Sefton Council ⊞

Overview & Scrutiny

MEETING: OVERVIEW AND SCRUTINY COMMITTEE (REGULATORY, COMPLIANCE AND CORPORATE SERVICES)

DATE: Tuesday 1st November, 2022

TIME: 6.30 pm

VENUE: Birkdale Room, Town Hall, Southport

Member	Substitute
Councillor	Councillor
Councillor Bradshaw (Chair)	Councillor McGinnity
Councillor Byrom (Vice-Chair)	Councillor Murphy
Councillor Bennett	Councillor Irving
Councillor Brennan	Councillor Myers
Councillor Carlin	Councillor Page
Councillor D'Albuquerque	Councillor Jones
Councillor Grace	Councillor Roche
Councillor Killen	Councillor Chris Maher
Councillor Robinson	Councillor Thomas
Councillor Shaw	Councillor Evans

COMMITTEE OFFICER: Paul Fraser
Senior Democratic Services Officer
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If you have any special needs that may require arrangements to facilitate your attendance at this meeting, please contact the Committee Officer named above, who will endeavour to assist.

We endeavour to provide a reasonable number of full agendas, including reports at the meeting. If you wish to ensure that you have a copy to refer to at the meeting, please can you print off your own copy of the agenda pack prior to the meeting.

A G E N D A

1.   Apologies for Absence

2.   Declarations of Interest

Members are requested at a meeting where a disclosable pecuniary interest or personal interest arises, which is not already included in their Register of Members' Interests, to declare any interests that relate to an item on the agenda.

Where a Member discloses a Disclosable Pecuniary Interest, he/she must withdraw from the meeting room, including from the public gallery, during the whole consideration of any item of business in which he/she has an interest, except where he/she is permitted to remain as a result of a grant of a dispensation.

Where a Member discloses a personal interest he/she must seek advice from the Monitoring Officer or staff member representing the Monitoring Officer to determine whether the Member should withdraw from the meeting room, including from the public gallery, during the whole consideration of any item of business in which he/she has an interest or whether the Member can remain in the meeting or remain in the meeting and vote on the relevant decision.

3.   Minutes of the Previous Meeting   (Pages 5 - 12)

Minutes of the meeting held on 22 September 2022

4.   New Ways of Working

Presentation by the Executive Director of Corporate Resources and Customer Services

5.   Disposal of Surplus Council Owned Land/Asset - Management Strategy

Presentation by the Executive Director of Corporate Resources and Customer Services

6.   Elections Act 2022   (Pages 13 - 24)

Report of the Assistant Director of Corporate Resources and Customer Services (Strategic Support)

7.   Digital Inclusion Working Group – Update on Recommendations   (Pages 25 - 40)

Report of the Chief Legal and Democratic Officer

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Overview & Scrutiny

OVERVIEW AND SCRUTINY COMMITTEE (REGULATORY, COMPLIANCE AND CORPORATE SERVICES)

MEETING HELD AT THE COMMITTEE ROOM, TOWN HALL BOOTLE ON THURSDAY 22ND SEPTEMBER, 2022

PRESENT: Councillor Bradshaw (in the Chair)
                                    Councillors Bennett, Grace, Killen, Murphy, Shaw
                                    and Thomas

ALSO PRESENT: Councillor Lappin

7.   APOLOGIES FOR ABSENCE

Apologies for absence were received from Councillors Byrom, Brennan (and his substitute member Councillor Myers), Carlin and Robinson.

8.   DECLARATIONS OF INTEREST

No declarations of interest were received.

9.   MINUTES OF THE PREVIOUS MEETING

RESOLVED:

That the Minutes of the meeting held on 14 June 2022 be confirmed as a correct record.

10.   MEMBER DEVELOPMENT PROGRAMME

Further to Minute No. 6 (2) of its meeting held on 14 June 2022 the Committee received a presentation from Michael Mainwaring, Workforce Learning and Development Manager and Ruth Appleby, Democratic Services Officer on Members' training and development.

Mr. Mainwaring and Ms. Appleby circulated a handout that provided information on:

- E-learning courses that lasted between 45 minutes and 1 hour
- Shorter courses offered by Sefton Corporate Learning Centre that lasted 30 minutes
- How to enrol on an E-learning course
- Difficulties experienced by Members logging onto Me-Learning and help that could be provided via the Member Development Handbook
- Password requirements in accordance with the ICT Acceptable Use Policy

Members of the Committee were also provided with a copy of the Councillor Induction and Member Development Schedule of Courses 2022/23.

OVERVIEW AND SCRUTINY COMMITTEE (REGULATORY, COMPLIANCE AND CORPORATE SERVICES) - THURSDAY 22ND SEPTEMBER, 2022

Members of the Committee asked questions/commented on the following issues:

- Difficulties experienced accessing the mandatory course relating to Safeguarding Adults Awareness
- Whether the mandatory courses are mandatory for all Members of the Council or targeted at Members of relevant Committees
- How Members could access courses "on the go" via use of their mobile devices
- The Overview and Scrutiny training event held in May 2022 being very informative and helpful
- The openness of the Treasury Management training event that provided a general introduction to treasury management in local government finance to all Members of the Council not just Audit and Governance Committee members

RESOLVED:

That Michael Mainwaring and Ruth Appleby be thanked for their informative presentation.

11. LEVELS OF DISCIPLINARY, GRIEVANCE, DIGNITY AT WORK AND SICKNESS ABSENCE

The Committee considered the report of the Executive Director of Corporate Resources and Customer Services that provided information on the levels of discipline, grievance, dignity at work and sickness absence within the Council (excluding schools).

The report indicated that the management of the workforce was an important activity to ensure outcomes for Sefton's communities were achieved and to ensure that the workforce was appropriately managed and motivated. Specific information was provided on:

- Disciplinary, Grievance and Dignity at Work - the organisation enjoyed a comparatively good level of cases and this reflected on the whole, both the good overall industrial relations environment, the partnership approach that was undertaken and also the work undertaken within departments
- Council Sickness Absence - Year End 2021/22 plus first quarter of 2022/23 - relating to both short-term and long-term absences; and analysis by service area
- Health Unit Data – advising that a new report would be prepared via the new iTrent system to provide information on percentage of sickness reasons across the Council; and that past reports had always shown the top 3 reasons to interchange between mental health, musculoskeletal and medical illness /infection

OVERVIEW AND SCRUTINY COMMITTEE (REGULATORY, COMPLIANCE AND CORPORATE SERVICES) - THURSDAY 22ND SEPTEMBER, 2022

- Occupational Health referrals – advising that as in previous years, mental health related issues continued to be the main reason for referral and that Operational In-House Services, Communities and Adult Social Care were the areas with the highest number of referrals overall
- The Strategic Leadership Board continuing to monitor and encourage the reduction of levels of both short and long-term absence; and that the Personnel Team worked closely with departments providing information and advice and appropriate levels of support, advising managers on informal processes and assisting managers with the more formal and complex levels of sickness absence management
- The Council's Sickness Absence Policy which operated in a partnership with trade unions

Members of the Committee asked questions/commented on the following issues:

- Concern expressed that staff working from home may continue working when they were ill. It was stressed that the same rules applied to staff working from home or office based regarding sickness absence, namely, that they should report any absence to their line manager in the normal way
- Did the Council follow the ACAS mental health guide, have mental health awareness training and have mental health champions. It was noted that the Council did not have mental health champions but that the consideration could be given to the first two issues. Information was provided on work undertaken with trades unions, staff being urged to have continuous conversations with their managers, the availability of referrals to occupational health and the provision of the appropriate kit to enable staff to work safely from home
- A comment was made that on occasions that a manager could be the cause of mental health problems for staff
- Regarding sickness level statistics by service area a comment was made that in areas with small numbers of staff a few people off ill in such areas could skew the percentage figure in comparison to larger service areas; and a request was made for actual numbers of staff being absent to be provided, together with percentage figures, in future reports. It was noted that the actual numbers of staff being absent would be provided, together with percentage figures, in future reports
- A question was asked whether the sickness absence policy was working to tackle short-term absences. The view of officers was that the policy was working and being managed well in respect of short-term absences but that the real challenge was long-term absence; and it was considered that the policy was fit for purpose but acknowledged that it had to be continually worked on and reviewed

OVERVIEW AND SCRUTINY COMMITTEE (REGULATORY, COMPLIANCE AND CORPORATE SERVICES) - THURSDAY 22ND SEPTEMBER, 2022

- Reference was made to the perceived high level of disciplinaries in In-House Operational Services. It was noted that this service area employed a high number of staff but that only 3 of the investigated case resulted in a sanction
- In respect of the reasons for referral to Occupational Health referred to in paragraph 8.1 of the report was it know whether staff had pre-existing conditions relating to their referrals

RESOLVED: That

(1)   the report providing information in terms of discipline, grievance, dignity at work and sickness levels be noted; and

(2)   the ongoing work and initiatives to monitor and encourage the reduction of levels of both short and long-term absence be noted.

12.   FINANCIAL MANAGEMENT 2022/23 TO 2024/25 AND FRAMEWORK FOR CHANGE 2020 - REVENUE AND CAPITAL BUDGET UPDATE 2022/23 – SEPTEMBER UPDATE

Further to Minute No. 50 of the meeting of the Cabinet held on 1 September 2022 the Committee considered the report of the Executive Director of Corporate Resources and Customer Services that advised of:

(1)   the current position relating to the 2022/23 revenue budget;

(2)   the current forecast on Council Tax and Business Rates collection for 2022/23; and

(3)   the monitoring position of the Council's capital programme to the end of July 2023 in respect of:

- the forecast expenditure to year end;
- variations against the approved budgets and an explanation of those variations for consideration by Members; and
- Updates to spending profiles and proposed amendments to capital budgets necessary to ensure the efficient delivery of capital projects are also presented for approval.

The Cabinet had resolved (Minute No. 50):

That in respect of the Revenue Budget:

(1)   the current position relating to the 2022/23 revenue budget be noted;

(2)   the Remedial Action Plan to offset the budget pressures being faced in 2022/23 be noted;

(3)   Council be recommended to release £1.666m from the Business Rates Income Reserve;

(4)   the financial risks associated with the delivery of the 2022/23 revenue budget be recognised and it be acknowledged that the forecast outturn position will continue to be reviewed; and that remedial actions put in place, to ensure a balanced forecast outturn position and financial sustainability can be achieved; and

(5)   the current position relating to the High Needs budget be noted and that officers are currently reviewing all options available to the Council to mitigate the additional pressure and to make the overall High Needs budget financially sustainable;

That in respect of the Capital Programme:

(6)   the spending profiles across financial years for the approved capital programme (paragraph 7.1) be noted;

(7)   the latest capital expenditure position as at 31 July 2022 of £7.535m (paragraph 7.5); and the latest full year forecast is £42.814m (paragraph 7.6) be noted;

(8)   the explanations of variances to project budgets (paragraph 7.1) be noted;

(9)   Council be recommended to approve of a supplementary capital estimate for £2.000m for Core Disabled Facilities Grants (paragraph 7.11);

(10)   Council be recommended to approve a supplementary revenue estimate of £1.064m for the City Region Sustainable Transport Settlement support grant (paragraph 7.13.1);

(11)   a supplementary capital estimate of £0.759m for the Maritime Corridor and Southport Eastern access schemes (paragraph 7.13.2) be approved;

(12)   a supplementary capital estimate of £0.577m for Section 106 funding for Highways Capital schemes (paragraph 7.13.3) be approved;

(13)   a supplementary capital estimate of £0.468m for projects on the Key Route Network (paragraph 7.13.4) be approved;

(14)   Council be recommended to approve a supplementary capital estimate of £1.620m for Tranche 3 of the Active travel Fund (paragraph 7.13.5);

(15)   Council be recommended to approve a supplementary capital estimate of £4.789m for the Highways Maintenance budget 2022/23 (paragraph 7.13.7);

(16)   Council be recommended to approve a supplementary capital estimate of £0.188m for Corporate Essential Maintenance funded from capital receipts (paragraph 7.37); and

(17)   it be noted that capital resources will be managed by the Executive Director of Corporate Resources and Customer Services to ensure the capital programme remains fully funded and that capital funding arrangements secure the maximum financial benefit to the Council (paragraph 7.40).

Members of the Committee asked questions/commented on the following issue:

- Regarding the estimated increase of £4.3m on the Council's energy and fuel costs a question was asked whether the recent Government announcement to provide help to businesses in this respect would also help local authorities. It was noted that at this stage it was unknown what help would be provided by the Government to local authorities

RESOLVED:

That the financial monitoring report and the decision taken by Cabinet in respect of this matter be noted.

13.   WORK PROGRAMME 2022/23, SCRUTINY REVIEW TOPICS AND KEY DECISION FORWARD PLAN

The Committee considered the report of the Chief Legal and Democratic Officer that sought the views of the Committee on the Work Programme for 2022/23; the identification of potential topics for scrutiny reviews to be undertaken by a Working Group(s) appointed by the Committee; the identification of items for pre-scrutiny by the Committee from the Key Decision Forward Plan; updated on the Liverpool City Region Combined Authority Overview and Scrutiny Committee; and updated on issues considered at previous meetings of the Committee.

RESOLVED: That

(1)   the Work Programme for 2022/23, as set out in Appendix 1 to the report, be noted;

(2)   the update on the Liverpool City Region Combined Authority Overview and Scrutiny Committee be noted; and

OVERVIEW AND SCRUTINY COMMITTEE (REGULATORY, COMPLIANCE AND CORPORATE SERVICES) - THURSDAY 22ND SEPTEMBER, 2022

(3)   the update on matters considered at previous meetings of the Committee in relation to the procurement for the provision of enforcement agent services and the Elections Act 2022 be noted.

14.   WELFARE REFORM AND ANTI-POVERTY REFERENCE GROUP - UPDATE

Further to Minute No. 24 of the meeting held on 2 November 2021 the Committee considered a Welfare Reform and Anti-Poverty update of the Head of Health and Wellbeing and Cabinet Member - Regulatory, Compliance and Corporate Services.

The update provided information on the latest meeting of the Welfare Reform and Anti-Poverty (WRAP) Cabinet Member Reference Group and in particular on activities associated with:

- The cost-of-living crisis
- Community pantry
- Childhood poverty in Sefton
- Feedback from Marmot work
- Council tax energy rebate
- Emergency Limited Assistance Scheme
- Child poverty and children entering care
- Household support grant
- Healthy start voucher uptake
- A request for action that period poverty be discussed at the next WRAP meeting

Councillor Lappin, Cabinet Member – Regulatory, Compliance and Corporate Services presented the update.

Members of the Committee asked questions/commented on the following issues:

- The establishment of "warm hubs", places within local communities where people could be assured of finding a safe, warm and friendly environment; and whether updates could be provided on such "warm hubs". The importance of a co-ordinated approach to the establishment of "warm hubs" was stressed to ensure adequate provision throughout the week. It was noted that updates would be provided via Cost of Living Crisis reports to Cabinet and Welfare Reform and Anti-Poverty Cabinet Member Reference Group reports; and that the matter was being coordinated by Councillor Hardy, Cabinet Member – Communities and Housing and the Neighbourhoods Team
- The great service provided by the St. Leonard's Youth and Community Centre food pantry

Agenda Item 3

RESOLVED: That

(1)   the update on the operation of the Members' Welfare Reform Reference Group be noted; and

(2)   Councillor Lappin be thanked for her update.

15.   CABINET MEMBER REPORT - JUNE 2022 TO AUGUST 2022

The Committee considered the report of the Chief Legal and Democratic Officer that included the most recent report from the Cabinet Member – Regulatory, Compliance and Corporate Services.

RESOLVED: That

(1)   the update report from the Cabinet Member – Regulatory, Compliance and Corporate Services be noted; and

(2)   Councillor Lappin be thanked for her attendance at the meeting.

Report to:	Overview and Scrutiny Committee (Regulatory, Compliance and Corporate Services)	Date of Meeting:	Tuesday 1 November 2022
Subject:	Elections Act 2022		
Report of:	Assistant Director of Corporate Resources and Customer Services (Strategic Support)	Wards Affected:	(All Wards);
Portfolio:	Cabinet Member – Regulatory, Compliance and Corporate Resources		
Is this a Key Decision:	No	Included in Forward Plan:	No
Exempt / Confidential Report:	No		

Summary:

The report provides members with an update on the implications of the Elections Act 2022 on the conduct of future elections.

Recommendation(s):

That the report be noted.

Reasons for the Recommendation(s):

For members to be briefed on the implications the Elections Act 2022 on the local authority in preparation for the local and parish elections in May 2023 and future elections.

Alternative Options Considered and Rejected: (including any Risk Implications)

What will it cost and how will it be financed?

(A)   Revenue Costs

Central government have confirmed that additional costs will be covered by the 'New Burdens' principles s detailed within the report.

(B)   Capital Costs

Agenda Item 6

Implications of the Proposals:

Resource Implications (Financial, IT, Staffing and Assets):
Please see the resource implications detailed within the report.

Legal Implications:
The Elections Act 2022 is now in force and the Council is obliged to follow its provisions and plan for the same.

Equality Implications:
The equality Implications have been identified and risk remains, as detailed in the report.

Climate Emergency Implications:

The recommendations within this report will

Have a positive impact	N
Have a neutral impact	Y
Have a negative impact	N
The Author has undertaken the Climate Emergency training for report authors	Y

Contribution to the Council's Core Purpose:

Protect the most vulnerable: The provisions of the Elections Act will support the provision of inclusive elections. Please see further details within the body of the report.
Facilitate confident and resilient communities:
Commission, broker and provide core services:
Place – leadership and influencer:
Drivers of change and reform:
Facilitate sustainable economic prosperity:
Greater income for social investment:
Cleaner Greener

What consultations have taken place on the proposals and when?

(A)   Internal Consultations

The Executive Director of Corporate Resources and Customer Services (FD.6987/22) and the Chief Legal and Democratic Officer (LD.5187/22) have been consulted and any comments have been incorporated into the report.

(B)   External Consultations

None

Implementation Date for the Decision

Immediately following the Committee meeting.

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Appendices:

Appendix A - New Burdens coming into play after May 2023

Background Papers:

There are no background papers available for inspection.

1.   Introduction

On 28 April 2022, the Elections Act 2022 received Royal Assent

The Act seeks to –

- require voters to show photo ID at polling stations before a ballot paper is issued.
- require Electoral Registration Officers (ERO) based in local authorities to issue free electoral identification documents – which is now called a 'Voter Authority Certificates' to eligible electors who apply for one.

- require postal voters to reapply for a postal vote every three years, replacing current rules of refreshing their signature every five years.

- restrict the handling of postal votes, including limiting the number of postal votes an individual can hand in at a polling station or council office.

- further limit the number of people someone may act as proxy for.

