

# Agenda

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## Scrutiny Committee

Date: **Thursday 6 October 2016**

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Time: **6.00 pm**

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Place: **St Aldate's Room, Town Hall**

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For any further information please contact:

**Sarah Claridge, Committee Services Officer**

Telephone: 01865 529920

Email: [democraticservices@oxford.gov.uk](mailto:democraticservices@oxford.gov.uk)

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# Scrutiny Committee

## Membership

|              |                              |
|--------------|------------------------------|
| <b>Chair</b> | Councillor Andrew Gant       |
|              | Councillor Tom Hayes         |
|              | Councillor Jamila Begum Azad |
|              | Councillor Nigel Chapman     |
|              | Councillor Van Coulter       |
|              | Councillor James Fry         |
|              | Councillor David Henwood     |
|              | Councillor Jennifer Pegg     |
|              | Councillor Craig Simmons     |
|              | Councillor Sian Taylor       |
|              | Councillor Marie Tidball     |
|              | Councillor Ruth Wilkinson    |

The quorum for this Committee is four, substitutes are permitted.

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# AGENDA

Pages

**1 APOLOGIES FOR ABSENCE**

**2 DECLARATIONS OF INTEREST**

**3 WORK PLAN AND FORWARD PLAN**

Contact Officer: Andrew Brown, Scrutiny Officer Tel: 01865 252230  
abrown2@oxford.gov.uk

9 - 32

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| Background Information   |
| The Scrutiny Committee operates within a work plan which has been set for the 2016/17 council year. This plan will be reviewed at every meeting so that it can be adjusted to reflect the wishes of the Committee and take account of any changes to the latest <a href="#">Forward Plan</a> (which outlines decisions to be taken by the City Executive Board or Council).  |
| Why is it on the agenda?   |
| The Committee is asked to review and note its work plan for the 2016/17 council year.<br><br>The Committee is also asked to select which Forward Plan items they wish to pre-scrutinise based on the following criteria: <ul style="list-style-type: none"><li>• Is the issue controversial / of significant public interest?</li><li>• Is it an area of high expenditure?</li><li>• Is it an essential service / corporate priority?</li><li>• Can Scrutiny influence and add value?</li></ul> A maximum of three items for pre-scrutiny will normally apply. |
| Who has been invited to comment?   |
| <ul style="list-style-type: none"><li>• Andrew Brown, Scrutiny Officer</li></ul>   |






**4 REPORT BACK ON RECOMMENDATIONS**

Contact Officer: Andrew Brown, Scrutiny Officer Tel: 01865 252230  
abrown2@oxford.gov.uk

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| Background Information  |
| The Committee makes a number of recommendations to officers and decision makers, who are obliged to respond in writing.   |
| Why is it on the agenda?  |
| This item allows Committee to see the results of recent recommendations to the City Executive Board. Since the last meeting CEB has responded to scrutiny recommendations on the following items: |

|   |
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| <ul style="list-style-type: none"> <li>• OxLEP Strategic Economic Plan,</li> <li>• Credit Union Services,</li> <li>• Equality and Diversity (recommendation 15).</li> </ul> |
| Who has been invited to comment?  |
| <ul style="list-style-type: none"> <li>• Andrew Brown, Scrutiny Officer.</li> </ul>   |

## 5 DEVOLUTION PLANS FOR OXFORDSHIRE

35 - 40

Contact Officer: Andrew Brown, Scrutiny Officer Tel: 01865 252230  
 abrown2@oxford.gov.uk

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| Background Information   |
| The Scrutiny Committee has appointed a Review Group to examine devolution proposals for Oxfordshire. The Committee considered a proposed review scope in July 2016 and asked the Review Group to consider both consultant reports before proposing a tighter scope. The Review Group met on 19 September 2016 and questioned the Leaders and Chief Executives of the City and County Councils. |
| Why is it on the agenda?   |
| For the Scrutiny Committee to approve the revised scope of the Devolution Review Group. Also included is a list of evaluation criteria used in conducting the unitary studies.   |
| Who has been invited to comment?   |
| <ul style="list-style-type: none"> <li>• Councillor Marie Tidball, Chair of the Devolution Review Group.</li> </ul>  |

## 6 RECOMMENDATION MONITORING - INEQUALITY PANEL

41 - 70

Contact Officer: Val Johnson, Policy Team Leader Tel: 01865 252209  
 vjohnson@oxford.gov.uk

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| Background Information  |
| The Inequality Panel was chaired by Councillor Van Coulter and reported to the City Executive Board in July 2015. CEB responded to the recommendations in October 2015 and the Scrutiny Committee requested a progress update report after 12 months. |
| Why is it on the agenda?  |
| For the Scrutiny Committee to monitor progress and the implementation of agreed recommendations.  |
| Who has been invited to comment?  |
| <ul style="list-style-type: none"> <li>• Councillor Bob Price, Leader and Board Member for Corporate Strategy and Economic Development,</li> <li>• Val Johnson, Policy and Partnerships Team Leader.</li> </ul>                                       |

## 7 EDUCATIONAL ATTAINMENT

71 - 116

Contact Officer: Tim Sadler, Executive Director Community Services Tel: 01865 252101 tsadler@oxford.gov.uk

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| Background Information  |
| The Council commissioned independent research from Oxford Brookes University on the impacts of the Council's educational attainment investments in the poorest performing Oxford schools. The Scrutiny Committee has previously considered the Council's educational attainment programme and this item was included in the Scrutiny work plan for 2015/16. |
| Why is it on the agenda?  |
| For the Scrutiny Committee to consider the report on educational attainment. The Committee is asked to note the report and to provide any feedback on the Council's educational attainment investments.   |
| Who has been invited to comment?  |
| <ul style="list-style-type: none"><li>• Councillor Pat Kennedy, Board Member for Young People, Schools and Skills;</li><li>• Tim Sadler, Executive Director for Community Services;</li><li>• Deb McGregor, Oxford Brookes University.</li></ul>  |

## 8 REVIEW OF TREE MANAGEMENT POLICY

117 - 134

Contact Officer: Stuart Fitzsimmons, Parks and Open Spaces Manager sfitzsimmons@oxford.gov.uk

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| Background Information   |
| The Scrutiny Committee has asked for this item to be included on the agenda for pre-decision scrutiny. The Committee previously provided feedback on the Tree Management Policy in April 2016.                                 |
| Why is it on the agenda?   |
| The City Executive Board will be asked to approve the updated Tree Management Policy at its meeting on 13 October 2016. This is an opportunity for the Scrutiny Committee to make recommendations to the City Executive Board. |
| Who has been invited to comment?   |
| <ul style="list-style-type: none"><li>• Councillor Linda Smith, Board Member for Leisure, Parks &amp; Sport,</li><li>• Stuart Fitzsimmons, Parks and Open Spaces Manager.</li></ul>  |

## 9 FINANCE PANEL REPORT ON THE IMPACTS OF BREXIT

135 - 138

Contact Officer: Andrew Brown, Scrutiny Officer Tel: 01865 252230  
abrown2@oxford.gov.uk

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| Background Information  |
| The Finance Panel requested a report from the Head of Financial Services on the expected impacts on the Council of Brexit. The Panel considered this item in September. |
| Why is it on the agenda?  |
| For the Scrutiny Committee to review and comment on the report of the Finance Panel before it is submitted to the City Executive Board on 13 October 2016.              |
| Who has been invited to comment?  |
| <ul style="list-style-type: none"><li>• Councillor Craig Simmons, Chair of the Finance Panel.</li></ul>   |

## 10 MINUTES

139 - 146

Minutes from 5 September 2016

**Recommendation:** That the minutes of the meeting held on 5 September 2016 be APPROVED as a true and accurate record.

## 11 DATES OF FUTURE MEETINGS

Meetings are scheduled as followed:

### Scrutiny Committee

7 November 2016  
6 December 2016  
30 January 2017  
28 February 2017  
27 March 2017

All meetings start at 6.00 pm.

### Standing Panels

Housing Standing Panel – 9 November 2016, 5.00pm  
Finance Standing Panel – 8 December 2016, 5.30pm

## **DECLARING INTERESTS**

### **General duty**

You must declare any disclosable pecuniary interests when the meeting reaches the item on the agenda headed "Declarations of Interest" or as soon as it becomes apparent to you.

### **What is a disclosable pecuniary interest?**

Disclosable pecuniary interests relate to your\* employment; sponsorship (ie payment for expenses incurred by you in carrying out your duties as a councillor or towards your election expenses); contracts; land in the Council's area; licences for land in the Council's area; corporate tenancies; and securities. These declarations must be recorded in each councillor's Register of Interests which is publicly available on the Council's website.

