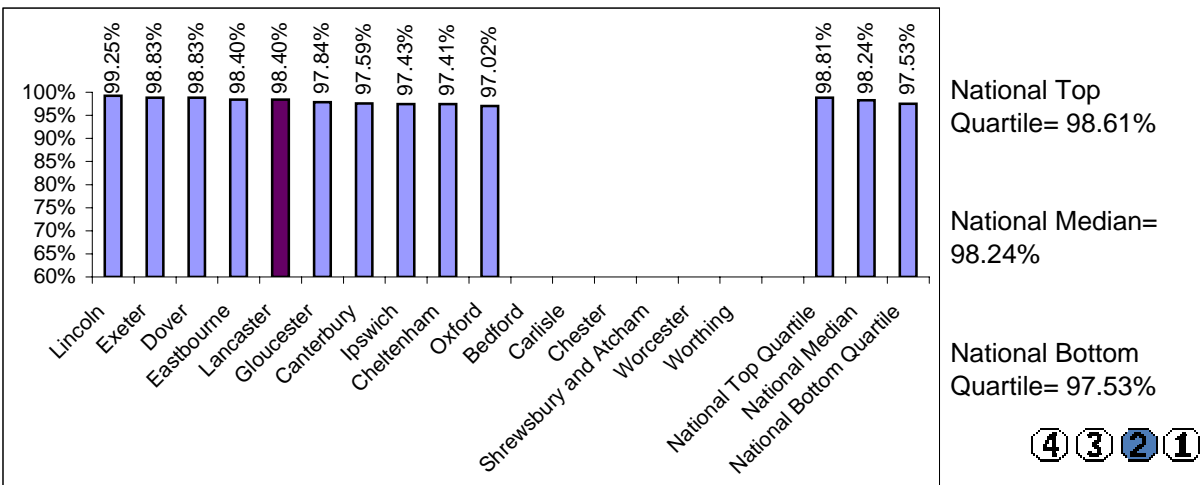
2.1 Energy Efficiency- the average Standard Assessment Procedure (SAP) rating of local authority owned dwellings (BVPI 63)



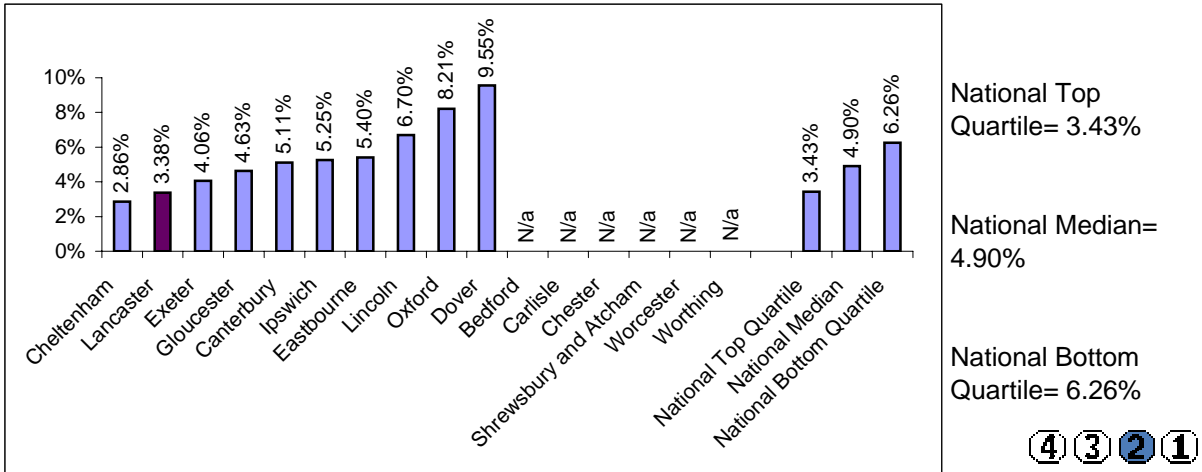
2.2 The number of private sector vacant dwellings that are returned into occupation (BVPI 64)



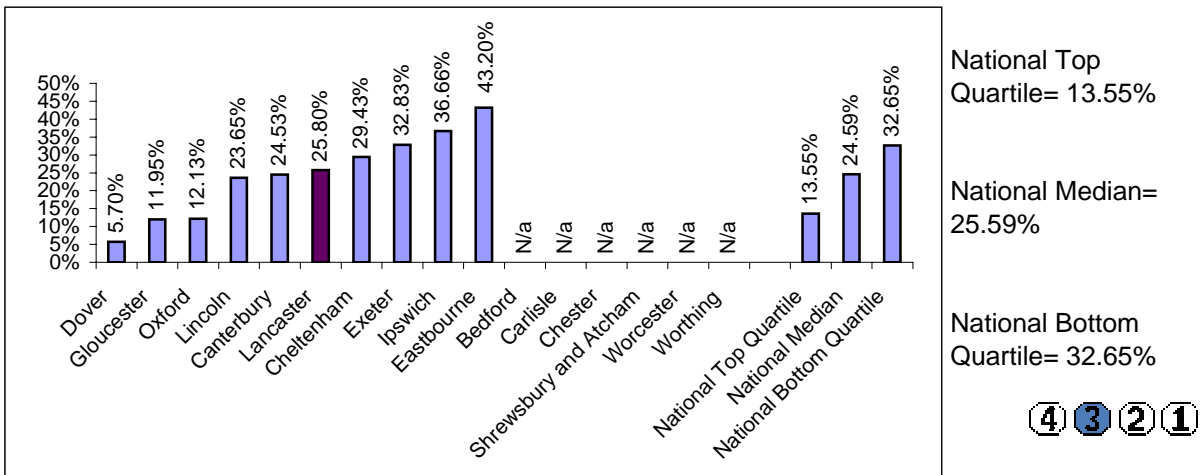
2.3 Rent collected as a proportion of rents owed on Housing Revenue Account Dwellings (BVPI 66a)



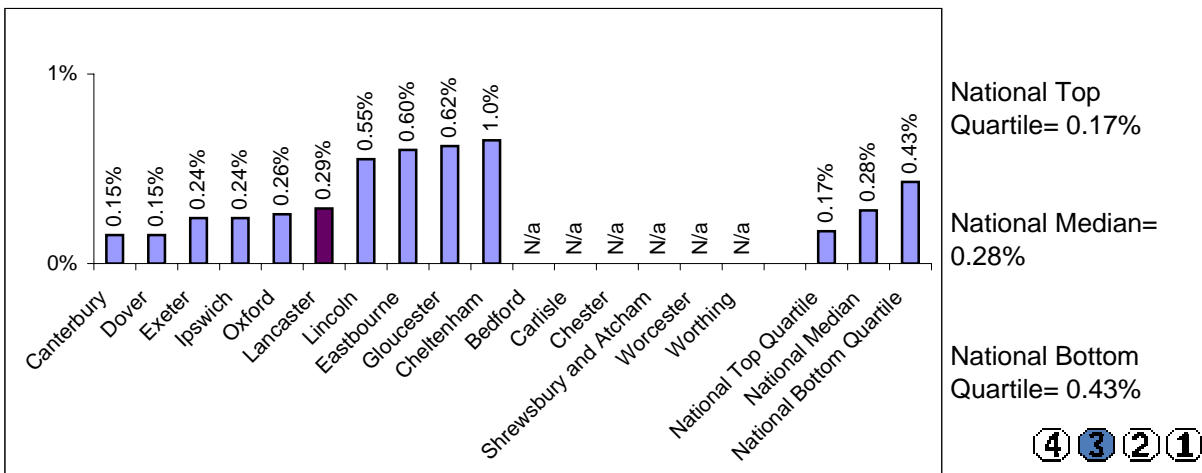
2.4 The percentage of local authority tenants with more than seven weeks of (gross) rent arrears (BVPI 66b)



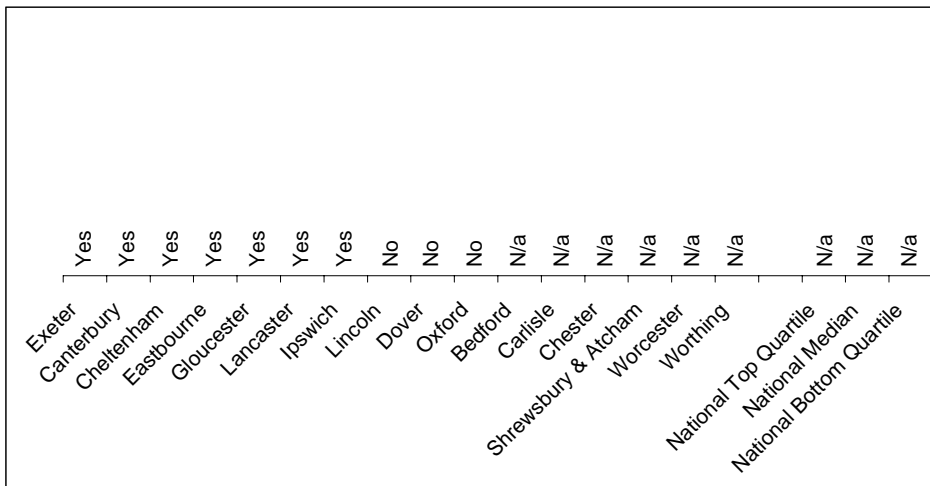
2.5 Percentage of local authority tenants in arrears who have had Notices Seeking Possession served (BVPI 66c)



2.6 Percentage of local authority tenants evicted as a result of rent arrears (BVPI 66d)



2.7 Equal Access to Social Housing (BVPI 164)



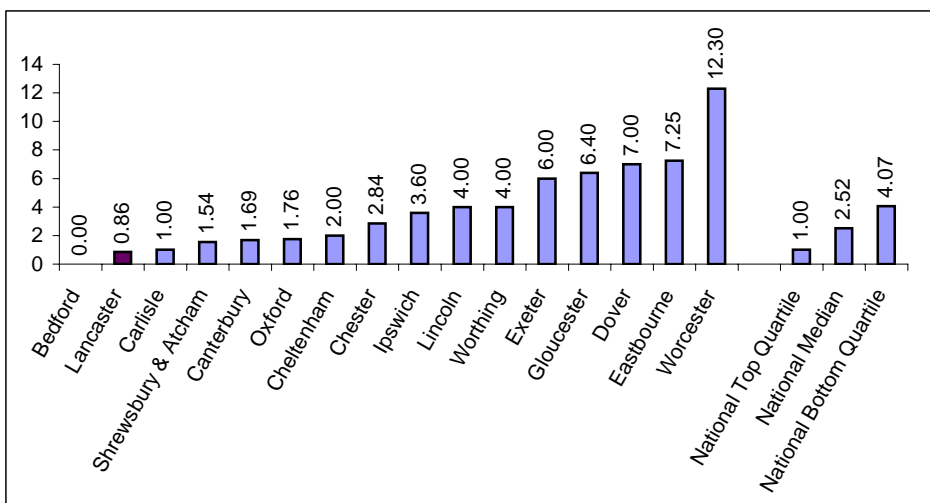
National Top Quartile= N/a

National Median= N/a

National Bottom Quartile= N/a

**N/a**

2.8 Average length of Stay in bed and breakfast accommodation (weeks) (BVPI 183a)



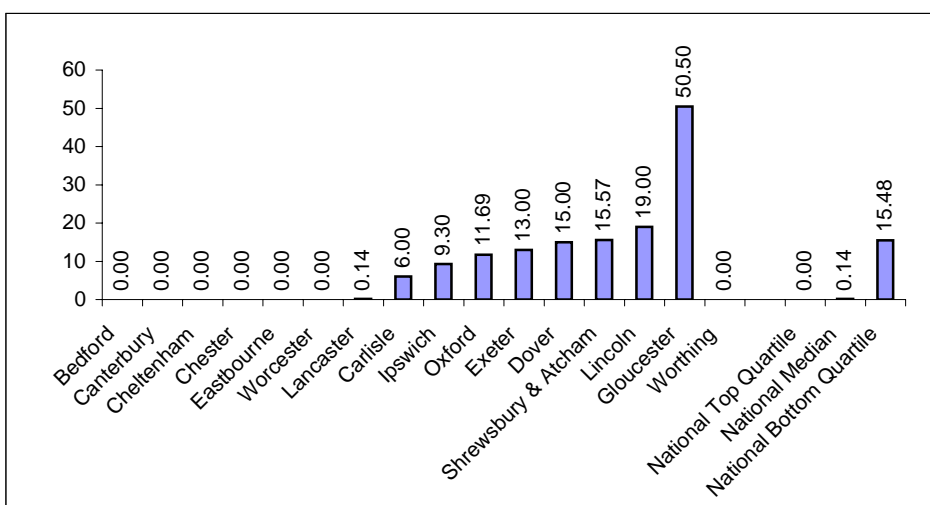
National Top Quartile= 1.00

National Median= 2.52

National Bottom Quartile= 4.07

**4 3 2 1**

2.9 Average length of stay in hostel accommodation (weeks) (BVPI 183b)



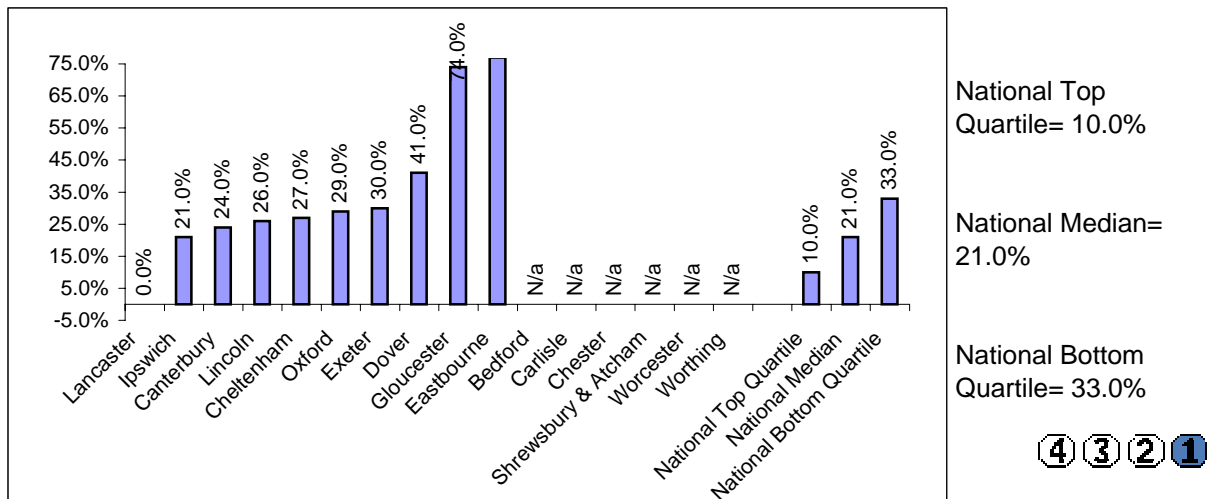
National Top Quartile= 0.00

National Median= 0.14

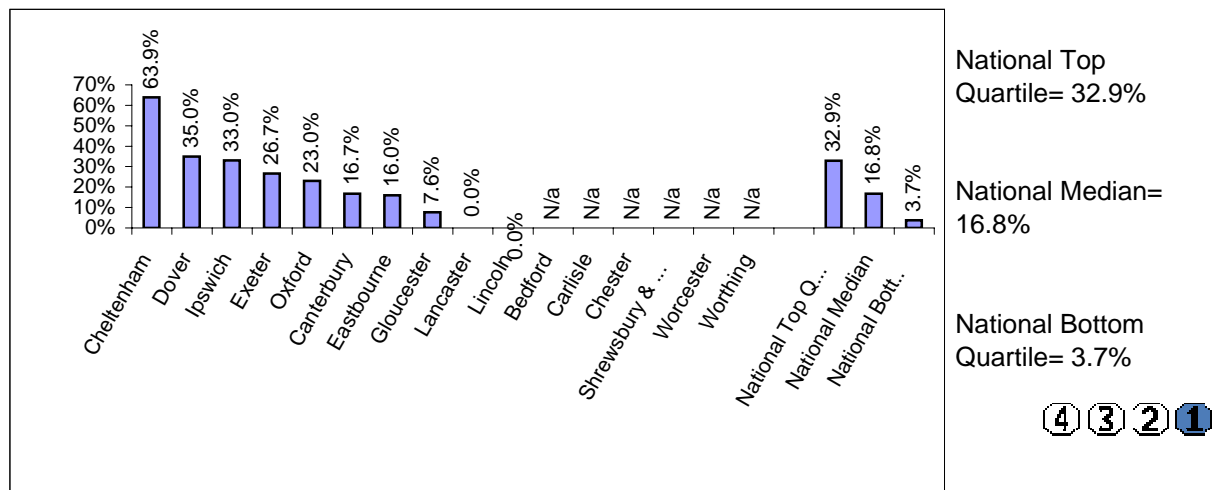
National Bottom Quartile= 15.48

**4 3 2 1**

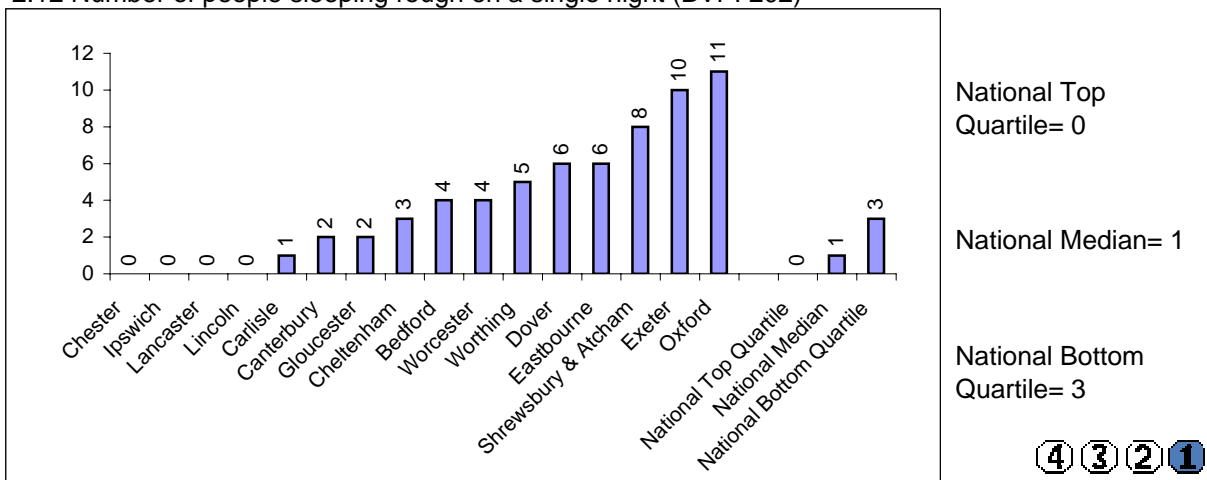
2.10 Proportion of local authority homes which were non-decent at the start of the financial year (BVPI 184a)



