

Committee: Overview and Scrutiny Commission

Date: 11 March 2014

Subject: Member Survey 2014 - Analysis

Lead officer: Julia Regan, Head of Democracy Services

Lead member: Councillor Peter Southgate, Chair of the Overview and Scrutiny Commission

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Recommendations:

- A. That the Overview and Scrutiny Commission considers the findings arising from the 2014 Member Survey and from a meeting of scrutiny chairs and vice chairs with the scrutiny officers.
 - B. That the Overview and Scrutiny Commission agrees the proposed actions to be taken forward to improve the effectiveness of scrutiny.
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1. PURPOSE OF REPORT AND EXECUTIVE SUMMARY

- 1.1 For the Overview and Scrutiny Commission to consider the findings from the 2014 Member Survey, a meeting of the scrutiny chairs and vice chairs, and the proposed actions to be taken forward to improve the scrutiny function.

2. DETAILS

- 2.1 Each year the Scrutiny Team carries out a survey to collect the views of Merton councillors and co-opted scrutiny members about how scrutiny is working - where things work well, where things don't work quite so well, and how they can be improved. The survey also evaluates satisfaction with the scrutiny function as a whole and with the different workstreams that make up overview and scrutiny.
- 2.2 The 2014 Member Survey was sent out to 60 councillors and 6 co-opted members. It was completed by 37 councillors and 3 co-opted members, giving an overall response rate of 61% (which was a 60% response rate from councillors). These response rates are higher than those achieved in recent years, with the exception of the 62% in 2011.
- 2.3 A late response was received. This has not been included in any of the numerical results but the verbatim comments have been added to the appendix.
- 2.4 The target set for Member satisfaction with the overall effectiveness of the scrutiny function has again been exceeded, with a rating of 81% against a target of 80%.
- 2.5 The target set on scrutiny agendas was also met. In response to the question "do you think that the commission/panel agendas are too full to consider the items properly?", 56% thought this to be the case, which is lower (and therefore better) than the target of 58%.

- 2.6 Overall the survey results indicate that scrutiny is well established and effective in Merton and is well regarded by councillors (both scrutiny and Cabinet). All three co-opted members who replied stated that they felt that the support provided by the scrutiny team was good and met their needs and expectations.
- 2.7 Satisfaction levels continue to be high. Task group work was given a satisfaction rating of 89%, pre-decision scrutiny 77%, budget scrutiny 72% and performance monitoring scored 70%. There is still scope for improvement with call in which scored a 56% satisfaction rating.
- 2.8 The level of satisfaction with the support provided by the scrutiny team continues to be high. 33% rated this support as excellent and 64% rated it as good. 1 respondent rated the support as poor.
- 2.9 The analysis and detailed findings of the 2014 Member Survey are contained in Appendix 1. Appendix 2 contains all the verbatim comments received from members.
- 2.10 Appendix 3 contains a list of proposed actions for improvement.
- 2.11 Appendix 4 contains notes of the meeting of scrutiny chairs and vice chairs with the scrutiny team in December 2013.
- 3. ALTERNATIVE OPTIONS**
- 3.1 Whilst there is not a requirement to undertake an annual member survey, the findings of the survey enable members' satisfaction with the scrutiny process at Merton to be measured against agreed annual targets and actions to be taken to improve the scrutiny process year on year.
- 4. CONSULTATION UNDERTAKEN OR PROPOSED**
- 4.1 The Member Survey is conducted annually during February/March and runs for a minimum of three weeks each year.
- 5. TIMETABLE**
- 5.1 The Member Survey is undertaken in February/March each year so that the reported members' satisfaction with the scrutiny process and the agenda length, for which there are annual service plan targets, can be fed into the performance management framework.
- 6. FINANCIAL, RESOURCE AND PROPERTY IMPLICATIONS**
- 6.1 None directly relating to the Member Survey itself. However, some actions arising from the findings of the survey year on year may have resource implications which need to be taken into consideration.
- 7. LEGAL AND STATUTORY IMPLICATIONS**
- 7.1 None relating to this report.
- 8. HUMAN RIGHTS, EQUALITIES AND COMMUNITY COHESION IMPLICATIONS**
- 8.1 It is a fundamental aim of the scrutiny process to ensure that there is full and equal access to the democratic process through public involvement and

engagement. The findings of the Member Survey are reported to the Overview & Scrutiny Commission which is open to the public.