### **Declaring an interest**

Where any matter disclosed in your Register of Interests is being considered at a meeting, you must declare that you have an interest. You should also disclose the nature as well as the existence of the interest.

If you have a disclosable pecuniary interest, after having declared it at the meeting you must not participate in discussion or voting on the item and must withdraw from the meeting whilst the matter is discussed.

### **Members' Code of Conduct and public perception**

Even if you do not have a disclosable pecuniary interest in a matter, the Members' Code of Conduct says that a member "must serve only the public interest and must never improperly confer an advantage or disadvantage on any person including yourself" and that "you must not place yourself in situations where your honesty and integrity may be questioned". What this means is that the matter of interests must be viewed within the context of the Code as a whole and regard should continue to be paid to the perception of the public.

\*Disclosable pecuniary interests that must be declared are not only those of the member her or himself but also those of the member's spouse, civil partner or person they are living with as husband or wife or as if they were civil partners.

a)

b)

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# SCRUTINY WORK PLAN

## October 2016 – May 2017

Published on: 28/09/16

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The Scrutiny Committee agrees a work plan every year detailing selected issues that affect Oxford or its inhabitants. Time is allowed within this plan to consider topical issues as they arise throughout the year as well as decisions to be taken by the City Executive Board. This document represents the work of scrutiny for the remainder of the 2016-17 council year and will be reviewed monthly by the Scrutiny Committee.

The work plan is based on suggestions received from all elected members and senior council officers. Members of the public can also contribute topics for inclusion in the scrutiny work plan by completing and submitting our [suggestion form](#). See our [get involved webpage](#) for further details of how you can participate in the work of scrutiny.

The following criteria will be used by the Scrutiny Committee to evaluate and prioritise suggested topics:

- *Is the issue controversial / of significant public interest?*
- *Is it an area of high expenditure?*
- *Is it an essential service / corporate priority?*
- *Can Scrutiny influence and add value?*

Some topics will be considered at Scrutiny Committee meetings and others will be delegated to two standing panels. Items for more detailed review will be considered by time-limited review groups.

The Committee will review the Council's [Forward Plan](#) at each meeting and decide which executive decisions it wishes to comment on before the decision is made. The Council also has a "call in" process which allows decisions made by the City Executive Board to be reviewed by the Scrutiny Committee before they are implemented.

**Scrutiny Committee and Standing Panel responsibility and membership**




| Committee / Panel  | Remit  | Nominated councillors   |
|--------------------|--|---|
| Scrutiny Committee | Overall management of the Council's scrutiny function. | Cllrs Azad, Chapman, Coulter, Fry, Gant (Chair), Hayes, Henwood, Pegg, Simmons, Taylor, Tidball & Wilkinson |
| Finance Panel      | Finance and budgetary issues and decisions             | Cllrs Fooks, Fry, Simmons (Chair) & Taylor  |
| Housing Panel      | Strategic housing and landlord issues and decisions    | Cllrs Goff, Henwood (Chair), Pegg, Sanders, Thomas & Wade, Geno Humphrey (tenant co-optee)                  |

**Current and planned review groups**

| Topic                            | Scope   | Nominated councillors                                 |
|----------------------------------|---|---|
| Budget review 2017/18            | To review the Council's 2017/18 draft budget and medium term financial strategy | Cllrs Fooks, Fry, Simmons & Taylor                    |
| Devolution plans for Oxfordshire | To scrutinise devolution proposals for Oxfordshire                              | Cllrs Coulter, Gant, Hayes, Simmons & Tidball (Chair) |
| Language schools                 | TBC   | TBC   |

**Indicative timings of 2016/17 review panels**

| Scrutiny Review                  | Aug     | Sept               | Oct                | Nov       | Dec                | Jan       | Feb | March | April | May |
|----------------------------------|---------|--------------------|--------------------|-----------|--------------------|-----------|-----|-------|-------|-----|
| Devolution plans for Oxfordshire | Scoping | Evidence gathering | Reporting          |           |                    |           |     |       |       |     |
| Budget review 2017/18            |         | Scoping            | Evidence gathering | Reporting |                    |           |     |       |       |     |
| Language schools                 |         |                    |                    | Scoping   | Evidence gathering | Reporting |     |       |       |     |

|   |                    |
|---|--------------------|
|  | Scoping            |
|  | Evidence gathering |
|  | Reporting          |

## SCRUTINY COMMITTEE

### 6 OCTOBER 2016 - PROVISIONAL REPORTS

| Agenda item                                  | Decision | Description  | CEB Portfolio                               | Report Contact                                    |
|--|----------|--|---|---|
| Recommendation monitoring - Inequality Panel | No       | To monitor progress and implementation following the recommendations of the Inequality Panel, which reported to the City Executive Board in July 2015.                 | Corporate Strategy and Economic Development | Val Johnson, Policy Team Leader                   |
| Educational attainment                       | No       | To consider an independent report on the Council's educational attainment investments produced by Oxford Brookes University.   | Young People, Schools and Skills            | Tim Sadler, Executive Director Community Services |
| Review of Tree Management Policy             | Yes      | The Tree Management Policy was adopted in 2008 and last reviewed in 2011. If the Tree Management Policy needs to be revised then a report will be submitted to the CEB | Leisure, Parks and Sport                    | Stuart Fitzsimmons, Parks and Open Spaces Manager |

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### 7 NOVEMBER 2016 - PROVISIONAL REPORTS

| Agenda item                            | Decision | Description  | CEB Portfolio                             | Report Contact                                       |
|--|----------|--|---|--|
| Air Quality                            | No       | To consider data on air quality in the City and ways of improving air quality in the worst areas (e.g. the city centre).               | Climate Change and Cleaner Greener Oxford | Mai Jarvis, Environmental Quality Team Manager       |
| Discretionary Housing Payments spend   | No       | To monitor Discretionary Housing Payments spend mid-way through the year.  | Customer and Corporate Services           | Paul Wilding, Programme Manager Revenue & Benefits   |
| Safeguarding Language School Students  | Yes      | Update on safeguarding arrangements for foreign language students studying in Oxford.  | Community Safety                          | Richard Adams, Community Safety & Resilience Manager |
| Annual Monitoring Report (AMR) 2015/16 | Yes      | This is the City Council's 12th AMR to assess the effectiveness of planning policies contained within Oxford's Local Development Plan. | Planning and Regulatory Services          | Rebekah Knight, Planner                              |

|  |     |   |   |  |
|--|-----|---|---|--|
| Sustainable Energy Action Plan (SEAP) for Oxford | Yes | This report will request approval of our aims, objectives and emission reduction target for the City and adoption of the action plan attached to the Sustainable Energy Strategy. | Climate Change and Cleaner Greener Oxford | Mairi Brookes, OxFutures Programme Manager |
| Digital Strategy                                 | Yes | Sets out the City Council's vision and strategy for delivering a world-class digital city.  | Customer and Corporate Services           | Neil Lawrence, Digital Development Manager |

## 6 DECEMBER 2016 - PROVISIONAL REPORTS

| Agenda item                         | Decision | Description  | CEB Portfolio                               | Report Contact                                 |
|-------------------------------------|----------|--|---|--|
| Recommendation Monitoring - Cycling | No       | To monitor progress and implementation following the recommendations of the Cycling Review Group, which reported to the City Executive Board in September 2015.  | Climate Change and Cleaner Greener Oxford   | Sophie Hearn, Contracts Manager                |
| Workplace parking levies            | No       | To consider the pros and cons of the proposed introduction of workplace parking charges in Oxford.   | Corporate Strategy and Economic Development | Andrew Brown, Scrutiny Officer                 |
| Corporate Plan 2017/2018            | Yes      | A new Corporate Plan for the period 2017/2018<br>· The pre-consultation draft report will be submitted to CEB in December 2016.<br>The post-consultation draft report will be submitted to CEB in February 2017. | Corporate Strategy and Economic Development | Caroline Green, Assistant Chief Executive      |
| Sustainability Strategy 2017        | Yes      | The report will provide the revised Oxford Sustainability Strategy, which will set out the vision for Oxford's sustainable future and steps we are required to take to deliver it.                               | A Clean and Green Oxford                    | Mai Jarvis, Environmental Quality Team Manager |
| Performance monitoring - quarter 2  | No       | Quarterly reports on Council performance against a set of corporate service measures chosen by the Committee.  | Corporate Strategy and Economic Development | Andrew Brown, Scrutiny Officer                 |