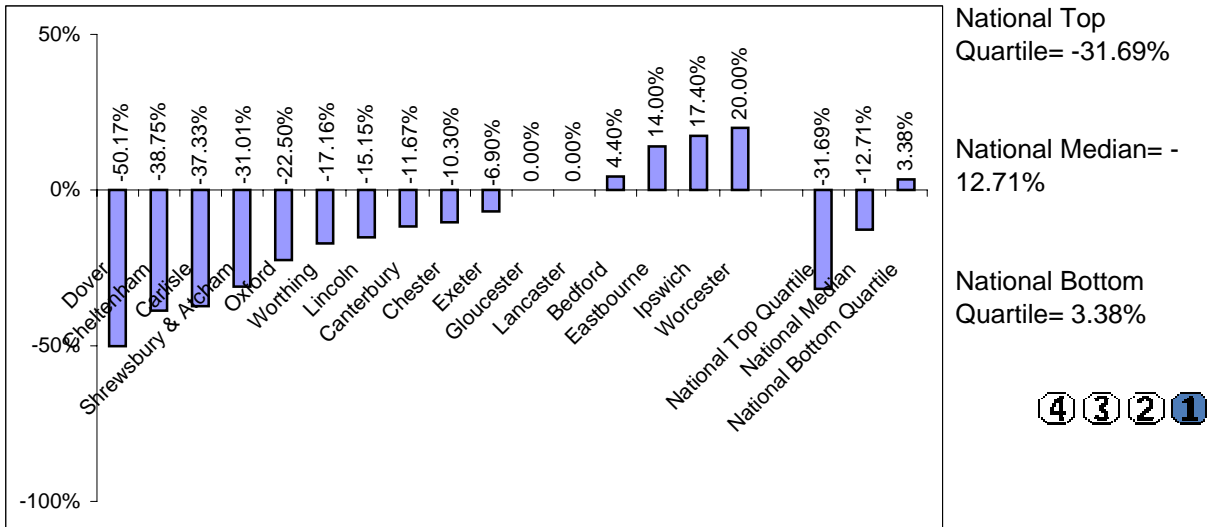
2.11 Percentage change in the proportion of non decent homes (BVPI 184b)



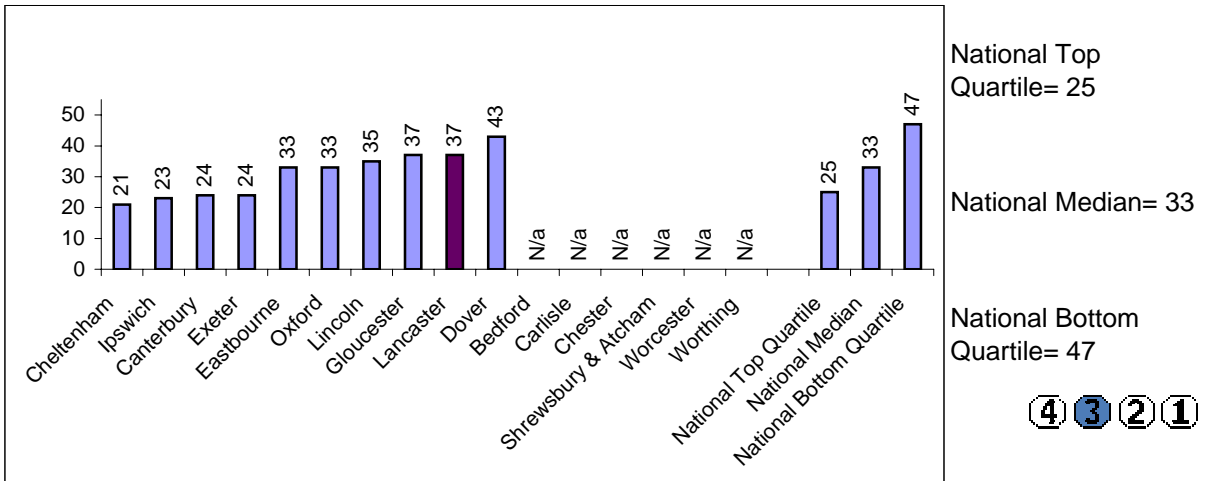
2.12 Number of people sleeping rough on a single night (BVPI 202)



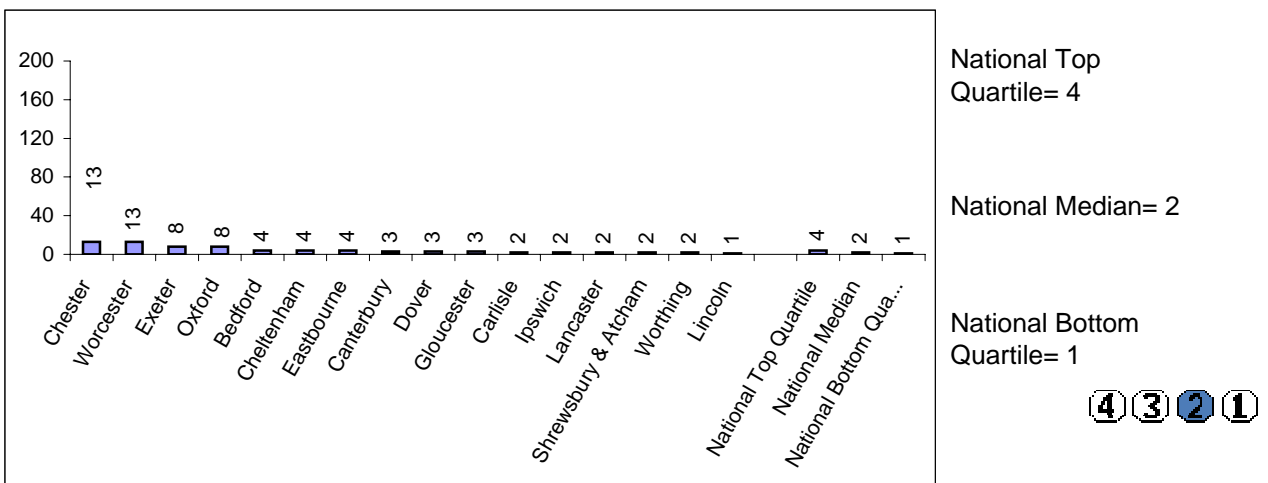
2.13 The percentage change in average number of families in temporary accommodation (BVPI 203)



2.14 Average time taken to re-let local authority housing in days (BVPI 212)

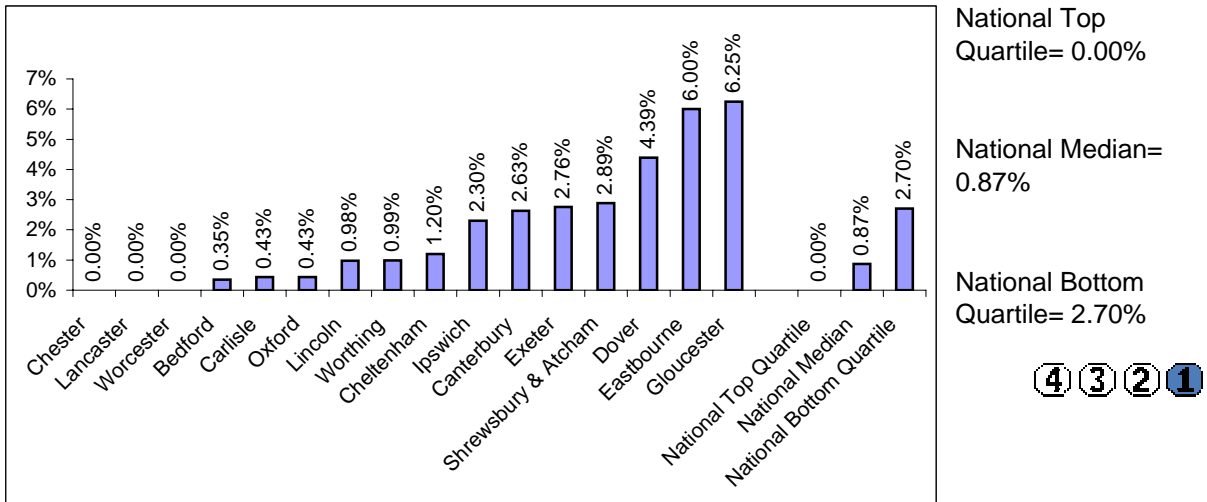


2.15 Number of households (per 100) who considered themselves homeless, who approached the local housing authority and for whom housing advice casework intervention resolved their situation (BVPI 213)



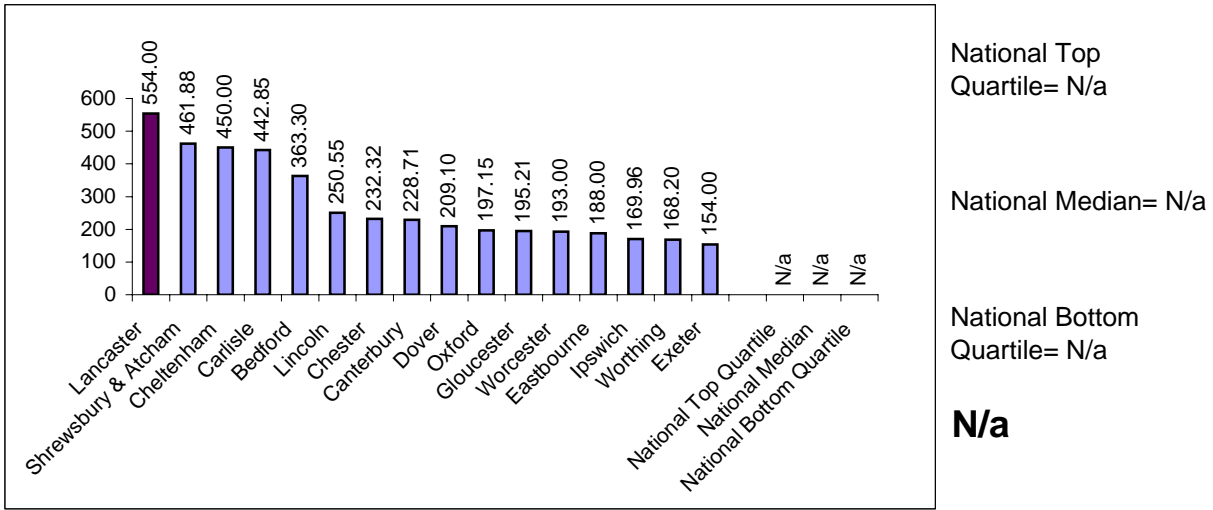


2.16 Proportion of households accepted as statutorily homeless who were accepted as statutorily homeless by the same authority within the last two years (BVPI 214)

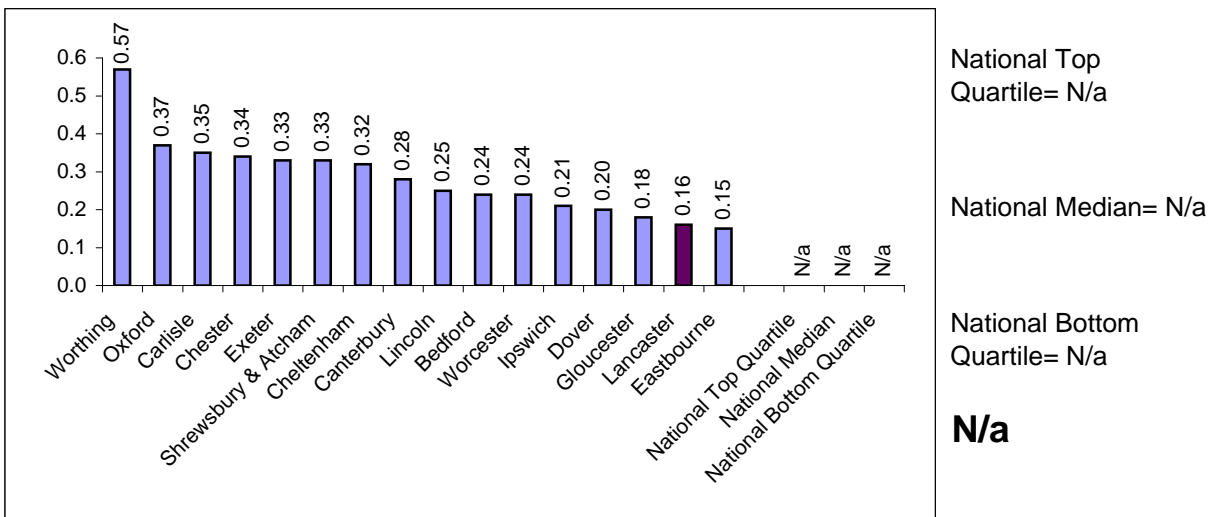


### 3. Benefits

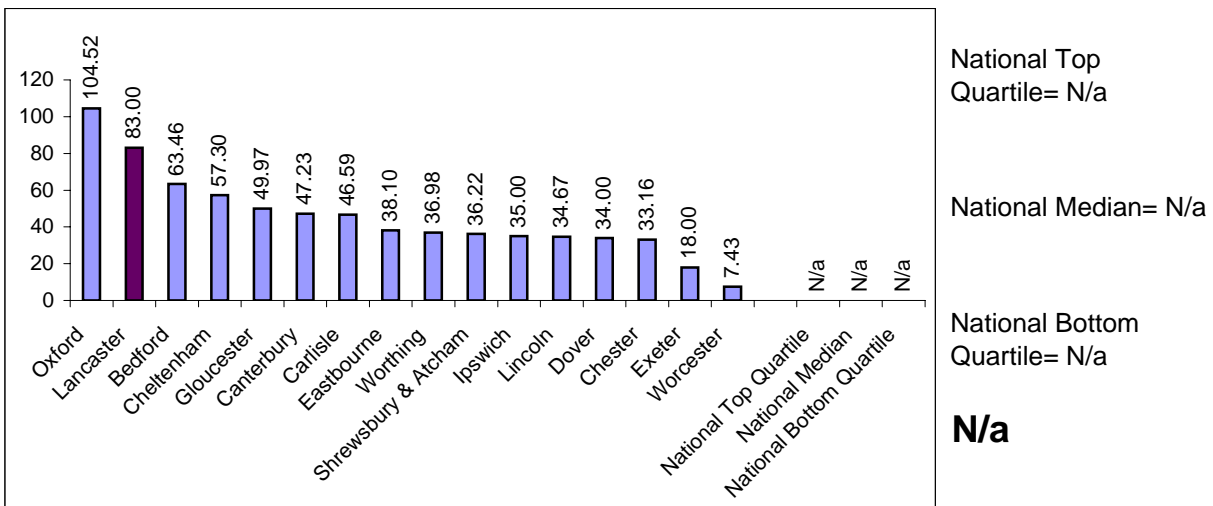
#### 3.1 Housing Benefit Security - Number of claimants visited per 1000 caseload (BVPI 76a)



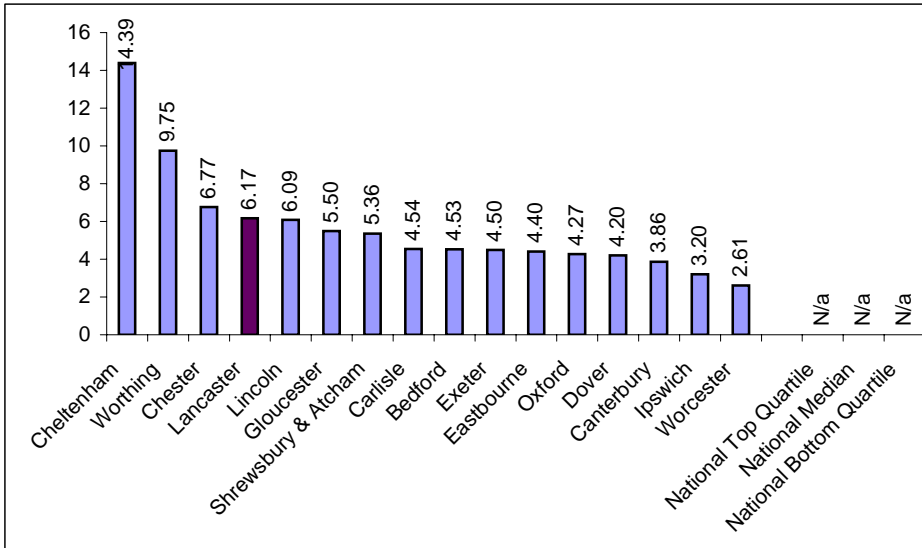
#### 3.2 Housing Benefit Security - Number of investigators employed per 1000 caseload (BVPI 76b)



#### 3.3 Housing Benefit Security - Number of fraud investigations per 1000 caseload (BVPI 76c)

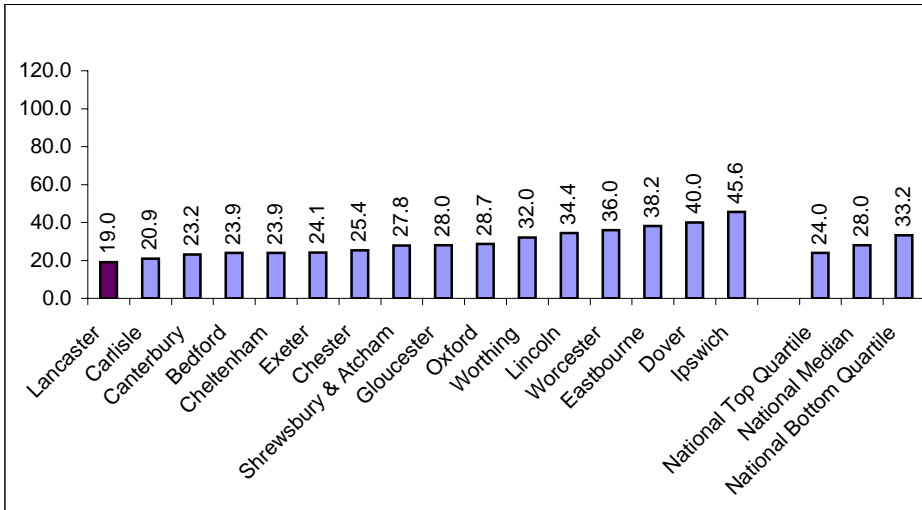


3.4 Housing Benefit Security - Number of prosecutions and sanctions per 1000 caseload (BVPI 76d)



National Top Quartile=N/a  
 National Median= N/a  
 National Bottom Quartile= N/a  
**N/a**