- extend accessibility to elections including requiring Returning Officers to take all reasonable steps to provide support for those with a disability in polling stations.

- simplify and clarify the offence of undue influence.

- change the voting and candidacy arrangements for EU voters.

- allow all British citizens living overseas to vote in UK Parliamentary elections, regardless of when they left the UK.

Members should be aware that the Department for Levelling Up, Housing and Communities (DLUHC) are still developing the policy and secondary legislation, and more detail will be shared when it is available.

At this time, it is expected that Secondary legislation will pass through Parliament around the 6 November.

The majority of changes will result in a new financial burden being placed on the local authority. The Government has committed that where changes in the Act will result in a new burden on local authorities, these costs will be initially covered in line with new burdens principles.

A summary of what we can expect to be funded is provided later in this report. However, at this stage we only have the cost lines that will be funded via the New Burdens Funding process. As policy is still being determined some elements may change or we are still awaiting further detail.

The provisions contained within the Elections Act will apply at:
- UK Parliamentary elections in Great Britain
- Local elections and referendums in England (this included Mayoral elections)
- PCC elections in England and Wales

We know that Voter Identification in polling stations and accessibility to elections requiring Returning Officers (RO) to provide support for those with a disability in polling stations will come into effect for May 2023, so this report will concentrate on those two areas along with proposed funding to support such, but will touch on what impact the other provisions of the Act will bring moving forward.

2. Voter Identification in Polling Stations

Electors will have to show an approved form of photo identification before voting.

Photographic identification that can be used to vote include passport, driving license, immigration document, a PASS card, Ministry of Defence Form 90, concessionary travel pass (excluding railcards) and national ID card.

Work/student passes, railcards and photocopies of identification documents or pictures on mobile phones will not be acceptable

If electors cannot provide one of the required forms of identification as set out in legislation, they will be able to apply for a free Voter Authority Certificate from their ERO.

The Voter Authority Certificate is likely to be an A4 paper-based document with inherent security features. It will display the elector's name and photograph, the date of issue and the issuing local authority.

There will be three varieties of "Voter Authority Certificate" - the Voter Authority Certificate, the temporary Voter Authority Certificate and the Anonymous Electors Document (AED).

Electors will have a range of options to choose from when applying for a Voter Authority Certificate - in person, by post or online, ensuring accessibility for all electors.

Regardless of the way a person applies, there will be a check as to the person's electoral registration status, and their identity will need to be confirmed.

The deadline to apply for a voter authority certificate will be set at 5pm at 6 working days ahead of the poll (the day of the poll is not included).

The photographic identification does not to be in date to be used – it just needs to bear a likeness to the voter.

Voter Authority Certificates will not have an expiry date but will include a recommended renewal date, with words along the lines of *"This document is only valid so long as the photograph remains a good likeness of you – we therefore recommend that you apply for a new document before [10 years after issue date]"*). 10 years has been used as this is the standard length of validity for passports and driving licences and aims to keep the photo up to date.

In the event that an elector loses all their forms of identification before the deadline for applications for a Voter Authority Certificate has passed, or if their identification is stolen, destroyed or damaged beyond use, they may apply for a Voter Authority Certificate.

If they lose their identification after the deadline for applications for a Voter Authority Certificate, the ERO will have the ability to allow the appointment of an emergency proxy for that polling day.

Polling stations will be required to have a private area for the elector to produce identification in private if requested. Privacy screens may be used for this purpose.

No other person other the presiding officer and poll clerk may inspect the document unless permitted by the elector.

A presiding officer must refuse to give an elector a ballot paper if they have reasonable doubt that the photographic identification does not look like the elector, or if they reasonably suspect the documents to be forged

A refusal to deliver the ballot paper to the voter is FINAL and may not be questioned in any way. A refusal to deliver the ballot paper to a voter is subject to review on an election petition.

The application service for Voter Authority Certificates is expected to commence from January 2023 – it will be called the 'Get ready to vote in person' service on GOV.UK Voter Identification expected to be in place at elections from 4 May 2023 DLUHC research is suggesting that around 2-4% of people may require identification issued by the ERO – for Sefton this translates to approximately people 4,300 to 8,600 electors. However, the figure could be much higher than this and there is nothing

preventing a person who already has an acceptable form of photo ID applying for a Voter Authority Certificate.

DLUHC have also suggested that each application could take up to 8 minutes of staff time to process. If we have to process, say 5,000 applications, that equates to 40,000 minutes or 666 hours of staff working time.

3. Polling Station Accessibility

ROs will have a general responsibility to take all reasonable steps to support voters with disabilities.

The Electoral Commission will produce guidance (final version expected end of January 2023) to aid RO's in providing reasonable support to aid disabled people to vote in polling stations. The Commission's guidance will recommend a range of support that should be made available to voters with disabilities, and this will be developed in conjunction with organisations representing disabled voters and those from the electoral sector.

Draft guidance produced by the EC makes it clear that the RO has a legal obligation to provide:

- A notice inside and outside the polling station providing instructions on how to vote at the election
- A notice in each polling booth providing information on how to mark the ballot paper at the election
- At least one large sample copy of the ballot paper must be displayed inside the polling station
- An enlarged hand-held copy of the ballot paper

It also states that the following equipment should, as a minimum, be provided to all polling stations:

- Chair/seating – this provides a place to rest for voters who cannot stand for long periods and a seat for voters who would like to take some time to think before entering the polling booth
- Magnifiers – these increase the size of the text on a document providing support for voters who are visually impaired to vote independently
- Tactile voting device –this provides support for voters who are visually impaired to mark their vote on the ballot paper in the correct place.
- Polling booth at wheelchair level –helps to ensure that voters who use a wheelchair are able access a lower writing surface to ensure they can cast their vote in secret in a booth that is accessible
- Staff name badges – these help voters more easily identify that a person is a member of staff in the polling station and is someone they can approach for assistance
- Pencil grip – these can help voters with dexterity impairments to more easily hold and use a pencil independently
- Ramps (for buildings with steps) – these support access to a polling station for voters who use a wheelchair or have difficulty using steps
- Temporary alerters or doorbells for any doors that are required to remain shut during the day (for example, fire doors) – these provide a way for voters to let

polling station staff know that they need assistance to open the door so they can access the polling station

- Appropriate lighting – some polling station venues have good lighting but others may need additional lighting at the desk; to ensure that voters can clearly see the faces of staff, and in the polling booths; to support voters with visual impairments to be able to read and complete the ballot paper.
- Reserved parking spaces reserved for voters with disabilities (where parking is available at the venue) – this ensures that disabled voters can park as close as possible to the polling station

However, we are not limited to only providing the equipment listed above and still need to consider whether other types of equipment could also be provided to polling stations such as hearing induction loop, audio devices and information in easy read format. The EC have advised that we should not reduce or remove any equipment that we have provided to support disabled voters at polling stations in our area at previous polls. The provisions for voters to be assisted by a companion will be extended to allow anyone over the age of 18 to assist.

In addition to equipment, the EC draft guidance states that we should provide accessibility awareness training for all staff who interact with voters, including staff who support electoral services, to help improve their understanding of the needs of those with disabilities and the importance of clear communication. It is also vital that our training for polling station staff addresses the importance of being aware of accessibility needs of voters at the polling station and what steps they should take to support them.

We also need to consider how we provide and promote information about the voting process and support available to voters. For example, we could:
- Provide information on the location of polling stations
- Provide advance information on voting at the polling station on council website
- Include additional information on poll cards and making information accessible
- Provide accessible sample ballot papers

4.   New Burdens Funding

There will be three funding mechanisms for the new burdens being brought about by the Elections Act:

- Grants – allocated to Local Authorities based on a funding allocation model in the form of a single yearly payment
- Justification Led Bids (JLBs) – fund released to LAs retrospectively based on a justification led bid (evidence of spend)
- Hybrid – proportion of the allocation will initially be distributed early in the year by grant. Later in the year, a bidding process will be undertaken where Las can claim the value of additional funds required, along with evidence of spend.
- The funding will be made to Local Authorities via Section 31 Grants.
  A "letter of comfort" from DLUHC has been received to confirm that funding will be made and we are now wating to received guidance on costs and our grant determination letter in October 2022 with our initial new burdens funding being received in November 2022.

Impact on the RO, ERO, Electoral Services Team and Local Authority

Voter Authority Certificate application process on electoral services team
* This additional process will require the electoral services team to process and validate Voter Authority Certificate applications and send them for printing via a new digital service.
* The deadline to apply for an electoral identity document will be set at six working days ahead of poll.

Accessibility
* In order to take all reasonable steps to support voters with disabilities through supplying appropriate equipment and adaptations – the electoral services team needs to consult and engage with other council departments and key stakeholders who are best placed to inform on what practical steps can be taken by the Returning Officer.

* Assistance from departments such as equalities, access officers who have expertise in what measures would be helpful to put in place will be required.

* In addition, it would be sensible to consult and engage with local disability groups to form constructive working relationships and feed their expert opinions into what support is required within our area.

* If it is determined that additional equipment is needed to support voters with disabilities - which is likely to be the case – this equipment will need to be procured and subsequently stored. Assistance may be sought from the Council's procurement team and depending on the size and volume of equipment required an assessment of storage requirements will need to be undertaken by the Council's facilities team.

5. Communication

There is a need to ensure that electors are aware of new requirements well in advance of polling day in addition to candidates and agents. New Burdens funding does include additional money for local public awareness to promote Voter ID but not on scale where we are able to make direct contact with all households.

* Electors will need to be fully aware that photo ID is now required to vote at Local and Parish elections in May 2023 what constitutes an acceptable form of photo ID and what they need to do to apply for a Voter Authority Certificate if they do not possess a valid form of photo ID.

* While there will be national campaigns provided by the Electoral Commission, there will inevitably be a need to provide localised communication activity to link into this national campaign. This will place prolonged resource implications on both communication and electoral services teams with targeted communications required from January 2023 following the launch of the Voter Authority Certificate application process up to and including polling day.

* Communication activities linked to voter identification will be an ongoing feature for several years after its introduction until it becomes established as a 'business as usual' practice for electors.

We will provide a dedicated page on our website for each election that contains accessible content to help voters who want to know more about voting at the polling station.

6. Polling Day Implications

Difficulties recruiting staff, polling station suitability

The Returning Officer and the electoral services team will need to put processes in place for checking voters' photographic ID at polling stations from relevant polls taking place from May 2023.

The requirement for polling station staff to have to check ID, determine whether it's acceptable and in some instances, where the ID is not deemed to be acceptable, refuse the elector a ballot paper places increased responsibilities on them.

There are other burdens on polling station staff to including the: potential introduction of new equipment for voters with disabilities - additional requirement for polling station staff to learn how to use and administer correctly.

The requirement to check ID and use new equipment in the Act will certainly require further training for all polling station staff going forward and is likely that the fees paid to polling station staff will need to be reviewed to ensure they are sufficient and take account of additional complexity being placed upon them.

It is likely that this new responsibility may deter some experienced staff from wanting to work at polling stations. This is further compounded by the likely need for additional polling station staff to provide capacity for checking ID and for other responsibilities introduced by the Act.

This would have several implications including risk to running elections if we cannot get sufficient staff to work. The churn of staff working for the Returning Officer is high now and at times it is difficult to recruit staff to work in polling stations. It is likely there will be a requirement to undertake extensive recruitment campaigns to attract sufficient staff; increased training needs if large volume of staff are new.

The additional time required per elector to check ID (as well as other tasks introduced by the Act) may result in us needing additional polling stations to ensure adequate numbers of electors are allocated to a station considering the new requirements.

In addition, in order to ensure that electors who cover their faces for religious or other sensitive reasons are not deterred from voting, there will need to be facilities in every polling station that allows the electors ID to be verified in private. This may take the form of a separate area within the station or by using privacy screens.

The potential need for new and/or additional polling stations will place a burden on the electoral services to review whether existing polling stations can accommodate the new requirements introduced by the Act and where there is need for changes or additional stations, a polling district review would need to be undertaken.

A polling district review is a large undertaking with required consultation with electors and disability groups. This would place significant pressure on the electoral services team if they were expected to carry out the review while also implementing the changes required by the Act.

Mitigation

All of the above require additional resources in terms of staff, training and equipment to enable the new processes to be implemented successfully. This will be particularly relevant in the weeks leading up to polling day where the elections team is already at full capacity without this additional unknown burden to accommodate.

In order to mitigate the risk, a review of the Electoral Services team is ongoing to ensure there is sufficient capacity and resilience to contend with the Act, with measures being put in place for future succession planning within the team.

7.   Impacts for Elected Members

The requirement for electors to have photo ID in order to vote will need to be widely communicated by a variety of stakeholders.

While there will be national campaigns provided by the Electoral Commission, there will inevitably be a need to provide localised communication activity undertaken by the ERO and RO to link into this national campaign. Elected Members, Candidates and Election Agents will be asked to support this and help get the message out to the electorate.

For all elections where ID is required Elected Members, Candidates and Election Agents may wish to include reminders in campaign literature and inform campaigners to remind electors on the doorstep to take their photo ID to the station or advise how they can apply for an electoral identity document.

Members may also want to include information from January 2023 onwards about the electoral identity document application process in councillor's newsletters or social media posts.

Members should remind your polling and election agents that only the presiding officer and poll clerk can inspect a voter's photographic ID unless the voter permits someone else to do so. Where a presiding officer refuses to deliver a ballot paper to the voter – their decision is final and may not be questioned in any way. A refusal to deliver a ballot paper to a voter is subject to review on an election petition only.

Beyond May 2023:

In addition to voter identification, sharing information at the appropriate time on the new requirements to complete a new postal vote application every 3 years, the limits to how many postal votes can be handed in at a polling station by an individual or how many people a person can act as proxy for would be most appreciated.

In addition to making your campaigners aware of changes to the voting process, they also need to understand political parties and campaigners will be banned from handling postal votes. It may be beneficial to have briefings ahead of any elections to make them

aware of the new requirements. In addition to the consequences for them, you and the electors' postal votes if they breach the restriction.

The move to allow electors to apply for an absent vote online (as well as by paper) will potentially bring benefits to candidates standing in elections with it being easier to direct electors to a website to complete their postal vote application rather than needing to collate names to ask the ERO to send forms out to electors. The link to the online postal vote application may also be something that could be promoted on social media and include in future campaign literature to help make voting more accessible for electors.

Offence of Undue influence:

Someone is guilty of undue influence if they use, or threaten to use, force or violence to make someone vote a certain way, or not vote at all. The proposed changes would make it simpler for the police to take action when allegations of undue influence are made.

The government plans to clarify the offence by setting out the ways someone might be found guilty of undue influence. There will be a broader definition of the offence, clarifying the types of illegal behaviour which people may use to unfairly influence someone's vote. This may include physical violence, damage to someone's property or damage to their reputation.

The proposals will apply to all campaign activity, including printed materials, and extend to anyone who seeks to intimidate a voter either inside or outside a polling station.

8.   Summary

The Elections Act will present numerous challenges for the RO, ERO, Elections Team, the wider council, Elected Members, Candidates and Election Agents.

Challenges that may be faced in recruiting enough polling station staff especially suitably qualified staff will also need to be considered along with an appropriate rate of pay to recognize the increased responsibility.

It has long been the case that electoral services teams cannot continue to work in isolation due to the ever-growing scale and complexity of elections – the Elections Act further cements the need to review our approach to elections to ensure all aspects of the Act are successfully implemented.

Agenda Item 6

New Burdens coming into play after May 2023

Absent Voting
•   The new requirement to verify the identity of each absent vote application will potentially lead to longer processing times for applications. Furthermore, the requirement to provide a new application every 3 years instead of a signature refresh every 5 years is likely to be more of a burden.

Online Absent Vote Applications
•   This change has the potential to lead to an increase in the number of postal votes – leading to more postal votes to issue and open at elections. The biggest risk is surge immediately before an election and the delay it could cause issuing ballot papers.

Overseas Electors
•   The requirement on the ERO and the electoral services team to determine applications of people who have not been resident in the UK for more than 15 years will require them to check past copies of the register (where available), use local records or request attestations – all of which will bring substantial burden to the election team and may require assistance from other council departments with relevant records.

EU Citizen Voting and Candidacy Rights

Extensive communications with EU electors will need to be taken to ensure they understand the new criteria particularly if it is determined they are no longer eligible to vote as well additional training for our canvass staff to ensure they are aware of the requirements for EU electors wishing to register to vote.

It has been confirmed that an EU citizen who is currently an elected member, that:
•   An EU citizen elected to office before the measures in the Act come into force, and who otherwise remains eligible, will be able to remain in office for their full term, irrespective of immigration status, and irrespective of whether they qualify under the new eligibility criteria - Unless they become disqualified because of another reason.
•   For EU citizens elected after these measures come into force, the Act provides that the individual must have leave to enter or remain, or not require such leave. Should they lose this status they will no longer qualify to stand or serve as a candidate.

Report to:	Overview and Scrutiny Committee (Regulatory, Compliance and Corporate Services	**Date of Meeting:**	1 November 2022
	Overview and Scrutiny Committee (Regeneration and Skills)		8 November 2022
Subject:	Digital Inclusion Working Group – Update on Recommendations	**Wards Affected:**	(All Wards);
Cabinet Portfolio:	Cabinet Member – Regulatory, Compliance and Corporate Services		
	Cabinet Member – Regeneration and Skills		
Report of:	Chief Legal and Democratic Officer		

Is this a Key Decision? No   **Is it included in the Forward Plan?**   No

Exempt/Confidential   No

Purpose/Summary

To provide a monitoring report setting out progress made against each of the recommendations formulated by the Digital Inclusion Working Group and approved by Cabinet.

Recommendation:

That the report setting out progress made against each of the recommendations formulated by the Digital Inclusion Working Group and approved by Cabinet be noted.

Reasons for the Recommendation:

To comply with a decision of Cabinet to submit monitoring reports on a six-monthly basis setting out progress made against each of the recommendations.

Alternative Options Considered and Rejected:

No alternative options were considered. Cabinet has requested the submission of monitoring reports.

What will it cost and how will it be financed?

(A)   Revenue Costs

There are no financial implications arising for the Council as a direct result of this report. The implementation of recommendations that result in efficiency savings and any necessary financial investment will be the subject of separate reports.

(B)   Capital Costs

There are no financial implications arising for the Council as a direct result of this report. The implementation of recommendations that result in efficiency savings and any necessary financial investment will be the subject of separate reports.

Implications:

The following implications of this proposal have been considered and where there are specific implications, these are set out below:

Financial
Legal
Human Resources

Equality
1.   No Equality Implication   [√]
2.   Equality Implications identified and mitigated   [ ]
3.   Equality Implication identified and risk remains   [ ]

Climate Emergency Implications:

The recommendations within this report will

Have a positive impact	No
Have a neutral impact	Yes
Have a negative impact	No
The Author has undertaken the Climate Emergency training for report authors	Yes

There are no direct climate emergency implications arising from this report.