### 30 JANUARY 2017 - PROVISIONAL REPORTS

| Agenda item  | Decision | Description   | CEB Portfolio            | Report Contact  |
|--|----------|---|--------------------------|---|
| Leisure update   | No       | To receive a further update in response to the Committee's written questions to the Head of Community Services on leisure performance.                        | Leisure, Parks and Sport | Ian Brooke, Head of Community Services                            |
| Recommendation monitoring - Recycling rates                          | No       | To receive an update on the monitoring of recycling rates and the impacts of the Blue Bin Recycling League following a site visit to the Waste Services Team. | A Clean and Green Oxford | Jeff Ridgley, waste Services Business Development & Fleet Manager |
| Grant Allocations to Community and Voluntary Organisations 2017/2018 | Yes      | This report is for the City Executive Board to make decisions on the allocation of grants to the community and voluntary organisations for 2017/2018.         | Culture and Communities  | Julia Tomkins, Grants & External Funding Officer                  |

### 28 FEBRUARY 2017 - PROVISIONAL REPORTS

| Agenda item                        | Decision | Description   | CEB Portfolio                               | Report Contact                       |
|------------------------------------|----------|---|---|--------------------------------------|
| Graffiti prevention                | No       | To consider the appreciative inquiry and focus group around graffiti and other initiatives to solve the issues long term. | Climate Change and Cleaner Greener Oxford   | Liz Jones, Interim ASBIT Team Leader |
| Performance Monitoring - quarter 3 | No       | Quarterly reports on Council performance against a set of corporate service measures chosen by the Committee.             | Corporate Strategy and Economic Development | Andrew Brown, Scrutiny Officer       |

## 27 MARCH 2017 - PROVISIONAL REPORTS

| Agenda item                              | Decision | Description  | CEB Portfolio                               | Report Contact                                       |
|--|----------|--|---|--|
| Recommendation Monitoring - Guest Houses | No       | To monitor progress and implementation following the recommendations of the Guest Houses Review Group, which reported to the City Executive Board in December 2015.                | Corporate Strategy and Economic Development | Richard Adams, Community Safety & Resilience Manager |
| Waterways Public Space Protection Order  | Yes      | The report will contain a proposal to the CEB to introduce a Public Spaces Protection Order for certain behaviours on the waterways within Oxford City's local authority boundary. | Community Safety                            | Richard Adams, Community Safety & Resilience Manager |
| Safeguarding Report 2017/18              | Yes      | An annual report to monitor the progress made on Oxford City Council's Section 11 Self-assessment Action Plan 2016-2017 and to approve the Action Plan for 2017-2018.              | Finance, Asset Management and Public Health | Val Johnson, Policy Team Leader                      |

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## 2 MAY 2017 - PROVISIONAL REPORTS

| Agenda item  | Decision | Description  | CEB Portfolio                               | Report Contact  |
|--|----------|--|---|---|
| Recommendation monitoring - Local economy  | No       | To monitor progress following the local economy review group, which considered Council support for city centre retailers.  | Corporate Strategy and Economic Development | David Edwards, Executive Director City Regeneration and Housing |
| Fusion Lifestyle's 2017/18 Annual Service Plan for the management of leisure facilities. | Yes      | The report will recommend that the City Executive Board endorse Fusion Lifestyle's Annual Service Plan for the management of the Council's leisure facilities for 2017/18. | Leisure, Parks and Sport                    | Lucy Cherry, Leisure and Performance Manager                    |

**JUNE 2017**

| <b>Agenda item</b>           | <b>Decision</b> | <b>Description</b>                       | <b>CEB Portfolio</b>             | <b>Report Contact</b>          |
|------------------------------|-----------------|--|----------------------------------|--------------------------------|
| Local Plan Preferred Options | Yes             | Progress of the review of the Local Plan | Planning and Regulatory Services | Sarah Harrison, Senior Planner |

**SCRUTINY COMMITTEE - TO BE SCHEDULED**

| <b>Agenda item</b>                     | <b>Decision</b> | <b>Description</b>  | <b>CEB Portfolio</b>                        | <b>Report Contact</b>                                |
|--|-----------------|---|---|--|
| Public Spaces Protection Orders        | No              | To monitor the impacts of PSPOs the city, including the numbers and types of early interventions and enforcement actions.   | Community Safety                            | Richard Adams, Community Safety & Resilience Manager |
| Assessing disabled impacts in planning | No              | To consider how the Council fulfils its duty to assess the impacts on disabled people of new developments and changes of use, including for businesses and private and social sector housing. | Planning and Regulatory Services            | Patsy Dell, Head of Planning & Regulatory Services   |
| Design Review Panel                    | No              | To consider the work and effectiveness of the Oxford Design Review Panel.   | Planning and Regulatory Services            | Patsy Dell, Head of Planning & Regulatory Services   |
| Disabled Students' Allowance           | No              | To consider the impacts of cuts to Disabled Students' Allowance on disabled students in the City.   | Corporate Strategy and Economic Development | Andrew Brown, Scrutiny Officer                       |
| Health and Wellbeing Board update      | No              | To receive an update on the work of Oxfordshire Health and Wellbeing Board by the Council's representative on the Board.  | Finance, Asset Management and Public Health | Val Johnson, Policy Team Leader                      |
| Police and Crime Panel update          | No              | To receive an update on police and crime scrutiny activities by the Council's representative on Thames Valley Police and Crime Panel (PCP).   | Community Safety                            | Andrew Brown, Scrutiny Officer                       |

## FINANCE PANEL

### 8 DECEMBER 2016 - PROVISIONAL REPORTS

| Agenda item  | Decision | Description   | CEB Portfolio   | Report Contact  |
|--|----------|---|---|---|
| Gross budgeting  | No       | To receive a briefing on gross council income and expenditure.  | Finance, Corporate Asset Management and Public Health | Nigel Kennedy, Head of Financial Services   |
| Budget monitoring - quarter 2  | No       | To monitor the Council's finances at the end of quarter 2 2016-17 (September).  | Finance, Corporate Asset Management and Public Health | Nigel Kennedy, Head of Financial Services   |
| Treasury Management Performance: Annual Report and Performance 2016/17                       | Yes      | This performance monitoring report on the Treasury Management Strategy: Annual Report and Performance 2016/17 is submitted twice a year: Dec 2016– the position at the 30 September 2016 (Half Year).           | Finance, Asset Management and Public Health           | Bill Lewis, Financial Accounting Manager  |
| Feasibility study for the development of a site for a Transfer Station for Recycled Material | Yes      | To present a feasibility study for the development of a site to operate a Council managed transfer station for City collected co-mingled recyclables, green waste, street arisings and engineering works spoil. | A Clean and Green Oxford                              | Geoff Corps, Cleaner Greener Services Manager, Fiona Piercy, Partnership & Regeneration Manager |

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### 16 JANUARY 2017 - PROVISIONAL REPORTS

| Agenda item     | Decision | Description   | CEB Portfolio                               | Report Contact                            |
|-----------------|----------|---|---|---|
| Service reviews | No       | To consider the outcomes of comprehensive reviews of a number of service area budgets undertaken as part of this year's budget setting process. | Finance, Asset Management and Public Health | Nigel Kennedy, Head of Financial Services |



|  |    |   |   |   |
|--|----|---|---|---|
| Funding mechanisms for affordable housing        | No | To consider alternative and innovative models for financing new affordable housing. | Finance, Asset Management and Public Health | Nigel Kennedy, Head of Financial Services |
| Scrutiny Budget Review 2017/18 - recommendations | No | To agree recommendations following the annual scrutiny budget review.               | Finance, Asset Management and Public Health | Nigel Kennedy, Head of Financial Services |

### 1 FEBRUARY 2017 - PROVISIONAL REPORTS

| Agenda item                          | Decision | Description   | CEB Portfolio                               | Report Contact                            |
|--------------------------------------|----------|---|---|---|
| Scrutiny Budget Review 2017/18       | No       | Review of the Councils draft budget for 2017/18 and medium term financial strategy.   | Finance, Asset Management and Public Health | Nigel Kennedy, Head of Financial Services |
| Capital Strategy 2017/18             | Yes      | To consider the Council's Capital Strategy for 2017/18.   | Finance, Asset Management and Public Health | Nigel Kennedy, Head of Financial Services |
| Treasury Management Strategy 2017/18 | Yes      | Treasury Management Strategy for 2017/2018, including prudential indicators. The post-consultation draft report will be submitted to CEB in February 2017 | Finance, Asset Management and Public Health | Bill Lewis, Financial Accounting Manager  |
| Divestment                           | No       | To consider an ethical policy on divestment.  | Finance, Asset Management and Public Health | Nigel Kennedy, Head of Financial Services |

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### 29 MARCH 2017 - NO REPORTS CURRENTLY SCHEDULED