9. CRIME AND DISORDER IMPLICATIONS

9.1 None relating to this report.

10. RISK MANAGEMENT AND HEALTH AND SAFETY IMPLICATIONS

10.1 None relating to this report.

11. APPENDICES – THE FOLLOWING DOCUMENTS ARE TO BE PUBLISHED WITH THIS REPORT AND FORM PART OF THE REPORT

11.1 Appendix 1: Member Survey 2014

11.2 Appendix 2: verbatim comments from members

11.3 Appendix 3: list of proposed action points

11.4 Appendix 4: note of the meeting of scrutiny chairs and vice chairs with the scrutiny team, 11 December 2013

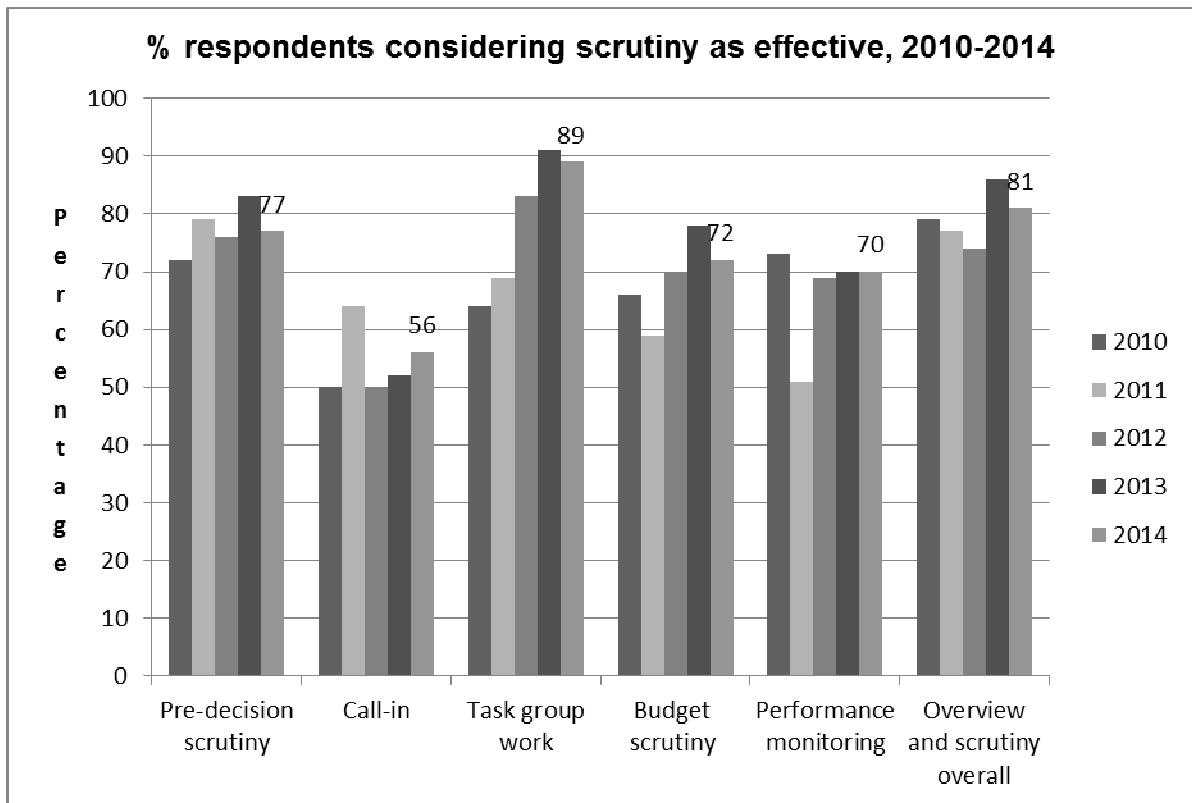
Member Survey 2014

Survey respondents

1. The survey was sent to all 60 Members of the Council and to the 6 co-opted scrutiny panel members.
2. 37 councillors and 3 co-opted members completed the survey form, giving a 61% response rate overall (60% for councillors). This is the second highest response rate achieved since 2010.
3. The majority of respondents have been actively involved in the scrutiny process over the past year:
 - ❖ 24 are **members of the scrutiny commission or a panel**. Fifteen of these have sat on a scrutiny review task group. Three have called in a decision.
 - ❖ 9 are “**other non-executive members**”, one of whom sat on a scrutiny review task group, one who has given evidence to a scrutiny review/meeting, and four who have attended a scrutiny meeting as a visiting member to observe/make a contribution.
 - ❖ 4 are **cabinet members**, all of whom have attended a scrutiny meeting to observe or make a contribution. One cabinet member sat on a scrutiny review task group prior to being appointed to the cabinet.
 - ❖ 3 are **co-opted members**, one of whom sat on a scrutiny review task group.

Effectiveness of the scrutiny function

4. The survey asked respondents to indicate whether they considered the scrutiny function to be effective in each key area of scrutiny activity and to rate the effectiveness of scrutiny overall. Results from the past five years are set out in the chart overleaf. These show a broadly positive trend in all areas since 2010.



Overall effectiveness

5. Respondents' perception of the overall effectiveness of overview and scrutiny continues to be high. Overall effectiveness is now rated at 81%, exceeding the 80% target set for 2013/14.
6. Comments made indicate a range of views held: some respondents think scrutiny is a useful tool, whereas others see it as needing more power:
 - *Overall find overview and scrutiny very intensive and effective.*
 - *Really don't think scrutiny in my portfolio area has been good and its contribution has been limited.*
 - *The scrutiny team has helped to ensure the Cabinet adheres to its manifestos.*
 - *It does not have enough teeth.*

Pre-decision scrutiny

7. The broadly upward trend in satisfaction since 2010 with the effectiveness of pre-decision scrutiny indicates that this function continues to be an integral part of scrutiny within an authority that has no overall political control.