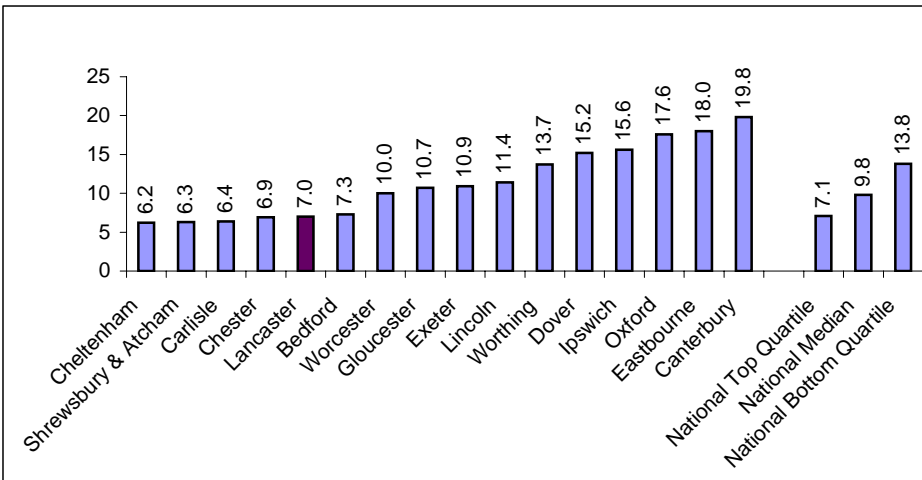
3.5 Average time (in days) to process new claims (BVPI 78a)



National Top Quartile= 24.0  
 National Median= 28.0  
 National Bottom Quartile= 33.2



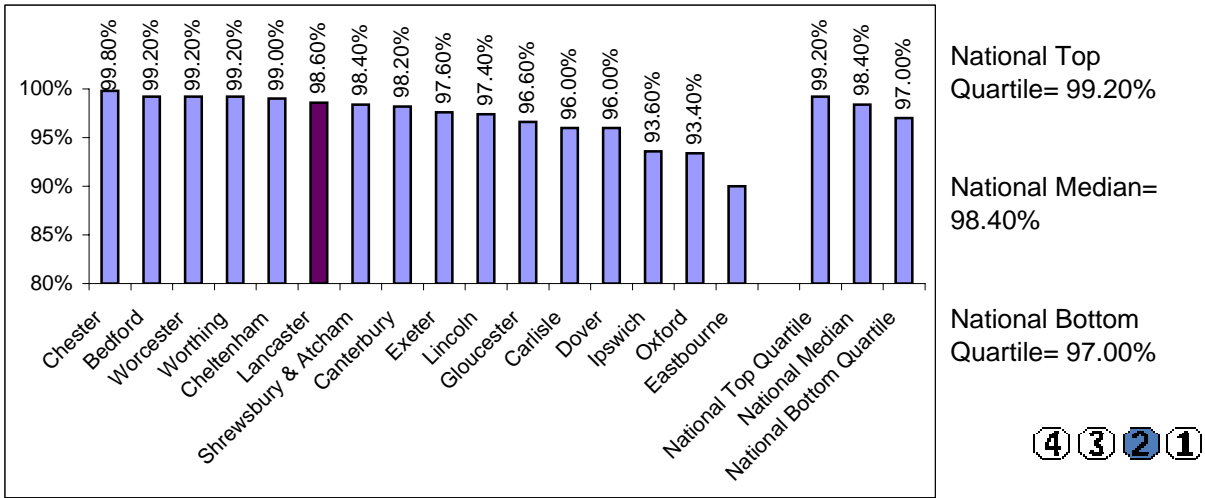
3.6 Average time taken to process change in circumstances (days) (BVPI 78b)



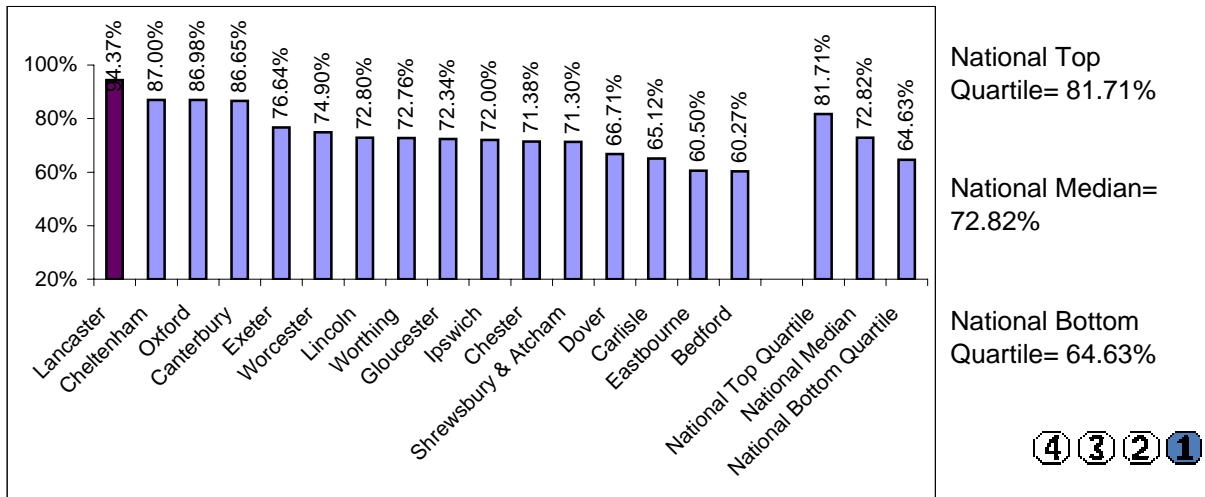
National Top Quartile= 7.1  
 National Median= 9.8  
 National Bottom Quartile= 13.8



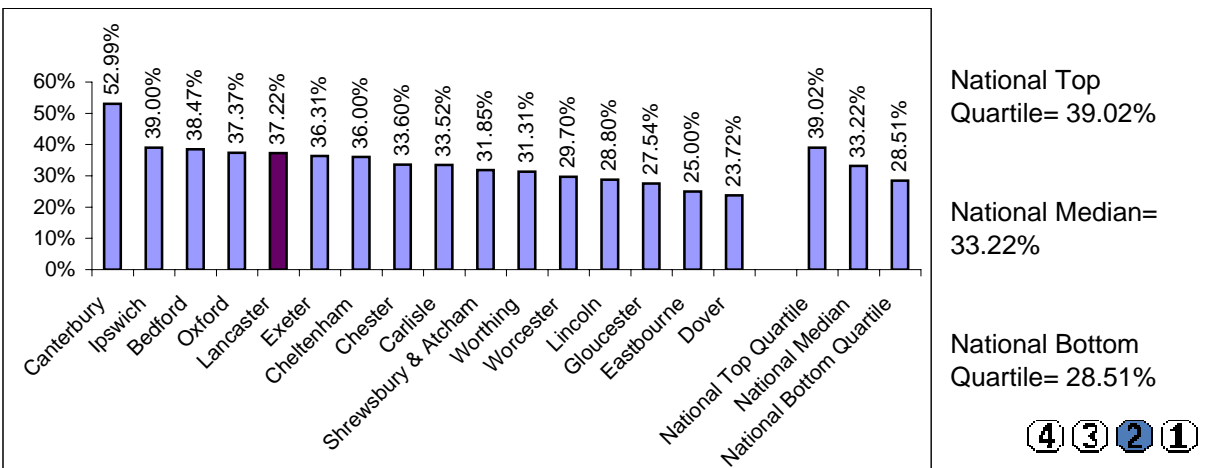
3.7 Proportion of benefit claims processed correctly (BVPI 79a)



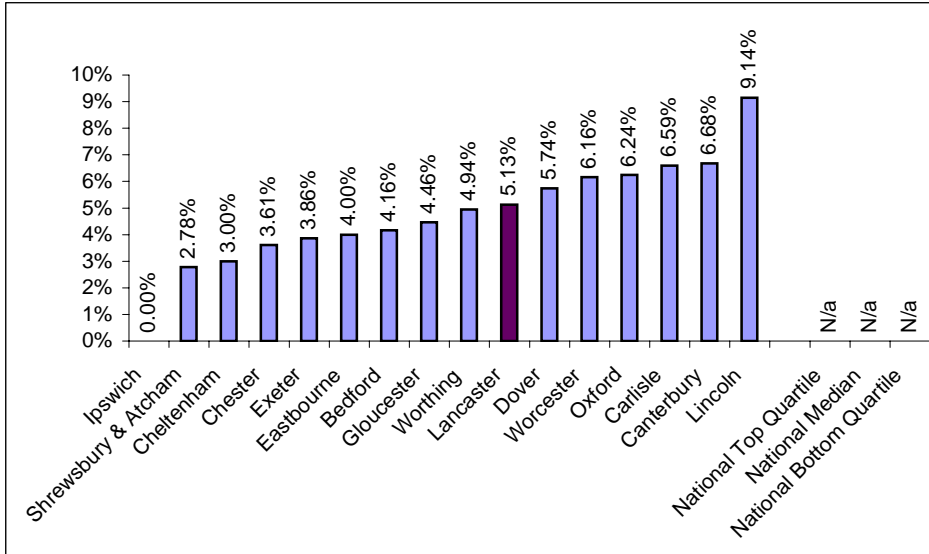
3.8 The amount of Housing Benefit overpayments recovered as a percentage of all housing benefit overpayments (BVPI 79b(i))



3.9 The amount of Housing Benefit overpayments recovered as a percentage of all housing benefit overpayments (BVPI 79b(ii))



3.10 Housing Benefit overpayments written off as a percentage of the total amount of overpayment debt outstanding at the start of the year, plus the amount of overpayments identified during the year (BVPI 79b(iii))



National Top Quartile= N/a

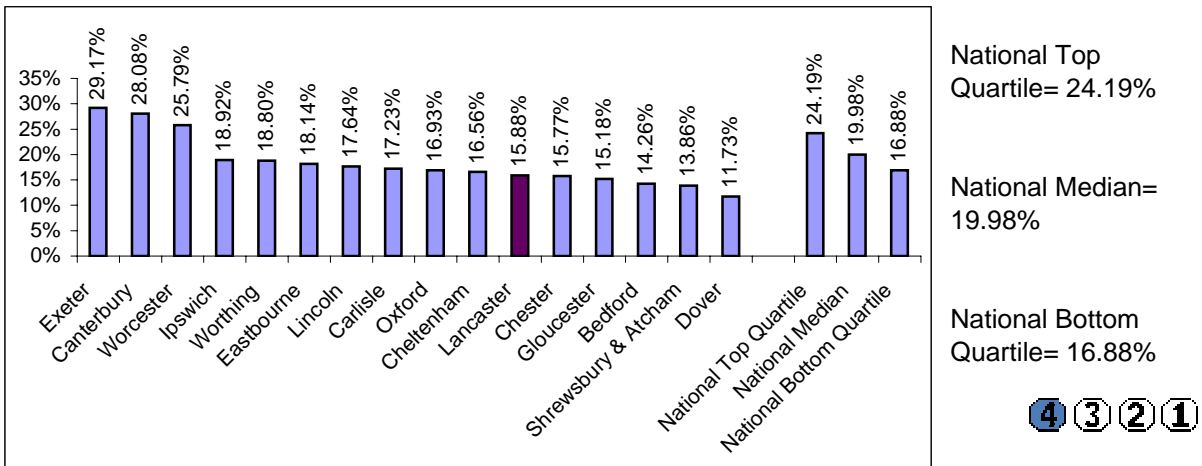
National Median= N/a

National Bottom Quartile= N/a

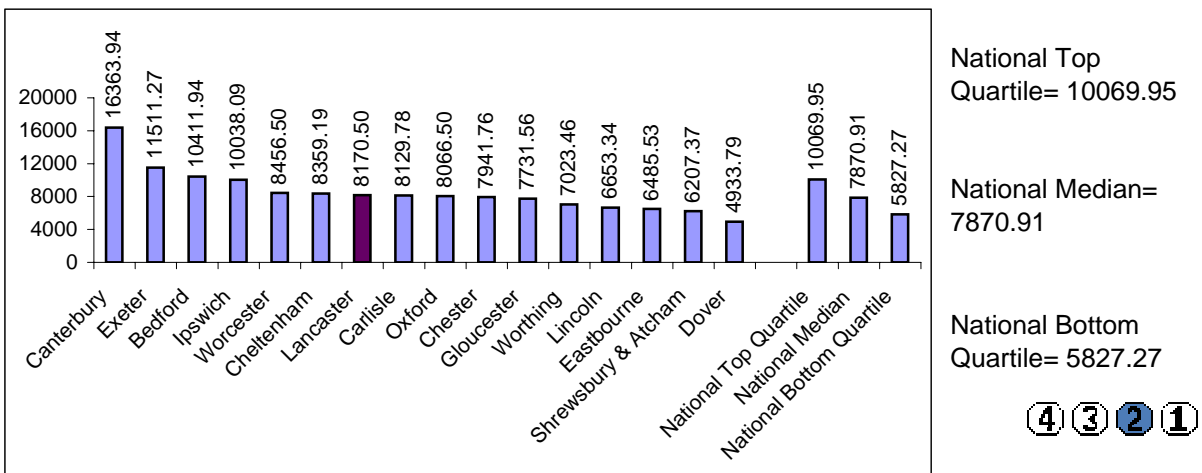
**N/a**

### 4. Environment

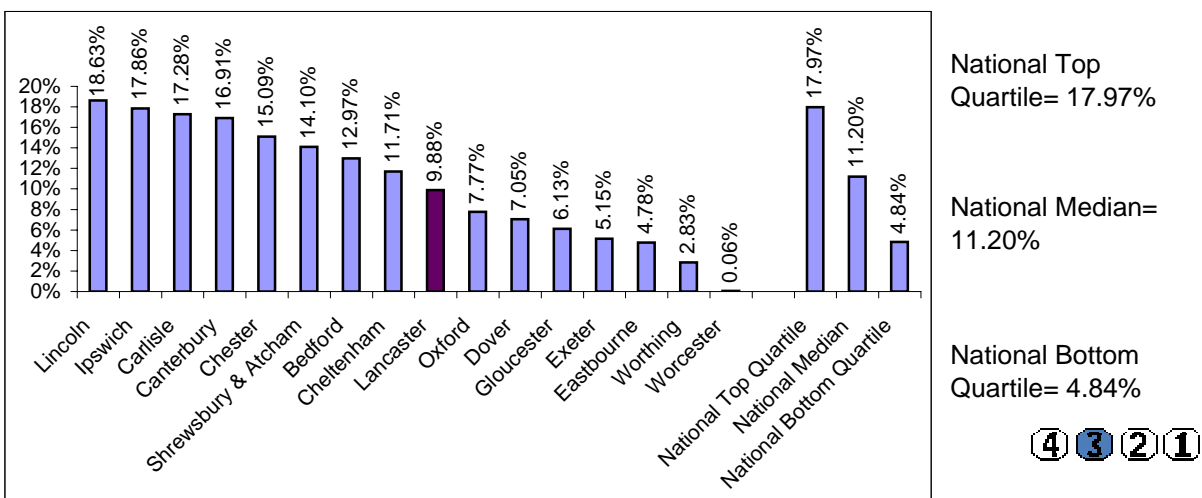
#### 4.1 Percentage of household waste arisings which have been sent for recycling (BVPI 82a(i))



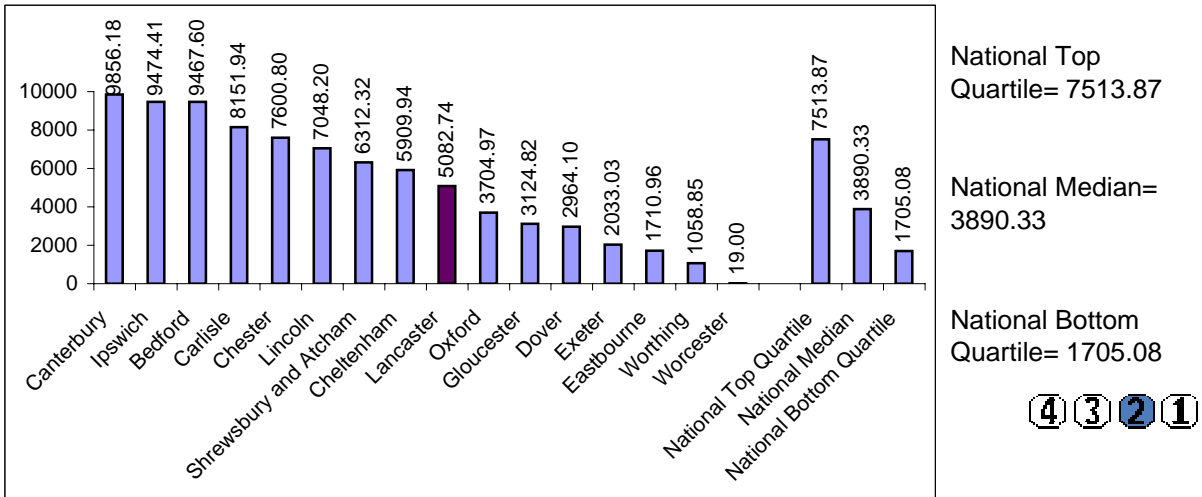
#### 4.2 Total tonnage of household waste arisings sent for recycling (BVPI 82a(ii))