## HOUSING PANEL

### 5 OCTOBER 2016 - PROVISIONAL REPORTS

| Agenda item                                     | Decision | Description  | CEB Portfolio | Report Contact                                     |
|---|----------|--|---------------|--|
| Housing performance - quarter 1                 | No       | To consider Council performance against a set of housing service measures chosen by the Panel.   | Housing       | Stephen Clarke, Head of Housing and Property       |
| Choice Based Lettings refusal reasons           | No       | To receive a briefing on reasons given by Choice Based Lettings applicants for refusing Council properties, including requests for minor adaptations.                          | Housing       | Tom Porter, Allocations Manager                    |
| Under-occupation in the Council's housing stock | No       | To receive an update on the levels of under-occupation in the Council's housing stock and efforts to reduce under-occupation, including support and incentives for downsizing. | Housing       | Bill Graves, Landlord Services Manager             |
| Energy Strategy - Housing & Property            | No       | To consider past, current and future work around energy in Housing, and Housing & Property's approach to Energy and fuel poverty in its own domestic housing stock.            | Housing       | Deborah Haynes, Energy Efficiency Projects Officer |

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### 9 NOVEMBER 2016 - PROVISIONAL REPORTS

| Agenda item                     | Decision | Description   | CEB Portfolio                               | Report Contact                               |
|---------------------------------|----------|---|---|--|
| Housing performance - quarter 2 | No       | To consider mid-year Council performance against a set of housing service measures chosen by the Panel. | Housing                                     | Stephen Clarke, Head of Housing and Property |
| Universities land management    | No       | To invite representatives of universities to discuss their approach to land management in the City.     | Corporate Strategy and Economic Development | Andrew Brown, Scrutiny Officer               |

|                                       |     |  |  |  |
|---------------------------------------|-----|--|--|--|
| Rent performance                      | No  | To monitor the Council's rents performance including current and former tenant arrears.  | Housing  | Tanya Bandekar, Service Manager Revenue & Benefits |
| Tower block refurbishment             | No  | To receive a progress update on the Tenant Scrutiny Panel's review of the tower block refurbishment project.   | Housing  | Stephen Clarke, Head of Housing and Property       |
| Houses in multiple occupations (HMOs) | No  | To consider the licensing of HMOs in the City including member oversight of HMO planning decisions (currently delegated) and rules around the numbers of rooms and the number of HMOs in the street etc. | Corporate Strategy and Economic Development          | Ian Wright, Service Manager Environmental Health   |
| Right to Buy Retention Funding        | Yes | Seeks approval for alternative mechanisms to use Right to Buy Retention Funding to avoid having to return any such funding to Department for Communities and Local Government (DCLG).                    | Finance, Asset Management and Public Health, Housing | Nigel Kennedy, Head of Financial Services          |

### 1 MARCH 2017 - PROVISIONAL REPORTS

| Agenda item                                 | Decision | Description   | CEB Portfolio             | Report Contact  |
|---|----------|---|---------------------------|---|
| Housing performance - quarter 3             | No       | To consider a report on Council performance against a set of housing service measures chosen by the Panel.  | Housing                   | Stephen Clarke, Head of Housing and Property              |
| Access to the private rented sector         | No       | To receive a briefing on Council support to people in receipt of Housing Benefit in accessing the private rented sector, including the rent guarantee scheme, Home Choice pilot and 'real lettings' property investments. | Housing                   | Dave Scholes, Housing Strategy & Needs Manager            |
| Rough sleeping                              | No       | To consider how the Council deals with people sleeping rough including those with no recourse to public funds.  | Community Safety, Housing | Ossi Mosley, Rough Sleeping & Single Homelessness Officer |
| Allocation of Homelessness Prevention Funds | Yes      | To agree the allocation of the homelessness prevention funds with the purpose of meeting the objectives of the homelessness strategy  | Housing                   | Ossi Mosley, Rough Sleeping & Single Homelessness Officer |

### 3 MAY 2017 - PROVISIONAL REPORTS

| Agenda item                           | Decision | Description   | CEB Portfolio | Report Contact   |
|---------------------------------------|----------|---|---------------|--|
| Great Estates update                  | No       | To receive an update on progress made in developing masterplans for estates and working up and delivering a rolling programme of priority improvement schemes.      | Housing       | Stephen Clarke, Head of Housing and Property           |
| Empty garages and former garage sites | No       | To receive an update on how the Council is dealing with empty garages and former garage sites.  | Housing       | Martin Shaw, Property Services Manager                 |
| Empty Property Strategy               | No       | To receive a briefing on the Council's approaches to dealing with empty properties in the City ahead of a refresh of the Council's Empty Property Strategy 2013-18. | Housing       | Melanie Mutch, Empty Property Officer (Private Sector) |

### HOUSING PANEL - TO BE SCHEDULED

| Agenda item                           | Decision | Description   | CEB Portfolio                               | Report Contact  |
|---------------------------------------|----------|---|---|---|
| Housing Revenue Account Business Plan | Yes      | To pre-scrutinise a decision on the Housing Revenue Account (HRA) business plan, which sets out projected income (from rents, service charges etc.) and expenditure on the Council's housing stock. | Finance, Asset Management and Public Health | Stephen Clarke, Head of Housing and Property                    |
| Housing Company for Oxford            | Yes      | To pre-scrutinise any decisions on funding the Housing Company for Oxford and monitor progress in the Company's first year of operation.  | Housing                                     | David Edwards, Executive Director City Regeneration and Housing |
| Private sector licensing              | Yes      | To pre-scrutinise any decisions on extending private sector licensing to non-HMO properties.  | Planning and Regulatory Services            | Ian Wright, Environmental Health Service Manager                |

|                           |     |  |         |  |
|---------------------------|-----|--|---------|--|
| Pay to stay               | Yes | To pre-scrutinise any decisions on the local implementation of government plans to increase rents for council and housing association tenants with incomes over £30,000 a year. This is known as “Pay to Stay”, and it is expected to start in April 2017 for council tenants. | Housing | Bill Graves, Landlord Services Manager       |
| Flexible tenancies        | Yes | To pre-scrutinise any decisions on the local implementation of government plans to prevent local authorities in England from offering secure tenancies for life to new council tenants in most circumstances.  | Housing | Bill Graves, Landlord Services Manager       |
| Leaseholder relationships | No  | To consider Council relationships with leaseholders including the views of individual leaseholders.  | Housing | Stephen Clarke, Head of Housing and Property |

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# FORWARD PLAN

## November 2016 – January 2017

Published on: 28/09/16

### What is the Forward Plan?

The Forward Plan gives information about all the decisions (key and non-key) that the City Executive Board (CEB) is expected to take over the next year. For completeness, the Forward Plan also includes important decisions which will be taken by the full Council.

The Forward Plan provides an indicative date for matters to be considered by CEB. Where possible, CEB will keep to the dates shown, however, it may be necessary for some items to be rescheduled.

The Forward Plan is published on the Council's website on the first working day of the month. However, it is subject to regular revision and new issues or changes to existing issues will be posted on the website as soon as they are known.

The Forward Plan includes:

- a short description of the decision to be made
- who will make the decision
- when the decision will be made
- details of the planned consultation with local people and other stakeholders
- contact details for further information

### What is a Key decision?

A key decision is an executive decision which is likely:

- to result in the council incurring expenditure of more than £500,000; or
- to be significant in terms of its effects on communities living or working in an area comprising of two or more wards.

A key decision, except in special or urgent circumstances, cannot be taken unless it has appeared in the Forward Plan for 28 days before the decision is made.

### Inspection of documents

The agenda papers (including the reports and background papers) for CEB meetings are available 5 working days before the meeting on the council website:

<http://www.oxford.gov.uk>

The Forward Plan is available to view at the Town Hall.

### Private meetings

The majority of the decisions taken by the CEB are made in the "open session" of a meeting when the press or public have the right to attend. However, some or all, of the information supporting decisions in the Forward Plan may be confidential and as such it will be taken in the "private session" a meeting when the press or public are excluded. Items that will be taken in "private session" are marked in this plan and the reason for doing so given.