Call-in

8. 56% of respondents expressed satisfaction with the effectiveness of call-in this year. This is up on 2013 and 2012, but down on the figure from 2011. 2011 saw a jump to 64% but this has not been repeated.
9. Three call-ins have been received so far in 2013/14. This is comparable to previous years, with 4 received in 2012/13, 2 in 2011/12, 5 in 2010/11, 3 in 2009/10, and 4 in 2008/9.
 - *It's difficult to comment on call-ins, but its effectiveness is subjective, depending on whether the result is the one you wanted; call ins are normally tabled for overt/covert partisan reasons.*
 - *Call-ins appear to be a bit of time wasting.*

Task groups

10. Task group work was once again rated the most effective element of scrutiny, with satisfaction reaching 89%, its second highest level since 2010. Comments included reference to the longer time period to reflect on council policy.
 - *Enables time to look at policy direction. Task group work is good.*
 - *Task group work continues to be one of the most rewarding aspects of scrutiny for those who take part.*

Budget scrutiny

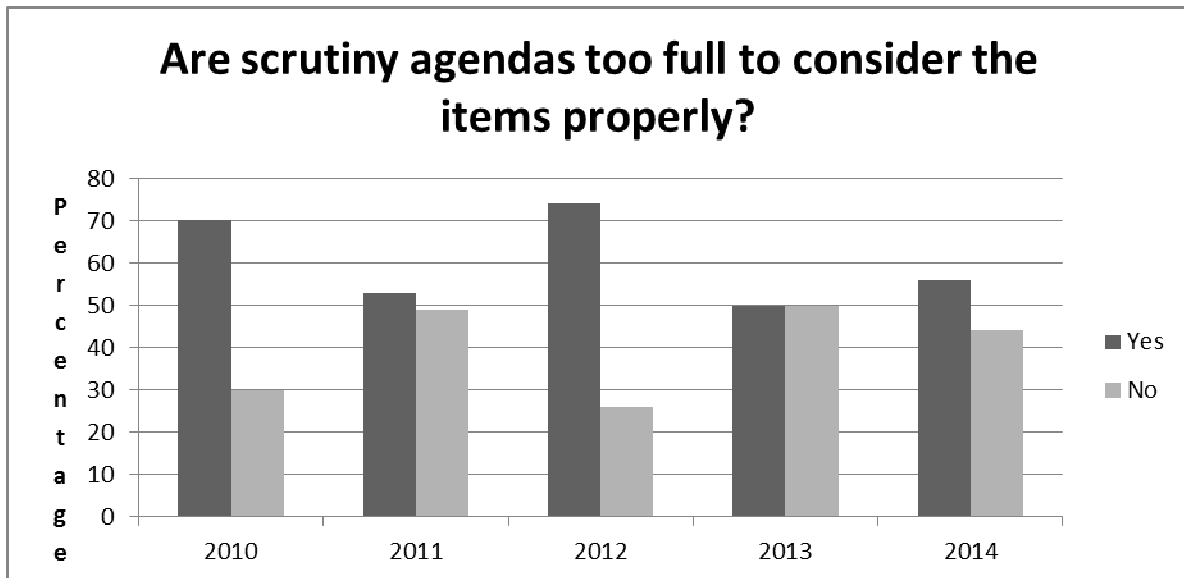
11. Satisfaction with budget scrutiny has shown an upward trend after a dip in 2011. It now stands at a 72% satisfaction rating.
 - *Budget scrutiny is generally challenging, probing and informative, but queries which can't be answered at the meeting often need to be pursued at least once before the answer is received.*

Performance monitoring

12. Satisfaction with the scrutiny of performance monitoring information has increased slightly, from 69% in 2012, to 70% in 2013, remaining at 70% in 2014. There have previously been negative comments about performance monitoring. This year there were no responses on the subject in the comment box.

Scrutiny agendas/ workload

13. The proportion of respondents who consider scrutiny agendas to be too full to consider items properly decreased significantly between 2012 (74%) and 2013 (50%). The figure now stands at 56% in 2014, which is lower and therefore better than the target of 58%.



14. Chairs have worked hard to aim for shorter and more strategically focused agendas, and comments made reflect mixed success:

- *Applies only to some panels.*
- *Panel chairs have got a lot better at controlling agenda length.*
- *Need better chairing of meetings.*

15. Two members made suggestions for other ways of shortening the agendas:

- *More sub groups to look at specific issues.*
- *Start by being more selective, focussing on subjects where the panel needs to be informed and, critically, where it can make a useful contribution. I am often asking myself "what value are we supposed to be bringing to this issue"?*

16. Action points

That the Commission and Panels continue to aim to have short strategically focussed agendas.

Development of the Commission/Panel work programmes

17. The survey asked respondents whether they have an opportunity to contribute to the development of the Commission/Panel work programmes.
18. In 2014, 92% of respondents said that they have had an opportunity to contribute to the panel work programmes, an increase from 2013's 79%. There has been an overall upward trend since 2009, which may in part be due to the success of the topic workshops which were introduced in 2010:
- *There's opportunity to get together at the start of the year.*
 - *Every member can suggest; though it doesn't guarantee acceptance!*

Scrutiny impact on decision making by the Cabinet

19. The survey asked whether decision making by the Cabinet had been influenced by scrutiny. The proportion agreeing that there had been an influence increased from 67% in 2010 to 79% in 2013 and has fallen to 66% this year.
20. As has been the case for some time, there are conflicting views on whether the Cabinet's decision making has been influenced by scrutiny. Some cited political considerations as being paramount in whether scrutiny recommendations are accepted, others noted that in a situation of no overall control scrutiny was key to influence on decision making.
- *Seems to be a "horse-trading" exercise. Some points/comments taken into account by Cabinet; but feel that done for political expediency.*
 - *Not nearly enough as far as I can see.*
 - *Yes in the case of wheelie bins in the past and in other areas. In education I think their contribution has been limited especially in relation to secondary school places.*
 - *Budget decisions take scrutiny concerns on board.*
 - *Cabinet usually takes on board the comments/communique issued during scrutiny meetings.*