Contribution to the Council's Core Purpose

Protect the most vulnerable:
Digital inclusion is a principal and approach that aims to ensure that people have the capability to use the internet to do things that benefit them on a day to day basis - whether they be individuals, businesses or other entities e.g. the voluntary sector. Likewise digital inclusion aims to reduce digital exclusion and the digital divide that can exist within society for a variety of reasons
The government's Information Economy Strategy called for greater focus on digital inclusion in order to:
•   help businesses make smart use of information technology and data;
•   ensure citizens benefit from the digital age; and
•   underpin economic growth
Digital inclusion will be one of the areas that the Council will seek to contribute to and

enable within the Borough of Sefton and as such help residents to improve their chances to gain employment.
Facilitate confident and resilient communities: As above
Commission, broker and provide core services: As above
Place – leadership and influencer: As above
Drivers of change and reform: As above
Facilitate sustainable economic prosperity: As above
Greater income for social investment: As above
Cleaner Greener: None directly associated with this report

Impact of the Proposals on Service Delivery:

What consultations have taken place on the proposals and when?

The Executive Director of Corporate Resources and Customer Services (FD6985 /22) has no comments on the report
The Chief Legal and Democratic Officer (LD 5185/22) is the author of this report
Assistant Director of Place (Economic Growth and Housing)
Sefton CVS
Liverpool City Region Combined Authority

Implementation Date for the Decision

Following the meeting of the Overview and Scrutiny Committees.

Contact Officer: Paul Fraser
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Email: paul.fraser@sefton.gov.uk

Background Papers:

There are no background papers available for inspection

1.   **Introduction/Background**

1.1   At its meeting held on 13 June 2017 the Overview and Scrutiny Committee (Regulatory, Compliance and Corporate Services) approved the establishment of a Joint Working Group. The commencement of the Working Group was deferred to enable the objectives of the ICT Development Programme to be progressed and thereafter aspects of the Programme to be included in the Working Group's Scoping Document to review the topic of Digital Inclusion. The objectives of the Working Group were as follows:

- Identify the opportunity for the Council in supporting and enabling Digital Inclusion within the Borough of Sefton and the wider City Region;
- Identify how this can feed into the Councils future ICT and Digital Strategies;
- Confirm the strategic themes that should be addressed as part of this work e.g. connectivity and skills;
- Identify potential council activities that could be provided on a more digital basis and the enabling activity that will be required to support this; and

- proactively engaging with the Combined Authority and their advisors/consultants to ensure that opportunities identified for Sefton are incorporated in to the Liverpool City Region Digital Infrastructure Action Plan to ensure positive outcomes for the borough and its constituent communities

it was noted that all proposals would need to take account of resource requirements and be within the parameters of the current Medium Term Financial Plan.

1.2   Accordingly, the Working Group met on numerous occasions to gather evidence and produce its [Final Report](#) Because of the cross-cutting nature of the Working Group the Final Report was also considered by the Overview and Scrutiny Committee (Regeneration and Skills). Approval of the Final Report and associated recommendations was given by the Overview and Scrutiny Committee (Regulatory, Compliance and Corporate Services), Overview and Scrutiny Committee (Regeneration and Skills) and Cabinet at their meetings held on 11 September 2018, 6 November 2018 and 6 December 2018 respectively. The approved recommendations are set out below:

1.   The Working Group was impressed with the Visitor Economy (VE) 'Passport to Success' scheme aimed at college students across the Liverpool City Region coming into the tourism industry; whereby students are able to achieve a bronze, silver or gold passport standard to provide them with a range of opportunities to either gain quality work experience, an interview, apprenticeship or a full-time job.

The Working Group, at its meeting held on 23 May 2018 acknowledged that literary and numeracy skills should be embedded as a priority along with digital skills.

Accordingly, it is recommended that:

(A)   The Liverpool City Region Combined Authority Employment and Skills Board be requested to consider the development of a Digital Skills Passport Scheme (incorporating numeracy, literacy and communication skills) to help Sefton residents to gain future employment, via the Learning and Skills budget to be devolved from 2019; and

(B)   Sefton Council, via Sefton@Work, in conjunction with local organisations such as Sefton Community Learning Service, work with the Liverpool City Region with the aim of exploring the application of such a Skills Passport for the benefit of Sefton employers and residents;

2.   Using the Poverty Modelling and Digital Inclusion "Mosaic" data, areas of high unemployment be targeted to enable those Sefton residents excluded from the labour market to develop their ICT skills to improve their opportunities for gaining future employment;

3.   To facilitate the above the Liverpool City Region Combined Authority be

requested to devolve sufficient funding to Sefton Council to appoint a project worker with the clear objectives of:

(A)   Working with local employers to map ICT/digital skills;

(B)   Working with local partners such as Sefton Community Learning Service to develop and deliver bespoke training programmes to target residents in the areas identified in the Poverty Modelling and Digital Inclusion "Mosaic" data;

(C)   Identifying, using the data from the Poverty Modelling and Digital Inclusion "Mosaic", a number of residents who would benefit from and be able to undertake training as referred to in 3. (B) above; and

(D)   Working with local employers to develop a compact agreement to enable those residents who successfully complete the bespoke training programme(s) to gain relevant employment;

4.   If further opportunities arise for a roll out of the Include-IT project and to support the objectives of recommendation 2 then Sefton CVS be requested to consider such roll out to the priority areas identified within the Poverty Modelling and Digital Exclusion document; and

5.   the Head of Regulation and Compliance be requested to submit a monitoring report to the meeting of the Overview and Scrutiny Committee (Regulatory, Compliance and Corporate Resources to be held on 5 March 2019, setting out progress made against each of the recommendations set out in the report and that thereafter, monitoring reports be submitted to the Committee on a six-monthly basis.

1.3   In accordance with recommendation (5) above the table attached to the report sets out progress made against each of the recommendations.

2.   Update

2.1   Three update reports have previously been submitted to both Overview and Scrutiny Committees (Regulatory, Compliance and Corporate Services) and (Regeneration and Skills) at meetings held in 2019, 2020 and 2021.

2.2   The table below details responses to the recommendations reported to the meetings in 2019, 2020 and 2021 together with updates received following recent consultations with Liverpool City Region Combined Authority, Sefton CVS and the Assistant Director of Place (Economic Growth and Housing).

PROGRESS ON RECOMMENDATIONS ARISING FROM THE DIGITAL INCLUSION WORKING GROUP	
Recommendation	**Progress Made**
The Liverpool City Region Combined Authority Employment and Skills Board be requested to consider the development of a Digital Skills Passport Scheme (incorporating numeracy, literacy and communication skills) to help Sefton residents to gain future employment, via the Learning and Skills budget to be devolved from 2019	**Progress made at September 2019** Correspondence has been received from Frank Rogers, Chief Executive of the Liverpool City Region Combined Authority. The following comments have been made: "I am pleased to report that the we have now published an updated Liverpool City Region Digital & Creative Skills for Growth Action Plan, a key element of which is a commitment for the Combined Authority to establish a Digital Skills Partnership to enhance collaboration and agree a Digital Skills Passport for the whole City Region. We look forward to Sefton Council's engagement with this Liverpool City Region Digital Skills Partnership, which will also focus on: • Map provision using LCR Learn as basis. • Promoting diverse role models in the tech. sector • Better promoting engagement within digital inclusion provision • Evaluating existing engagement delivery, and identifying both targeting and progression gaps • Considering how to ensure tutors and teachers are kept up to date with tech development • Working with the National Digital Skills Partnership to ensure that curricula and apprenticeship standards required by employers are in place. • Developing future digital trends labour market information for all sectors • Developing Careers Education, Information, Advice and Guidance to include digital fusion job roles. Linked to the above, we are looking at collective and collaborative City Region wide skills development solutions, rather than by devolving funding to individual Local Authorities. In this regard, I would also draw your attention to the positive recent extension of the Big Lottery and ESF-funded Include-IT Mersey project delivered by a consortium led by Sefton CVS. This will be able to use the information generated by the Poverty Modelling and Digital Inclusion "Mosaic" data in order to identify need across Liverpool City Region, and target digital inclusion activities accordingly.

Please also note that Sefton Council has been represented form its outset on the CA-convened "Core Group" that brings together representatives from all the LCR Local Authorities. This has hitherto focused on development of the pan-LCR core fibre network project, however its remit may be extended in the future to look at the wider digital agenda".

Progress made at October 2020
The Policy Lead: Employment and Skills at the Liverpool City Region Combined Authority has advised that LCR has nothing further to update

Progress made at September 2021
The following information has been received from the Liverpool City Region Combined Authority:

"Improving digital skills at all ages and levels remains a priority as highlighted within the recently approved Liverpool City Region Digital Strategy and Action Plan 2021-2023 and we are grateful to Sefton Council for their contribution to its development.

The action plan builds on the LCR Digital & Creative Skills for Growth Action Plan and retains the commitment to establish a Digital Skills Partnership to enhance collaborative approaches and progress the concept of a Digital Skills Passport.

Unfortunately, COVID-19 has impacted on the establishment of the Digital Skills Partnership. However, recent events have highlighted the need for enhanced digital skills and this is set out in more detail in the Local Skills Action Plan 2021/22.

Partners across LCR also remain actively engaged in innovative pilot approaches to the delivery of digital skills. The digital Test & Learn pilots such as those delivered by Sefton's Adult Community Learning Service and Sefton@work have been evaluated across the City Region, the outcomes of which are feeding through to future skills planning.

The LCR Digital Skills Bootcamps have also commenced, which are expected to deliver £1.5m of employer led digital skills training for 1,000 people across the City Region, linked to specific job roles such as coding and cyber security".

Progress made at October 2022
A generic response has been received from LCR as follows:
Our Update:
- We will seek to develop and implement a revised action plan for Digital Inclusion across the

Liverpool City Region.

- Following the objective to understand and map provision to support Digital Inclusion two activities have now been completed. This has resulted in the University of Liverpool gathering findings from stakeholder listening events and Vola presenting a map of the digital provision across LCR, further analysis will be conducted to inform next steps.

Activity to Date:

- £4.5m committed to Include IT Mersey Digital Inclusion Project (£3.8m spent between 2017 – Present).
- £1.1m Adult Education Budget on Digital Skills Related Courses for the YTD 2021/22
- 470 Digital Skill Interventions by the Be-More Brokerage Team
- 212KM of ultrafast, gigabit capable network created as part of LCR Connect
- 1.3 million laptops and tablets were provided nationally by the Department for Education to pupils during the pandemic.
- Free Wi-Fi is available across Merseytravel Bus Services and at select train stations on the Merseyrail network.
- 6 Months Free Broadband provided to eligible unemployed residents by Jobcentre Plus.
- Over 1000 participants undertook LCR Digital Skills for the Workplace Training Programmes
- £65,000 LCR Cares Funding to VOLA who delivered a project to provide 300 tablets with 3 months of data.

Sefton Council, via Sefton@Work, in conjunction with local organisations such as Sefton Community Learning Service, work with the Liverpool City Region with the aim of exploring the application of such a Skills Passport for the benefit of Sefton employers and residents	**Progress made at September 2019** The Head of Economic Growth and Housing has advised that "Sefton Council is a recipient of Adult Education Budget which is used to support the Sefton Adult Community Learning Service. With effect from August 2019, this funding has been incorporated into the LCR Devolution deal on employment and skills, and therefore the accountability lead for this function will sit with the LCR Combined Authority from this year. In this context, Sefton has been successful in securing pilot funding from the LCR Combined Authority to develop a new project which will focus on the development of English, maths and digital skills featuring a partnership approach between the Adult Community Learning Service and Sefton@work. The aim of this pilot is to flag up alternative delivery mechanisms to promote the digital inclusion of learners and enhance their employability, working with employers across a

number of different occupational sectors to progress the concept of the "digital passport" identified by the working Group.

The outcomes of the pilot will be learning points which will be evaluated by the Combined Authority as part of the wider development on digital inclusion and will be fed into the architecture of future skills programming.

Furthermore, InvestSefton, as part of its ongoing business support activities, have delivered workshops to businesses to help them maximise the benefits of digital technology including:

- Facebook advertising
- Google advertising platforms
- Video production
- Social media branding and marketing".

Progress made at October 2020

The Head of Economic Growth and Housing has advised that following a recent IT specific workshop organised by Corporate Services and Agilisys, there may be some new opportunities for supporting businesses which can be explored.

The Test and Learn funding for digital skills pilots has been deployed but unfortunately the scheme was interrupted as a result of COVID. However, after negotiation with the LCR CA, the funding has extended to allow the Community Learning Service to undertake the pilot fully in 2020/21. Plans are in place to re-start delivery and build upon the early actions. One of the first activities was a specific employability-related intervention which was successfully co-designed and delivered for clients of Sefton@work prior to lockdown. Furthermore, additional test and learn pilot resource has also now been secured from the LCR CA. This will fund the design, delivery and implementation of interactive technology programmes which will be installed at the Cambridge Road Community Learning Hub as part of the renovations of this centre during 2020/21.

The Community Learning Service has embraced a variety of new technologies in order to continue its delivery during the lockdown period. Many of these have enabled learners to have greater choice over their means of engagement with learning and have been transformative for many in their approach to understanding the benefits of digital skills. The delivery of blended learning using a bespoke learning platform where learners can attend in person and /or attend online wherever they are at home or work has been very well received by leaners who have given feedback that this change has boosted digital confidence and access to a wider range of applications. The rapid rise

	in job losses in Sefton is expected to boost demand for learning new digital skills and the Service is currently devising new content to respond to his demand. Furthermore, Invest Sefton, as part of its ongoing Covid-19 business support activities, are delivering webinars to businesses to help them maximise the benefits of digital technology including: How to Facilitate Business Gains, through Stress Management; Covid-19: Starting Your Business Up Again Safely; Digital Marketing Tools for Small Businesses; HR for Small Business Managers; Mental Health and Wellbeing for Business Managers and Teams; Maintaining an Effective Virtual Office; Managing Business Finance and Cashflow for SMEs; and Promoting Your Business Online
	Progress made at September 2021 No update was provided
	Progress made at October 2022 InvestSefton organised and hosted the first Sefton Digital Business Forum on 14th July in Formby Hall, attended by 20 local businesses from the digital and creative sector. There was unanimous agreement to continue this work and the team is planning four events p.a. Sefton also continues to promote 'generic digital help and support to businesses' via InvestSefton mechanisms such as, bootcamps, online resources, google garage and is developing a digital skills survey which will be sent to businesses in the sector
Using the Poverty Modelling and Digital Inclusion "Mosaic" data, areas of high unemployment be targeted to enable those Sefton residents excluded from the labour market to develop their ICT skills to improve their opportunities for gaining future employment	**Progress made at September 2019** Correspondence has been received from the Chief Executive of Sefton CVS which states that: "Sefton CVS have just recently received notification that the Building Better Opportunities Digital Inclusion programme for the LCR Region has been extended until June 2021. We have been awaiting confirmation of this news for a number of weeks. Further to your correspondence, I can confirm that Sefton CVs has included Ravenmeols, Ford and Derby Wards in the proposed delivery going forward focused on the eligible targeted recipients in the overall programme and in line with the Poverty Modelling and Digital Exclusion document referred to in your letter"
	Progress made at October 2020 The Chief Executive of Sefton CVS has advised that Include-IT Mersey, the LCR Building Better

Opportunities Digital Inclusion programme, has further been extended, with active delivery to participants now planned to continue until September 2022. Sefton participants have mostly been from the high unemployment Wards of Bootle, Litherland and Netherton, with a smaller proportion from other South Sefton Wards and Southport. To date, 144 unemployed Sefton residents have attended courses run through the project and improved their basic IT skills. Over 100 have received a free tablet and some also provided with mobile data bundles to enable them to get online at home.

Hundreds of Sefton residents have also benefited from the support of the project's volunteer Digital Champions who, prior to the Coronavirus lockdown operated a network of digital drop-ins in Bootle (Library, Liferooms and Akenside Supported Accommodation), Netherton (Feelgood Factory) and Southport (The Atkinson & Southport Community Centre).

The drop-ins unfortunately had to be suspended in March and are unlikely to reopen this year due to the prolonged social distancing restrictions that remain in place. However, the project quickly developed an alternative approach to supporting people's requests for digital advice and support during the lockdown. The remote telephone support service was rolled out in April, with four Digital Champions still active in assisting people remotely.

Although a city region wide service, uptake in Sefton has been much higher than in the other five boroughs, with 71 Sefton residents supported to date. Initially, the majority of enquiries were for help with online shopping but since then, there has been a mixture of enquiries relating to shopping, video calls (e.g. Zoom), connection issues and getting online in general, including using emails and internet search engines.

In partnership with VOLA, Sefton CVS also secured LCR Cares funding to help get socially and digitally excluded Sefton residents online, providing 32 tablets and a short-term mobile data allowance to Sefton Households. A further 3 households received kit that we secured through another digital initiative. All 35 devices were set up prior to distribution and all recipients provided with remote support to help them learn the basics of how to use them. Information packs were also provided including a dos & don'ts guide, staying safe online, and financial awareness.

Progress made at September 2021
The Chief Executive of Sefton CVS has advised as follows:

Support to get online

Include-IT Mersey project
Following the National Lottery Community Fund's recent confirmation of the extension of the Building Better Opportunities programme, due the consistent good performance of the Include-IT Mersey project, the Lottery has increased investment to enable its extension until March 2023, which is very positive news.

Face to face delivery of basic digital and employability skills courses has now restarted having temporarily been paused or moved to remote delivery due to the various Covid lockdowns and social distancing restrictions over the last 16 months. The WEA is now delivering in Sefton following 3tc's closure in 2020, currently delivering out of the Feelgood Factory in Netherton, with other courses to be planned in other parts of the borough over the coming months.

During the pandemic, all participants have been provided with a free tablet and mobile data bundles to enable them to get online at home in order to support their continued engagement and learning during the periods of lockdown and social distancing. New participants will continue to receive a free tablet when they enrol on a course.

In total, 173 Sefton residents have been supported through the project to date, with 26 having progressed to work, 41 to further training and 12 in to active job search. The majority of Sefton participants have been from the high unemployment Wards of Bootle, Litherland and Netherton, with a smaller proportion from other South Sefton Wards and Southport.

Volunteer-led face-to-face digital drop-ins have been suspended since the April 2020 and are yet to reopen. Our aim is to gradually start to reopen them from September, adhering to Public Health Covid-safe guidance. While the face-to-face drop-ins have been on hold, we have rolled out a telephone support service, run by Digital Champion volunteers, who have supported 174 people since it was first launched in during the first national lockdown in April 2020, with a range of advice and support provided around the use of IT and getting online. 95 of these were Sefton residents, where take up has been stronger than other boroughs.