If you object to an item being taken in private, or if you wish to make representations about any matter listed in the Forward Plan, then please contact Committee & Member Services at least 7 working days before the decision is due to be made:

T: 01865 252191

Email: [cityexecutiveboard@oxford.gov.uk](mailto:cityexecutiveboard@oxford.gov.uk)

### **The Council's decision-making process**

Further information about the Council's decision making process can be found in the Council's Constitution, which can be inspected at the Council's offices or online at

<http://www.oxford.gov.uk>

### **City Executive Board Members and Senior Officers**

| <b>City Executive Board Member</b> | <b>Portfolio</b>                            |
|------------------------------------|---|
| <b>Bob Price, Council Leader</b>   | Corporate Strategy and Economic Development |
| <b>Ed Turner, Deputy Leader</b>    | Finance, Asset Management and Public Health |
| <b>Susan Brown</b>                 | Customer and Corporate Services             |
| <b>Alex Hollingsworth</b>          | Planning and Regulatory Services            |
| <b>Pat Kennedy</b>                 | Young People, Schools and Skills            |
| <b>Linda Smith</b>                 | Leisure, Parks and Sport                    |
| <b>Mike Rowley</b>                 | Housing                                     |
| <b>Dee Sinclair</b>                | Community Safety                            |
| <b>Christine Simm</b>              | Culture and Communities                     |
| <b>John Tanner</b>                 | A Clean and Green Oxford                    |

| <b>Senior Officers</b> | <b>Job Title</b>  |
|------------------------|---|
| <b>Peter Sloman</b>    | Chief Executive   |
| <b>David Edwards</b>   | Executive Director, City Regeneration and Housing                     |
| <b>Tim Sadler</b>      | Executive Director, Community Services                                |
| <b>Jackie Yates</b>    | Executive Director, Organisational Development and Corporate Services |
| <b>Caroline Green</b>  | Assistant Chief Executive   |
| <b>Helen Bishop</b>    | Head of Business Improvement  |
| <b>Ian Brooke</b>      | Head of Community Services  |
| <b>Graham Bourton</b>  | Head of Direct Services   |
| <b>Nigel Kennedy</b>   | Head of Financial Services/Section 151 Officer                        |
| <b>Stephen Clarke</b>  | Head of Housing and Property  |
| <b>Jeremy Thomas</b>   | Head of Law and Governance / Monitoring Officer                       |
| <b>Patsy Dell</b>      | Head of Planning and Regulatory                                       |



## KEY EXECUTIVE DECISIONS DELEGATED TO OFFICERS

|   |  |
|---|--|
| <b>ITEM 1:</b>  | <b>HOUSING IMPROVEMENT AGENCY CONTRACT AWARD<br/>ID: I011842</b>                               |
| On 9 July 2015 the City Executive Board resolved to GRANT delegated authority to the Executive Director of Regeneration and Housing, in consultation with the Head of Financial Services and Head of Law and Governance to enter into an appropriate contract for the provision of a Home Improvement Agency. |  |
| <b>Is this a Key Decision?</b>  | Yes It is likely to result in the Council incurring expenditure which is greater than £500,000 |
| <b>Is this item open or exempt to the public?</b>   | Part exempt - Commercially Sensitive   |
| <b>Will this decision be preceded by any form of consultation?</b>  | None   |
| <b>Decision Taker</b>   | City Executive Board<br><br>Executive Director for Regeneration and Housing                    |
| <b>Executive Lead Member</b>  | Housing  |
| <b>Lead Executive Director</b>  | Executive Director for Regeneration and Housing  |
| <b>Report Contact</b>   | Ian Wright, Service Manager Environmental Health iwright@oxford.gov.uk                         |

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| <b>ITEM 2:</b>   | <b>ARRANGEMENTS TO FACILITATE THE FITTING OF SOLAR PANELS ON COUNCIL-OWNED HOUSING STOCK<br/>ID: I012328</b> |
| A solar panel installation programme for council properties funded through a community-benefit model.  |  |
| <b>May 2016:</b> Decision on hold due to changing national policy on Feed In Tariffs. The position will be review in February 2017 following an EU decision on solar panel import tariffs which may favourably impact the viability of the scheme.   |  |
| <b>October 2015:</b><br>On 15 October 2015 the City Executive Board resolved to:   |  |
| <ol style="list-style-type: none"> <li>1. <b>Grant project approval</b> to fit solar panels on Council-owned housing stock in the manner described in this report;</li> <li>2. <b>Delegate authority to the Chief Executive, in conjunction with the Head of Finance, to enter into an Agreement to Lease with the Low Carbon Hub IPS (on the basis that this would permit leases to the roof space of individual Council properties to be drawn up and executed if required) plus any ancillary agreement required; and to submit an appropriate VEAT notice to the EU; and</b></li> <li>3. <b>Agree</b> that on the basis of the matters set out in this report, the proposed arrangement with the Low Carbon Hub IPS represents best value to the Council.</li> </ol> |  |
| <b>Is this a Key Decision?</b>   | Yes It is likely to result in the Council incurring expenditure which is greater than £500,000               |
| <b>Is this item open or exempt to the public?</b>  | Open -   |
| <b>Will this decision be preceded by any form of consultation?</b>   | N/A  |

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| <b>Decision Taker</b>          | Chief Executive  |
| <b>Executive Lead Member</b>   | Climate Change and Cleaner Greener Oxford  |
| <b>Lead Executive Director</b> | Executive Director for Regeneration and Housing  |
| <b>Report Contact</b>          | Mairi Brookes, OxFutures Programme Manager<br>Tel: 01865 252212 mbrookes@oxford.gov.uk |

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|---|---|
| <b>ITEM 3:</b>  | <b>AWARD OF GOODS &amp; SERVICE CONTRACT: TO DELIVER ASPHALT AND AGGREGATES</b><br><b>ID: I014320</b> |
| To seek delegation to the Executive Director, Community Services authority to award a contracts to deliver: Asphalt and Aggregates to the Council |   |
| <b>Is this a Key Decision?</b>  | Yes It is likely to result in the Council incurring expenditure which is greater than £500,000        |
| <b>Is this item open or exempt to the public?</b>   | Part exempt -   |
| <b>Will this decision be preceded by any form of consultation?</b>  | None  |
| <b>Decision Taker</b>   | Executive Director for Community Services   |
| <b>Executive Lead Member</b>  | Finance, Asset Management and Public Health   |
| <b>Lead Executive Director</b>  | Executive Director for Community Services   |
| <b>Report Contact</b>   | Graham Bourton, Head of Direct Services<br>gbourton@oxford.gov.uk                                     |

## REPORTS TO CEB AND COUNCIL

### CEB 17 NOVEMBER 2016

|  |   |
|--|---|
| <b>ITEM 16:</b>  | <b>ANNUAL MONITORING REPORT (AMR) 2015/16</b><br><b>ID: I012651</b> |
| This is the City Council's 12th AMR to assess the effectiveness of planning policies contained within Oxford's Local Development Plan. |   |
| <b>Is this a Key Decision?</b>   | Not Key   |
| <b>Is this item open or exempt to the public?</b>  | Open -  |
| <b>Will this decision be preceded by any form of consultation?</b>   | No consultation. This is a factual report.                          |
| <b>Decision Taker</b>  | City Executive Board  |
| <b>Executive Lead Member</b>   | Planning and Regulatory Services                                    |
| <b>Lead Executive Director</b>   | Executive Director for Regeneration and Housing                     |
| <b>Report Contact</b>  | Rebekah Knight, Planner Tel: 01865 252612<br>rknight@oxford.gov.uk  |

|   |  |
|---|--|
| <b>ITEM 17:</b>   | <b>COMMUNITY INFRASTRUCTURE LEVY – NEIGHBOURHOOD FUNDS TOWARDS PEDESTRIANISATION OF QUEEN STREET</b><br><b>ID: I015238</b> |
| Approval for expenditure of CIL Neighbourhood portion on scheme for Queen Street Public Realm |  |
| <b>Is this a Key Decision?</b>  | Yes It is likely to result in the Council incurring expenditure which is greater than £500,000                             |
| <b>Is this item open or exempt to the public?</b>   | Open -   |
| <b>Will this decision be preceded by any</b>  |  |

|                                |  |
|--------------------------------|--|
| <b>form of consultation?</b>   |  |
| <b>Decision Taker</b>          | City Executive Board   |
| <b>Executive Lead Member</b>   | Planning and Regulatory Services   |
| <b>Lead Executive Director</b> | Executive Director for Regeneration and Housing                          |
| <b>Report Contact</b>          | Lorraine Freeman, Development Funding Officer<br>lofreeman@oxford.gov.uk |