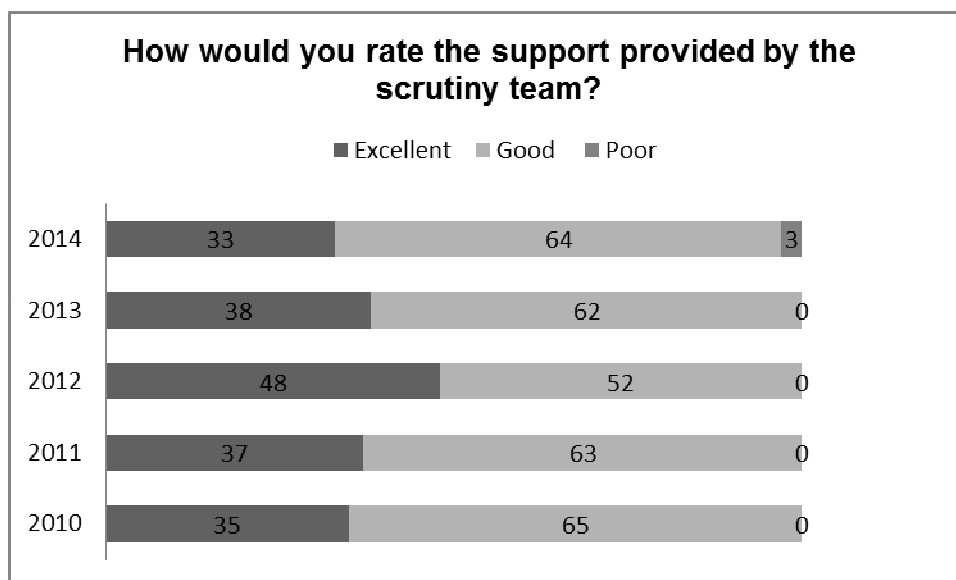
Quality of evidence presented to overview and scrutiny

21. 84% of respondents said that the evidence presented was good. This has slipped compared to the 87% rating last year but is comparable to the 83% rating in 2012, 80% in 2011 and 82% in 2010.

22. A significant majority of respondents thought the evidence was good, with scrutiny being an essential tool. Others pointed out how jargon can sometimes be a problem when understanding evidence presented to scrutiny.
- *Scrutiny is an essential tool but so many areas are set by statutory policy that there is not always a chance to change and influence. However officers provide good papers but on occasions they should more clearly respond to minuted requests and tasks set by councillors.*
 - *I think the reports have been of a high standard and officers have been willing to provide further information on request.*
 - *Not always. Translation services a good example. Have spent many meetings trying to get meaningful data – even suggesting new procedures to get the information, but constantly feel we are being “fobbed off”.*
 - *Sometimes it’s too wordy, not clear and full of jargon etc.*

Support from the Scrutiny Team

23. Satisfaction with the service remains positive, with 33% of respondents rating the support provided as excellent, 64% as good and 3% poor:



24. The proportion of respondents rating the scrutiny team as excellent (33%) has fallen since last year (38%), however the results continue to indicate general satisfaction with the service, with 97% stating the service was either good or excellent.
25. Members were also invited to rate different aspects of the scrutiny team on a scale from 1 to 4 (with 1 being the lowest and 4 being the highest). These results were very

positive. There were no '1' ratings, for example. The team scored a 93% satisfaction rate for email communication, a 90% satisfaction rate for task group reports, 86% for other written documents, 81% for verbal communication, 78% for quality of response to enquiries, and 74% for speed of response to enquiries.

Members' training and development needs

26. The skills and knowledge which members bring to the overview and scrutiny process are crucial to its effectiveness, so the survey asked what scrutiny related training and development opportunities would be useful for new and returning councillors following the May 2014 election.
27. A majority of respondents agreed that both new and returning councillors would find the following training useful:
- principles of effective scrutiny
 - questioning skills
 - budget scrutiny
 - how to monitor performance and interpret data
 - chairing and agenda management skills
28. The other suggestions for training were:
- overview of how the council works.
 - best practice in contributing to scrutiny.
 - effective call-in process.
 - assimilating the terminology within the subject field.
 - Council's service delivery partners – a rudimentary understanding of their role, functions and activities.
 - understanding the constitution
 - understanding finance (separate to budget scrutiny)
29. **Action points**
That the Head of Democracy Services will, in discussion with HR (who have responsibility for member development and training) ensure that appropriate training sessions are offered on all the areas identified by the survey.