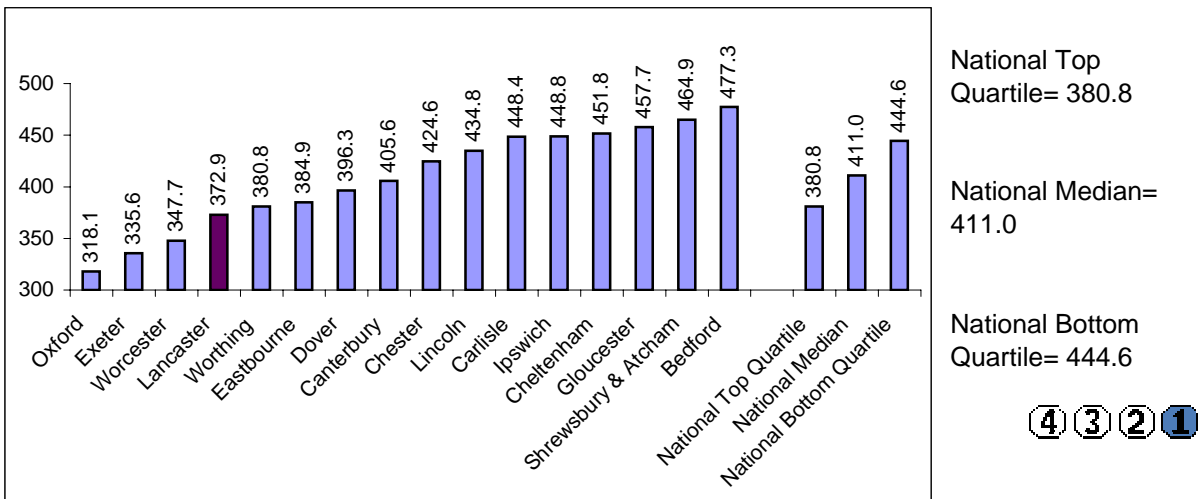
#### 4.3 Percentage of household waste composted (BVPI 82b(i))



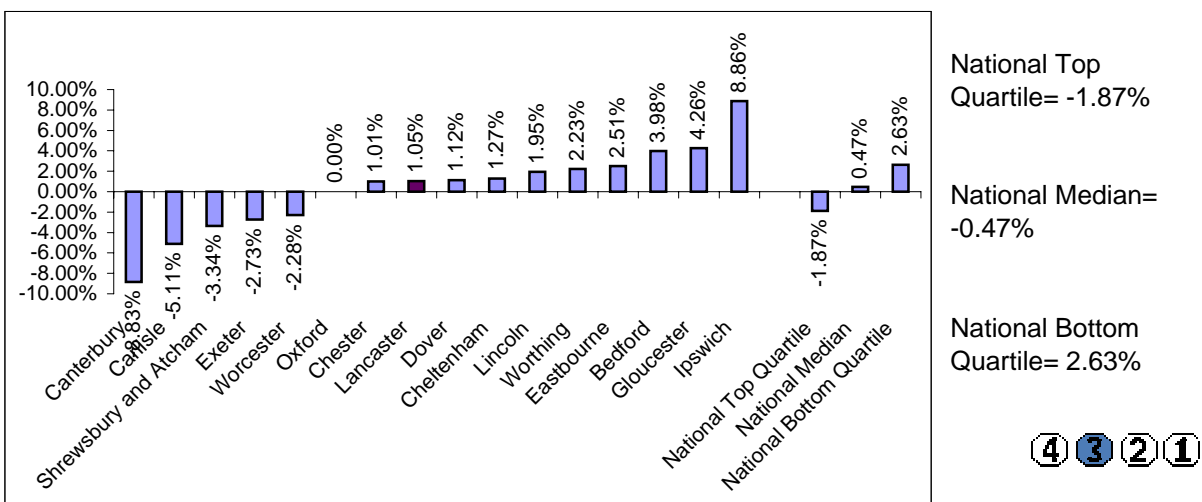
4.4 Total tonnage of household waste composted (BVPI 82b(ii))



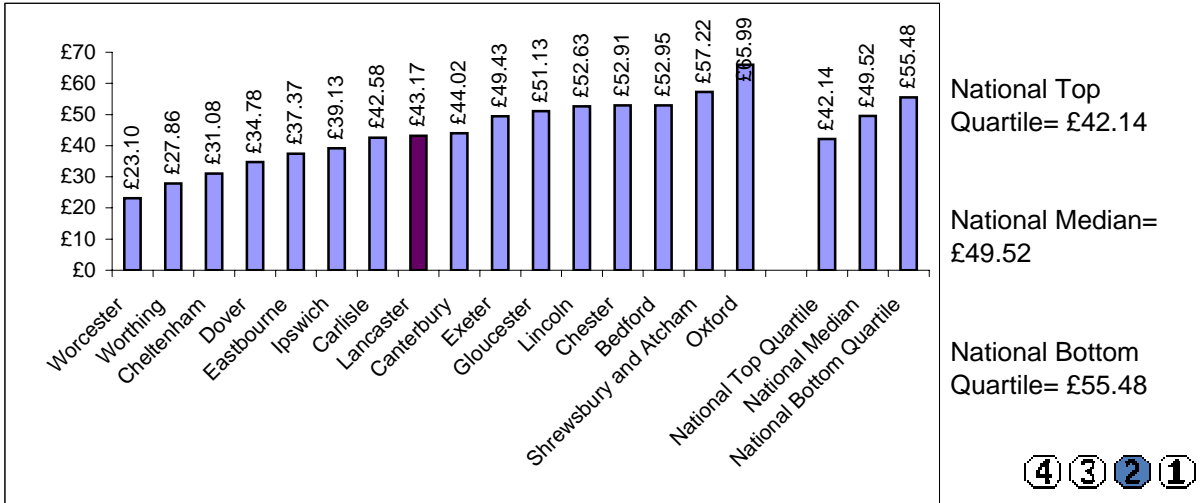
4.5 Number of kilograms of household waste collected per head of population (BVPI 84a)



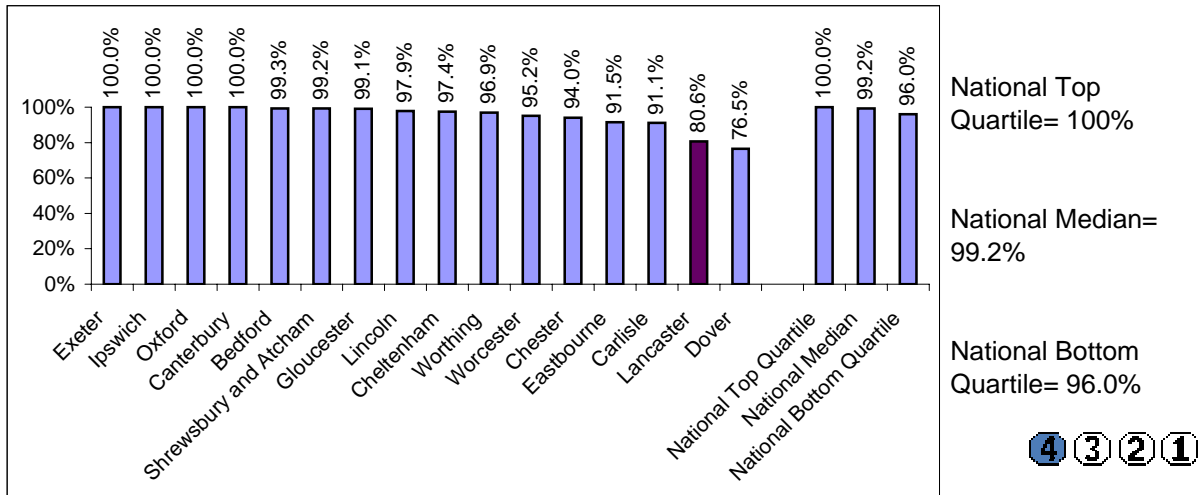
4.6 Percentage change from the previous financial year in the number of kilograms of household waste collected per head of population (BVPI 84b)



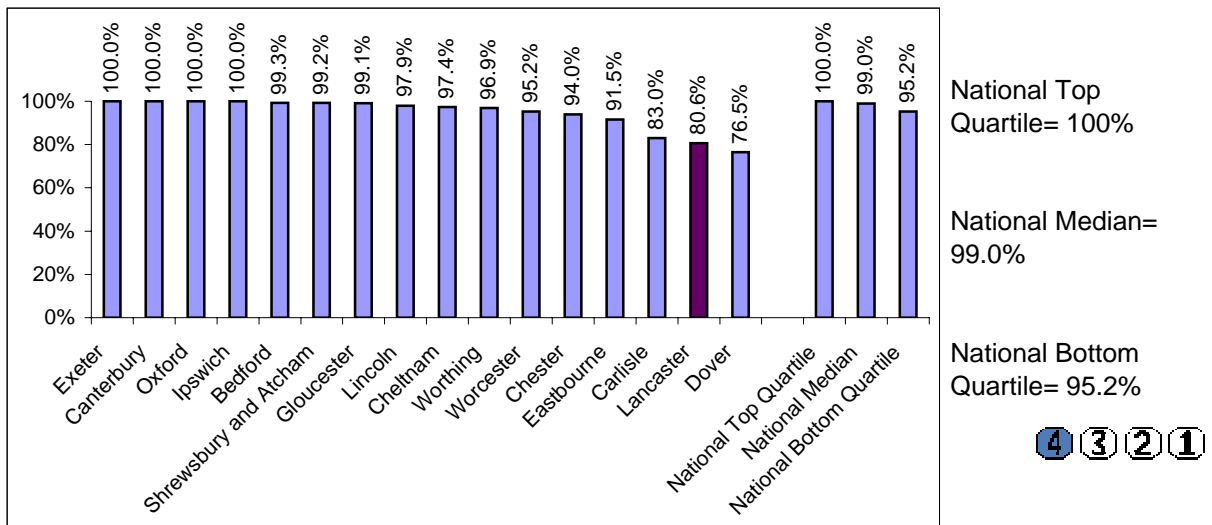
4.7 Cost of waste collection per household (BVPI 86)



4.8 Percentage of residents served by kerbside collection of recyclables (BVPI 91a)

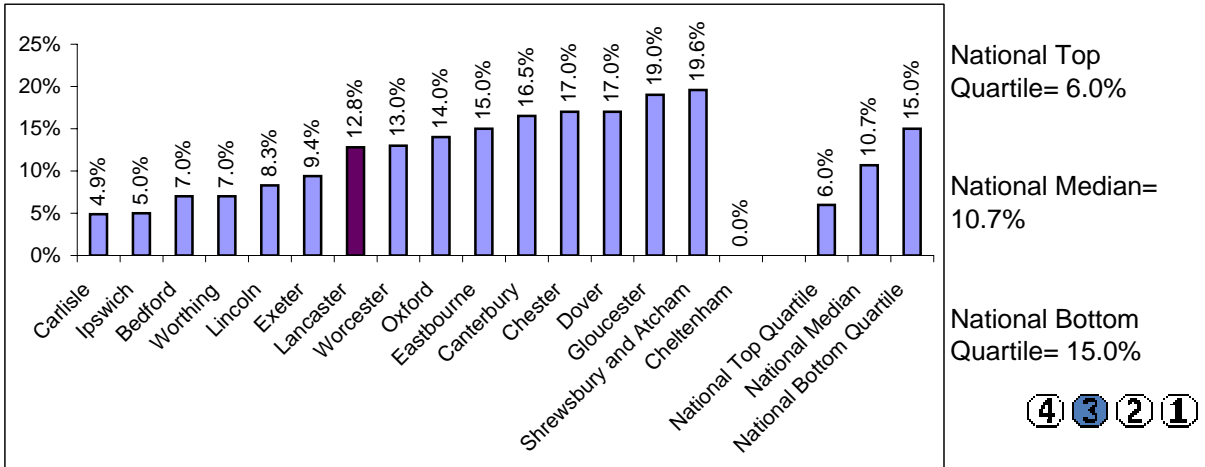


4.9 Percentage of residents served by kerbside collection of at least two recyclables (BVPI 91b)

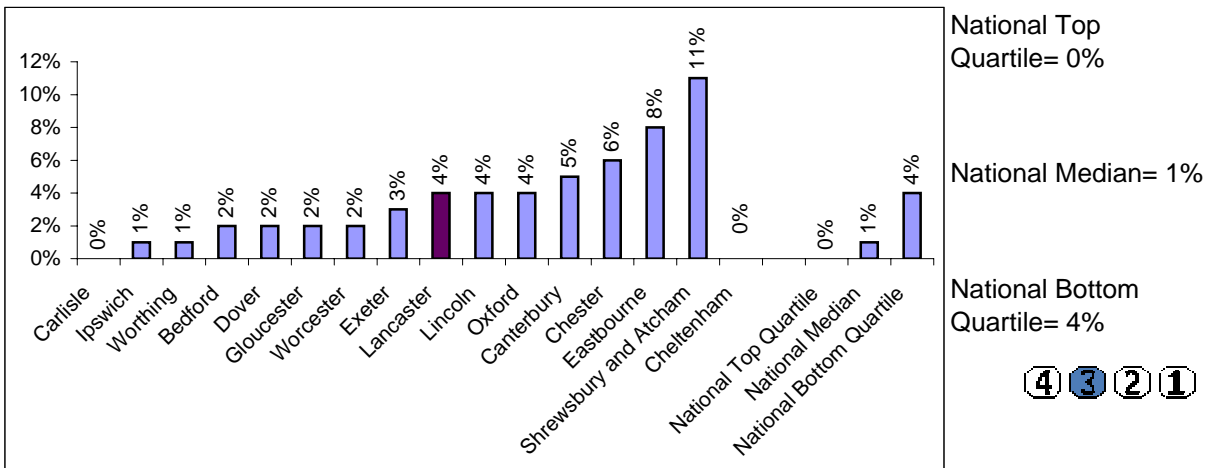




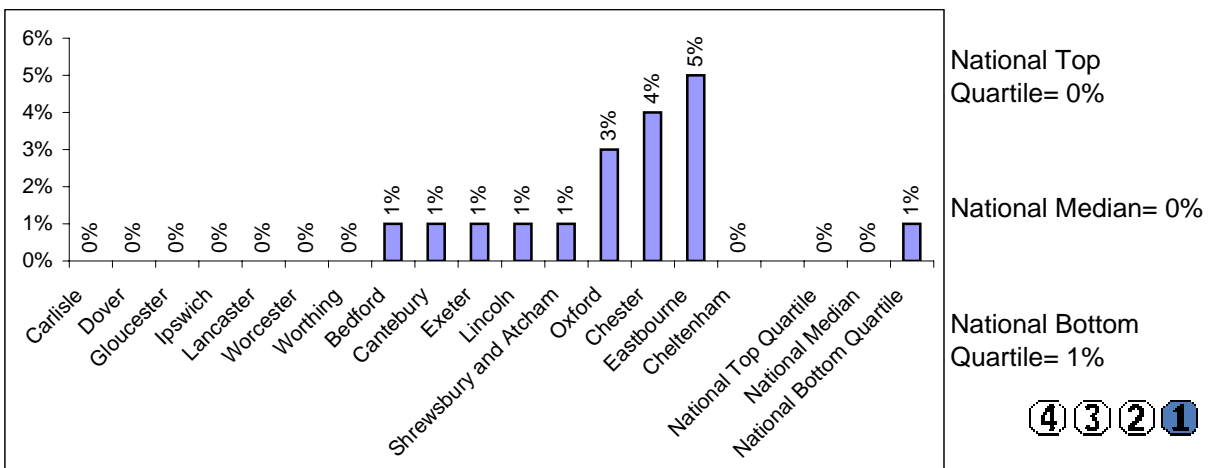
4.10 Percentage of relevant land and highways that is assessed as having combined deposits of litter and detritus that fall below an acceptable level (BVPI 199a)



4.11 Percentage of relevant land and highways from which unacceptable levels of graffiti are visible (BVPI 199b)

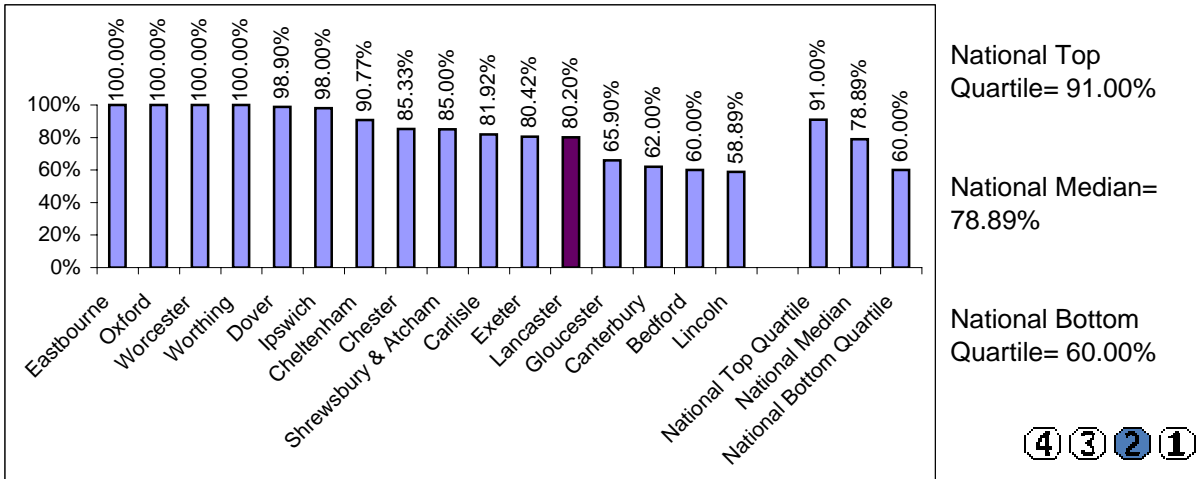


4.12 Percentage of relevant land and highways from which unacceptable levels of fly-posting are visible (BVPI 199c)

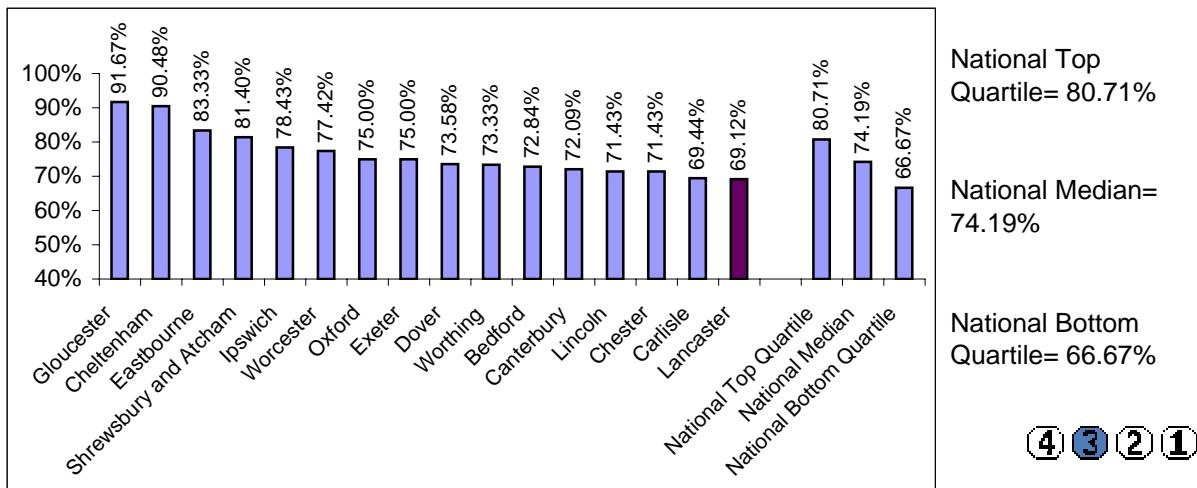


## 5. Planning

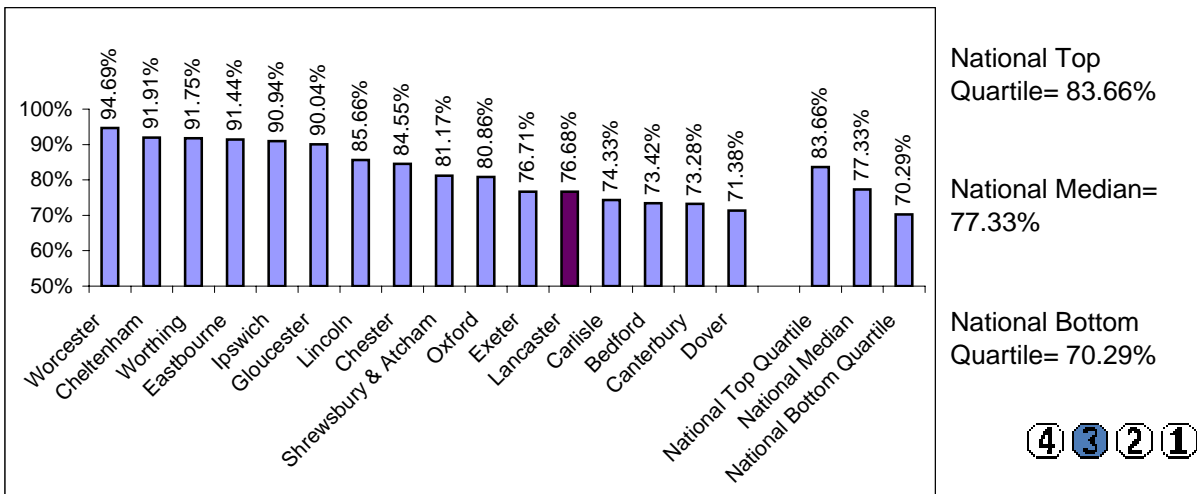
### 5.1 Percentage of new homes built on previously developed land (BVPI 106)