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|---|---|
| <b>ITEM 18:</b>   | <b>DIGITAL STRATEGY</b><br><b>ID: I014934</b>   |
| Sets out the City Council's vision and strategy for delivering a world-class digital city across the key themes of: Digital Leadership; Digital by Design; Inclusion; Customer in Control; Supporting Business Growth; and Collaboration, supported by an action plan to articulate how the strategy will be delivered. |   |
| <b>Is this a Key Decision?</b>  | Yes It is significant in terms of its effect on communities living or working in an area comprising two or more wards   |
| <b>Is this item open or exempt to the public?</b>   | Open -  |
| <b>Will this decision be preceded by any form of consultation?</b>  | Consultation taking place during August/September with key stakeholders including digital networks, Oxford Strategic Partnership, business community and other public sector partners |
| <b>Decision Taker</b>   | City Executive Board  |
| <b>Executive Lead Member</b>  | Customer and Corporate Services   |
| <b>Lead Executive Director</b>  | Head of Business Improvement  |
| <b>Report Contact</b>   | Neil Lawrence, Digital Development Manager<br>nlawrence@oxford.gov.uk   |

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| <b>ITEM 19:</b>   | <b>SAFEGUARDING LANGUAGE SCHOOL STUDENTS</b><br><b>ID: I014835</b>                              |
| Update on safeguarding arrangements for foreign language students studying in Oxford. |   |
| <b>Is this a Key Decision?</b>  | Not Key   |
| <b>Is this item open or exempt to the public?</b>                                     | Open -  |
| <b>Will this decision be preceded by any form of consultation?</b>                    | None  |
| <b>Decision Taker</b>   | City Executive Board  |
| <b>Executive Lead Member</b>  | Community Safety  |
| <b>Lead Executive Director</b>  | Executive Director for Community Services   |
| <b>Report Contact</b>   | Richard Adams, Community Safety & Resilience Manager Tel: 01865 252283<br>rjadams@oxford.gov.uk |

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| <b>ITEM 20:</b>   | <b>RIGHT TO BUY RETENTION FUNDING</b><br><b>ID: I014800</b>                                    |
| Seeks approval for alternative mechanisms to use Right to Buy Retention Funding to avoid having to return any such funding to Department for Communities and Local Government (DCLG). |  |
| <b>Is this a Key Decision?</b>  | Yes It is likely to result in the Council incurring expenditure which is greater than £500,000 |

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| <b>Is this item open or exempt to the public?</b>                  | Open -  |
| <b>Will this decision be preceded by any form of consultation?</b> | None  |
| <b>Decision Taker</b>  | City Executive Board<br>Council   |
| <b>Executive Lead Member</b>                                       | Finance, Asset Management and Public Health,<br>Housing   |
| <b>Lead Executive Director</b>                                     | Head of Financial Services  |
| <b>Report Contact</b>  | Nigel Kennedy, Head of Financial Services Tel:<br>01865 252708 nkennedy@oxford.gov.uk, Alan<br>Wylde, Housing Development & Enabling<br>Manager Tel: 01865 252319<br>awylde@oxford.gov.uk |

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| <b>ITEM 21:</b>   | <b>REVIEW OF PARLIAMENTARY BOUNDARIES 2018<br/>ID: I015276</b>   |
| The report will detail the proposals from the Boundary Commission and the comments of the party groups on the City Council. |  |
| <b>Is this a Key Decision?</b>  | Yes It is significant in terms of its effect on communities living or working in an area comprising two or more wards                          |
| <b>Is this item open or exempt to the public?</b>   | Open -   |
| <b>Will this decision be preceded by any form of consultation?</b>  | The three party groups on the Council will be consulted via their respective leaders. This will take place from late-September to mid-October. |
| <b>Decision Taker</b>   | City Executive Board   |
| <b>Executive Lead Member</b>  | Corporate Strategy and Economic Development  |
| <b>Lead Executive Director</b>  | Chief Executive  |
| <b>Report Contact</b>   | Martin John, Electoral Services Manager Tel:<br>01865 252518 mjohn@oxford.gov.uk   |

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| <b>ITEM 22:</b>  | <b>SUSTAINABLE ENERGY ACTION PLAN (SEAP) FOR OXFORD<br/>ID: I011844</b>   |
| On 29 September 2014 Council agreed to support the Covenant of Mayors initiative and authorised the Lord Mayor to sign the Covenant adhesion form. By signing up to the Covenant of Mayors the Council committed to submit a Sustainable Energy Action Plan (SEAP) for the City of Oxford. The SEAP does not set any new targets but estimates our baseline emissions in 2005 and captures the actions and policies that the Council and its partners are implementing to reduce carbon emissions. These actions will help to meet the Council's target of reducing carbon emissions by 40% by 2020 across the whole city. This report will request approval of our aims, objectives and emission reduction target for the City and adoption of the action plan attached to the Sustainable Energy Strategy. |   |
| <b>Is this a Key Decision?</b>   | Yes It is significant in terms of its effect on communities living or working in an area comprising two or more wards |
| <b>Is this item open or exempt to the public?</b>  | Open -  |
| <b>Will this decision be preceded by any form of consultation?</b>   | Yes - Stakeholder workshops took place in February 2016   |
| <b>Decision Taker</b>  | City Executive Board  |

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| <b>Executive Lead Member</b>   | Climate Change and Cleaner Greener Oxford  |
| <b>Lead Executive Director</b> | Executive Director for Community Services  |
| <b>Report Contact</b>          | Mairi Brookes, OxFutures Programme Manager<br>Tel: 01865 252212 mbrookes@oxford.gov.uk |

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| <b>ITEM 23:</b>  | <b>COMMERCIAL WASTE COLLECTION CAPACITY<br/>ID: I014726</b>   |
| The Council is reaching its commercial wastes collection capacity and requires an additional recycling collection vehicle and operational crew. This report requests the funding for this. |   |
| <b>Is this a Key Decision?</b>   | Not Key   |
| <b>Is this item open or exempt to the public?</b>  | Part exempt -   |
| <b>Will this decision be preceded by any form of consultation?</b>   | Between Direct Services Waste & Recycling Operations and Finance Business Partners.   |
| <b>Decision Taker</b>  | City Executive Board<br>Council   |
| <b>Executive Lead Member</b>   | Councillor John Tanner  |
| <b>Lead Executive Director</b>   | Head of Direct Services   |
| <b>Report Contact</b>  | Ashley Buttress, Waste Operations Co-ordinator<br>Tel: 07824384247 abuttress@oxford.gov.uk,<br>Stuart Pohler, Recycling & Waste Operations<br>Manager Tel: 07824 384 247<br>spohler@oxford.gov.uk |

## COUNCIL 5 DECEMBER

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|---|---|
| <b>ITEM 24:</b>   | <b>OUTSIDE ORGANISATION/COMMITTEE CHAIR REPORTS: OXFORDSHIRE<br/>LOCAL ENTERPRISE PARTNERSHIP<br/>ID: I015278</b> |
| To update Council on the work of the Oxfordshire Local Enterprise Partnership for the year. |   |
| <b>Is this a Key Decision?</b>  | Yes   |
| <b>Is this item open or exempt to the public?</b>   | Open -  |
| <b>Will this decision be preceded by any form of consultation?</b>                          | None  |
| <b>Decision Taker</b>   | Council   |
| <b>Executive Lead Member</b>  | Corporate Strategy and Economic Development   |
| <b>Lead Executive Director</b>  | Executive Director for Regeneration and Housing   |
| <b>Report Contact</b>   | Matthew Peachey, Economic Development<br>Manager Tel: 01865 252021<br>mpeachey@oxford.gov.uk                      |

## CEB 15 DECEMBER 2016

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|--|--|
| <b>ITEM 25:</b>  | <b>BUDGET 2017/2018</b><br><b>ID: I014683</b>  |
| <p>A new Budget for the period 2017/2018.</p> <ul style="list-style-type: none"> <li>· The pre-consultation draft report will be submitted to CEB in December 2016.</li> <li>The post-consultation draft report will be submitted to CEB in February 2017</li> <li>· The Budget will be submitted to Council for adoption in February 2017.</li> </ul> |  |
| <b>Is this a Key Decision?</b>   | Yes It is likely to result in the Council incurring expenditure which is greater than £500,000 |
| <b>Is this item open or exempt to the public?</b>  | Open -   |
| <b>Will this decision be preceded by any form of consultation?</b>   | Yes - public consultation  |
| <b>Decision Taker</b>  | City Executive Board<br>City Executive Board<br>Council  |
| <b>Executive Lead Member</b>   | Finance, Asset Management and Public Health  |
| <b>Lead Executive Director</b>   | Section 151 Officer  |
| <b>Report Contact</b>  | Nigel Kennedy, Head of Financial Services Tel: 01865 252708 nkennedy@oxford.gov.uk             |

