

TERMS OF REFERENCE

Review Title: Public Engagement on the Council's Budget

A Review by the Resources Overview and Scrutiny Panel

Background

Bath & North East Somerset Council, in its role both as provider of services to the local community but also as Community Leader, strives to engage with members of the public wherever possible. The Council provides a range of information on its Financial Plan, Budget and Council Tax and has, over the years, supplemented statutory budget consultation with business ratepayers with occasional public and/or stakeholder consultation exercises and consultation with trade unions, but does not have a routine process for wider budget consultation. The Resources O&S Panel members have proposed to review the way in which the authority engages with members of the public on budgetary issues.

Currently, the Council provides a leaflet which accompanies Council Tax bills giving information on Council Tax charges, percentage increases, details of where the Council spends money and how this is funded, and reasons for increases/decreases on the previous year. The design of the leaflet was changed for 2005/06 in an attempt to provide the information in a friendlier format for the public (using pie charts and details of services provided). Information is also provided through press releases, on the Council's website and using the new Revenues & Benefits 24 hour information phone number.

The Council's budget is driven by the Council's Corporate Plan (which incorporates a 4-year Financial Plan) with consultation focussing on the Corporate Plan document. For 2005/06 consultation was undertaken with executive & non-executive members, trade unions, the Local Strategic Partnership and the chambers of commerce in Bath and in North East Somerset. The detail of the Council's budget is contained in Service & Resource Plans, produced by individual Heads of Service, which are also potentially subject to consultation.

Purpose

This review is being undertaken by a Task and Finish group set up from within the membership and working under the auspices of the Resources Overview and Scrutiny Panel.

The purpose of this review is to explore the ways in which Bath and North East Somerset engages with the public when deciding and setting council budgets. The panel will take this opportunity to explore and present options for improvement to the current methods of engagement.

The Panel's recommendations proposing changes to methods and processes for engaging with the public will be sent to the Executive Member for Resources.

Objectives

It is anticipated that the review will recommend:

- Any necessary improvements to the way in which the Council provides information to the public about Council budgets
- Any necessary improvements to the way in which the Council seeks opinions from members of the public about the setting of Council budgets
- Possible future options for increased engagement with the public around setting of Council budgets

Scope

The Panel will explore the following:

1. The way in which the Council *provides information to the public* regarding Council budgets
 - looking at current practice by Bath & North East Somerset
 - compare and contrast with good practice in other Authorities
 - identify options for improvement, including resource implications
2. The way in which the Council *engages with the public* on Council budgets
 - Existing practice by Bath & North East Somerset
 - Methods used by other Authorities and national best practice advice
 - Identify options for improvement, including resource implications
 - And consider the most effective level for engagement on the Council's budget, given the hierarchy of plans made up by the Community Strategy, Corporate and Financial Plan, annual Budget and individual Service and Resource Plans.

This review will not consider the wider issue of consultation across the whole Council, but will focus on the way in which the public are engaged with specifically on issues of setting Council budgets.

Approach

The Panel will undertake the following activities to gather information:

1. Research
 - Audit of current practice in providing information to the public on Council Budgets
 - Investigation of the methods and media used by other Authorities in providing information to the public on budgets

- Investigation of other Authorities' approach to consultation with the public on budgets (including the use of referendums, focus groups etc)
- Gathering of any relevant studies or research into public engagement on budgetary issues (e.g. ODPM, IDeA)
- Exploration of any best practice guidelines

2. Consultation

- Possible facilitated workshops for task and finish group to hear from the public and/or key stakeholders (inc. the Executive member and involved Council officers)
- Web page
- Press releases

Outputs of this Review

- Notes and papers from public Resources O&S Panel meetings
- Any notes and papers from facilitated workshop
- Short summary report incorporating key findings, conclusions and recommendations for future public engagement on Council Budgets
- Recommendations to be presented to the Executive Member for Resources

Constraints

- The review must be managed within the budget and resources available to the Panel.
- It is likely that some Panel members will be involved in General Election activity during April and/or May and this could impact on the timescales of this review.

Draft Outline Project Plan

<i>Date</i>	<i>Stage / Activity</i>	<i>Meeting Type</i>
24 th March 2005	Resources O&S Panel receive and discuss draft terms of reference, and set up Task and Finish Group for review	Public
Early April 2005	First meeting of Task and Finish Group – to confirm its Terms of Reference and initiate research activities	Private
May 2005	Possible facilitated workshop for Task and Finish group to hear from members of the public and/or key stakeholders	Private
26 th May 2005	Resources O&S Panel receive update report from Task and Finish group	Public
23 rd June 2005	Resources O&S Panel receive conclusions from Task and Finish group and formulate recommendations	Public

Early/mid July	Final report agreed and referred to executive member	n/a Report published on Weekly List
Early Sept.	Panel receive Executive response to Panel recommendations	Public

Project Team

Resources O&S Panel	Cllr David Dixon Cllr Mike Kelleher Cllr Shaun McGall Cllr Colin Barrett Cllr Charles Gerrish Cllr Brian Webber Cllr Chris Cray Cllr Betty Perry (Permanent Substitute)
Directors:	Jean Hinks, Resources Director
*Service Officers:	Philip Hall, Head of Finance & Resource Planning Gary Adams, Financial Analyst
O&S Project Officer:	Alison Enever
Panel Administrator, Democratic Services	Ann Swabey

* To be determined - there may be a need to engage with the Council's Communications and Marketing team on some aspects of the review.

Review Task and Finish Group

Cllr David Dixon, Cllr Charles Gerrish, Cllr Christopher Cray, Philip Hall, Alison Enever, Gary Adams