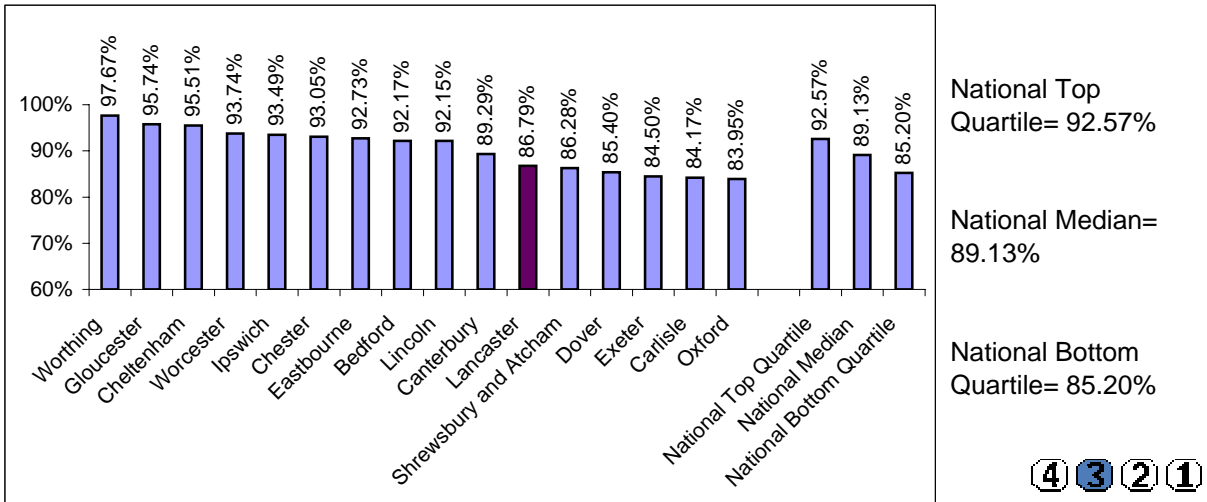
### 5.2 Percentage of major planning applications determined within 13 weeks (BVPI 109a)



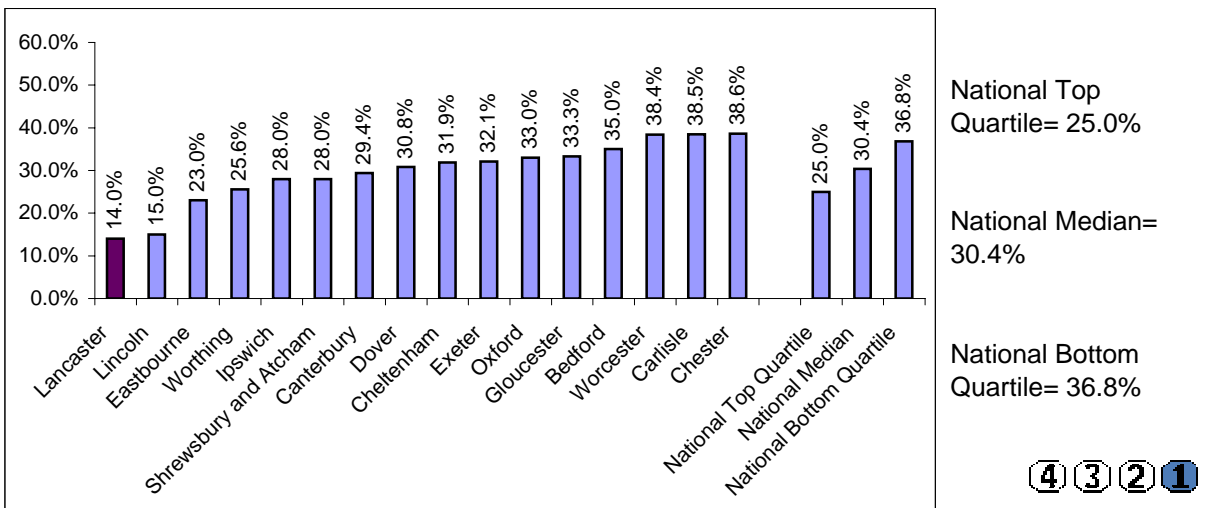
### 5.3 Percentage of minor planning applications determined within 8 weeks (BVPI 109b)



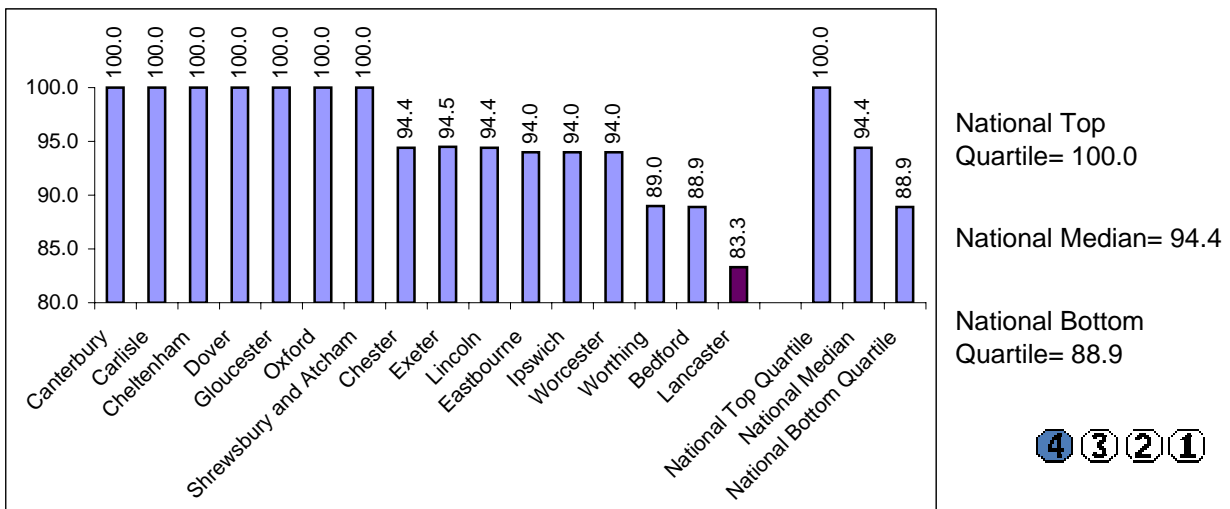
5.4 Percentage of other planning applications processed within 8 weeks (BVPI 109c)



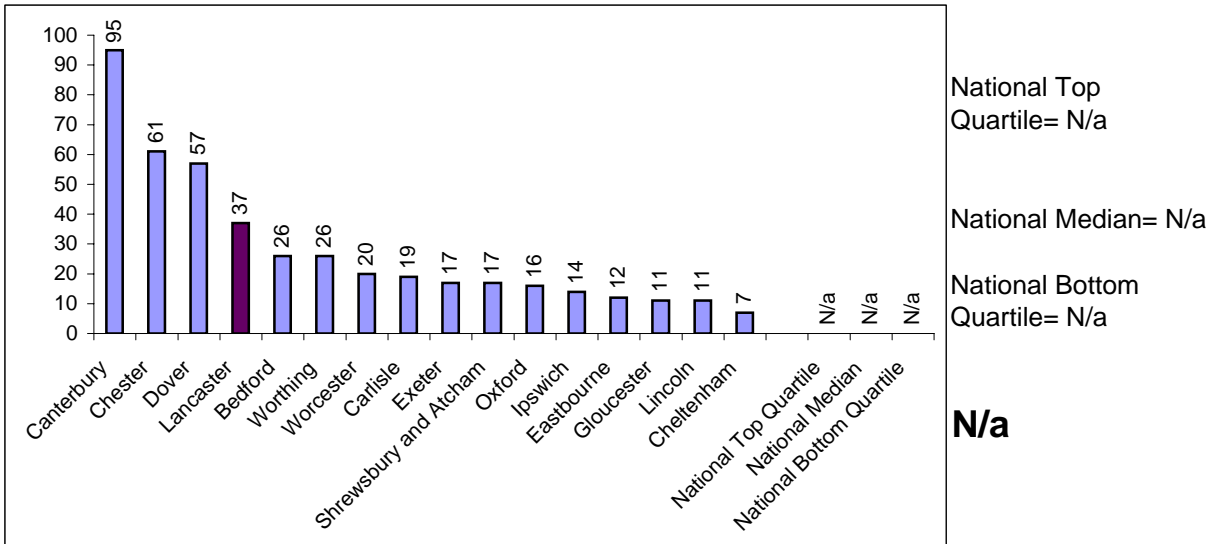
5.5 Percentage of appeals allowed against the authority's decision to refuse planning applications (BVPI 204)



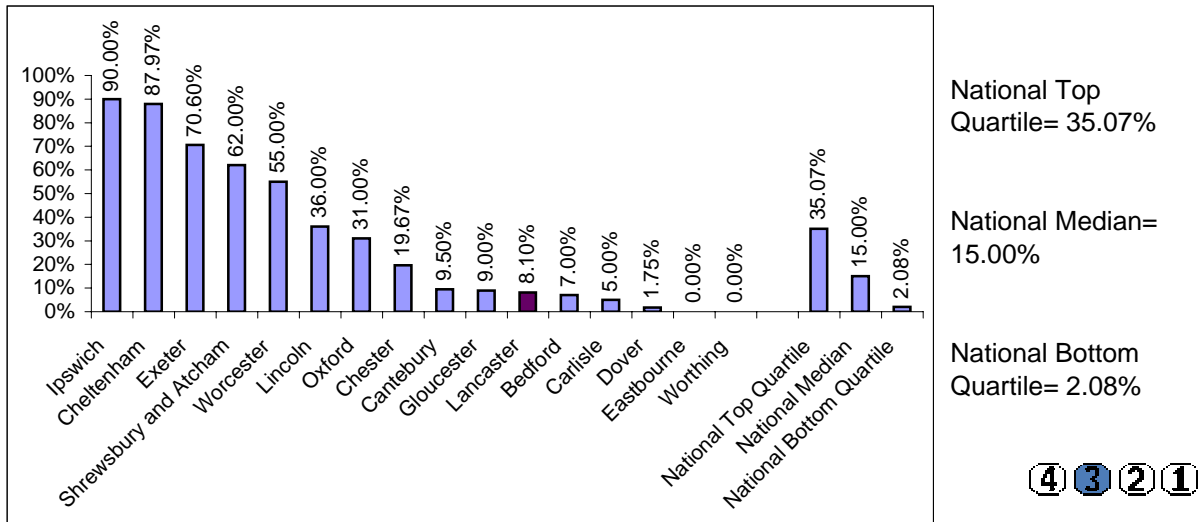
5.6 Quality of service checklist (BVPI 205)



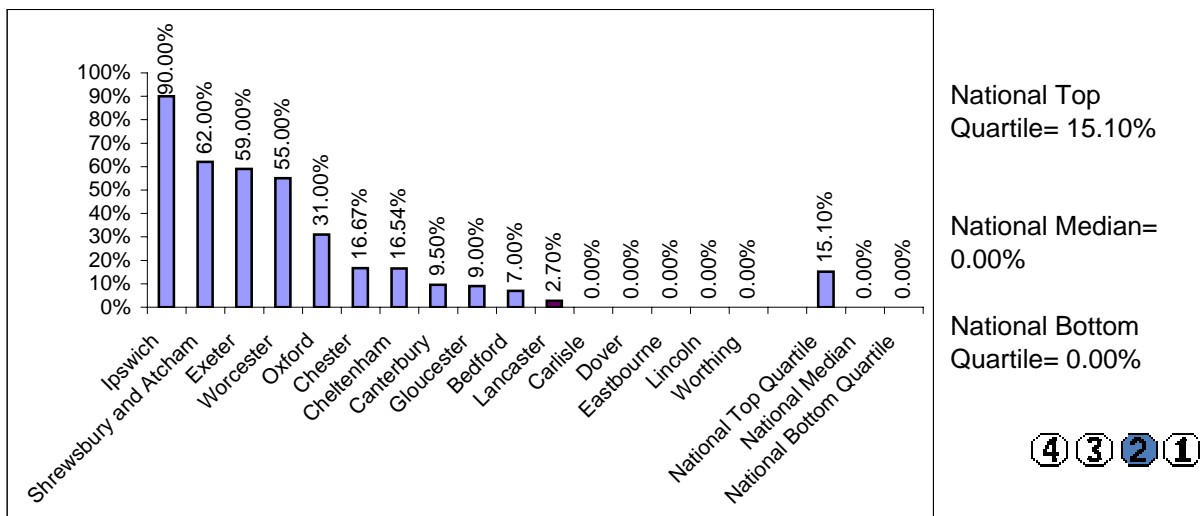
5.7 Total number of conservation areas in the local authority area (BVPI 219a)



5.8 Percentage of conservation areas in local authority area with an up to date character appraisal (BV 219b)



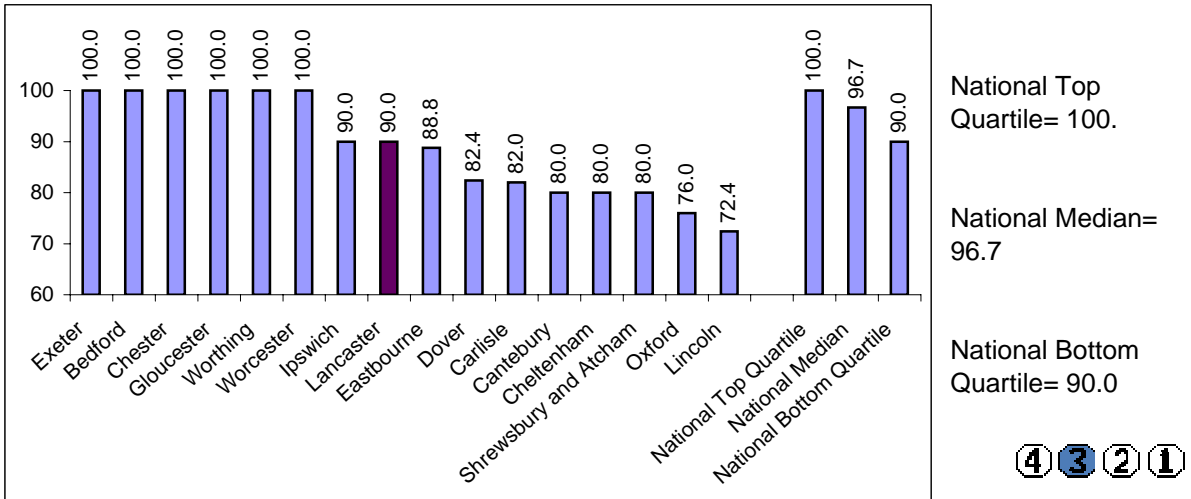
5.9 Percentage of conservation areas with published management proposals (BVPI 219c)