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| <b>ITEM 26:</b>  | <b>CORPORATE PLAN 2017/2018</b><br><b>ID: I014717</b>   |
| <p>A new Corporate Plan for the period 2017/2018</p> <ul style="list-style-type: none"> <li>· The pre-consultation draft report will be submitted to CEB in December 2016.</li> <li>The post-consultation draft report will be submitted to CEB in February 2017</li> <li>· The Asset Management Plan will be submitted to Council for adoption in February 2017.</li> </ul> |   |
| <b>Is this a Key Decision?</b>   | Yes It is significant in terms of its effect on communities living or working in an area comprising two or more wards |
| <b>Is this item open or exempt to the public?</b>  | Open -  |
| <b>Will this decision be preceded by any form of consultation?</b>   | Yes public consultation   |
| <b>Decision Taker</b>  | City Executive Board<br>City Executive Board<br>Council   |
| <b>Executive Lead Member</b>   | Corporate Strategy and Economic Development   |
| <b>Lead Executive Director</b>   | Assistant Chief Executive   |
| <b>Report Contact</b>  | Caroline Green, Assistant Chief Executive cgreen@oxford.gov.uk  |

|   |   |
|---|---|
| <b>ITEM 27:</b>   | <b>SUSTAINABILITY STRATEGY 2017</b><br><b>ID: I015077</b> |
| <p>The report will provide the revised Oxford Sustainability Strategy, which will set out the vision for Oxford's sustainable future and steps we are required to take to deliver it. The report will recommend approval of the draft strategy for public consultation.</p> <p>CEB April 2017: To report on the public consultation process and present the final Sustainability Strategy to the Board. CEB to recommend that Council approve the final Sustainability Strategy 2017.</p> |   |

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| Council April 2017 – Council to approve Sustainability Strategy 2017 |   |
| <b>Is this a Key Decision?</b>                                       | Yes It is significant in terms of its effect on communities living or working in an area comprising two or more wards |
| <b>Is this item open or exempt to the public?</b>                    | Open -  |
| <b>Will this decision be preceded by any form of consultation?</b>   | 6 weeks Online public consultation required   |
| <b>Decision Taker</b>  | City Executive Board<br>City Executive Board<br>Council   |
| <b>Executive Lead Member</b>   | A Clean and Green Oxford  |
| <b>Lead Executive Director</b>                                       | Executive Director for Community Services   |
| <b>Report Contact</b>  | Mai Jarvis, Environmental Quality Team Manager<br>Tel: 01865 252403 mjarvis@oxford.gov.uk                             |

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|---|--|
| <b>ITEM 28:</b>   | <b>TREASURY MANAGEMENT STRATEGY 2017/18</b><br><b>ID: I014416</b>                              |
| Treasury Management Strategy for 2017/2018, including prudential indicators.  |  |
| <ul style="list-style-type: none"> <li>• The pre-consultation draft report will be submitted to CEB in December 2016.</li> <li>• The post-consultation draft report will be submitted to CEB in February 2017</li> <li>• Submitted to Council for adoption in February 2017.</li> </ul> |  |
| <b>Is this a Key Decision?</b>  | Yes It is likely to result in the Council incurring expenditure which is greater than £500,000 |
| <b>Is this item open or exempt to the public?</b>   | Open -   |
| <b>Will this decision be preceded by any form of consultation?</b>  |  |
| <b>Decision Taker</b>   | City Executive Board<br>City Executive Board<br>Council  |
| <b>Executive Lead Member</b>  | Finance, Asset Management and Public Health  |
| <b>Lead Executive Director</b>  | Executive Director for Organisational Development and Corporate Services                       |
| <b>Report Contact</b>   | Bill Lewis, Financial Accounting Manager Tel: 01865 252607 blewis@oxford.gov.uk                |

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|--|---|
| <b>ITEM 29:</b>  | <b>TREASURY MANAGEMENT PERFORMANCE: ANNUAL REPORT AND PERFORMANCE 2016/17</b><br><b>ID: I014684</b> |
| This performance monitoring report on the Treasury Management Strategy: Annual Report and Performance 2016/17 is submitted twice a year:   |   |
| <ul style="list-style-type: none"> <li>· Dec 2016– the position at the 30 September 2016 (Half Year)</li> <li>· Sept 2017 – the position at 31 March 2017 (Full Year)</li> </ul> |   |
| This Performance monitoring report is submitted twice a year to cover: the position at 30 September (Half Year) and 31 March (Full Year)   |   |
| <b>Is this a Key Decision?</b>   | Yes It is likely to result in the Council incurring expenditure which is greater than £500,000      |

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| <b>Is this item open or exempt to the public?</b>                  | Open -  |
| <b>Will this decision be preceded by any form of consultation?</b> | None  |
| <b>Decision Taker</b>  | City Executive Board<br>City Executive Board                                    |
| <b>Executive Lead Member</b>                                       | Finance, Asset Management and Public Health                                     |
| <b>Lead Executive Director</b>                                     | Section 151 Officer   |
| <b>Report Contact</b>  | Bill Lewis, Financial Accounting Manager Tel: 01865 252607 blewis@oxford.gov.uk |

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| <b>ITEM 30:</b>   | <b>FEASIBILITY STUDY FOR THE DEVELOPMENT OF A SITE FOR A TRANSFER STATION FOR RECYCLED MATERIAL<br/>ID: I012199</b>  |
| To present a feasibility study for the development of a site to operate a Council managed transfer station for City collected co-mingled recyclables, green waste, street arisings and engineering works spoil. |  |
| <b>Is this a Key Decision?</b>  | Yes It is significant in terms of its effect on communities living or working in an area comprising two or more wards  |
| <b>Is this item open or exempt to the public?</b>   | Part exempt - Commercially Sensitive   |
| <b>Will this decision be preceded by any form of consultation?</b>  | None   |
| <b>Decision Taker</b>   | City Executive Board   |
| <b>Executive Lead Member</b>  | A Clean and Green Oxford   |
| <b>Lead Executive Director</b>  | Executive Director for Community Services  |
| <b>Report Contact</b>   | Geoff Corps, Cleaner Greener Services Manager gcorps@oxford.gov.uk, Fiona Piercy, Partnership & Regeneration Manager Tel: 01865 252185 fpiercy@oxford.gov.uk |



## Scrutiny recommendation tracker – 15 September 2016 CEB

The City Executive Board (CEB) on 14 July agreed responses to Scrutiny Committee recommendations on the following items:

- OxLEP Strategic Economic Plan
- Credit Union Services
- Equality and Diversity - Recommendation 15

### OxLEP Strategic Economic Plan

| <i>Recommendation</i>  | <i>Agreed?</i>        | <i>Comment</i>  |
|--|-----------------------|---|
| <p>That the City Executive Board agrees to relay the following feedback from the Scrutiny Committee to Oxfordshire Local Enterprise Partnership:</p> <p>1. The report sets a clear goal on page 19 to deliver sustainable growth in line with the Brundtland Commission definition. The SWOT analysis (p29) identifies the risk that, as it stands, this will not be achieved with regard to climate change targets - a key indicator of sustainable development. Nowhere are the conclusions of this aspect of the SWOT analysis addressed. The document should include details of how the climate change targets are to be met.</p> <p>2. The report and framework should make it clear that whilst the formal response from the business community was low this does not mean that views were not given and captured as part of this exercise. Businesses engaged through workshops and other informal channels with representatives of OxLEP</p> | <p>Yes</p> <p>Yes</p> | <p>The aspiration of the LEP should clearly be that the internationally agreed targets for carbon reduction should be achieved as an integral component of the growth pattern of the local economy.</p> <p>This matter was raised and extensively discussed at the most recent OxLEP Board meeting and will be captured in the final draft.</p> |

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| <p>3. The poor connectivity of buses across the City is identified as a threat but not closed off. This position has been made worse by the reduction in subsidised bus services. The document should include actions and solutions in this area including better use of trips around the ring road and additional stops along established routes.</p> | <p>Yes</p> | <p>The contribution of high quality and priority bus services to the connectivity between the key residential and employment centres across the county has been recognised in the County Council's Transport Strategy and features strongly in the LEP's vision for the future development of the Oxford Science Transit Corridor.</p> |
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**Credit Union Services**

| <b><i>Recommendation</i></b>  | <b><i>Agreed?</i></b> | <b><i>Comment</i></b>   |
|---|-----------------------|---|
| <p>That the Council promotes OCU to its employees alongside other options and within a carefully framed context, on the basis that OCU pay a dividend to investors.</p> | <p>Yes</p>            | <p>We will review the situation once OCU have agreed and made the dividend payment. We are happy to accept this recommendation at this point.</p> |