Get Yourself Online project
Alongside the Include-IT Mersey project, Sefton CVS also took part in another Digital Inclusion

	project in the summer of 2020, funded by the Community Foundation for Merseyside through the LCR Cares Fund, which was established by the Combined Authority in response to the Coronavirus pandemic. The project was developed to benefit the most excluded and vulnerable in society, with no internet access at home and who cannot afford to buy a device and/or connectivity. Sefton CVS distributed 32 free tablets with four-month internet access and technical support to Sefton households, as part of the wider project which, in total, supported 320 households (600 people) to get online across the Liverpool City Region.
	Progress made at October 2022 No update was provided
To facilitate the above the Liverpool City Region Combined Authority be requested to devolve sufficient funding to Sefton Council to appoint a project worker with the clear objectives of: (A) Working with local employers to map ICT/digital skills; (B) Working with local partners such as Sefton Community Learning Service to develop and deliver bespoke training programmes to target residents in the areas identified	**Progress made at September 2019** As referred to above in the response of Frank Rogers, Chief Executive of the Liverpool City Region Combined Authority, the following comments were made: "Linked to the above, we are looking at collective and collaborative City Region wide skills development solutions, rather than by devolving funding to individual Local Authorities. In this regard, I would also draw your attention to the positive recent extension of the Big Lottery and ESF-funded Include-IT Mersey project delivered by a consortium led by Sefton CVS. This will be able to use the information generated by the Poverty Modelling and Digital Inclusion "Mosaic" data in order to identify need across Liverpool City Region, and target digital inclusion activities accordingly. Please also note that Sefton Council has been represented form its outset on the CA-convened "Core Group" that brings together representatives from all the LCR Local Authorities. This has hitherto focused on development of the pan-LCR core fibre network project, however its remit may be extended in the future to look at the wider digital agenda".
	Progress made at October 2020 The Policy Lead: Employment and Skills at the Liverpool City Region Combined Authority has advised that LCR has nothing further to update
	Progress made at September 2021 The following information has been received from the Liverpool City Region Combined Authority: "LCRCA commissioned bespoke Digital Inclusion research to establish a baseline of current digital

	in the Poverty Modelling and Digital Inclusion "Mosaic" data;	skills and use across the City Region, enhancing the local evidence base to inform the development of digital inclusion and digital poverty initiatives. Between November 2020 and January 2021, fieldwork was undertaken than resulted in over 800 detailed responses (including 148 from Sefton) across a representative sample of respondents based on age and location. Whilst the Mosaic profiles have been useful, the research approach aims to deepen our understanding by asking a set of themed questions drawing on what we already know about digital exclusion. The conclusions set out a range of demographic factors that should be considered in targeting digital initiatives, including age, working status, housing type, education, disability and ethnicity. We are now looking to test our analysis with key partners, including Sefton MBC before sharing more widely.
(C)	Identifying, using the data from the Poverty Modelling and Digital Inclusion "Mosaic", a number of residents who would benefit from and be able to undertake training as referred to in 3. (B) above; and	**Progress made at October 2022** A generic response has been received from LCR as follows: Our Update: • We will seek to develop and implement a revised action plan for Digital Inclusion across the Liverpool City Region. • Following the objective to understand and map provision to support Digital Inclusion two activities have now been completed. This has resulted in the University of Liverpool gathering findings from stakeholder listening events and Vola presenting a map of the digital provision across LCR, further analysis will be conducted to inform next steps. Activity to Date: • £4.5m committed to Include IT Mersey Digital Inclusion Project (£3.8m spent between 2017 – Present). • £1.1m Adult Education Budget on Digital Skills Related Courses for the YTD 2021/22 • 470 Digital Skill Interventions by the Be-More Brokerage Team • 212KM of ultrafast, gigabit capable network created as part of LCR Connect • 1.3 million laptops and tablets were provided nationally by the Department for Education to pupils during the pandemic. • Free Wi-Fi is available across Merseytravel Bus Services and at select train stations on the Merseyrail network.
(D)	Working with local employers to develop a compact agreement to enable those residents who successfully complete the bespoke training programme(s) to gain relevant employment;	

	- 6 Months Free Broadband provided to eligible unemployed residents by Jobcentre Plus. - Over 1000 participants undertook LCR Digital Skills for the Workplace Training Programmes - £65,000 LCR Cares Funding to VOLA who delivered a project to provide 300 tablets with 3 months of data.
If further opportunities arise for a roll out of the Include-IT project and to support the objectives of recommendation 2 then Sefton CVS be requested to consider such roll out to the priority areas identified within the Poverty Modelling and Digital Exclusion document	**Progress made at September 2019** Correspondence has been received from the Chief Executive of Sefton CVS which states that: "Sefton CVS have just recently received notification that the Building Better Opportunities Digital Inclusion programme for the LCR Region has been extended until June 2021. We have been awaiting confirmation of this news for a number of weeks. Further to your correspondence, I can confirm that Sefton CVs has included Ravenmeols, Ford and Derby Wards in the proposed delivery going forward focused on the eligible targeted recipients in the overall programme and in line with the Poverty Modelling and Digital Exclusion document referred to in your letter"
	Progress made at October 2020 The Chief Executive of Sefton CVS has advised that most courses/ participants and digital drop-ins to date have taken place in Bootle. Delivery has taken place from Community By Nature and the Swan Women's Centre, based in Linacre and Litherland, which border the Derby Ward and are both easily accessible to its residents. As soon as we are able to resume face-to-face delivery, we intend to return to these venues as they have worked well to date. Prior to the Coronavirus lockdown the project had been planning towards delivering courses in the Feelgood Factory to capture Ford and Netherton residents. Long-term closure of community settings and subsequent prolonged social distancing measures post lockdown, coupled with the subsequent closure of our Sefton project delivery partner, 3tc, who unfortunately ceased trading earlier this year have all contributed to delays in implementing these plans. Contingency plans are currently being progressed to revive Sefton delivery in the coming months, if considered feasible and safe to do so in the context of recently increased local social distancing restrictions. Following initial investigation, the project has been unable to target the central Ward of Ravenmeols due to its population demographics not having a fit with the target groups of the Building Better Opportunities programme, on which the project is closely monitored and funded.

	Digital skill provision in this Ward might be better catered for through other training providers with more flexible funding regimes, such as Adult and Community Learning and/or the Adult Education Budget.
	Progress made at September 2021 See information provided by the Chief Executive of Sefton CVS in the column above
	Progress made at October 2022 No update was provided

Report to:	Overview and Scrutiny Committee (Regulatory, Compliance and Corporate Services)	Date of Meeting:	1 November 2022
Subject:	Work Programme 2022/23, Scrutiny Review Topics and Key Decision Forward Plan		
Report of:	Chief Legal and Democratic Officer	Wards Affected:	All
Cabinet Portfolio:	Regulatory, Compliance and Corporate Services		
Is this a Key Decision:	No	Included in Forward Plan:	No
Exempt / Confidential Report:	No		

Summary:

To seek the views of the Committee on the Work Programme for 2022/23, identify potential topics for scrutiny reviews to be undertaken by a Working Group(s) appointed by the Committee; identify any items for pre-scrutiny by the Committee from the Key Decision Forward Plan; and to update on the Liverpool City Region Combined Authority Overview and Scrutiny Committee.

Recommendation:

That:

(1)   the Work Programme for 2022/23, as set out in Appendix 1 to the report, be considered, along with any additional items to be included and thereon be agreed;

(2)   consideration be given to whether the Committee would like to select a further topic for a Working Group review; or wait until the completion of the recently established Corporate Communications and Covid-19 Working Group;

(3)   consideration be given to items for pre-scrutiny from the Key Decision Forward Plan as set out in Appendix 3 to the report, which fall under the remit of the Committee and any agreed items be included in the Work Programme referred to in (1) above; and

(4)   the update on the Liverpool City Region Combined Authority Overview and Scrutiny Committee be noted.

Reasons for the Recommendation(s):

To determine the Work Programme of items to be considered during the Municipal Year 2022/23 and identify scrutiny review topics which would demonstrate that the work of the Overview and Scrutiny 'adds value' to the Council.

The pre-scrutiny process assists Cabinet Members to make effective decisions by examining issues before making formal decisions.

Alternative Options Considered and Rejected: (including any Risk Implications)

No alternative options have been considered as the Overview and Scrutiny Committee needs to approve its Work Programme and identify scrutiny review topics.

What will it cost and how will it be financed?

There are no direct financial implications arising from this report. Any financial implications arising from the consideration of a key decision or relating to a recommendation arising from a Working Group review will be reported to Members at the appropriate time.

(A) **Revenue Costs –** see above

(B) **Capital Costs –** see above

Implications of the Proposals:

Resource Implications (Financial, IT, Staffing and Assets): None
Legal Implications: None
Equality Implications: There are no equality implications.

Climate Emergency Implications:	
The recommendations within this report will	
Have a positive impact	No
Have a neutral impact	Yes
Have a negative impact	No
The Author has undertaken the Climate Emergency training for report authors	Yes

There are no direct climate emergency implications arising from this report. Any climate emergency implications arising from the consideration of reports referred to in the Work Programme will be contained in such reports when they are presented to Members at the appropriate time.

Contribution to the Council's Core Purpose:

Protect the most vulnerable: None directly applicable to this report but reference in the Work Programme to the approval of, and monitoring of recommendations contained in Digital inclusion Working Group Final Report will help with the aim of ensuring that people have the capability to use the internet to do things that benefit them on a day-to-day basis - whether they be individuals, businesses or other entities e.g. the voluntary sector; and aim to reduce digital exclusion and the digital divide that can exist within society for a variety of reasons.
Facilitate confident and resilient communities: None directly applicable to this report. The aim of the Corporate Communications and Covid-19 Working Group is to assess the changes instigated by in communicating with residents during the Covid-19 pandemic; the impact the changes have had; and how such changes shape the future of the Council communicating with its communities. See reference to the Digital Inclusion Working Group referred to above.
Commission, broker and provide core services: None directly applicable to this report but reference in the Work Programme to the presentation on the update on the Commissioning and the Procurement Policy will raise awareness of associated issues with Members. The Working Group established by the Committee to review the Council's Ethical Business Practices will look into ethical procurement. See also reference to the Digital Inclusion Working Group referred to above.
Place – leadership and influencer: None directly applicable to this report.
Drivers of change and reform: None directly applicable to this report. See reference to the Digital Inclusion Working Group referred to above.
Facilitate sustainable economic prosperity: None directly applicable to this report. See reference to the Digital Inclusion Working Group referred to above.
Greater income for social investment: None directly applicable to this report.
Cleaner Greener: None directly applicable to this report but reference in the Work Programme to the submission of the report on Air Quality Monitoring will raise awareness of associated issues with Members.

What consultations have taken place on the proposals and when?

(A)   Internal Consultations

This report is not subject to LD and FD comments. Any specific financial and legal implications associated with any subsequent reports arising from the report will be included in those reports as appropriate.

Liverpool City Region Combined Authority

(B)   External Consultations

Not applicable

Implementation Date for the Decision

Immediately following the Committee meeting.

Contact Officer:	Paul Fraser
Telephone Number:	0151 934 2068
Email Address:	paul.fraser@sefton.gov.uk

Appendices:

The following appendices are attached to this report:
- Overview and Scrutiny Committee Work Programme for 2022/23
- Criteria Checklist for Selecting Topics for Review
- Latest Key Decision Forward Plan items relating to this Overview and Scrutiny Committee

Background Papers:

There are no background papers available for inspection.

Introduction/Background

1.   WORK PROGRAMME 2022/23

1.1   The Work Programme of items to be submitted to the Committee for consideration during the Municipal Year 2022/23 was approved by the Committee on 14 June 2022 as set out in Appendix 1 to the report. The programme has been produced in liaison with the appropriate Heads of Service, whose roles fall under the remit of the Committee.

1.2   The Work Programme has been produced based on items included in last year's Programme.

1.3   Members are requested to consider whether there are any other items that they wish the Committee to consider, that fall within the terms of reference of the Committee. The Work Programme will be submitted to each meeting of the Committee during 2022/23 and updated, as appropriate.

2.   SCRUTINY REVIEW TOPICS 2022/23

2.1   It is usual practise for the Committee to appoint a Working Group(s) to undertake a scrutiny review of services during the Municipal Year.

2.2   At its last meeting held on 14 June 2022 the Committee agreed to establish a Corporate Communications and Covid-19 Working Group.

2.3   The Committee is requested to consider whether a further Working Group should be selected; or wait until the completion of the recently established Corporate Communications and Covid-19 Working Group.

2.4   A criteria checklist for selecting and rejecting potential topics to review is attached at Appendix 2, to assist the Committee in selecting topics and appointing Working Group(s) for the Municipal Year.

2.5   **Corporate Communications and Covid-19 Working Group**

At its meeting held on 14 June 2022 the Committee agreed to establish a Corporate Communications and Covid-19 Working Group. The aim of the Working Group is to assess the changes instigated by Corporate Communications in communicating with residents during the Covid-19 pandemic; the impact the changes have had; and how such changes shape the future of the Council communicating with its communities.

Councillors Bradshaw, Byrom, Carlin and Robinson have agreed to serve on the Working Group.

At the time of preparation of this report the first meeting of the Working Group was being arranged. Updates on meetings of the Working Group will be submitted to the next meeting of the Committee.

3.   **PRE-SCRUTINY OF ITEMS IN THE KEY DECISION FORWARD PLAN**

3.1   Members may request to pre-scrutinise items from the Key Decision Forward Plan which fall under the remit (terms of reference) of this Committee. The Forward Plan which is updated each month, sets out the list of items to be submitted to the Cabinet for consideration during the next four-month period.

3.2   The pre-scrutiny process assists Cabinet Members to make effective decisions by examining issues beforehand and making recommendations prior to a determination being made.

3.3   The Overview and Scrutiny Management Board has requested that only those key decisions that fall under the remit of each Overview and Scrutiny Committee should be included on the agenda for consideration.

3.4   The latest Forward Plan is attached at Appendix 3 for this purpose. For ease of identification, items listed on the Forward Plan for the first time appear as shaded.

3.5   Should Members require further information in relation to any item on the Key Decision Forward Plan, would they please contact the relevant Officer named against the item in the Plan, prior to the Meeting.

4.   **LIVERPOOL CITY REGION COMBINED AUTHORITY OVERVIEW AND SCRUTINY COMMITTEE**

4.1   As Members will be aware, the Overview and Scrutiny Management Board and the four Overview and Scrutiny Committees considered a report on the guidance produced by the Ministry of Housing, Communities and Local Government relating to Overview and Scrutiny in Local and Combined Authorities following on from the Communities and Local Government Select Committee's inquiry into Overview and Scrutiny.

4.2   The Overview and Scrutiny Management Board and the four Overview and Scrutiny Committees all agreed the recommendations contained in the report, one of which being that updates on Liverpool City Region Combined Authority

Overview and Scrutiny Committee (LCRCAO&S) be included in the Work Programme report considered at each Overview and Scrutiny Committee meeting.

4.3 In accordance with the above decision, information on the LCRCAO&S is set out below.

4.4 **Role**

The Overview and Scrutiny Committee was established by the Combined Authority in May 2017 in accordance with the Combined Authorities Order 2017.

The role of the Overview and Scrutiny Committee is to:

- Scrutinise the decision and actions taken by the Combined Authority or the Metro Mayor;
- Provide a 'critical friend to policy and strategy development;
- Undertake scrutiny reviews into areas of strategic importance for the people of the Liverpool City Region; and
- Monitor the delivery of the Combined Authority's strategic plan.

4.5 **Membership**

The Committee is made up of 3 elected Members from each of the constituent Local Authorities of the LCR Combined Authority, along with one elected Member from both the Liverpool City Region Liberal Democrat Group and the Liverpool City Region Conservative Group.

Sefton's appointed Members are Councillors Hansen, Howard and Waterfield. Councillor Howard is Sefton's Scrutiny Link.

4.6 **Chair and Vice-Chair**

The Chair and Vice-Chair of the LCRCAO&S cannot be Members of the majority group. Councillor Steve Radford, a Liberal Party and Independent Group Councillor serving on Liverpool City Council has been appointed Chair for the 2022/23 Municipal Year; and Councillor Pat Moloney, a Liberal Democrat Councillor serving on Liverpool City Council has been appointed Vice-Chair.

4.7 **Quoracy Issues**

In the past a high number of meetings of the LCRCAO&S have been inquorate.

The quorum for meetings of the LCRCAO&S is 14, two-thirds of the total number of members, 20. This high threshold is not set by the Combined Authority but is set out in legislation.

4.8 **Meetings**

Information on all meetings and membership of the LCRCAO&S can be obtained using the following link

https://moderngov.merseytravel.gov.uk/ieListMeetings.aspx?CId=365&Year=0

4.9   The last meeting of the LCRCAO&S was held on 7 September 2022. The Committee considered the following items:

Portfolio Holder Update - Business Support
Race Equality Programme
Recommendations of the Improving Disability Employment Opportunities in the Liverpool City Region Task and Finish Group
Work Programme Update

4.10   The next meeting of the Committee is scheduled to be held on 9 November 2022.

4.11   The Committee is requested to note the update on the Liverpool City Region Combined Authority Overview and Scrutiny Committee.