Views and actions proposed at meeting of scrutiny chairs and vice chairs

30. The scrutiny chairs and vice chairs met with the scrutiny officers in December to review and learn from the way we have been conducting scrutiny over the past four years and to formulate proposals on how we might improve and adapt for the benefit of new and re-elected councillors, following the elections in 2014. The note of this meeting is attached in appendix 4.
31. They expressed mixed views on the desirability of councillors submitting some questions in advance of the meeting to enable officers to prepare responses.
32. They discussed the balance between officer and cabinet member contributions at scrutiny meetings and concluded that more opportunities should be taken to challenge and hold the cabinet members to account by engaging them in discussion. They also agreed to “re-invigorate” the informal meetings between scrutiny chairs, cabinet members and directors.
33. A number of suggestions were made to strengthen the impact of scrutiny on policy formation. These will be incorporated into the scrutiny officers’ preparation of the draft 2014/15 work programmes.
34. Attendees said that reports should be shorter and should outline the issues on which scrutiny input is sought. Technical details could be published electronically as background information and not included in the paper agendas. Scrutiny officers could provide suggested lines of enquiry.
35. They agreed to try out “mini” task groups to look at particular issues. A mini task group would have a short focussed brief, possibly on a very topical issue, and would take just one or two meetings to conclude its business.
36. Attendees also discussed ways of raising the profile of scrutiny in Merton and made various suggestions that the scrutiny officers will action.

Action points

- That the scrutiny officers will include information on key policy development dates in the information pack for the topic workshop discussion of the 2014/15 work programme so that pre-decision scrutiny can be timetabled
- That members of the Commission and Panels take opportunities to question cabinet members as well as officers at scrutiny meetings
- That the Head of Democracy Services should work with CMT and Scrutiny Chairs in order to get shorter reports to scrutiny meetings
- That the Head of Democracy Services should include a “mock scrutiny panel” as part of the training for new councillors.
- That the scrutiny team should approach a wider range of organisations for scrutiny topic suggestions, including local partners
- That the Commission, Panels and scrutiny team should identify opportunities within the 2014/15 work programme for holding half day/ mini scrutiny task groups

- That the Chair of the Overview and Scrutiny Commission should write to new candidates inviting them to get involved in scrutiny (this action to be reviewed after the prospective councillors' event on 25 February).
- That the Scrutiny Team should identify opportunities for promoting and celebrating the success of scrutiny and for encouraging new councillors to get involved. This should include a stall at the welcome event for new councillors (24 May), celebration of success on the scrutiny webpages, identification of opportunities for a "celebrating scrutiny" event.

Suggested issues and themes for scrutiny

37. In response to a request for suggested issues/ themes to be considered for inclusion in the overview and scrutiny work programme in 2014/15, the following suggestions were made:

- *Public health and how we can make our role as councillors effective in this arena.*
- *More examples of good financial management, i.e. reducing costs without diminution of service.*
- *Meeting the needs of the secondary school population over the next 5-10 years.*
- *Review of financial systems (eg HR/payroll systems/GL/Reporting) and projects to replace them. There are a number of system replacement projects coming up; Care First; GL etc. These should be reviewed by scrutiny.*
- *Scrutiny of the changes at St Helier and Epsom hospitals.*
- *Scrutiny of the clinical commissioning policy.*
- *Scrutiny of the health and wellbeing board.*
- *Scrutiny of the health watchdog (formerly the Link).*
- *Scrutiny of safeguarding.*
- *Inequalities in health in Merton.*
- *Transport in Merton.*
- *Wheelie bins.*
- *Tackling obesity.*
- *Parking in Merton.*
- *Exploring the system of the Universal Credit; and how it affects constituent members.*

- *With health being the big issue on east/west divide more scrutiny discussions required and target work programme to suit the needs. This wp must be linked with public health programme.*
- *Enforcement.*
- *Enforcement issues.*
- *Properties in multiple occupation.*
- *Would be happy to have something in my remit – cleanliness or parking.*
- *Review the impact (to date) of council tax localisation and the operation of welfare reforms for which the council has assumed responsibility from the Department of Work and Pensions.*
- *Building and mending communities.*
- *Mental illness is an urgent priority. Although CCG is giving presentation on 12/02/14, need information on council services e.g. supported housing/direct payments – personal budgets. Merton has lowest spend on MH services in whole of London. C Rethink report 2011.*
- *Vision/strategy for incoming/continuing administration.*
- *Four year plan to 2018.*
- *The report on demographic trends in Merton to 2017 should be seen as a backdrop to the work programme.*

38. Action point

All of these suggestions will be considered during the topic selection process for 2014/15.

Appendix 2: list of verbatim comments from respondents

#1 How would you rate the effectiveness of the overview and scrutiny function?

Members of the scrutiny commission or panels

- *My decisions/suggestions are overruled or don't "fit" with policy. It's hard to change plans and papers to any great effect. However we still need scrutiny.*
- *Overall find overview and scrutiny very intensive and effective.*
- *Performance monitoring discussions often incomplete with limited follow up of problem areas.*
- *I feel that, especially in the Commission, that a great deal of "pre meeting agreements" have been put in place and that there is bias towards certain parties/against certain parties – even though in theory meant to be non-political meetings!*
- *Difficult to give an effective view/comment as I have not been called on to sub very often.*
- *It does not have enough teeth.*
- *It's difficult to comment on call-ins, but its effectiveness is subjective, depending on whether the result is the one you wanted; call ins are normally tabled for overt/covert partisan reasons. Budget scrutiny is generally challenging, probing and informative, but queries which can't be answered at the meeting often need to be pursued at least once before the answer is received.*
- *As a new addition to the panels I am surprised about the function of call-ins. I feel that matters should not have reached a situation where we need a call in.*
- *Most members do not read and understand papers and this is evidenced by the verbal interventions of most members.*
- *The scrutiny team has helped to ensure the Cabinet adheres to its manifestos.*
- *Task group work continues to be one of the most rewarding aspects of scrutiny for those who take part.*
- *Most effective scrutiny takes place before any decisions are made. Unfortunately, very few Cabinet decisions come through pre-decision scrutiny; there should be an obligation (constitutional) to ensure this.*