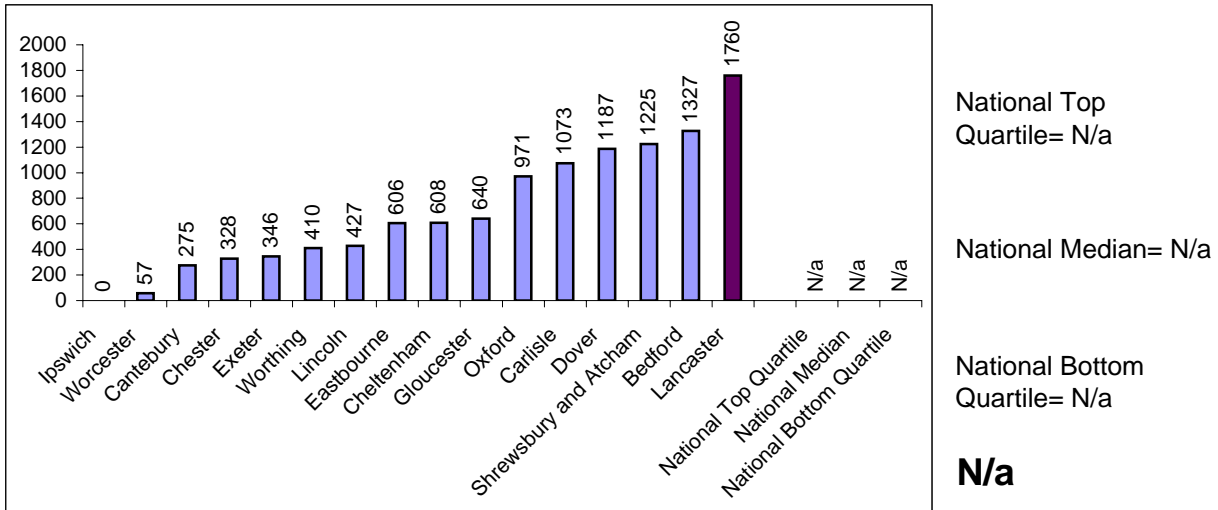


## 6. Environmental Health

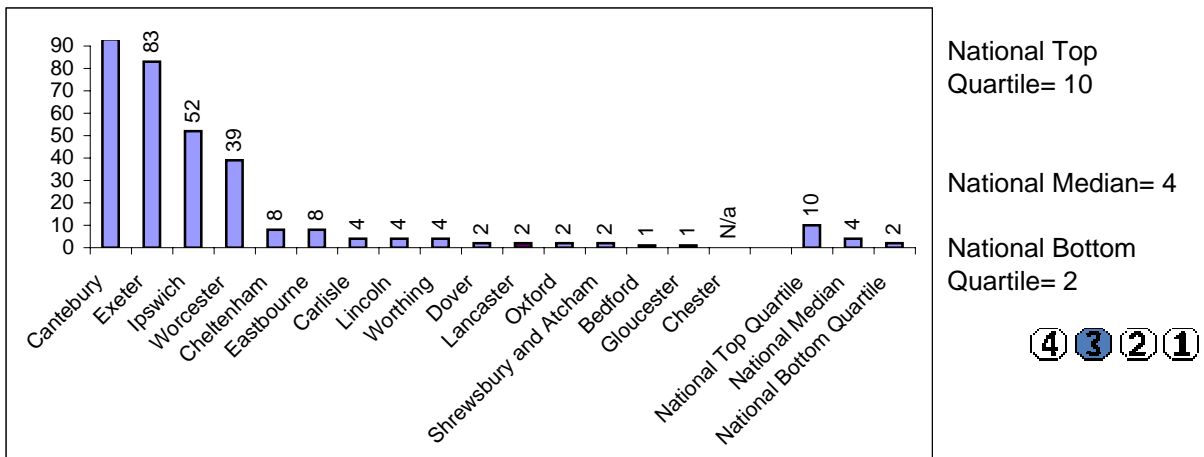
### 6.1 Score against a checklist of environmental health best practice (BVPI 166a)



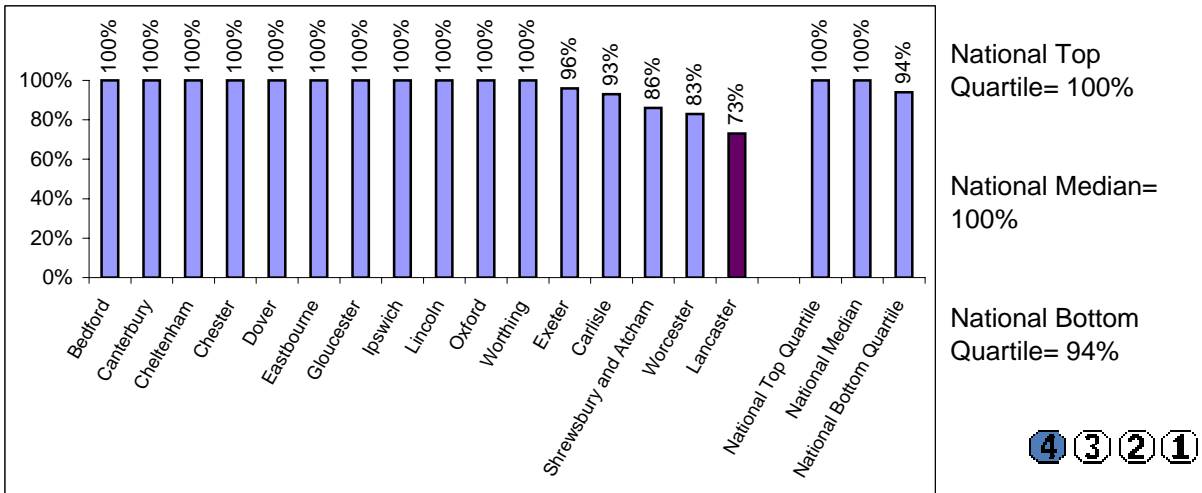
### 6.2 Number of 'sites of potential concern' with respect to land contamination (BVPI 216a)



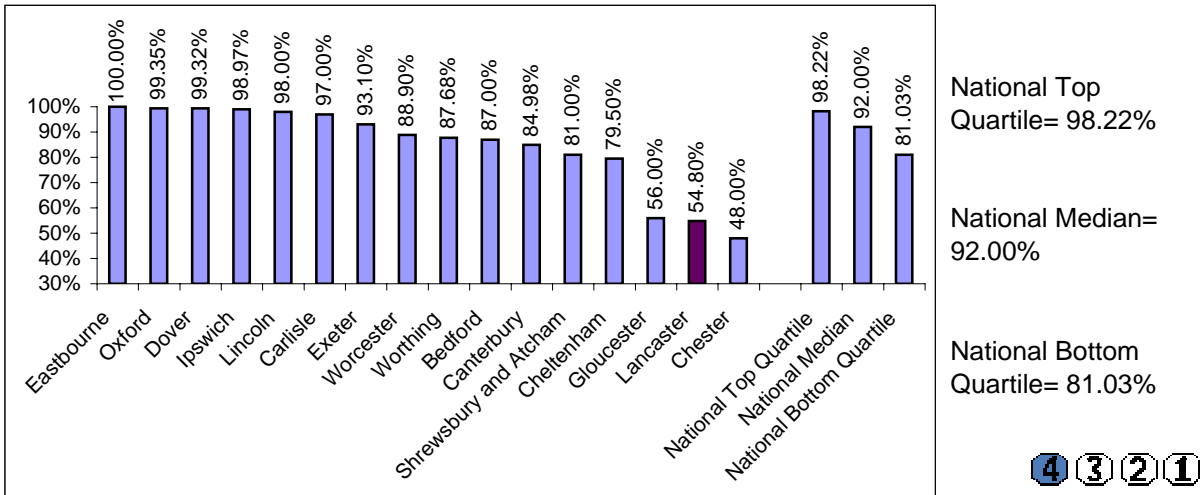
### 6.3 Number of sites for which sufficient detailed information is available to decide whether remediation of the land is necessary, as a percentage of all 'sites of potential concern' (BVPI 216b)



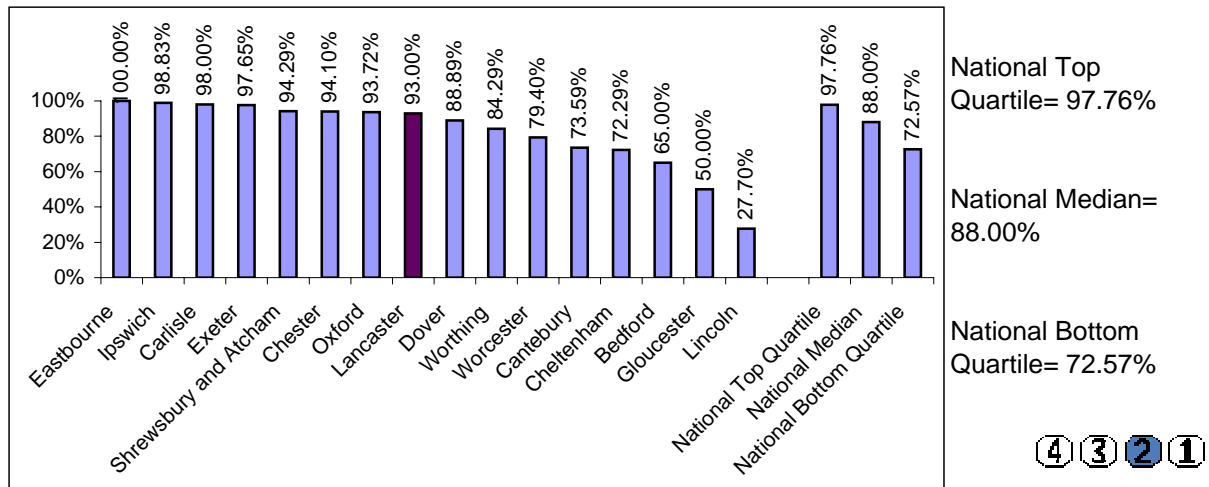
6.4 Percentage of pollution control improvements to existing installations completed on time (BVPI 217)



6.5 Percentage of new reports of abandoned vehicles investigated within 24 hours of notification (BVPI 218a)

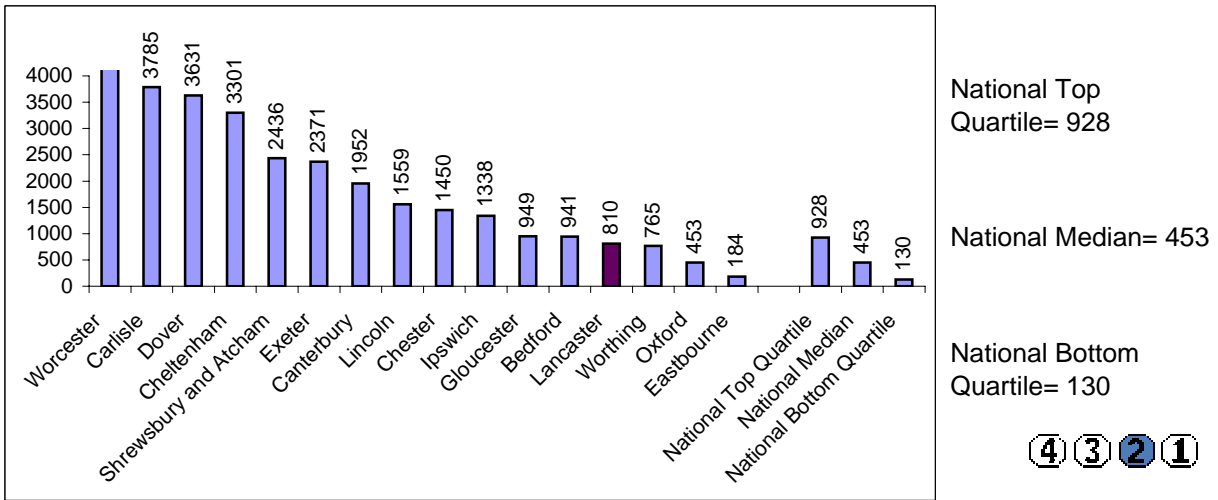


6.6 Percentage of abandoned vehicles removed within 24hrs from the point at which the authority is legally entitled to remove the vehicle (BVPI 218b)

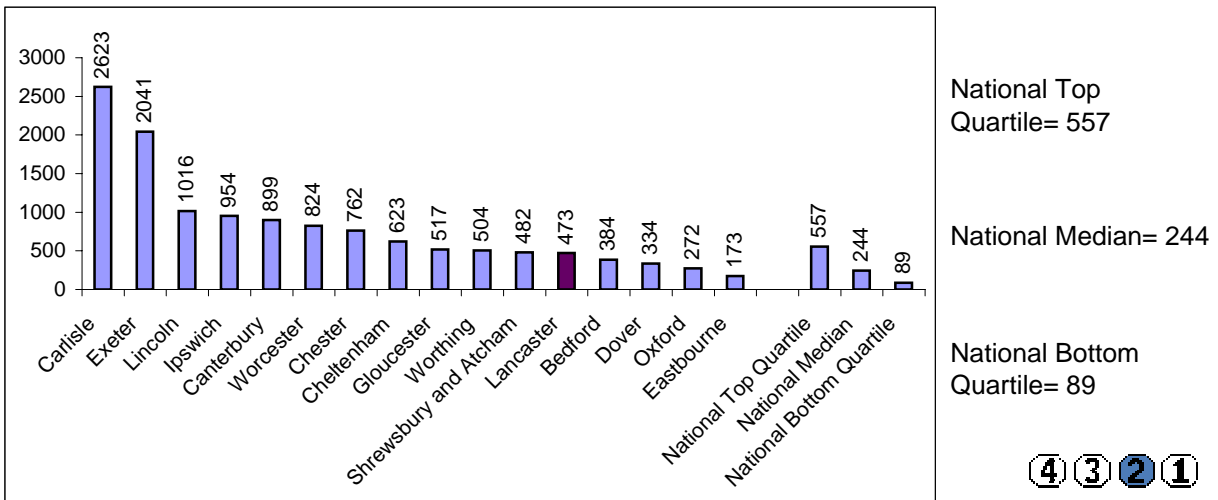


7. Culture

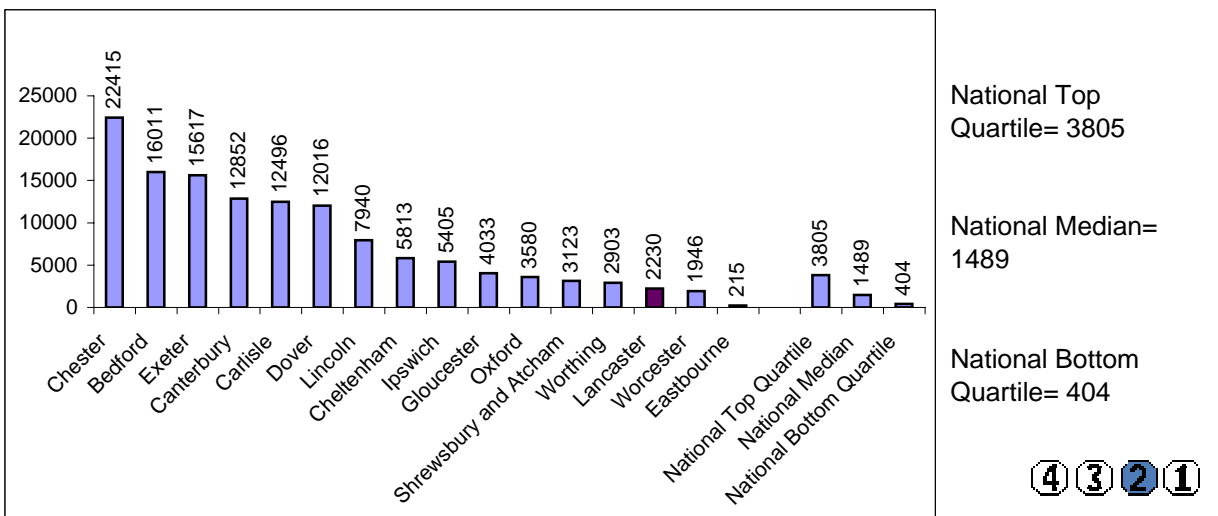
7.1 Number of visits to/usage of museums and galleries per 1000 population (BVPI 170a)



7.2 Number of those visits that were in person, per 1000 population (BVPI 170b)



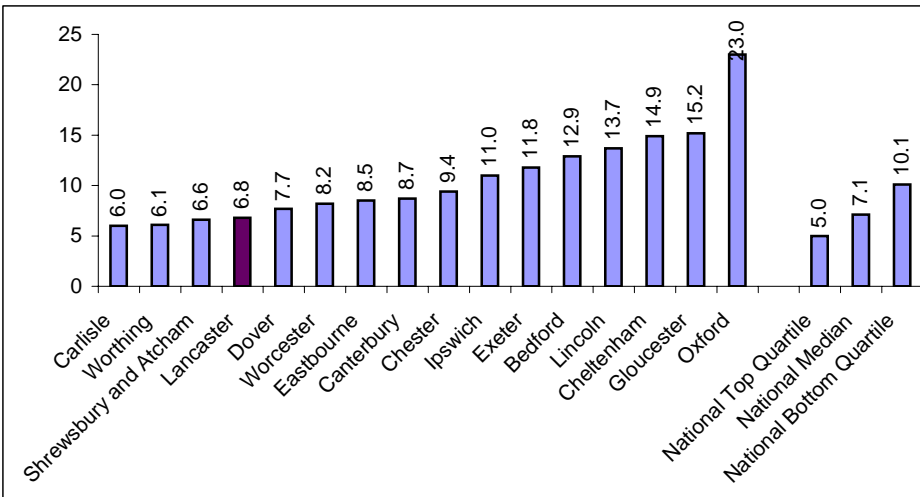
7.3 Number of pupils visiting museums & galleries in organised school trips (BVPI 170c)





### 8. Community Safety

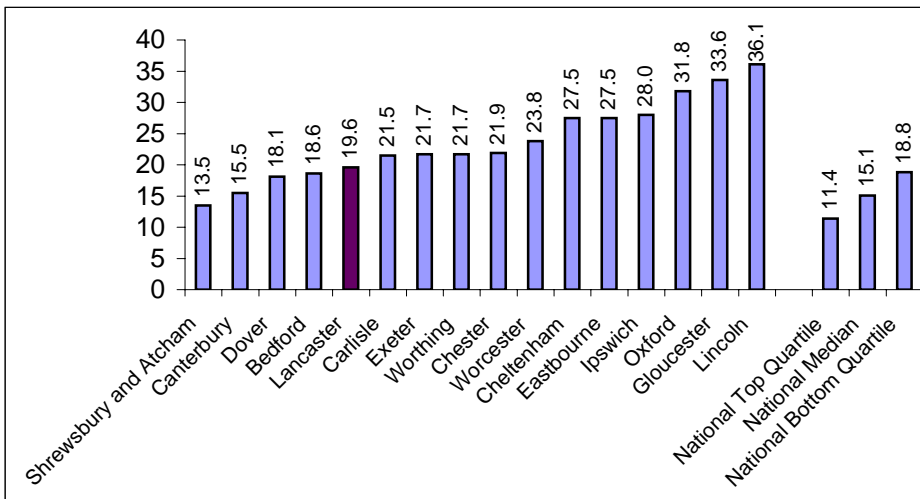
#### 8.1 Domestic burglaries per 1000 households (BVPI 126)



National Top Quartile= 5.0  
 National Median= 7.1  
 National Bottom Quartile= 10.1