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APPENDIX 1

OVERVIEW AND SCRUTINY COMMITTEE (REGULATORY, COMPLIANCE AND CORPORATE SERVICES)
WORK PROGRAMME 2022/23

	14 JUNE 22	13 SEPTEMBER 22	1 NOVEMBER 22	10 JANUARY 23	7 FEBRUARY 23 (BUDGET MEETING)	28 FEBRUARY 23
Cabinet Member Update Report - Paul Fraser	X	X	X	X		X
Work Programme - Update Paul Fraser	X	X	X	X		X
Service Operational Reports:						
New Ways of Working Dominic Ellis		X				
Review of the Council Tax Reduction Scheme - Stephan Van Arendsen/Diane Turner				X		
Disposal of Surplus Council Owned Land/Asset - Management Strategy Stephan Van Arendsen/Dom Ellis			X			
Members' Welfare Reform Reference Group – Update Margaret Jones	X	X	X	X		X
Air Quality Monitoring - Peter Moore/Greg Martin				X		
"Tool-Kit" for Armed Forces Covenant - Shaun Pimblett				X		
Annual ICT Update Report (Performance of						X

APPENDIX 1

Agilisys) Helen Spreadbury						
Impact of the Elections Act 2022 and the requirement for voters to produce photographic identification in polling stations – Neil Middlehurst			x			
Scrutiny Review Progress Reports:						
Digital Inclusion Working Group – Update on Recommendations - Paul Fraser			x			
Ethical Business Practices Working Group - Update on Recommendations - Paul Fraser				x		x
Financial Scrutiny:						
Budget Report 2023/24 to 2026/27 - Stephan Van Arendsen					x	
Financial Performance Monitoring - Stephan Van Arendsen		x	x	x	x	
Prudential Code for Capital Finance in Local Authorities – Prudential Indicators - Stephan Van Arendsen					x	
Treasury Management Policy and Strategy - Stephan Van Arendsen					x	

APPENDIX 1

Capital Strategy 2023/24 and Future Years - Stephan Van Arendsen					x	
Asset Management Strategy and Asset Disposal Policy – Update Position Stephan Van Arendsen					x	
Robustness of the 2023/24 Budget Estimates and the Adequacy of Reserves – local Government Act 2003 – Section 25 - Stephan Van Arendsen					x	
Presentations						
Corporate Communications Update - Elena Lloyd				x		
Cloud Migration Update – Helen Spreadbury	x					
Update on Progress of LCR Digital Inclusion Strategy - Andrea Watts				x		

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CRITERIA CHECKLIST FOR SELECTING TOPICS FOR REVIEW

Criteria for Selecting Items
▪ Issue identified by members as key issue for public (through member surgeries, other contact with constituents or volume of complaints)
▪ Poor performing service (evidence from performance indicators/benchmarking)
▪ Service ranked as important by the community (e.g. through market surveys/citizens panels)
▪ High level of user/general public dissatisfaction with service (e.g. through market surveys/citizens panels/complaints)
▪ Public interest issue covered in local media
▪ High level of budgetary commitment to the service/policy area (as percentage of total expenditure)
▪ Pattern of budgetary overspends
▪ Council corporate priority area
▪ Central government priority area
▪ Issues raised by External Audit Management Letter/External audit reports
▪ New government guidance or legislation
▪ Reports or new evidence provided by external organisations on key issue
▪ Others

CRITERIA FOR REJECTION

Potential Criteria for Rejecting Items
▪ Issue being examined by the Cabinet
▪ Issue being examined by an Officer Group : changes imminent
▪ Issue being examined by another internal body
▪ Issue will be addressed as part of a Service Review within the next year
▪ New legislation or guidance expected within the next year
▪ Other reasons specific to the particular issues.

APPENDIX 2

SCRUTINY CHECKLIST
DO'S AND DON'TS

DO

♦ Remember that Scrutiny
  ♦ Is about learning and being a "critical friend"; it should be a positive process
  ♦ Is not opposition

♦ Remember that Scrutiny should result in improved value, enhanced performance or greater public satisfaction
♦ Take an overview and keep an eye on the wider picture
♦ Check performance against local standards and targets and national standards, and compare results with other authorities
♦ Benchmark performance against local and national performance indicators, using the results to ask more informed questions
♦ Use Working Groups to get underneath performance information
♦ Take account of local needs, priorities and policies
♦ Be persistent and inquisitive
♦ Ask effective questions - be constructive not judgmental
♦ Be open-minded and self aware - encourage openness and self criticism in services
♦ Listen to users and the public, seek the voices that are often not heard, seek the views of others - and balance all of these
♦ Praise good practice and best value - and seek to spread this throughout the authority
♦ Provide feedback to those who have been involved in the review and to stakeholders
♦ Anticipate difficulties in Members challenging colleagues from their own party
♦ Take time to review your own performance

♦ DON'T
♦ Witch-hunt or use performance review as punishment
♦ Be party political/partisan
♦ Blame valid risk taking or stifle initiative or creativity
♦ Treat scrutiny as an add-on
♦ Get bogged down in detail
♦ Be frightened of asking basic questions
♦ Undertake too many issues in insufficient depth
♦ Start without a clear brief and remit
♦ Underestimate the task
♦ Lose track of the main purpose of scrutiny
♦ Lack sensitivity to other stakeholders
♦ Succumb to organisational inertia
♦ Duck facing failure - learn from it and support change and development
♦ Be driven by data or be paralysed by analysis - keep strategic overview, and expect officers to provide high level information and analysis to help.

APPENDIX 2

KEY QUESTIONS

Overview and Scrutiny Committees should keep in mind some of the fundamental questions:-
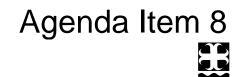
Are we doing what users/non users/local residents want?
Are users' needs central to the service?
Why are we doing this?
What are we trying to achieve?
How well are we doing?
How do we compare with others?
Are we delivering value for money?
How do we know?
What can we improve?

INVESTIGATIONS:-

To what extent are service users' expectations and needs being met?
To what extent is the service achieving what the policy intended?
To what extent is the service meeting any statutory obligations or national standards and targets?
Are there any unexpected results/side effects of the policy?
Is the performance improving, steady or deteriorating?
Is the service able to be honest and open about its current performance and the reasons behind it?
Are areas of achievement and weakness fairly and accurately identified?
How has performance been assessed? What is the evidence?
How does performance compare with that of others? Are there learning points from others' experiences?
Is the service capable of meeting planned targets/standards? What change to capability is needed.
Are local performance indicators relevant, helpful, meaningful to Members, staff and service users?

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APPENDIX 3

SEFTON METROPOLITAN BOROUGH COUNCIL
FORWARD PLAN

FOR THE FOUR MONTH PERIOD 1 NOVEMBER 2022 - 28 FEBRUARY 2023

This Forward Plan sets out the details of the key decisions which the Cabinet, individual Cabinet Members or Officers expect to take during the next four month period. The Plan is rolled forward every month and is available to the public at least 28 days before the beginning of each month.

A Key Decision is defined in the Council's Constitution as:

1. any Executive decision that is not in the Annual Revenue Budget and Capital Programme approved by the Council and which requires a gross budget expenditure, saving or virement of more than £100,000 <u>or</u> more than 2% of a Departmental budget, whichever is the greater;

2. any Executive decision where the outcome will have a significant impact on a significant number of people living or working in two or more Wards

Anyone wishing to make representations about any of the matters listed below may do so by contacting the relevant officer listed against each Key Decision, within the time period indicated.

Under the Access to Information Procedure Rules set out in the Council's Constitution, a Key Decision may not be taken, unless:

*   it is published in the Forward Plan;
*   5 clear days have lapsed since the publication of the Forward Plan; and
*   if the decision is to be taken at a meeting of the Cabinet, 5 clear days notice of the meeting has been given.

The law and the Council's Constitution provide for urgent key decisions to be made, even though they have not been included in the Forward Plan in accordance with Rule 26 (General Exception) and Rule 28 (Special Urgency) of the Access to Information Procedure Rules.

Copies of the following documents may be inspected at the Town Hall, Oriel Road, Bootle L20 7AE or accessed from the Council's website: www.sefton.gov.uk

*   Council Constitution
*   Forward Plan
*   Reports on the Key Decisions to be taken
*   Other documents relating to the proposed decision may be submitted to the decision making meeting and these too will be made available by the contact officer named in the Plan
*   The minutes for each Key Decision, which will normally be published within 5 working days after having been made

Some reports to be considered by the Cabinet/Council may contain exempt information and will not be made available to the public. The specific reasons (Paragraph No(s)) why such reports are exempt are detailed in the Plan and the Paragraph No(s) and descriptions are set out below:-

APPENDIX 3

1. Information relating to any individual
2. Information which is likely to reveal the identity of an individual
3. Information relating to the financial or business affairs of any particular person (including the authority holding that information)
4. Information relating to any consultations or negotiations, or contemplated consultations or negotiations in connection with any labour relations matter arising between the authority or a Minister of the Crown and employees of, or office holders under, the Authority
5. Information in respect of which a claim to legal professional privilege could be maintained in legal proceedings
6. Information which reveals that the authority proposes a) to give under any enactment a notice under or by virtue of which requirements are imposed on a person; or b) to make an order or direction under any enactment
7. Information relating to any action taken or to be taken in connection with the prevention, investigation or prosecution of crime
8. Information falling within paragraph 3 above is not exempt information by virtue of that paragraph if it is required to be registered under—
      (a) the Companies Act 1985;
      (b) the Friendly Societies Act 1974;
      (c) the Friendly Societies Act 1992;
      (d) the Industrial and Provident Societies Acts 1965 to 1978;
      (e) the Building Societies Act 1986; or
      (f) the Charities Act 1993.
9.Information is not exempt information if it relates to proposed development for which the local planning authority may grant itself planning permission pursuant to regulation 3 of the Town and Country Planning General Regulations 1992
10. Information which—
    (a) falls within any of paragraphs 1 to 7 above; and
    (b) is not prevented from being exempt by virtue of paragraph 8 or 9 above,is exempt information if and so long, as in all the circumstances of the case, the public interest in maintaining the exemption outweighs the public interest in disclosing the information.

Members of the public are welcome to attend meetings of the Cabinet and Council which are held at the Town Hall, Oriel Road, Bootle or the Town Hall, Lord Street, Southport. The dates and times of the meetings are published on www.sefton.gov.uk or you may contact the Democratic Services Section on telephone number 0151 934 2068.

NOTE:
For ease of identification, items listed within the document for the first time will appear shaded.

Dwayne Johnson
Chief Executive

APPENDIX 3

FORWARD PLAN INDEX OF ITEMS

Item Heading	Officer Contact
Financial Management 2022/23 to 2024/25 and Framework for Change 2020 - Revenue and Capital Budget Update 2022/23 – November Update	Paul Reilly paul.reilly@sefton.gov.uk Tel: 0151 934 4106
Treasury Management Position to September 2022	Graham Hussey graham.hussey@sefton.gov.uk Tel: 0151 934 4100
Sandbrook Way, Ainsdale - Acquisition and Development Brief	Steve Power steve.power@sefton.gov.uk
Financial Management 2022/23 to 2024/25 and Framework for Change 2020 - Revenue and Capital Budget Update 2022/23 – December Update	Paul Reilly paul.reilly@sefton.gov.uk Tel: 0151 934 4106
Sale of Ainsdale ATC and the Meadows Ainsdale	Suzanne Rimmer suzanne.rimmer@sefton.gov.uk
Land at Foul Lane, Southport	Suzanne Rimmer suzanne.rimmer@sefton.gov.uk
Financial Management 2022/23 to 2024/25 and Framework for Change 2020 - Revenue and Capital Budget Update 2022/23 – January Update	Paul Reilly paul.reilly@sefton.gov.uk Tel: 0151 934 4106
Council Tax Reduction Scheme, Council Tax Base 2023/24	Diane Turner diane.turner22@sefton.gov.uk
Financial Management 2022/23 to 2024/25 and Framework for Change 2020 - Revenue and Capital Budget Update 2022/23 – February Update	Paul Reilly paul.reilly@sefton.gov.uk Tel: 0151 934 4106

APPENDIX 3

SEFTON METROPOLITAN BOROUGH COUNCIL
FORWARD PLAN

Details of Decision to be taken	**Financial Management 2022/23 to 2024/25 and Framework for Change 2020 - Revenue and Capital Budget Update 2022/23 – November Update** Financial updates and Policy decisions relating to the Council's Framework for Change 2020, including the monthly Revenue and Capital budget monitoring reports
Decision Maker	Cabinet
Decision Expected	3 Nov 2022

Key Decision Criteria	Financial	Yes	Community Impact	Yes

Exempt Report	Open
Wards Affected	All Wards
Scrutiny Committee Area	Regulatory, Compliance and Corporate Services
Persons/Organisations to be Consulted	Cabinet, Chief Executive, Strategic Leadership Board, Trade Unions, Staff and relevant organisations as appropriate
Method(s) of Consultation	Individual budget saving options / amendments to the budget will be subject to consultation – internal and external to the Council (as appropriate).
List of Background Documents to be Considered by Decision-maker	Financial Management 2022/23 to 2024/25 and Framework for Change 2020 - Revenue and Capital Budget Update 2022/23 – November Update
Contact Officer(s) details	Paul Reilly paul.reilly@sefton.gov.uk Tel: 0151 934 4106

APPENDIX 3

SEFTON METROPOLITAN BOROUGH COUNCIL
FORWARD PLAN

Details of Decision to be taken	**Treasury Management Position to September 2022** This report provides Members with a review of the Treasury Management activities undertaken to 30th September 2022. This document is the Second report of the ongoing quarterly monitoring provided to Audit & Governance Committee and the mid-year report to Cabinet and Council, whose role it is to carry out scrutiny of treasury management policies and practices.
Decision Maker	Cabinet Council
Decision Expected	3 Nov 2022 17 Nov 2022

Key Decision Criteria	Financial	Yes	Community Impact	No

Exempt Report	Open
Wards Affected	All Wards
Scrutiny Committee Area	Regulatory, Compliance and Corporate Services
Persons/Organisations to be Consulted	N/A
Method(s) of Consultation	None
List of Background Documents to be Considered by Decision-maker	Treasury Management Position to September 2022
Contact Officer(s) details	Graham Hussey graham.hussey@sefton.gov.uk Tel: 0151 934 4100

APPENDIX 3

SEFTON METROPOLITAN BOROUGH COUNCIL
FORWARD PLAN

Details of Decision to be taken	**Sandbrook Way, Ainsdale - Acquisition and Development Brief** To note project progress and seek approval to a development brief to support the acquisition of properties, for potential compulsory purchase purposes (CPO)..
Decision Maker	Cabinet
Decision Expected	1 Dec 2022

Key Decision Criteria	Financial	Yes	Community Impact	Yes

Exempt Report	Open
Wards Affected	Ainsdale
Scrutiny Committee Area	Regulatory, Compliance and Corporate Services
Persons/Organisations to be Consulted	Consultation to date has included Cabinet members, Ward Councillors and local groups.
Method(s) of Consultation	As part of the Option Appraisal Process officers have formally consulted with Cabinet Members, Ward Councillors, and local interest groups.
List of Background Documents to be Considered by Decision-maker	Sandbrook Way, Ainsdale - Acquisition and Development Brief
Contact Officer(s) details	Steve Power steve.power@sefton.gov.uk

APPENDIX 3

SEFTON METROPOLITAN BOROUGH COUNCIL
FORWARD PLAN

Details of Decision to be taken	**Financial Management 2022/23 to 2024/25 and Framework for Change 2020 - Revenue and Capital Budget Update 2022/23 – December Update** Financial updates and Policy decisions relating to the Council's Framework for Change 2020, including the monthly Revenue and Capital budget monitoring reports
Decision Maker	Cabinet
Decision Expected	1 Dec 2022

Key Decision Criteria	Financial		Community Impact	

Exempt Report	Open
Wards Affected	All Wards
Scrutiny Committee Area	Regulatory, Compliance and Corporate Services
Persons/Organisations to be Consulted	Cabinet, Chief Executive, Strategic Leadership Board, Trade Unions, Staff and relevant organisations as appropriate
Method(s) of Consultation	Individual budget saving options / amendments to the budget will be subject to consultation – internal and external to the Council (as appropriate).
List of Background Documents to be Considered by Decision-maker	Financial Management 2022/23 to 2024/25 and Framework for Change 2020 - Revenue and Capital Budget Update 2022/23 – December Update
Contact Officer(s) details	Paul Reilly paul.reilly@sefton.gov.uk Tel: 0151 934 4106

Agenda Item 8

SEFTON METROPOLITAN BOROUGH COUNCIL
FORWARD PLAN

Details of Decision to be taken	**Sale of Ainsdale ATC and the Meadows Ainsdale** Seek Cabinet approval to the terms and conditions for the disposal of the premises
Decision Maker	Cabinet
Decision Expected	1 Dec 2022 Decision due date for Cabinet changed from 06/10/2022 to 01/12/2022. Reason: to finalise the terms and conditions for the proposed disposal
Key Decision Criteria	Financial	Yes	Community Impact	Yes
Exempt Report	Part exempt (Paragraph 3)
Wards Affected	Ainsdale
Scrutiny Committee Area	Regulatory, Compliance and Corporate Services
Persons/Organisations to be Consulted	Councillors as part of the above
Method(s) of Consultation	Updates on disposal previously reported to Cabinet
List of Background Documents to be Considered by Decision-maker	Sale of Ainsdale ATC and the Meadows Ainsdale
Contact Officer(s) details	Suzanne Rimmer suzanne.rimmer@sefton.gov.uk

APPENDIX 3

SEFTON METROPOLITAN BOROUGH COUNCIL
FORWARD PLAN

Details of Decision to be taken	**Land at Foul Lane, Southport** To seek approval to the Heads of Terms for the proposed sale of land at Foul Lane, Southport.			
Decision Maker	Cabinet			
Decision Expected	1 Dec 2022			
Key Decision Criteria	Financial	Yes	Community Impact	No
Exempt Report	Part exempt (Paragraph 3)			
Wards Affected	Norwood			
Scrutiny Committee Area	Regulatory, Compliance and Corporate Services			
Persons/Organisations to be Consulted	SCIG - Strategic Capital Investment Group			
Method(s) of Consultation	Meetings			
List of Background Documents to be Considered by Decision-maker	Land at Foul Lane, Southport			
Contact Officer(s) details	Suzanne Rimmer suzanne.rimmer@sefton.gov.uk			

Agenda Item 8

SEFTON METROPOLITAN BOROUGH COUNCIL
FORWARD PLAN

Details of Decision to be taken	**Financial Management 2022/23 to 2024/25 and Framework for Change 2020 - Revenue and Capital Budget Update 2022/23 – January Update** Financial updates and Policy decisions relating to the Council's Framework for Change 2020, including the monthly Revenue and Capital budget monitoring reports
Decision Maker	Cabinet
Decision Expected	5 Jan 2023

Key Decision Criteria	Financial	Yes	Community Impact	Yes

Exempt Report	Open
Wards Affected	All Wards
Scrutiny Committee Area	Regulatory, Compliance and Corporate Services
Persons/Organisations to be Consulted	Cabinet, Chief Executive, Strategic Leadership Board, Trade Unions, Staff and relevant organisations as appropriate
Method(s) of Consultation	Individual budget saving options / amendments to the budget will be subject to consultation – internal and external to the Council (as appropriate).
List of Background Documents to be Considered by Decision-maker	Financial Management 2022/23 to 2024/25 and Framework for Change 2020 - Revenue and Capital Budget Update 2022/23 – January Update
Contact Officer(s) details	Paul Reilly paul.reilly@sefton.gov.uk Tel: 0151 934 4106

APPENDIX 3

SEFTON METROPOLITAN BOROUGH COUNCIL
FORWARD PLAN

Details of Decision to be taken	**Council Tax Reduction Scheme, Council Tax Base 2023/24** The report will provide details of a review of the Council Tax Reduction Scheme for the current year 2022/23 and sets out recommendations for Sefton Council's Council Tax Reduction Scheme for 2023/24, and will also provide details of the Council Tax Base.
Decision Maker	Cabinet Council
Decision Expected	5 Jan 2023 19 Jan 2023

Key Decision Criteria	Financial	Yes	Community Impact	Yes

Exempt Report	Open
Wards Affected	All Wards
Scrutiny Committee Area	Regulatory, Compliance and Corporate Services
Persons/Organisations to be Consulted	Precepting authorities, i.e. i.e. Merseyside Police and Crime Commissioner, Merseyside Fire and Rescue Service and the Liverpool City Region Combined Authority.
Method(s) of Consultation	Details of the review of the Council Tax Reduction Scheme and recommendations for the Scheme for 2023/24, together with details of the Council Tax Base are provided to precepting authorities, i.e. Merseyside Police and Crime Commissioner, Merseyside Fire and Rescue Service and the Liverpool City Region Combined Authority.
List of Background Documents to be Considered by Decision-maker	Council Tax Reduction Scheme, Council Tax Base 2023/24
Contact Officer(s) details	Diane Turner diane.turner22@sefton.gov.uk

Agenda Item 8

APPENDIX 3

SEFTON METROPOLITAN BOROUGH COUNCIL
FORWARD PLAN

Details of Decision to be taken	**Financial Management 2022/23 to 2024/25 and Framework for Change 2020 - Revenue and Capital Budget Update 2022/23 – February Update** Financial updates and Policy decisions relating to the Council's Framework for Change 2020, including the monthly Revenue and Capital budget monitoring reports
Decision Maker	Cabinet
Decision Expected	2 Feb 2023

Key Decision Criteria	Financial	Yes	Community Impact	Yes

Exempt Report	Open
Wards Affected	All Wards
Scrutiny Committee Area	Regulatory, Compliance and Corporate Services
Persons/Organisations to be Consulted	Cabinet, Chief Executive, Strategic Leadership Board, Trade Unions, Staff and relevant organisations as appropriate
Method(s) of Consultation	Individual budget saving options / amendments to the budget will be subject to consultation – internal and external to the Council (as appropriate).
List of Background Documents to be Considered by Decision-maker	Financial Management 2022/23 to 2024/25 and Framework for Change 2020 - Revenue and Capital Budget Update 2022/23 – February Update
Contact Officer(s) details	Paul Reilly paul.reilly@sefton.gov.uk Tel: 0151 934 4106

Report to:	Overview and Scrutiny Committee (Regulatory, Compliance and Corporate Services)	Date of Meeting:	1 November 2022
Subject:	Cabinet Member Report – August 2022 to October 2022		
Report of:	Chief Legal and Democratic Officer	Wards Affected:	All
Cabinet Portfolio:	Regulatory, Compliance and Corporate Services		
Is this a Key Decision:	No	Included in Forward Plan:	No
Exempt / Confidential Report:	No		

Summary:

To submit the Cabinet Member - Regulatory, Compliance and Corporate Services report for the period August 2022 to October 2022 relating to the remit of the Overview and Scrutiny Committee.