Cabinet Members

- *Really don't think scrutiny in my portfolio area has been good and its contribution has been limited.*
- *Enables time to look at policy direction. Task group work is good. Call ins appear to be a bit of time wasting.*

Other non-executive Members

- *As I don't sit on scrutiny I cannot comment on all the Qs here.*
- *Almost inevitably the system is dominated by politics. There are glimmers of holding to account and for this we must be grateful.*
- *If not all councillors or council groups have a place on scrutiny how can it do its job at all?*

#2 Do you have an opportunity to contribute to the development of the commission/panel work programmes (for example, suggesting topics for review or items for agendas?) If not, why not?

Members of the scrutiny commission or panels

- *Yes at the annual workshops.*
- *Have done in the past.*
- *Every member can suggest; though it doesn't guarantee acceptance!*
- *Participated in the formulation of the scrutiny's work programme – in the Health Panel.*

Cabinet Members

- *If a key issue for adult social care arose, I would suggest Panel might want to look into it. It would be for them to decide how they structure their time.*
- *As cabinet member its not a decision of mine.*
- *There's opportunity to get together at the start of the year.*

#3 Do you think that the commission/panel agendas are too full in order to consider the items properly?

Members of the scrutiny commission or panels

- *Better chairing of meetings.*
- *But commission/panels can be more selective when setting their agendas.*
- *Start by being more selective, focussing on subjects where the panel needs to be informed and, critically, where it can make a useful contribution. I am often asking myself "what value are we supposed to be bringing to this issue"? Items brought to the panel for information without pre-reading are generally a waste of time with limited discussion and negligible outcome. If items are important enough they should not simply be dropped for lack of time; extra meetings if necessary.*
- *More sub groups to look at specific issues.*
- *Applies only to some panels.*
- *Some members have to get up early in the morning, if you wish to have a cross section the evening meeting must be shorter. Stop item being put forward as a matter of urgency.*
- *As I've previously suggested, some items could be dealt with electronically, with the same opportunities for comment/question/answer, e.g. CSF update reports.*
- *Scrutiny is so important for the council's function – it should not be left to well meaning volunteers.*
- *No because we discuss what we want on the agenda and how long for.*
- *Panel chairs have got a lot better at controlling agenda length.*
- *Some items should be considered on a remote basis (i.e. via email exchanges) to allow more time during meetings*

Cabinet Members

- *Do not think my panel has been focused in the least despite the meetings being two hours.*
- *Overkill sometimes. Information items can be emailed.*

Co-opted members

- *More specialist working groups.*

#4 Has decision-making by the Cabinet been influenced by comments from the commission/panels? If yes, please give examples.

Members of the scrutiny commission or panels

- *Not really aware of any major changes.*
- *Where staff was going to be reduced in department the panels influence the reversal of the decision because of the reduction the service to the community would not be satisfactory.*
- *When items referred back for further consideration.*
- *Seems to be a "horse-trading" exercise. Some points/comments taken into account by Cabinet; but feel that done for political expediency.*
- *I still not got the grip of this. I feel that Cabinet makes their own decision.*
- *Not often enough.*
- *Last year's budget, e.g. Duke of Edinburgh award scheme. However, representations are only accepted by Cabinet if they don't depart from the pre-agreed cabinet line.*
- *Cabinet usually takes on board the comments/communique issued during scrutiny meetings.*
- *Cabinet responded to scrutiny's case for additional noise patrols with budget for a pilot on Friday nights year round.*

Cabinet Members

- *Budget particularly.*
- *Yes in the case of wheelie bins in the past and in other areas. In education I think their contribution has been limited especially in relation to secondary school places.*
- *Budget decisions take scrutiny concerns on board.*
- *Budget savings not taken after hearing scrutiny concerns.*

Other non-executive Members

- *Not aware of anything in the last year but previously yes.*
- *Not nearly enough as far as I can see.*
- *With a minority administration key to budget process.*

#5 Do you feel that the quality of evidence presented to overview and scrutiny has been good? Has it met the needs of the session? If not, why not?

Members of the scrutiny commission or panels

- *Scrutiny is an essential tool but so many areas are set by statutory policy that there is not always a chance to change and influence. However officers provide good papers but on occasions they should more clearly respond to minuted requests and tasks set by councillors.*

- *Sometimes data presented does not support the conclusions. For example the conclusions on 20 mph were not supported by the high level data presented.*
- *Not always. Translation services a good example. Have spent many meetings trying to get meaningful data – even suggesting new procedures to get the information, but constantly feel we are being “fobbed off”.*
- *Sometimes its too wordy, not clear and full of jargon etc.*
- *I feel more research would be ideal.*
- *Too many reports say the same thing 2 or 3 times.*
- *Inconsistent delivery of information, e.g. information withheld on basis of “confidentiality” – contrary to legislation*