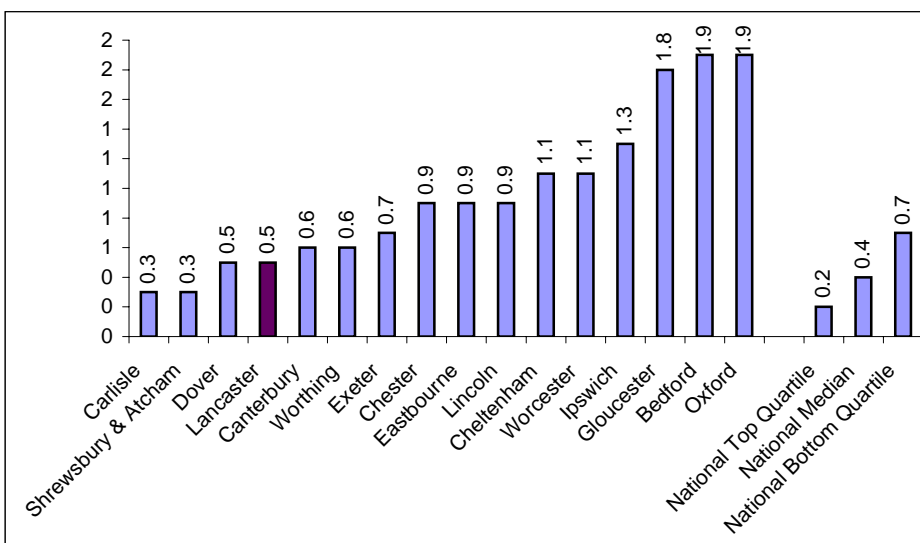
#### 8.2 Violent offences committed by a stranger per 1000 population (BVPI 127a)



National Top Quartile= 11.4  
 National Median= 15.1  
 National Bottom Quartile= 18.8



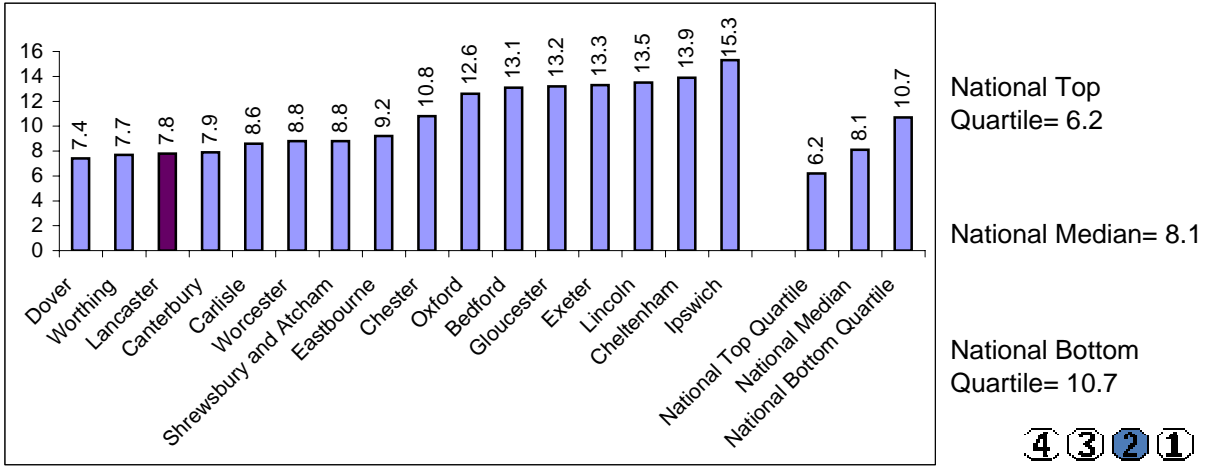
#### 8.3 Robberies per 1000 population (BVPI 127b)



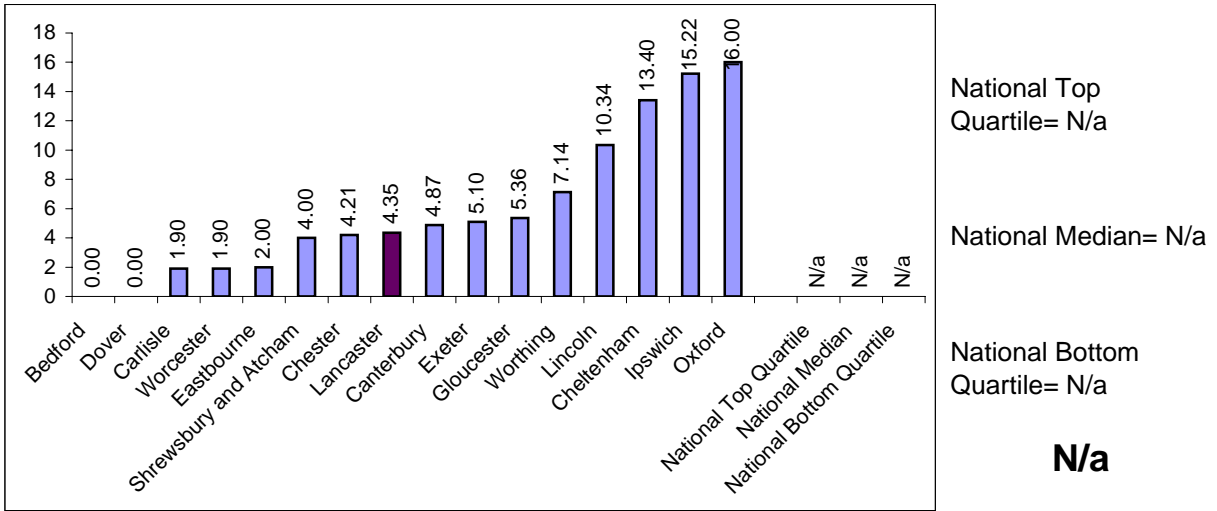
National Top Quartile= 0.2  
 National Median= 0.4  
 National Bottom Quartile= 0.7



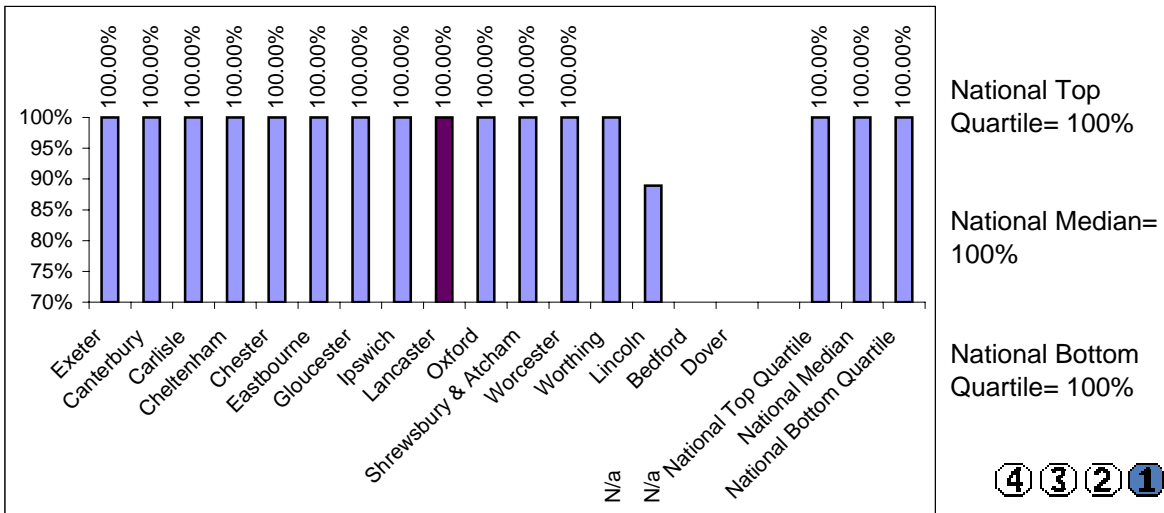
8.4 Vehicle crimes per 1000 population (BVPI 128)



8.5 Number of racial incidents recorded by the authority per 100,000 population (BVPI 174)

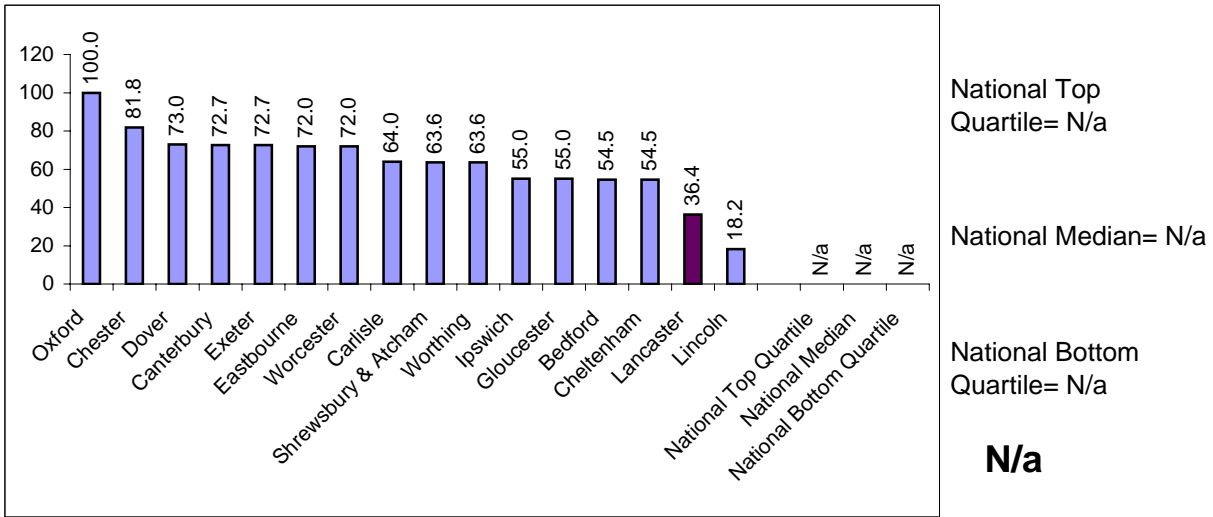


8.6 Percentage of racial incidents resulting in further action by the local authority (BVPI 175)

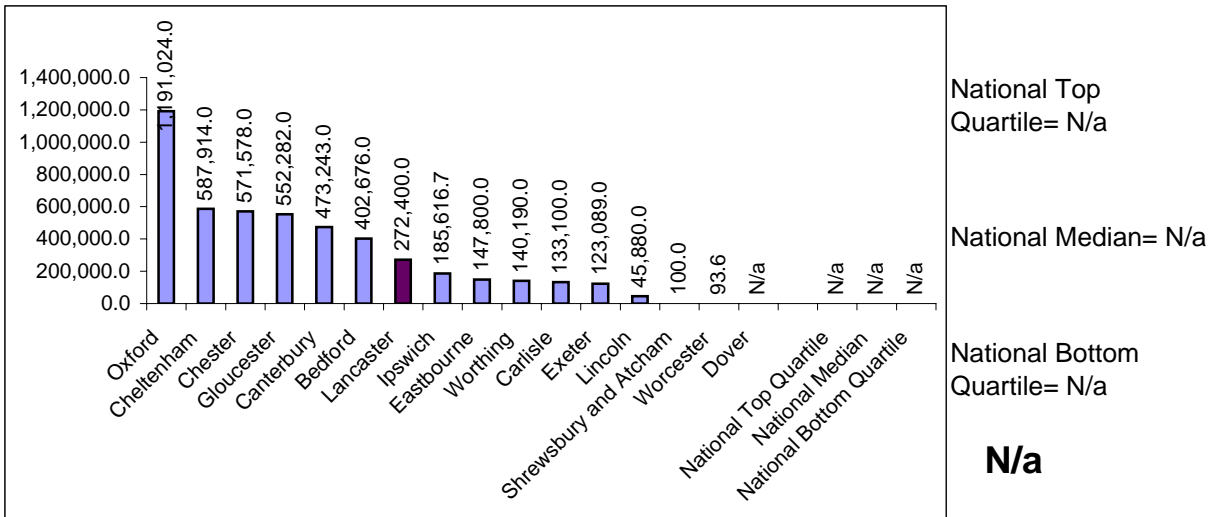




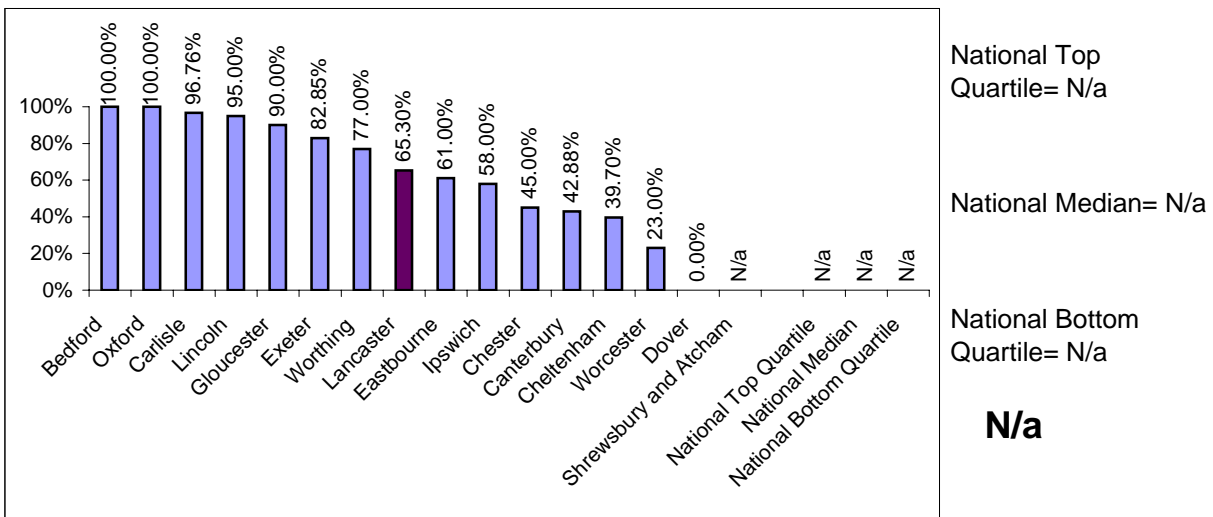
8.7 Effectiveness of local authority services designed to help victims of domestic violence (BVPI 225)



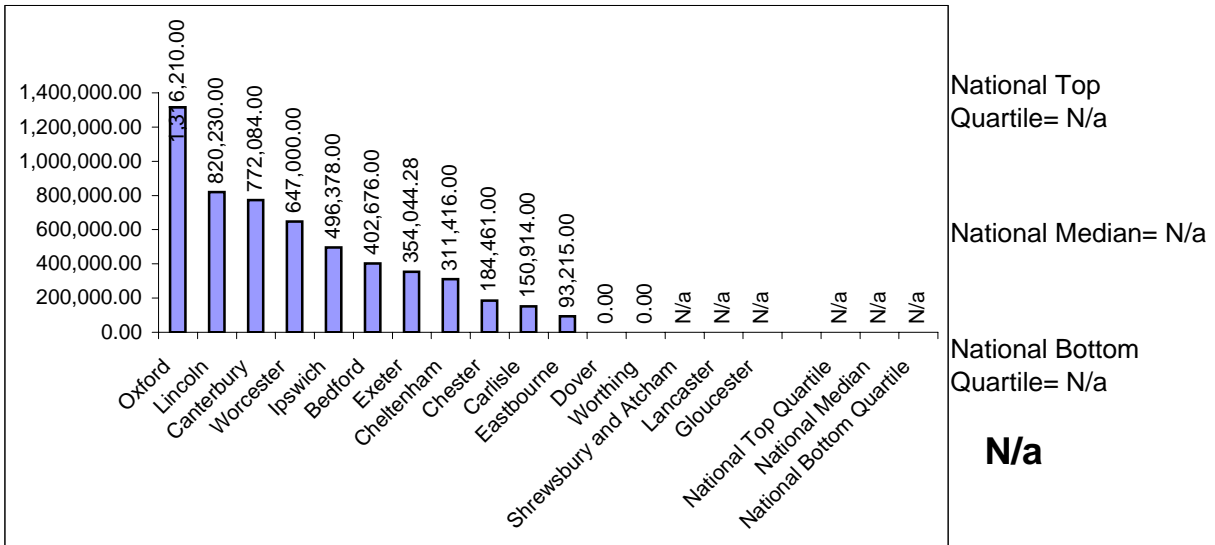
8.8 Total amount spent by the local authority on Advice and Guidance services provided by external organisations (BVPI 226a)



8.9 Percentage of monies spent on advice and guidance services provision that was given to organisations holding the CLS Quality Mark at 'General Help' level and above (BVPI 226b)



8.10 Total amount spent on advice and guidance in the areas of housing, welfare benefits and consumer matters which is provided directly by the authority to the public (BVPI 226c)

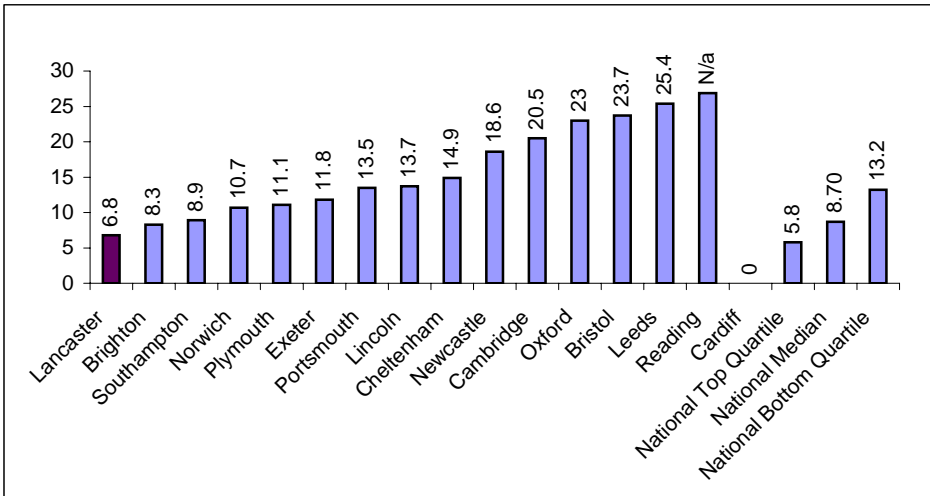


**N/a**

### 9. Community Safety comparison with Crime and Disorder Reduction Partnership (CDRP) family group.

The Community Safety CDRP comparisons below display the All England quartile position.