Recommendation:

That the Cabinet Member - Regulatory, Compliance and Corporate Services report relating to the remit of the Overview and Scrutiny Committee be noted.

Reasons for the Recommendation:

In order to keep Overview and Scrutiny Members informed, the Overview and Scrutiny Management Board has agreed for relevant Cabinet Member Reports to be submitted to appropriate Overview and Scrutiny Committees.

Alternative Options Considered and Rejected:

No alternative options have been considered because the Overview and Scrutiny Management Board has agreed for relevant Cabinet Member Reports to be submitted to appropriate Overview and Scrutiny Committees.

What will it cost and how will it be financed?

Any financial implications associated with the Cabinet Member report that are referred to in this update are contained within the respective reports.

(A)   Revenue Costs – see above

(B)   Capital Costs – see above

Implications of the Proposals:

Resource Implications (Financial, IT, Staffing and Assets):
Legal Implications:
Equality Implications: There are no equality implications.
Climate Emergency Implications: The recommendations within this report will

Have a positive impact	No
Have a neutral impact	Yes
Have a negative impact	No
The Author has undertaken the Climate Emergency training for report authors	Yes

There are no direct climate emergency implications arising from this report. Any climate emergency implications arising from matters referred to in the Cabinet Member report will be contained in reports when they are presented to Members at the appropriate time.

Contribution to the Council's Core Purpose:

Protect the most vulnerable: None directly applicable to this report. The Cabinet Member update provides information on activity within Councillor Lappin's portfolio during a previous two/three-month period. Any reports relevant to her portfolio considered by the Cabinet, Cabinet Member or Committees during this period would contain information as to how such reports contributed to the Council's Core Purpose.
Facilitate confident and resilient communities: As above
Commission, broker and provide core services: As above
Place – leadership and influencer: As above
Drivers of change and reform: As above
Facilitate sustainable economic prosperity: As above

Greater income for social investment: As above
Cleaner Greener: As above

What consultations have taken place on the proposals and when?

(A)   Internal Consultations

The Cabinet Member Update Report is not subject to FD/LD consultation. Any specific financial and legal implications associated with any subsequent reports arising from the attached Cabinet Member update report will be included in those reports as appropriate

(B)   External Consultations

Not applicable

Implementation Date for the Decision

Immediately following the Committee meeting.

Contact Officer:	Paul Fraser
Telephone Number:	0151 934 2068
Email Address:	paul.fraser@sefton.gov.uk

Appendices:

Cabinet Member - (Regulatory, Compliance and Corporate Services) update report – to follow

Background Papers:

There are no background papers available for inspection.

1.   Introduction/Background

1.1   In order to keep Overview and Scrutiny Members informed, the Overview and Scrutiny Management Board has agreed for relevant Cabinet Member Reports to be submitted to appropriate Overview and Scrutiny Committees.

1.2   The most recent Cabinet Member report for the Regulatory, Compliance and Corporate Services is attached to the report.

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CABINET MEMBER REPORT Overview and Scrutiny Committee (Regulatory, Compliance and Corporate Services) -		
Councillor	**Portfolio**	**Period of Report**
Paulette Lappin	Regulatory, Compliance and Corporate Services	November 2022

Finance

Within the finance service, there has been significant activity on a number of key issues:

The latest budget monitoring report will be presented to Cabinet and Council in November. This highlights the growing financial pressure that the Council is facing in 2022/2023, particularly in Children's Social Care, the pay award offer and energy. There is a remedial action plan agreed to meet the majority of the current forecast pressure in 2022/2023 – however, this is mainly through utilising one-off funding (e.g., general balances and earmarked reserves) which isn't a sustainable solution to the ongoing impact of these pressure in future years. In addition, the Council has introduced a recruitment freeze across a number of service areas, as well as identifying areas of non-essential spend to try to offset some of the pressures being faced.

The implications on the Medium-Term Financial Plan will also be reported to Cabinet and Council in November, in terms of the overall pressures and what is permanent or temporary, and proposals are currently being formulated to enable to the Council to set a robust and sustainable budget in 2023/2024. The implications for 2024/25 and 2025/26 are also being considered.

The draft Statement of Accounts for 2020/2021 was published at the end of July 2021 with the final Statement of Accounts being presented to Audit and Governance Committee on 15th December. However, although nearly all work has been finalised, the audit is still to be completed. This is mainly due to an emerging technical valuation issue that needs to be resolved at a national level – CIPFA consulted on a practical solution that would enable audits to be completed. However, the consultation was inconclusive, so no solution has been proposed – CIPFA plan to consult on the issue again in the near future. Should any further amendments be required since the December 2021 Committee, the Chair has been granted delegated authority to approve the final Statement of Accounts following these changes.

The work to close the accounts for 2021/2022 was completed, with the revenue and capital outturn position reported to Cabinet in July. The draft Statement of Accounts for 2021/2022 have been published. Officers met with our external auditors in early September to discuss their plans for the audit. Some audit work has now started with the main work expected to start in November.

Customer Centric Services

The Service continues to manage high workloads, especially relating to Council Tax, with outstanding work volumes starting to reduce, albeit slowly.

New staff recruited to the Contact Centre earlier this year to manage the peak of Energy Rebate calls are now being trained, and gaining experience, in handling a range of enquiries for other Council services to help to reduce customer delays. Staff in Revenues and Benefits continue to work extra hours at weekends to reduce work volumes.

Council Tax Energy Rebate

Administration of the Government's Council Tax Energy Rebate scheme has been a priority for the Service for the last six-months. The main x Energy Rebate scheme closed on 30th

Agenda Item 9

September 2022. Over 110,000 households in Band A-D properties, payments totaling approximately £16.5m, have now received the automatic £150 energy rebate.

In addition to the main £150 Energy Rebate scheme, the Council was allocated a discretionary fund from Government of £708,150. The discretionary scheme is due to close on 30th November 2022. By the end of September 2022, approximately £593,000 has been awarded to targeted groups, e.g., households in receipt of means-tested Council Tax Reduction, households where a severe mental impairment exemption has been granted. An application process is now open until the end of October 2022, to consider awards for the remaining amount, approximately £115,000. The Communications team has issued press releases and social media posts to promote and publicise the availability of the fund.

COVID Additional Relief Fund (CARF)

The Government provided CARF to support to businesses that did not qualify for any previous reliefs announced as part of the business support response to COVID-19.

During September 2022, the CARF work was completed by the Business Rates team. Due to the lower-than-expected volumes of applications the total value of relief awarded was £1.3 million from the £4.4 million made available.

All applicants were awarded 100% relief for 2021/22. Where this has resulted in a credit for that year it has been offset against the 2022/23 liability.

Customer Services

The Contact Centre continues to handle telephone calls from an increasing number of residents stating that they are unable to pay their monthly Council Tax due to the cost-of-living crisis. To assist customers, Council Tax Exceptional Hardship Payments, ELAS applications and extended instalment payment plans are being offered.

ELAS enquiries remain high, with over 100 calls per day being received on some days in September. With further ELAS funding being secured and residents allowed an increase in the number of claims that they can make over a 12-month rolling period, it is expected that the increase will continue month-on-month as energy bills start to rise during the winter season.

By the end of September 2022, the Benefits team processing the ELAS claims has considered 6,569 applications for support since 1st April 2022. 2,121 food vouchers have been issued, 3,176 utility awards and 584 essential household goods provided. Staff resource in both the Contact Centre and the Benefits team is managed to ensure that ELAS enquiries and claims are handled without delay.

In addition, the Council awarded payments from the latest round of Government Household Support funding to support pensioners in receipt of Council Tax Reduction. Approximately 10,000 pensioner households received a payment of £80.00. The Contact Centre experienced a spike in calls when payment notifications were issued with most callers checking the validity of the payment or enquiring if a third party acting on behalf of the recipient could cash the payment at the Post Office.

Contact by social media continues to increase with more customers using the digital contact options that are available. Over 1,837 e-mails were processed in September with a two-day turnaround.

During September 2022, 2,733 customers attended Bootle One Stop Shop, this included 536 taxi drivers, with 428 'dropping-in' and 108 who had appointments. Aside from taxi's, drop-in arrangements (rather than pre-booked app have been reinstated at Bootle One Stop

each Wednesday and Thursday which are popular with residents. 729 customers dropped-in to discuss a wide range of Council Tax, benefits, ELAS, parking and Blue Badges enquiries.

At Southport, 673 customers attended the One Stop Shop service at the Atkinson, with most customers attending with a Council Tax or benefits enquiry. There were also a small number of enquiries for Blue Badges and parking matters. Due to the small and restricted area that the service is delivered from at the Atkinson, it is not possible to offer any form of drop-in service, so this location remains by appointment only.

Taxi-Licensing

Progress with Taxi Licensing continues to be particularly good, with the licensing of vehicle plates being processed within 3– 4 days of receipt.

It is pleasing to report that with effect from 13th September 2022, the Council has reinstated a Taxi Licensing service from the Atkinson in Southport each Tuesday and Thursday. A soft launch has been implemented with current customer demand low. Space restrictions mean that an appointment-only service is in place.

Key-stakeholders and trade representatives from Taxi Licensing requested a meeting in September to discuss the Council's approach to the processing of New Driver applications. Their preference is for the Council to only consider applications that had been received in the last 3-months and to ignore and delete the 4,700 applications that were received during the period September 2020 to June 2022. In addition to an overhaul of the New Driver application, the Taxi-trade has formally asked for Taxi Licensing to be delivered independently from a stand-alone location, and for staff resources to be significantly increased to cope with customer demand – they have offered to pay for the additional resources and for the costs associated to any relocation. All agenda items discussed at the meeting are currently being considered by the Council's Licensing department.

Risk and Audit

The **Internal Audit** team are continuing to work on delivering the internal audit plan with a current focus on reviews of:
- Beach Car Parking,
- Golf Income,
- Business Rates
- Schools Finance Budget
- Performance Management,
- Corporate Governance review
- Grants assurance and a review of number of Schools.
- Climate Change
- Risk Management
- Highways Maintenance
- Covid Grants (
- Payroll
- Integrated Care
- Energy price cap payments

We have appointed a temporary Principal Auditor to a vacant position and will consider recruiting permanently to the post in the New Year.

Insurance Team have completed and are working on the following initiatives to improve the Council's risk management.

- We are at the initial stage of the procurement for the re-valuation for insurance purposes of the remaining Council properties which have not been subject to a re-valuation in the past two years.
- We have completed the insurance renewal for the Council for 2022/23 and are considering the next stages of completing the proposed tender for the Council's insurance arrangements to be completed by September 2023. The insurance market remains focused on technical pricing to achieve profit rather than in the past focused on market share.
- We have used some of the "free days" as part of the insurance programme risk bursary to examine how the Council's trees are managed effectively in accordance with our legal responsibilities. Other days have been used to look at the Council's Highways Winter Service Policy.
- We are working with insurers and the Council's liability insurers to robustly defend claims and in limited circumstances will pursue through the Courts claimants to recover Council costs where the claims are proven to be exaggerated.
- Team continues to work extensively with Service Teams including Highways, Green Sefton and Tourism to improve the management of insurable risk in areas where there are high numbers of claims or areas of concern.
- We are currently ensuring that outstanding risk actions from the Risk Improvement Surveys completed by the material damage insurer have been implemented which will help the renewal in 2022.

The **Risk and Resilience Team.** The Emergency Planning focus during the previous quarter was on the Monarch's death in September 2022.

Business Continuity we are reviewing the current Service Area Business Continuity Plans with the teams and are looking to undertake another activation test of the BC plans. We have arranged a exercise of the Council's BC arrangements in January 2023.

The **Risk and Resilience Team** are currently working on the Council's Risk Appetite which is due which is due to complete in October 2022 as well as facilitating the updates of the Council's Corporate Risk Register working with the Risk Owners to update the risk register. Other work includes:
- Working with the Merseyside Resilience Forum
- Development of a Shoreline Pollution Plan
- Development of Severe Weather Protocol

The **Assurance Team** were seconded to the Business Grants Team to provide support and assistance for the delivery of grants to local businesses until the end of June 2022. Subsequently two of the Team were seconded to Revenues and Benefits to provide additional support to the Team.

For the **Health and Safety Team** there will be a continued focus during the next quarter of delivering the Health and Safety Improvement Plan and also the ongoing recovery programmes from COVID-19 with planned priorities –

- Continue to support to assist Managers with the recovery programmes from COVID-19.

- Continue to review, update and monitor the Health and Safety Standards and Policies, with focus on working from home, display screen and workstation assessments and stress risk assessments.

- Continue to develop the Council-wide training needs assessment which will eventually build into the health and safety training plan and provision.

- Undertaking a planned review of the Council's Health and Safety Policy and completing the Annual Health and Safety report.

- Focus on improving the accuracy of incident reporting across the Council will continue to ensure incidents of threatening and abusive behaviours towards staff are reported.

- Continue to deliver a health and safety management audit and inspection regime across the Council, to schools with a Service Level Agreement with the Council and those schools where the Council retains responsibility for the health and safety as the employer. This will provide assurance that health and safety management systems are suitable and effective.

ICT

The ICT Service continues to work on a number of significant transformation programmes as well as delivering the BAU ICT Service alongside Agilisys. A key priority over the last period has been to support the moves of Children's Services into Magdalen House and ensuring the delivery and installation of all ICT equipment. There have been some challenges with obtaining equipment in a timely fashion due to worldwide supply issues, but we are now pleased to be able to now report that the Children's moves are completed, and the focus is now upon moving Revenues and Benefits teams from St Peters as well as Adult Social Care back into Magdalen. The final step will be to backfill the remaining desks in Magdalen House with Keyboards, Mice, Monitors and docking stations to support hotdesking.

Much of the Cloud Migration project is now completed, the remaining work ongoing includes the migration of the Liquid Logic system to its new environment, which is being supported by the vendor. This is well underway, with Test and Training Servers already located in the Cloud and go live planned for the 19th and 20th of October. In addition, the Net loans system (in libraries) is also planned in with the supplier. Work is now focused on the Data Centre Rationalisation and Right sizing, ready for an eventual move to Bootle Town Hall.

Cloud Telephony deployment is now completed with number porting from the Virgin Contract to 8x8 in progress, the first (smaller phase) is now done with no issues reported. There have been some delays with the second round of porting due to a dependency on BT for legacy lift and alarm lines, this is now planned in for November.

Further deployment of the new CXP solution is now planned for the forthcoming period. 9 processes are now live, with a further 8 due to go-live imminently, 6 legacy processes are built and in various stages of final configuration and testing, with 4 remaining legacy processes to be built. Support has been requested from back-office teams to prioritise testing of all processes so that we can complete migration in advance of the Christmas break, as the server for the legacy Northgate system reaches end of extended support in January 2023 and will need to be decommissioned.

Work continues the rolling website improvement programme. An external web agency (Ozum) has been commissioned to carry out the required work. In addition, quotes have been requested for the upgrade of the Umbraco web content management system (to be planned in next year). Alongside this, the Communications team continues with an ongoing content review and is also reviewing ancillary sites to see if any of these should be incorporated into the main Council website.

The migration of legacy bulk print jobs to the Council's new bulk print provider continues, some contingency has been built in to allow for the testing of complex print runs during November, with the legacy system due to be decommissioned prior to Christmas.

Procurement activity continues to be a challenge, a new procurement forward plan has been developed to take account of the reduced res; agency support secured for Procurement

is supporting the work around the iTrent renewal, ESP (Leisure system procurement), the Mobile Phones contract and Capita One at present, with potential to also work on the lone worker system procurement (pending service approval to release to market). Recruitment activity for a permanent officer is also underway.

Procurement is now completed for Managed Print, with an award to Canon, Xerox devices will be replaced from Autumn. Procurement is well underway for Corporate Connectivity, with evaluators now reviewing the bids received, the next projects will include ESP for Leisure and the Mobile Phones Contract which is up for renewal next year.

The threat level in relation to Cyber Security remains high and the team are working hard to implement new technologies and tools to stay one step ahead of the risk. Recently Sefton commissioned Microsoft to complete a Cyber Security Assessment, our result was positive with Sefton scoring above average based on the scores of other local authorities assessed however a full action plan is now in development to work through the improvements recommended. In addition, the LGA will be completing a Cyber 360 in October this year, the results of which will also feed into our continuous Cyber Security improvement plan.