Cabinet Members

- *I think the reports have been of a high standard and officers have been willing to provide further information on request.*
- *Essential information is sometimes missing that helps in decision making – or at least in forming opinions + recommendations – usually statistical evidence.*

Other non-executive Members

- *Yes for the most part.*
- *Not always transparent from meetings I have witnessed and questioning by members has been exceptionally poor.*

Co-opted members

- *Variable. Example. Excellent update from St Georges NHS Trust to HCOP on 13/11/13 but same Panel on 15/01/14 received little information from SW London St Georges MH Trust. Panel were asked to approve their governance requirements but no information was given on the services they provide. Chief Nurse spoke about IAPT service – but no reference to closure of 153 beds or that Trust has been rated WORSE by CQC for crisis services. Panel nodded through request without proper information. I asked Scrutiny Team for copy of previous CQC report – not provided!*

#8 How could the scrutiny team improve the way it supports overview and scrutiny?

Members of the scrutiny commission or panels

- *By setting report out in a simple and straight forward way.*
- *Now that attendance is being recorded online – need to ensure that all councillors can make the meetings when task groups arranged – especially if then rearranged to suit chairs. Otherwise will find members unwilling to put their names forward.*
- *Maintain effective communication between councillors and officers.*
- *More open discussion with the chair weeks before agenda is set.*
- *Within its limited resources, probably not much. However, with particular reference to CYP, we could be forwarded documents in A3 size where appropriate (e.g. service plans, key performance indicators) automatically – specifically, this would obviate the need for those of us with poor sight to make subsequent requests, and aid meeting preparation. The team could also liaise with departments to minimise the size of agendas; though I appreciate that this might lead some to complain of not receiving enough pertinent information. Generally very good, professional, courteous and friendly service.*
- *I would like to compare what we do with other council scrutiny panels.*
- *Satisfied with current level of support – although there will be a need for additional support to new councillors from May.*
- *Push cabinet/officers for timely responses*

Cabinet Members

- *I've never actually contacted them! Some reliance on the scrutiny team is needed in potential questioning. The early scrutiny officers were really good at this, there's some reluctance over the years but it has improved.*

Other non-executive Members

- *Scrutiny team is important but it's the members that can improve the process.*
- *Better report summaries and less repetition in reports.*

Co-opted members

By working with the Chair of HCOP Panel to provide more detailed background information to reports on request. Encourage/invite panel members to send in questions to the Chair on receipt of their public documents pack which arrives a week before Panel meeting. It is too late to ask questions at the meeting itself if one wants a detailed response, e.g. 13/01/14 one page doc on MH but info was too general.

#10 If you have any further comments/ suggestions about the overview and scrutiny function, including how it can be improved, please use the space below.

Members of the scrutiny commission or panels

- *Have reports more concise, and simple straight forward with each item where possible are complete before the start of another so we don't have to turn pages to get connected to the basics of what we are dealing with especially when dealing with numbers.*
- *More training.*
- *We should tell the residents what we do!*
- *Request to scrutiny panel for each council department (not directorate) which meet approx. every 6 weeks.*
- *More training programmes for budget scrutiny should be arranged for scrutiny members.*
- *Cabinet members responsible for the various departments should give periodic reports of their performance to scrutiny members. This will help in accountability.*

Cabinet Members

- *I think more effective training for some members would be useful. Chairs are of a variable standard, some very good, but others need training. Performance monitoring is of a mixed picture. Small summary reports given that it is quite clear that many in scrutiny meetings are reading reports in the meeting. Tendency to get bogged down in minor details.*
- *I always had problems with the times of the task group meetings. They usually started around 6-6.30. Sometimes would be good to see if members could meet daytime/morning. I know this is difficult with many people working, but could look at a topic that would be suited to daytime meetings and visits – i.e. education issues.*

Other non-executive Members

- *We need real discussion of challenges to the Executive not just “whipped” voting.*
- *I sit on the borough plan scrutiny panel which operates differently to other panels so most of the questions are not relevant.*
- *Ensuring all members from all political groups have seats on scrutiny.*

Co-opted members

- *On 15/01/14 HCOP Panel were presented with a 471 page report – this detailed information should still be provided but it would be helpful if an executive summary could be presented by the Finance Director for each section of the budget report*

outlining the main changes. She did this verbally but it needs to be written down in advance for members – I found it impossible to pick out spending on MH services.

Appendix 3: List of proposed action points

- That the Commission and Panels continue to aim to have short strategically focussed agendas.
- That the Head of Democracy Services will, in discussion with HR (who have responsibility for member development and training) ensure that appropriate training sessions are offered on all the areas identified by the survey.
- That the scrutiny officers will include information on key policy development dates in the information pack for the topic workshop discussion of the 2014/15 work programme so that pre-decision scrutiny can be timetabled
- That members of the Commission and Panels take opportunities to question cabinet members as well as officers at scrutiny meetings
- That the Head of Democracy Services should work with CMT and Scrutiny Chairs in order to get shorter reports to scrutiny meetings
- That the Head of Democracy Services should include a “mock scrutiny panel” as part of the training for new councillors.
- That the scrutiny team should approach a wider range of organisations for scrutiny topic suggestions, including local partners
- That the Commission, Panels and scrutiny team should identify opportunities within the 2014/15 work programme for holding half day/ mini scrutiny task groups
- That the Chair of the Overview and Scrutiny Commission should write to new candidates inviting them to get involved in scrutiny (this action to be reviewed after the prospective councillors’ event on 25 February).
- That the Scrutiny Team should identify opportunities for promoting and celebrating the success of scrutiny and for encouraging new councillors to get involved. This should include a stall at the welcome event for new councillors (24 May), celebration of success on the scrutiny webpages, identification of opportunities for a “celebrating scrutiny” event.
- That all the topic suggestions made will be considered at the scrutiny topic workshops in June 2014.