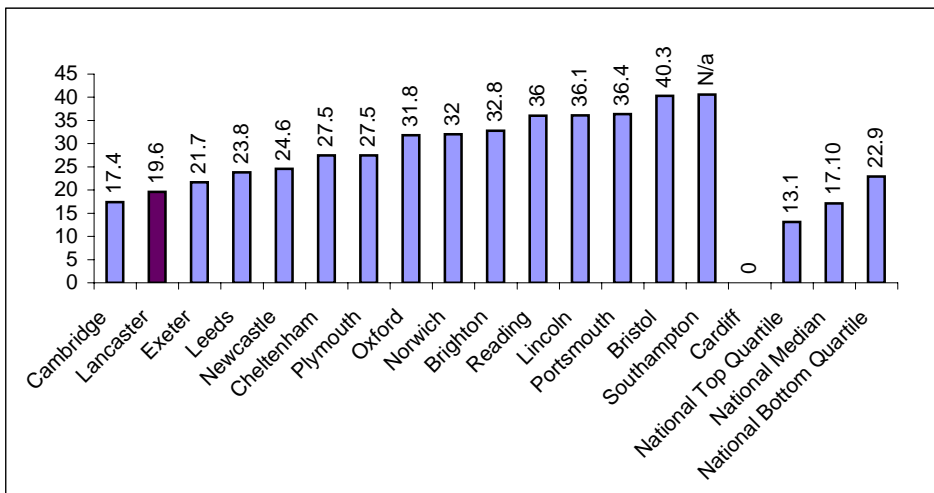
#### 9.1 Domestic burglaries per 1000 households (BVPI 126)



National Top Quartile= 5.8  
 National Median= 8.7  
 National Bottom Quartile= 13.20

④ ③ ② ①

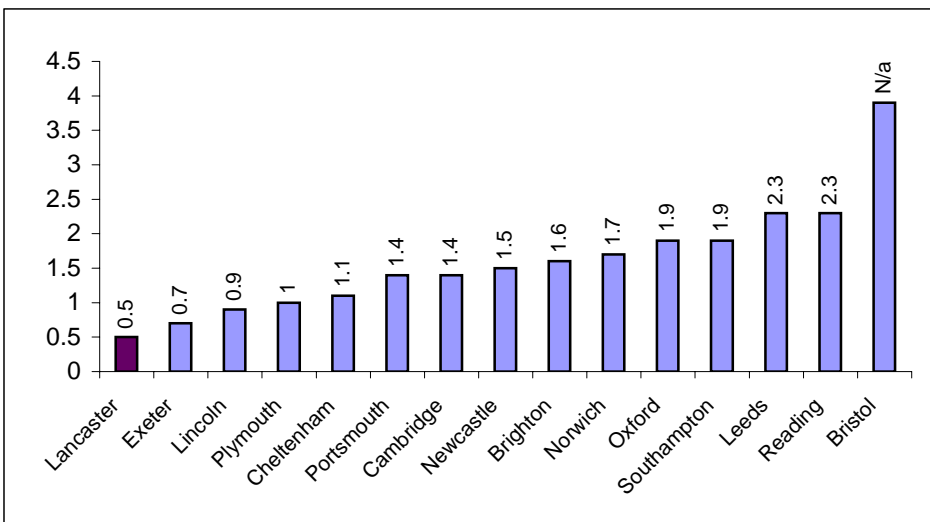
#### 9.2 Violent offences committed by a stranger per 1000 population (BVPI 127a)



National Top Quartile= 13.1  
 National Median= 17.1  
 National Bottom Quartile= 22.90

④ ③ ② ①

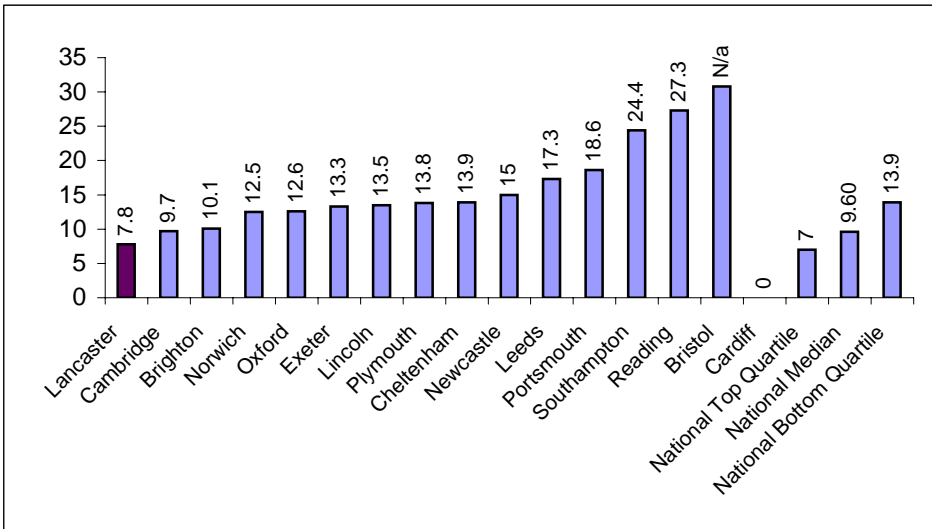
#### 9.3 Robberies per 1000 population (BVPI 127b)



National Top Quartile= 0.3  
 National Median= 0.6  
 National Bottom Quartile= 1.30

④ ③ ② ①

9.4 Vehicle crimes per 1000 population (BVPI 128)



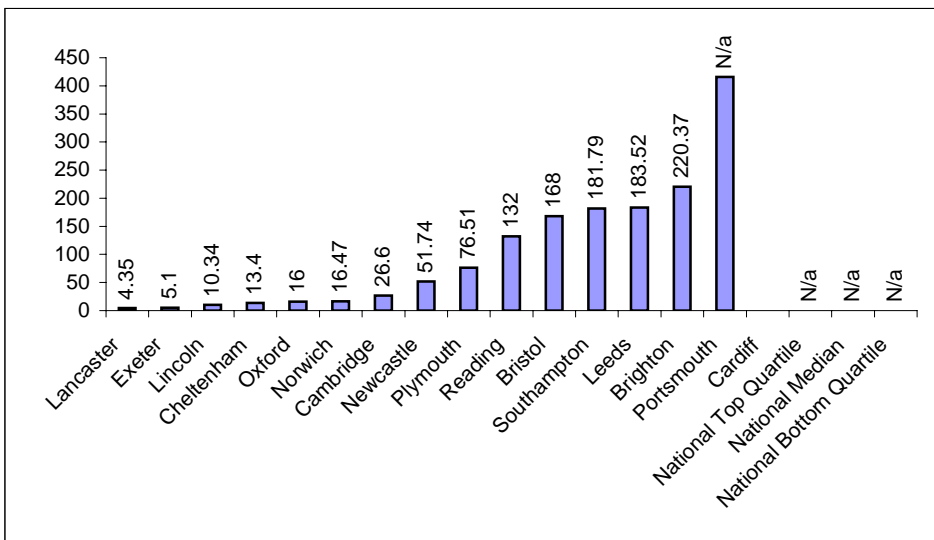
National Top Quartile= 7

National Median= 9.6

National Bottom Quartile= 13.9



9.5 Number of racial incidents recorded by the authority per 100,000 population (BVPI 174)



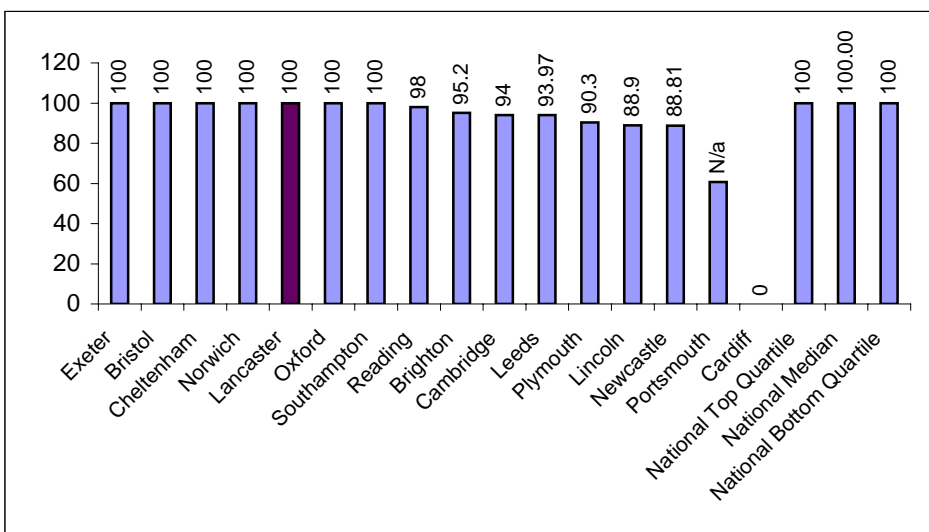
National Top Quartile= N/a

National Median= N/a

National Bottom Quartile= N/a

N/a

9.6 Percentage of racial incidents resulting in further action by the local authority (BVPI 175)



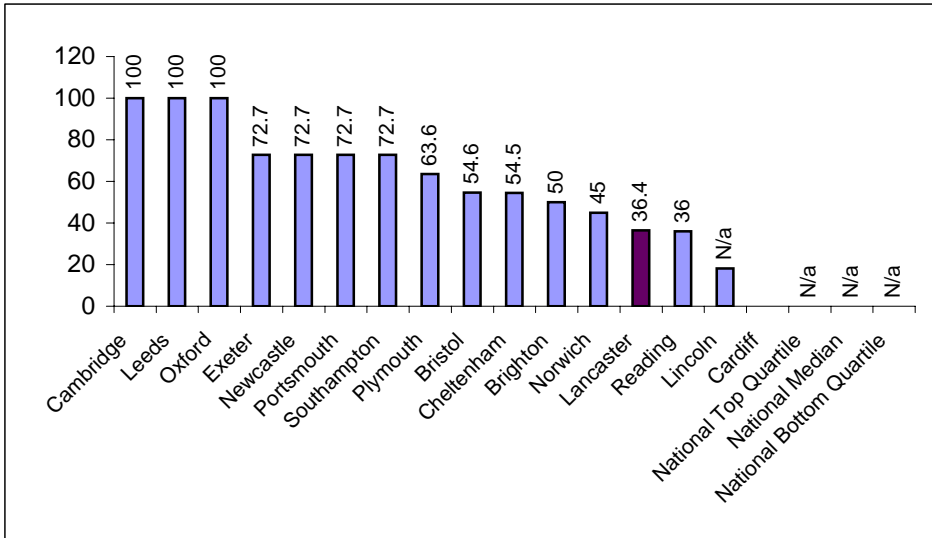
National Top Quartile= 100

National Median= 100

National Bottom Quartile= 100

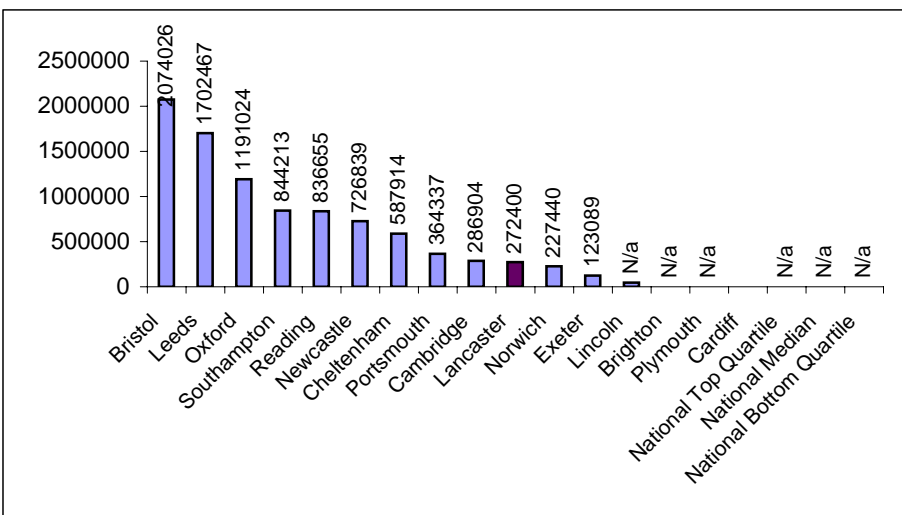


9.7 Effectiveness of local authority services designed to help victims of domestic violence (BVPI 225)



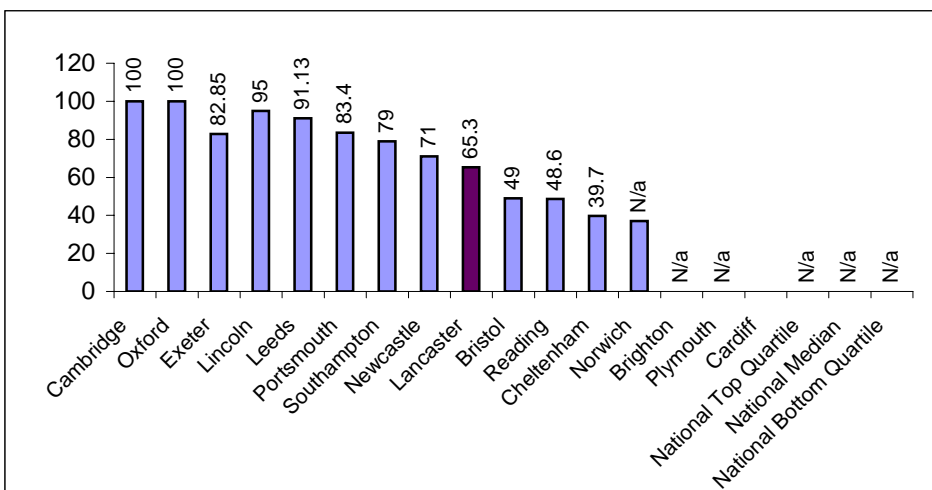
National Top Quartile= N/a  
 National Median= N/a  
 National Top Quartile= N/a  
**N/a**

9.8 Total amount spent by the local authority on Advice and Guidance services provided by external organisations (BVPI 226a)



National Top Quartile= N/a  
 National Median= N/a  
 National Bottom Quartile= N/a  
**N/a**

9.9 Percentages of monies spent on advice and guidance services provision that was given to organisations holding the CLS Quality Mark at 'General Help' level and above (BVPI 226b)



National Top Quartile= N/a  
 National Median= N/a  
 National Bottom Quartile= N/a  
**N/a**





**BUDGET AND PERFORMANCE PANEL****Work Programme Report****29<sup>th</sup> April 2008****Report of Head of Democratic Services****PURPOSE OF REPORT**

To update Members with regard to the Work Programme.

**This report is public**

**RECOMMENDATIONS**

- (1) That Members consider the referrals from the Overview and Scrutiny Committee and the additional information previously circulated and consider whether reports should be requested and the following items added to the Work Programme:-
  - (a) That the Budget and Performance Panel be asked to look at non-priority repairs in Council Housing and Councillors be asked to inform Democratic Services of any cases they are aware of.
  - (b) That the Budget and Performance Panel be asked to look at the budgetary issues regarding the funding of building conversions in the West End.
  - (c) That the Budget and Performance Panel be asked to consider the adequacy of social rented housing provision in the District.
- (2) That Members note the scheduled financial training event taking place at Lancaster Town Hall on Tuesday, 9<sup>th</sup> September 2008, and agree to add this to the draft Work Programme for 2008/09.

**1.0 Introduction**

This report provides Members with recommendations for additions to its Work Programme for consideration and advises of upcoming items to be dealt with by the work of the Panel.

1.1 **Upcoming Reports to the Panel**

The Panel is requested to note that an update on Service Level Agreement (SLA) Monitoring will be available for the Panel's consideration at its meeting scheduled for 10<sup>th</sup> June 2008. Furthermore the Panel should be advised that the Local Environment Quality Pilot Study results will also be available for consideration at the meeting on 10<sup>th</sup> June 2008.

1.2 **Referrals from Overview and Scrutiny Committee**

At the Panel's request additional information on the referred items from the Overview and Scrutiny Committee regarding Housing issues has been circulated in advance of this meeting. The Panel is requested to consider the recommendations from the Overview and Scrutiny Committee:-

- (1) That the Budget and Performance Panel be asked to look at non-priority repairs in Council Housing and Councillors be asked to inform Democratic services of any cases they are aware of.
- (2) That the Budget and Performance Panel be asked to look at the budgetary issues regarding the funding of building conversions in the West End.
- (3) That the Budget and Performance Panel be asked to consider the adequacy of social rented housing provision in the District.

The Panel are requested to note these referrals and agree to request reports on the highlighted matters and add them to its Work Programme.

1.3 **Training Event**

Members should be advised that Financial Services have organised a short training event for Members of the Budget and Performance Panel, covering the basics of treasury management. In particular, it will include an overview of the economy and other factors to be taken account of by the Council, in formulating its borrowing and investment plans for the forthcoming year.

Richard Dunlop, a Director of Butlers (i.e. the Council's Treasury Advisors), will be presenting the session. The training will also be available to other Members and Officers involved in financial monitoring or decision making and is due to take place at the meeting scheduled for 9<sup>th</sup> September 2008. Members are requested to note this event and agree to add it to the Panel's draft Work Programme for 2008/09.

<b>BACKGROUND PAPERS</b>  Current Work Programme	<b>Contact Officer:</b> Jon Stark <b>Telephone:</b> 01524 582132 <b>E-mail:</b> <a href="mailto:jstark@lancaster.gov.uk">jstark@lancaster.gov.uk</a> <b>Ref:</b> JS/DSO
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ISSUE	NOVEMBER 27 <sup>TH</sup>	JANUARY 15 <sup>TH</sup>	JANUARY 29 <sup>TH</sup>	FEBRUARY 26 <sup>TH</sup>	APRIL 1 <sup>ST</sup>	APRIL 29 <sup>TH</sup>	JUNE 10 <sup>TH</sup>	JULY 15 <sup>TH</sup>	SEPTEMBER 9 <sup>TH</sup>
HOUSING SLA's				Interim report of Review and Monitoring Form Review					
DISCUSSIONS WITH SERVICE HEADS (ONGOING)									
SCRUTINY OF FUNDING TO EXTERNAL BODIES						Council Funding to Duke's Theatre			
CAR PARK PRICING AND ENFORCEMENT AND THE POSSIBILITY OF ADDING BARRIERS TO CAR PARKS				Car Park pricing and enforcement and potential barrier use					
RECHARGING INHOUSE COSTS BETWEEN SERVICES				Report from CC(D)S and IS					
PROGRESS AND SUCCESS OF CUSTOMER SERVICE CENTRES							Report of Head of I&CS		
LOCAL ENVIRONMENT QUALITY PILOT STUDY RESULTS							CC(D)S and Corporate Strategy		

Please Note:

Performance Management - Following consideration of performance management information the Panel may be minded to timetable meetings with Service Heads and Cabinet Members as a need is identified.