Property Services

The Property Services Department are a multi-Disciplinary team delivering various services, professional advice and initiatives across the Borough of Sefton. Below are some examples of ongoing pieces of work throughout the department.

Asset Management / FM

- Ongoing work to deliver Phase 1 Asset Disposals.
- Ongoing work supporting Growth Board projects.
- Asset records input and liaison with Building Maintenance colleagues for new (property based) IT system.
- Agreement of terms and reporting for Lease of various assets ongoing.
- Reoccupation of Magdalen House to accommodate future ways of working nearing completion.
- Working in conjunction with Children's Services to support their accommodation strategy.

Maintenance Management & Building Services

- Delivering a range of schemes in support of Corporate Buildings.
- Delivering a range of schemes in support of Education Capital programme.
- Delivery of reactive maintenance and statutory compliance services to Corporate and Educational buildings.
- Professional advice and support on a broad range of regeneration programmes.
- Development and implementation of a new coordinated (property based) IT system in support of Corporate & Education Properties.
- Managing remedial works scheme
- Formulated phase 1 essential maintenance delivery plan for corporate buildings.
- Formulating asset survey delivery plan alongside the essential maintenance.
- Delivering services in support of major adaptation to vulnerable and disabled residents.

Project Management

- Provide professional support to Growth Board on several projects.
- Project manage various Education capital schemes.
- Provide support to other teams on Asset Disposal, Building Maintenance, Asset Management, Energy and Statutory Compliance colleagues.

Energy Management

- Busy period for the affordable warmth team, supporting residents without adequate heating for range of reasons. Additional funding secured to help repair boilers or provide emergency top ups for gas/electricity meters.
- Local Authority Delivery of Green homes Grant (LAD, GHG) – Providing insulation to privately owned properties (worst/not insulated & for poorest residents) LAD2 has now completed with 222 homes improved. LAD3/HUG is currently being delivered – an additional £1M (100 homes) has been awarded to Sefton (Oct 2022).
- Working with the LCRCA on an extension of the Retrofit for the future to improve social housing across the LCR.
- Works to upgrade roof insulation and improve glazing at Southport and Bootle Town Halls are complete.
- A programme of work to support schools (after large energy price rises) is being developed to be delivered this year.
- Feasibility Study for a replacement Wind turbine at Southport Eco Centre is ongoing.
- Energy price rises are being modelled for the remainder of 2022/23, after the Government price guarantee announcement. Prices for 23/24 also being modelled and shared with finance dept.
- Review of Climate Emergency works required for 2023-26 underway.

Legal Services

Democratic Services Team – Overview

Overview and Scrutiny

- **Overview and Scrutiny Committee (Adult Social Care and Health)**
  A meeting of the Committee was held on 6 September 2022. A summary of the key issues considered at the meeting is provided below:

  - **Domestic Abuse Update** - the Committee considered a report updating on Sefton's strategic approach to tackling domestic abuse, including an overview of the Domestic Abuse Act and work of the Sefton Domestic Abuse Partnership Board to date. The report set out the background to the matter; an overview of the Domestic Abuse Act; local authority statutory duties within the Act; the roles and responsibilities of the Sefton Domestic Abuse Partnership Board; links to other national/statutory guidance; and cross-partnership collaboration.
  - **Sefton Partnership Development Update** - the Committee considered a report that provided an update on the establishment of a Sefton Partnership. This was as a result of the Royal assent given to the Health and Care Act 2022 in April 2022, and the Act introduced significant reforms to the organisation and delivery of health and care services in England. The report set out the background to the matter; provided key updates; together with guidance on the role of Overview and Scrutiny.
  - **Overview & Scrutiny Mental Health Review** - the Committee considered a report that presented the progress on implementation of the findings and recommendation of the former Mental Health Issues Working Group. The findings and recommendations from the Working Group were being taken forward as part of the Sefton Mental Health Programme Task and Finish Group which consisted of key representatives from Sefton Council, Sefton Clinical Commissioning Groups, Mersey Care NHS Foundation, Sefton CVS and the wider Voluntary, Community and Faith Sector. The report set out progress updates against each of the recommendations made by the Working Group.
  - **NHS Cheshire and Merseyside, Sefton - Update Report** - the Committee considered a report that provided an update about the work of NHS Cheshire and Merseyside, Sefton.

- **Sefton Clinical Commissioning Groups - Health Provider Performance Dashboard** - the Committee considered a report that provided data on key performance areas, together with responses for the Friends and Family Test for both Southport and Ormskirk Hospital NHS Trust and Liverpool University Hospital NHS Foundation Trust (LUHFT). Information on the monitoring of the 7-day GP extended access scheme, and ambulance response times were also included within the data.
- **Cabinet Member Update Reports** - the Committee considered, as is the usual practice, the most recent reports from the Cabinet Members for Adult Social Care, and Health and Wellbeing.
- **Work Programme** – the report sought the views of the Committee on the Work Programme for 2022/23; reported on progress of the Mental Health Issues Working Group; reported on progress of informal briefing sessions for Committee Members to be held during 2022/23; the identification of items for pre-scrutiny by the Committee from the Key Decision Forward Plan; updated on the Liverpool City Region Combined Authority Overview and Scrutiny Committee; updated on progress made by the Joint Health Scrutiny Committee in considering proposals for the reconfiguration of the hyper-acute stroke services across North Merseyside and West Lancashire; updated on progress made by the Joint Health Scrutiny Committee in considering proposals in relation to clinical service integration for a number of services delivered by Liverpool University Hospitals NHS Foundation Trust (LUFT); updated on progress of the Joint Cheshire and Merseyside Scrutiny Committee, established to scrutinise the work of the Cheshire and Merseyside Integrated Care Board; and submitted an update by Healthwatch Sefton.

- **Overview and Scrutiny Committee (Children's Services and Safeguarding)**
  A meeting of the Committee was held on 27 September 2022. A summary of the items considered at the meeting is provided below.

  - **Domestic Abuse Update** - the Committee considered a report updating on Sefton's strategic approach to tackling domestic abuse, including an overview of the Domestic Abuse Act and work of the Sefton Domestic Abuse Partnership Board to date. The report set out the background to the matter; an overview of the Domestic Abuse Act; local authority statutory duties within the Act; the roles and responsibilities of the Sefton Domestic Abuse Partnership Board; links to other national/statutory guidance; and cross-partnership collaboration.
  - **Children's Services Improvement Programme** - the Committee considered a report that updated on progress made and presented the Performance Dashboard for consideration. The report set out details of progress and priorities for the next quarter.
  - **Early Help Services** - the Committee considered a report that provided an update on the work to review Early Help Services and set out an approach to present to Members of the Committee. The report detailed the background and current position.
  - **Education Excellence Strategy for Sefton 2022-2027** - the Committee considered a report that presented the Education Excellence Strategy for Sefton 2022-2027. The development of the Strategy, together with the proposed next steps in terms of programme development were also set out. The report would also be considered by the Cabinet at its next meeting.
  - **Ofsted Inspection Reports** - the Committee considered a report updating on recent Ofsted Inspection Reports and the work of the School Improvement Team.
  - **Cabinet Member Update Reports** - the Committee considered, as is the usual practice, the most recent reports from the Cabinet Members for Children's Social Care and – Education.
  - **Work Programme** – the report sought the views of the Committee on the Work Programme for 2022/23; noted the progress of the Impact of Covid 19 on the Primary Curriculum Working Group; sought the views of the Committee on the re-establishment of the Secondary School Performance and Attainment Working Group; sought the views of the

Committee on holding informal briefing sessions during 2022/23, rather than establish a traditional working group;
requested the identification of any items for pre-scrutiny by the Committee from the latest Key Decision Forward Plan; updated on the Liverpool City Region Combined Authority Overview and Scrutiny Committee; and noted the position of the Parent Governor Representatives that sat on the Committee.

- **Overview and Scrutiny Committee (Regeneration and Skills)**
  A meeting of the Committee was held on 28 September 2022. A summary of the key issues considered at the meeting is **provided** below:

  - **Domestic Abuse Update** - the Committee considered a report updating on Sefton's strategic approach to tackling domestic abuse, including an overview of the Domestic Abuse Act and work of the Sefton Domestic Abuse Partnership Board to date. The report set out the background to the matter; an overview of the Domestic Abuse Act; local authority statutory duties within the Act; the roles and responsibilities of the Sefton Domestic Abuse Partnership Board; links to other national/statutory guidance; and cross-partnership collaboration
  - **Winter Maintenance Policy and Operational Plan** – the Committee gave consideration to the revised Winter Maintenance Policy and Operational Plan policy document for 2022/23. The Committee endorsed the policy
  - **United Kingdom Shared Prosperity Fund** – the Committee considered a report that provided an update on the United Kingdom Shared Prosperity Fund (UKSPF) and the potential implications of the introduction of this funding for Sefton and the Liverpool City Region (LCR). With regard to the nominal allocations per local authority area as detailed in paragraph 2.1 of the report, the Committee asked that Sefton's representatives on the Liverpool City Region Combined Authority Overview and Scrutiny Committee be requested to seek clarification from the Combined Authority on the funding formula resulting in Sefton receiving 16.8% of the total allocation, in comparison with Liverpool's receipt of 33.2%.
  - **Housing Support Services to Vulnerable People Working Group** - the Committee considered a report setting out progress made against each of the recommendations formulated by the Housing Support Services to Vulnerable People Working Group and approved by Cabinet and Council.
  - **Effectiveness of the Council's Enforcement Activity Working Group** - the Committee considered a report setting out progress made against each of the recommendations formulated by the Effectiveness of the Council's Enforcement Activity Working Group and approved by Cabinet and Council. The Committee were not satisfied with some of the responses contained in the report and asked that the Cabinet Member – Locality Services and the Cabinet Member – Regulatory, Compliance and Corporate Services to give further consideration to the implementation of the recommendations referred to in the report and report their findings to the next meeting of the Committee
  - **Work Programme** - the report sought the views of the Committee on the Work Programme for 2022/23; the identification of potential topics for scrutiny reviews to be undertaken by a Working Group(s) appointed by the Committee; the identification of items for pre-scrutiny by the Committee from the Key Decision Forward Plan; updated on the Liverpool City Region Combined Authority Overview and Scrutiny Committee; and updated on issues considered at previous meetings of the Committee.

- **Overview and Scrutiny Committee (Regulatory, Compliance and Corporate Services)**
  A meeting of the Committee was held on 22 September 2022. A summary of the key items considered at the meeting is provided below:

  - **Member Development Programme** - a presentation on Members' training and development that provided information on E-learning courses that lasted between 45 minutes and 1 hour; shorter courses oefton Corporate Learning Centre that

lasted 30 minutes; how to enrol on an E-learning course; difficulties experienced by Members logging onto Me-Learning and help that could be provided via the Member Development Handbook; and password requirements in accordance with the ICT Acceptable Use Policy

- **Levels of discipline, grievance, dignity at work and sickness absence** - The report indicated that the management of the workforce was an important activity to ensure outcomes for Sefton's communities were achieved and to ensure that the workforce was appropriately managed and motivated
- **Financial Management 2022/23 to 2024/25 and Framework for Change 2020 - Revenue and Capital Budget Update 2022/23 – September Update** – this was the usual report submitted to each meeting setting out the latest position with regards to the Council's revenue budget and capital programme
- **Work Programme** - the report sought the views of the Committee on the Work Programme for 2022/23; the identification of potential topics for scrutiny reviews to be undertaken by a Working Group(s) appointed by the Committee; the identification of items for pre-scrutiny by the Committee from the Key Decision Forward Plan; updated on the Liverpool City Region Combined Authority Overview and Scrutiny Committee; and updated on issues considered at previous meetings of the Committee.
- **Welfare Reform and Anti-Poverty Reference Group** - The update provided information on the latest meeting of the Welfare Reform and Anti-Poverty (WRAP) Cabinet Member Reference Group and in particular on activities associated with the cost-of-living crisis; community pantry; childhood poverty in Sefton; feedback from Marmot work; council tax energy rebate; Emergency Limited Assistance Scheme; child poverty and children entering care; household support grant; healthy start voucher uptake; a request for action that period poverty be discussed at the next WRAP meeting
- **Cabinet Member Update Report** - The Committee considered, as is the usual practice, the most recent report from the Cabinet Member – Regulatory, Compliance and Corporate Services.

- **Overview and Scrutiny Management Board**
  The last meeting of the Management Board, scheduled to be held on 13 September 2022 was cancelled. The matters discussed at the meeting prior to this on 21 June 2022 were reported as part of the last cabinet Member update. The next meeting of the Management Board will be held on 8 November 2022.

- **Liverpool City Region Combined Authority Overview and Scrutiny Committee**
  A meeting of the Committee was held on 7 September 2022. A summary of the key items considered at the meeting is provided below:

  - Portfolio Holder Update - Business Support
  - Race Equality Programme
  - Recommendations of the Improving Disability Employment Opportunities in the Liverpool City Region Task and Finish Group
  - Work Programme Update

The next meeting of the Committee is scheduled to be held on 9 November 2022. Information on all meetings and membership of the LCRCAO&S can be obtained using the following link

https://moderngov.merseytravel.gov.uk/ieListMeetings.aspx?CId=365&Year=0
At the Council meeting held on 29 September 2022, Councillor Howard was appointed as the Council's Scrutiny Link on the Committee in place of Councillor Waterfield.

The Section has also continued to organise and clerk school admission appeal hearings and school exclusion reviews.

The start of the new academic year continues to be an extremely busy time for the Clerk to Education Appeals. Between September and October 66 LEA appeals were scheduled, and 4 Diocese (Church of England voluntary aided schools) appeals were scheduled. Two full days (potentially 20 appeals) for Archdiocese (Catholic voluntary aided schools) appeals are scheduled for the week commencing 31 October 2022.

The Local Government Ombudsman can investigate complaints about 'maladministration' and 'service failure'. In July 2022, following an unsuccessful appeal to an Archdiocese school, a parent submitted a complaint to the Local Government Ombudsman regarding their appeal, alleging the Panel did not properly consider their appeal for a place for her child, and that the system 'failed her'.

The Ombudsman conducted an initial assessment, based on:

- o the parents' complaint;
- o the Clerk's notes of the hearing; and
- o the Clerk's letter containing the decision of the Panel.

The Ombudsman concluded that they will not conduct a full investigation into the complaint as 'It is unlikely the Ombudsman would find fault which caused them to lose out on a school place.'

Legislation that enabled school appeals to be heard remotely were brought in under Covid rules. Initially this change was due to last until 30 September 2022. However, following consultation, the changes to school appeals have been made permanent and they will continue to be held remotely. The arrangements proved popular with Panel members and officers with virtually no negative feedback from parents/guardians.

- **Civic and Mayoral Services**

The Mayoral Office was extremely busy following the sad death of Queen Elizabeth II on 8 September 2022 and was heavily involved in the Council's activities undertaken under Operation London Bridge along with other officers across the various Council departments.

The key activities undertaken by the Mayoral Office were:

- Setting up of Books of Condolence in Bootle Town Hall and The Atkinson, Southport.
- Arrangements for the raising and lowering of the Union Flags at Bootle Town Hall, Southport Town Hall, and Waterloo Town Hall at the key times during the plan.
- Co-ordination of the attendance of the Mayor and other Council representatives at the following events in liaison with the Merseyside Lieutenancy Office:
- Merseyside Proclamation by the High Sheriff of Merseyside at the Liverpool Parish Church on 11 September 2022 and the reading out of the Proclamation by the Mayor at Bootle Town Hall and Southport Town Hall on the same day.
- the Requiem Mass for Her Late Majesty at the Metropolitan Cathedral of Christ the King, Liverpool on 13 September 2022.
- the Service of Celebration for Her Late Majesty at the Liverpool Cathedral on 18 September 2022.
- the 'Memorial on the Mersey' event on 14 September 2022 with the Mayors' of all the Merseyside local authorities, when 20 ships on the River Mersey sounded their horns in sync, in honour of Her Late Majesty.

The Mayoral Office is currently preparing the arrangements for the following Civic events:

- Mayoral Charity Quiz Night at the Bootle on 3rd November 2022.

- Charity World Cup Sweepstake, which will be launched on 1st November 2022.
- Organisation of the four main Remembrance Sunday Services on 13th November 2022 at Bootle, Five Lamps, Crosby and Southport and the attendance of Council representatives at the 7 other locations.
- Production and circulation of Mayoral Christmas Cards.
- Freedom of the Borough event at Bootle Town Hall on 26 January 2023 for the four Hospital NHS Foundation Trusts for both providing key services within the Borough of Sefton and for their response during the pandemic.

- **Member Development**

    1.   Member Development Programme

    The recent feedback report on the LGA Corporate Peer Challenge Re-visit in April 2022 commended the various steps that had taken place since the last Peer Challenge visit to support Member Development more widely across the Council and in particular on the member induction programme and Planning Committee training was very pleasing to see.

    2.   Member Development Steering Group

    The LGA welcomed the establishment of the cross-party Member Development Steering Group which would provide additional cross-party input and focus and could be a real strength for the Council.

    Membership of the Steering Group has been finalised comprising representatives from each Political Group on the Council and the first meeting will held on 1 November 2022.

Electoral Services
Annual Canvass of the Register of Electors
The annual canvass to update the register of electors is underway and initial contact has been made with the 130,500 residential properties on our register database. Work will continue through the autumn months to update the register with those areas with substantial new developments being targeted as well as promoting electoral registration with young people. The new 2023 Register of Electors will be published on the 1 December 2022.

Linacre Ward
Following the passing of Councillor Gordon Friel, there is a vacancy for the office of Councillor in Linacre Ward. The Returning Officer has now published a Notice of Vacancy. A by-election will be held if the Returning Officer receives a request from two local government electors from within the area of Sefton. If no requests are received, then the vacancy will be filled at the next round of local elections on Thursday 4 May 2023.

Elections Act 2022
Progress of the Elections Act 2022 has been relatively slow, despite a huge amount of work being undertaken to develop policy to introduce each new element of the Act. This was also impacted by Ministerial changes. The new Secretary of State for Levelling up, Housing and Communities is The Rt Hon Greg Clark MP with strategic oversight of the Department's business. The Minister of State at the Department of Levelling Up, Housing and Communities and Minister for London: Paul Scully MP with responsibility for the Electoral Integrity Programme.
Ministers have made some key decisions which are summarised below:
1. Voter identification implementation has been moved from December 2022 to January 2023. The policy will be in place for scheduled polls in May 2023 and the voter card application service is expected to go live in January 2023.
2. Postal vote handling and secrecy measures will now be implemented after the May 2023 polls. They will most likely come into force in Aut

3. The voter card, or electoral identification document, could be an A4 paper-based document with inherent security features, such as watermarks and holograms.