Note of Scrutiny Development Forum with Chairs and Vice Chairs on the 11th December 2013

Present: Councillors: Peter Southgate, Ray Tindle, James Holmes, Peter McCabe, Jeff Hanna

Apologies: Councillor Russell Makin, Councillor Logie Lohendran

Councillor Southgate said the purpose of the session is to reflect on what we have been doing for the last four years, our successes and challenges and to prepare for the new intake of members after the election. He said that scrutiny at Merton has come a long way and has moved away from a partisan approach to councillors taking a balanced view on issues based on the evidence provided.

Julia Regan, Head of Democracy Services added that the purpose of the discussion is to think about how we might get new members enthused about scrutiny, to promote what we have done so far and look at how things can be done differently.

Councillor Tindle said that he enjoyed scrutiny and found the parliamentary seminars very useful and suggested that new councillors would find it helpful to watch select committees in action. He also suggested that we develop a mechanism to enable councillors to submit questions to officers in advance of scrutiny meetings. This could mean that officers have the answers to hand at panel meetings.

There were some mixed views on the proposal to allow councillors to ask questions in advance as it was thought that it could; deflect from the opportunity to ask searching questions or make the process contrived which could impact on the quality of the debate at the panel.

There was a discussion on whether the balance is right between officer and cabinet member contribution to the discussion at panel meetings. It was thought that most questions were directed at officers but we should engage cabinet members more in the discussion.

Councillor Southgate reflected on whether scrutiny has enough input into policy formation;

Rebecca Redman, Scrutiny Officer, said that as part of the work programming process for next year, in consultation with the policy, partnerships and strategy team we plan to provide a list of policies that are due to be refreshed and think about the best opportunities for pre-decision scrutiny.

Stella Akintan, Scrutiny Officer, suggested we could also look at key policies being developed by local partners which may also be suitable for pre decision scrutiny.

Councillor Holmes said that he felt we need to provide more challenge to cabinet members. Concerns were expressed that reports simply ask Members to note the information and do not provide opportunity for scrutiny. There needs to be substantial improvements to reports that come to scrutiny panels:

- Reports should include a detailed one page executive summary.
- We currently have long reports bogged down in detail. There is too much background information and focus on the process.
- We need a strategic overview rather than a report that attempts to answer all the questions.

Rebecca Redman also suggested that officers provide suggested lines of enquiry to councillors in advance of the meeting to help guide their questioning. It was thought that questions would be useful alongside, good practice information and comparative data.

Councillor Hanna said that action plans are included in reports which can be used to challenge the department

Councillor Tindle feels that scrutiny meetings can be party political and therefore values the contribution of lay people who bring expertise.

Julia Regan confirmed that members are asking for ; lay experts to contribute to the panel discussion, comparative data, good practice, and lines of questioning.

Councillor Hanna suggested that we hold a mock scrutiny panel as part of the induction process to introduce new members to the scrutiny process. He also suggested that we need to cultivate a culture in which meetings are well chaired and kept within a two hour time slot. When officers present reports they need to keep it brief.

We need to re-invigorate the tri-angulation meetings between the Director, Cabinet Member and Chair to create a forum for constructive dialogue to discuss issues of concern; the work programmes and seek support for scrutiny of particular issues.

Councillor Southgate suggested the idea of short concise scrutiny sessions to look at particular issues.

Councillor Holmes expressed support for the idea of mini task groups; these could be two to three sessions held in the evening. They should be private sessions to encourage open debate. The Cabinet member will be an important part of the process they should be encouraged to attend and engage in the debate. There should be a willingness from the cabinet member to support the scrutiny topic and use the debate/recommendations to inform their decisions on the area, service or policy.

Councillor McCabe said we should be trying to communicate with people who are interested in becoming local councillors and talking to them about the scrutiny process.

It was also suggested that Councillor Southgate could write an article for the local guardian on scrutiny

Councillor Holmes said we should be raising the profile of Merton scrutiny. There should be a dedicated section on the website, we should send our reports to other boroughs, and brief summary of task group reports in My Merton, Cllr Southgate could send a letter to all new councillors highlighting scrutiny achievements and asking them to get involved.

Julia Regan said that Merton Scrutiny reports are placed on the Centre for Public Scrutiny Website and published on www.merton.gov.uk/scrutiny

Actions

Make use of the Policy timetable for pre-decision scrutiny

Question cabinet members as well as officers at scrutiny meetings

Report writing – Scrutiny reports should include short executive summaries and outline what officers are seeking views on

Training for new councillors –Hold a mock scrutiny panel.

Topic suggestions – open up to other sources including local partners

Hold Half day/ mini scrutiny task groups

Celebrating scrutiny event – identifying opportunities, stall at welcome event, celebrate success on website

Chair to write to new candidates inviting them to get involved - review after event on 25 February.