4. The voter card application deadline will be six working days ahead of a poll. This will enable central production and delivery management, removing pressure on local authorities in the immediate lead-up to a poll.

5. Electoral Registration Officers will be able to appoint an emergency proxy up until 5pm on polling day for electors whose photo ID is no longer available to them after the application deadline (in the case of their voter id being lost or destroyed).

The delay in pushing back the implementation of Voter ID to January 2023 will have a significant impact on preparations for the May 2024 elections as its introduction will coincide with other key time events in the run up to the elections.

A Voter ID card will only be required if electors don't hold requisite means of photographic identification. Further details will emerge once secondary legislation is in place and guidance issued on implementation of this part of the Act.

Other measures which will be introduced:

1. Change of voting and candidacy rights for EU citizens – June 2023
2. Online Postal Vote Applications – July 2023
3. Remove the 15-year ceiling for overseas electors – July 2023
4. Requirement for existing postal voters to re-apply every 3 years – January 2024
5. Limit the numbers or electors someone can act as a proxy for – May 2024

Boundary Reviews

The Boundary Commission for England have now confirmed that an electoral review of Sefton will take place starting in March 2023

It is nearly 20 years since our last review, which culminated in all-out elections in 2004. The outcome of the review will be the Commission recommending to government the number of councillors we have and the number and geographical make-up of the wards in the borough. The Commissioners will consider the warding arrangements in the borough based on the principles of equality of electors, community identity and the effectiveness and convenience of local government. Interestingly, unlike parliamentary reviews which are based on factual evidence from an earlier point in time, they will base their recommendations on the estimated borough population in 2029.

The process will start in March 2023 with final recommendations going to government in April 2024 in time for all-out elections in 2026 (we have a fallow year in 2025).

The Boundary Commissioners will brief all Members on 17 November 2022 via a Teams meeting. The Council have recently received a request from Thornton Parish Council to undertake a Community Governance Review to consider proposals to extend the existing parish boundaries. In light of the Boundary Commission undertaking a review of Sefton, Thornton Parish Council have been advised that their request and any similar requests to create new parish or amend existing boundaries will be postponed until the Boundary Commission finals recommendations have been agreed and actioned.

The Parliamentary Boundary Review is still scheduled to be completed in July 2023. The next Parliamentary General Election must be called no later than December 2024.

Legal Services

- **Children and Social Care Team**

The Children's and Social Care Team have worked through a very difficult period for the client departments and continues to face unprecedented levels of demand on the service. The impact of the pandemic has brought increased pressures and there has been a significant rise in court proceedings which has been a very challenging time for the team. Nationally there has been a significant and sustained rise in children being deemed at risk during Covid and Sefton have had a rise in care proceedings during this period which together with cases not being able

to be concluded due to Covid restrictions has brought increased workloads for the team. There also continues to be a rise in cases with an international element.

- **Contracts**

The Legal Contracts team remains extremely busy, uniquely supporting procurement and contracting activity across the entire spectrum of Council departments and services and having to prioritise limited resource based on the complexity/value/risk of particular projects and contracts.

The team continues to provide essential legal support and play a key role in helping to shape and structure major development and regeneration projects under the Growth Plan, in particular the MLEC project, other regeneration projects in Southport and Bootle, and the continuing transformation of the CLAC. An increasing amount of capacity is being dedicated to the Council's efforts to transform its social care and public health services, including reviewing the positions under existing contracts/services and proactively helping to structure new services including the Council's first ventures into establishing its own tailored frameworks/dynamic purchasing systems.

The team continues to be busy advising on a stream of ICT-related work, often to very tight timeframes where service continuity is essential. The stream of highways and infrastructure work continues apace in particular advising around the latest round of LCRCA grant funding on various highway schemes, and also many works/construction-type projects both for the Council itself and for schools which are very often critical in nature and risk even if modest in value.

The team continues to be heavily involved in advising on the Council's commercialisation ventures including initiatives, and the nuanced issues around how the Council interacts with its wholly-owned companies such as SHOL, Sandway, SND and advising on the pros and cons of different commercialisation options, e.g. proposals for food & drink concessions involving SHOL.

The team is also advising on the Council's initiatives to re-enter the council housing market including potential grant funding from Homes England and other housing support programmes, and on the subsidy control aspects of many funding schemes including the Government's 'Levelling Up' agenda. The after-effects of Covid pandemic continues to impact the Council's procurement and contracting activity which Legal Contracts supports, including ongoing variations reacting to the pandemic, extensions of existing contracts to endure service continuity in a sub-optimal market for fresh procurement) and numerous post-Covid recovery schemes particularly around social care provision, work restart schemes, mental health schemes, etc.

Brexit also continues to have a transformative effect on the Council's contracting and procurement activity and Legal Contracts continues to provide proactive advice around forthcoming changes to the UK's public procurement regime (both the general regime, and the proposals for a bespoke health and social care regime) and new subsidy control (formerly state aid).

The Legal Contracts team also continues to provide strategic advice on best practice and risk mitigation in light of the Caller Report, especially around the Council's development and regeneration projects including advising commissioners on procurement best practice to mitigate scope for procurement challenges.

- **Prosecutions and Regulation**

The Litigation and Regulatory team continue to be busy working across a range of prosecution, regulation, information and compliance issues supporting a wide range of Council functions. The Prosecution team successfully resisted an appeal against refusal of a taxi licence in the magistrates' court, obtained two warrant of entry's and the sundry debt team recovered £11, 271.53, giving a total of £145, 5021.16 recovered this year.

The team also provides employment law advice on a range of day to day and strategic matters for both the Council and the schools in the Borough. The team also have conduct of all of the Council's employment tribunal cases and a broad range of cases for schools under service level agreements. The team has been providing strategic support on high profile employment work including recruitment issues and incentives in Children's Services and a proposal to apply for immigration sponsorship licenses for overseas social workers.

- **Property and Planning**

The Property team continue to have a heavy caseload, and have by way of example, just concluded 2 large projects with sizable capital receipts for the Council, namely the sale of land at Holgate netting £6,195,077.00 (50% received now, £3,097,538.50 (50%) deferred, and paid in 12 months' time. And sale of the Bates Dairy (Broome Road) site which has netted an additional £225,000; and nearly £15,000 in legal fees combined.

PERSONNEL DEPARTMENT

Operational Issues

Advice and support are provided to all service areas regarding employment/staffing matters.

Predominantly, work and support are focused on Children's Social Care. There is a small, dedicated HR team in Children's Social Care providing advice and guidance on all staffing issues. The challenge continues to be the recruitment and retention of Social Work staff combined with developing improvements in the service area overall.

The majority of the HR team are working from home with agile working at office sites as required and in accordance with the advice and guidance from the Health and Safety team.

Matters relating to disciplinary, grievance and dignity at work continue to be lesser than usual. Formal meetings are being held via Microsoft Teams, although in person meetings are arranged as necessary. Advice and support in the management of sickness absence continues and formal action under the sickness absence policy is being taken, again via Microsoft Teams but can be arranged in person as necessary.

Operational Teams appreciate the need for sensitive advice given the pressures on Employees and the Authority.

Pay & Grading and Establishment Control Team

Job evaluation is undertaken relative to all Council and School posts for new or revised roles and relative to any operational and service reviews to maximise efficiencies as part of restructuring exercises across the Council. Team members are involved in service reviews and work to support transformational proposals and potential changes to service delivery.

The Establishment Control team are responsible for building any revised structures and changes to reporting hierarchies into the Councils opems. The Managers Self Service (MSS)

module was rolled out in April 22 to include Children's services following a full review of the CS structure, and consequently managers should be able to access all their direct reports.

The Establishment Control deal with all requests in relation to the release of vacancies, changes of hours, temporary arrangements. These changes are mapped to ensure correct payments are made, hierarchical organisational structures are appropriate and operational processes are effectively maintained. A review of the EC forms used by managers has been completed and a revised suite of forms and guidance is now available for use.

Establishment Control review safeguarding checks held against posts e.g. Disclosure and Barring Service, Health Care Professional Council (HCPC) etc and the team manages and controls the temporary end dates relative to all fixed term contracts and provides establishment control information reports for the Council and schools.

Regrading applications and appeals are processed in line with the Council protocol.

The team undertakes the review of HAY graded positions for new posts and the evaluation of HAY posts stemming from any revised proposals to the HAY grading structure.

The team manage the Matrix contract relative to the recruitment of Agency workers. Agency recruitment is currently at an all-time high relative to social worker and associated positions especially within Children's Services

The team manage sickness absence data, including production of management reports, sickness absence analysis and quarterly absence figures for SLT.

Officers are involved with Employment Tribunal claims (approx. 580) relative to employees seeking backdating of amendments to Term Time Only salary calculations. Consultations are underway in relation to the potential settlement of these claims following the recent Court of Appeal case.

Within the Policy unit the officers undertake regular reviews of policy, procedures and guidance and introduce new policies as required in line with current legislation. They are also involved in Corporate Equalities initiatives, staff support groups, responding to Freedom of Information and subject access requests, and assistance with mandatory training for managers.

Transactional HR Payroll & Pension (THRP) Services

There are still issues with Monthly Data Collection (MDC) for the Local Government Pension Scheme (LGPS) which we are working with MHR and Merseyside Pension Fund to resolve. The last file to be sent was for April 2022. Issues have also been found with Teachers MDC and a meeting is to be held with MHR regarding resolving issues.

The staff are still learning the new system are still working extremely hard and long hours to ensure all staff are paid on time.

There are backlogs in the teams due to process and resource issues and all work is being prioritised. The service is currently looking at the feasibility of bring in some additional resources (temporarily for 12 months) to try to clear the backlogs being caused by issues with the new system. There will then be a structural review of the resources required for the service, based on the appropriate knowledge transfer having taken place.

Teachers Pensions Monthly data collection (MDC) move to Monthly Contribution Reconciliation (MCR) has been delayed until 1st April 2023 and a further delay may be requested as the iTrent software has several known issues.

The Local Government pay award from 1st April 2022 is still to be settled and is expected to be agreed end of October and if this is the case it will be processed in December 2022 with back pay from April 2022.

Children's Services.

A designated Children's Services Team has been established within Corporate HR. Working as Business partners the team will provide professional HR support and advice to Children's Social Care, Education Excellence and Sefton Schools.

Children's Social care is continuing with their improvement journey and the team are also continuing to support in a number of different projects including; recruitment activities and incentives, reviews of teams and establishment, the launch of the Social Work Academy, exploration of International Social Workers and many more. The team is also supporting with exit and movement interviews with an aim to gather some current data that will support improvement and recruitment and retention moving forward. The Learning and Development team have supported the Service areas in the creation and launch of an induction policy specifically for the Service which compliments Sefton's generic induction programme.

Education Excellence functions are being reviewed and is due to undergo an SEN inspection in spring. The team will support the service area with anything that may arise out of either.

The Schools Team operate an SLA with Sefton schools and receive 100% buy back demonstrating the value of the service. There are three Sefton Schools who are due to academies, two voluntarily and under an academy order. Unfortunately the team have received notice to end the SLA's as the trusts that the schools are joining have their own HR. Working closely with Sefton Legal Services work is underway however to introduce a disengagement free for schools opting to convert to academies.

Health Unit

During August and September 2022, a total of 108 referrals for SMBC employees were made to the Health Unit. This is a decrease of 11.34% when compared to the same period in the previous 12 months in which there were 97 referrals.

Referrals during this latest period included Education Excellence (28.70%), Operational In House Services (25.93%), and Adult Social Care (12.96%). As usual the main reasons were stress and mental health related (53.70%), musculoskeletal (24.07%) and chronic medical illness (16.67%).

Face to face appointments for the OH Nurse commenced in August and OH Physician appointments are due to resume on 17 November. Both clinicians will offer a hybrid service via telephone and video calls and face to face appointments all of which will be triaged based on the nature and the circumstances of individual cases.

It is hoped that face to face counselling and Cognitive Behavioural Therapy sessions will follow fairly quickly.

Workforce Learning and Development (CLC)

Apprenticeships

Staff enrolled on the **Level 6 Social Work Apprenticeship Degree** and the **Level 7 Senior Leader Apprenticeship Degree programme (MBA)** are continuing with their studies and are making good progress.

Agenda Item 9

We recruited two Occupational Therapy (OT) trainees in September 2022 to join the **Level 6 Occupational Therapy Degree** in March 2023. The degree will take 3 years to complete and on completion the trainees will be able to register with the Health and Care Professions (HCPC) Council.

Training delivery

The Workforce Learning and Development Team continues to deliver a number of training programmes and initiatives. These include:

- **Corporate Mandatory Training** – this includes Equality and Diversity, Health and Safety, Safeguarding Adults Awareness, Safeguarding Children & Young People Awareness and Climate Change. Monthly reports are shared with ELT/SLB to encourage staff to complete these courses.
- **Mental Health First Aid (MHFA)** training delivery is going well. To date, we have trained 200 Sefton Council and schools' staff, an increase of 47 since the previous report (August 2022).
- **Training Needs Analysis / Performance Development Review –** the PDR cycle for 2022/23 begins 1st September 2022. To support this year's process, we produced an online survey to capture staff L&D needs and requirements – this was circulated with SLB on 30th September 2022. To support the PDR, we are producing an online reporting tool to capture the total number of PDR returns by service area.
- **LCRCA Race Equality Training** – working with the LCRCA and neighbouring LAs to develop a training programme to complement existing E&D awareness training. This will include the 'lived experience' to enable us to address the structural and systemic racial biases that exist in some organisations and to challenges micro aggressions and unconscious biases in the workplace. Sefton was allocated 225 places for the 1st phase of the training to commence December 2022, this will include a cross section of middle managers and hard to reach groups.
- **Corporate Induction** eLearning was launched on Friday 19th August. The eLearning will be for new starters joining the organisation and includes 3 modules: Module 1 provides an overview of the landscape and the people of Sefton; Module 2 includes the services provided by the Council and Module 3 provides information that supports employees initial period with the Council e.g., a range of services and resources available for new starters. 87 new starters have completed the course since its launch.

Workforce/Organisational Development

We have been supporting Children's Social Care with a number of workforce development actions following the recent Ofsted inspection:

- Produced a Corporate Induction Booklet specifically for Children's Services new starters.

We are supporting CSC senior management team to roll out a training programme to support the implementation of the Leeds Family Valued Model. This includes:

- **Relational Leadership Management Programme** to discuss and reflect on practice and management issues, and how to progress their own and their team members' understanding and application of a restorative practice approach.
- **Core Components for Effective Team Leadership** - Provides opportunities to focus on particular themes, which highlights findings from Ofsted reports, audits, case reviews and research continuously highlight as a Page 90 provement.

- **Restorative Practice Awareness / Principles into Practice** – this will introduce the main features of Restorative Practice and further develop restorative approaches in key areas of practice.
- **A series of Practitioner Briefings / Practice Forums** – provides opportunities to explore a specific piece of research or practice in depth e.g., Reimagining Child Welfare. Values and Principles and using Language.
- **Series of Practice Forums** which include SMART Planning and Review of Impact Plans, Restorative Practice Approach to Domestic Violence, Family Led Decision Making, Voice of the Child.

Courses are being added to Me Learning and we are sending out comms to various audiences to ensure staff sign up to the programmes that are relevant to them.

We delivered a Culture session to a cross section of Senior Managers to explore our culture and our teams from different perspectives (organisational, own peer group, service areas) and looking to the future which included the positive elements of Sefton's culture now. We are planning to replicate these sessions with a cross section of middle managers some time in the Autumn of 2022.

Strategic Support
Business Intelligence

The Business Intelligence team is continuing to support many work streams across the Council including Economic Regeneration, Education Excellence, Adult Social Care, Children's Social Care and Public Health Services. The team have developed a new performance framework for Children's Social Care and Adults Social Care services, using the recently implemented Data Warehouse and Power BI.

The team continues to support the Integrated Care System (ICS), leading on Population Health Management workstream and has now completed population health profiles for each Sefton Ward.

Progress continues with the implementation of the Council's new enterprise data warehouse platform, which will enable big data analytics. Staff have now been trained on the new tools and the team is beginning to inspect and wrangle the data that has been copied from the live systems into the new data warehouse, whilst continuing to develop new data models that can be reported through Power BI.

The Service continues to support consultation and engagement activities, respond to complaints and subject access requests in a timely manner and provide information, advice, and guidance across the Council on matters relating to information governance and data protection.

The project to digitise the Council's historic paper records continues at pace. All legacy records stored at disparate 3rd part locations have now been moved to the Council's preferred secured storage provider, taking opportunity to destroy legacy records and digitise those that are not required to be kept in original paper format. The team has recently begun to process legacy records stored at the former Thomas Gray School site.

Strategic Support

The team is now focused to providing support across the various services with policy & strategy development, service reviews and transformation activity, including support for the Council 2023 and supporting the Children's Social Care Improvement plan.

Members of the team are also supporting Children's Services team with the actions in the Improvement Plan and associated review work.

Agenda Item 9

Procurement

The Council Social Value Policy, having been approved is being rolled out, as appropriate, across our Procurement tendering processes. The team is currently waiting for the new Procurement Legislation to be finalised in Parliament, so we may ensure our Procurement Team are ready to adopt the changes in legislation to enable the Council to be fully compliant in our procurement procedures.

Communications

The Communications team were integral in ensuring the smooth rollout of the Council's plans for "Operation London Bridge", the plans for the Queen's passing and funeral arrangements.

The team also supported colleagues in Tourism in helping to promote the Musical Fireworks event in Southport, and were on hand when the decision was made to cancel the final night due to inclement weather.

The new Web Content Officer continues to make good progress on updating and reconfiguring the Council website.

A specific area of the website which captures all the information and advice residents may need about the Cost-of-Living support available has been created, along with a helpful factsheet for community leaders and elected members to share with Sefton Residents. Factsheet (sefton.gov.uk)

The Communications Team have been providing significant support to colleagues in Children's Services; most recently with support to launch the Children's Services Academy and the ongoing recruitment drive.

The team have been liaising with external partner agencies to implement "Operation Banger", the police-led operation in relation to Mischief Night, Halloween and Bonfire Night.

The team were delighted to support in the promotion of Sefton being awarded the Navajo Charter Mark for displaying good practice and commitment towards its LGBT+ staff and community.

Bootle and England football legend Alex Greenwood has now been immortalised with a huge mural in the heart of her hometown. The 29-year-old Euro 2022 winning Lioness said she was honoured to have a mural commemorating her sporting successes painted onto the front of 320 Stanley Road in Bootle, thanks to joint funding from Sefton Council and REPT Sports. The Comms Team will be integral to plans for an official unveiling in the coming weeks.

The team now looks ahead to plans to mark Remembrance Sunday, and the annual Mayor's Christmas Toy Appeal, along with a host of other Winter-related messages.