**Equality and Diversity - Recommendation 15**

| <b><i>Recommendation</i></b>  | <b><i>Agreed?</i></b> | <b><i>Comment</i></b>   |
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| <p>That the Council ceases to be a Stonewall Diversity Champion and invests the fee currently paid to Stonewall (£2.5K) to better effect.</p> | <p>Yes</p>            | <p>Agreed on the understanding that the saving should be redirected to other means of promoting equality and diversity.</p> |

## Project Scope – Scrutiny review of ‘devolution plans for Oxfordshire’

|                                   |   |
|-----------------------------------|---|
| <b>Review Topic</b>               | ‘Devolution plans for Oxfordshire’  |
| <b>Lead Member</b>                | Councillor Marie Tidball  |
| <b>Other Review Group Members</b> | Councillors Van Coulter, Andrew Gant, Tom Hayes & Craig Simmons   |
| <b>Officer support</b>            | Scrutiny Officer support approx. 1-2 days per week for up to 4 months between August and December 2016. Additional support from the Assistant Chief Executive and other Council Officers.   |
| <b>Background</b>                 | <p>The Government has actively offered areas in England the chance to have additional funding and devolved powers in exchange for elected mayors or streamlined governance structures. All Councils in Oxfordshire agreed a joint proposal to put to Government in February 2016 aimed at unlocking £1bn funding for infrastructure to realise the County’s growth potential. Government advised that a deal hinged on strengthening the governance arrangements.</p> <p>Following discussions with the Secretary of State at the time, Greg Clark MP, the District Councils commissioned PricewaterhouseCoopers (PwC) to undertake an independent study into the options for unitary government to inform their thinking. The County Council separately commissioned Grant Thornton to consider options for future models of local government across Oxfordshire. Both reports were published in the Summer. Subsequently the County Council has declared its intention to develop proposals for a unitary council covering all of Oxfordshire. This proposal is not supported by the District Leaders who support an alternative proposal for three new unitary authorities and a combined authority as the best option for any potential reorganisation.</p> <p>This work has taken place against a backdrop of considerable political uncertainty and significant changes at national level. A new Prime Minister and cabinet reshuffle followed the public referendum held on 23rd June, which resulted in a decision for the UK to leave the European Union.</p> <p>As a consequence of these national changes, officials from the Department of Communities and Local Government (DCLG) met with representatives of the city, district and county councils. Their advice made clear that the Government would only agree proposals for devolution or local government reorganisation if the parties involved came to government with an agreed approach and that will not act as referee between different proposals. They</p> |

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|                                      | <p>have advised that they remain open to discussion on locally supported devolution proposals that include strong, accountable governance and clear accountability.</p> <p>In the absence of agreement between the County and the Districts on a future unitary model and no government led process to resolve the matter, the District Leaders view is that the focus should now be on working collectively to deliver the savings that reports from PwC and Grant Thornton have identified are available; and potential for a revised devolution deal based on current councils and a combined authority. Such a deal is currently being considered for Cambridgeshire and Peterborough.</p>   |
| <b>Rationale</b>                     | <p>Devolution is one of the biggest issues facing the City Council and local government in Oxfordshire. The public would expect the development of devolution proposals to be subject to independent oversight and challenge from elected members. Due to the complexity of the issues this detailed work would need to be undertaken by a review group over a series of meetings.</p> <p>The Scrutiny Committee prioritised a review of ‘devolution proposals for Oxfordshire’ when agreeing its 2016-17 work plan.</p>   |
| <b>Purpose of Review / Objective</b> | <p>To examine what governance structures can provide the strong, accountable governance to deliver a devolution deal while balancing cost savings and stable, high quality long-term service delivery, and the process of securing an agreement and taking the findings of the consultants’ reports forwards.</p>  |
| <b>Methodology/ Approach</b>         | <ul style="list-style-type: none"> <li>• Invite verbal or written evidence from key stakeholders on their experiences of the issues, challenges and key things that need to be delivered to address these.</li> <li>• Review both consultant reports and any available engagement feedback.</li> <li>• Review and critique the original devolution proposal.</li> <li>• Assess the strengths and weaknesses of different governance models (e.g. 1 Unitary Authority (UA), 2UAs, 3UAs with a combined authority (CA) and mayor, 4UAs with a CA and mayor, existing structures with a CA and mayor) through the lenses of: <ul style="list-style-type: none"> <li>○ the original devolution proposal,</li> <li>○ the Governments’ criteria, and</li> <li>○ the delivery of two or three key services (e.g. spatial planning, adult social care).</li> </ul> </li> <li>• Seek to reach a consensus view on one or more preferred governance models for Oxfordshire.</li> <li>• Consider the process of securing an agreement and how progress can be made in building a consensus and taking the consultants’ findings forward to improve outcomes.</li> </ul> |

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|   | <ul style="list-style-type: none"> <li>• Consider case study examples from other areas (e.g. Cambs, Wiltshire, Berkshire).</li> <li>• Desk research / literature review.</li> </ul>  |                                  |                 |
| <b>Indicators of Success</b>                  | <ul style="list-style-type: none"> <li>• Robust independent scrutiny of devolution proposals.</li> <li>• High quality engagement with key stakeholders.</li> <li>• Detailed consideration of different governance models and the development of a matrix setting out their strengths and weaknesses.</li> <li>• Broad agreement on the strengths and weaknesses of different governance models and the identification of one or more preferred options.</li> <li>• Recommendations that add value to devolution proposals.</li> <li>• The majority of recommendations are agreed.</li> <li>• The production of an evidence based report.</li> </ul>  |                                  |                 |
| <b>Specify Witnesses/ Experts</b>             | <p>External witnesses could include:</p> <ul style="list-style-type: none"> <li>• Jeremy Long – Chairman, OxLEP</li> <li>• Councillor Ian Hudspeth – Leader, Oxfordshire County Council</li> <li>• Peter Clark – County Director, Oxfordshire County Council</li> <li>• Other Oxfordshire District Council Leaders</li> <li>• A representative of the County Council for adult social care</li> <li>• A representative of the Clinical Commissioning Group</li> <li>• PwC report author(s)</li> <li>• Grant Thornton report author(s)</li> </ul> <p>City Council witnesses to include:</p> <ul style="list-style-type: none"> <li>• Councillor Bob Price – Leader, Oxford City Council</li> <li>• Peter Sloman – Chief Executive</li> <li>• Caroline Green – Assistant Chief Executive</li> <li>• Patsy Dell – Head of Planning and Regulatory Services</li> </ul> |                                  |                 |
| <b>Specify Evidence Sources for Documents</b> | <ul style="list-style-type: none"> <li>• PwC report.</li> <li>• Grant Thornton report.</li> <li>• Original devolution proposal.</li> <li>• Summary of PwC study and District Proposition.</li> <li>• Any engagement feedback.</li> <li>• Relevant academic / policy papers.</li> </ul>   |                                  |                 |
| <b>Site Visits</b>                            | N/A  |                                  |                 |
| <b>Projected start date</b>                   | September 2016   | <b>Draft Report Deadline</b>     | 25 Nov 2016     |
| <b>Meeting Frequency</b>                      | 4 meetings in 3 months   | <b>Projected completion date</b> | 15 Dec 2016 CEB |

## Draft outline of meetings (to be held in private session)

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| <b>Meeting one – 19 September 2016, 6pm</b>  |
| To consider purpose, scope and methodology of scrutiny review.<br><br><u>Invited</u><br>Councillor Ian Hudspeth - Leader, Oxfordshire County Council<br>Peter Clark – County Director, Oxfordshire County Council<br>Councillor Bob Price, Leader, Oxford City Council<br>Peter Sloman – Chief Executive<br>Caroline Green – Assistant Chief Executive |
| <b>Meeting two – 14 October 2016, 2pm</b>  |
| Focus on issues and challenges around growth, infrastructure and spatial planning, including a review of the original devolution proposal.<br><br><u>Invited</u><br>Jeremy Long – Chairman, OxLEP<br>Caroline Green, Assistant Chief Executive   |
| <b>Meeting three – 31 October 2016, 6pm</b>  |
| Focus on issues and challenges around health and adult social care.<br><br><u>Invited</u><br>TBC – Oxfordshire Clinical Commissioning Group<br>TBC – Oxfordshire County Council (Adult Social Care)<br>PwC and Grant Thornton report authors<br>Patsy Dell, Head of Planning and Regulatory<br>Caroline Green – Assistant Chief Executive              |
| <b>Meeting four – 23 November 2016, 6pm</b>  |
| Wash up session to agree conclusions and recommendations.<br><br><u>Invited</u><br>Councillor Bob Price, Leader, Oxford City Council.<br>Peter Sloman – Chief Executive.<br>Caroline Green – Assistant Chief Executive.  |

### Evaluation criteria used for unitary studies

| <b>DCLG advice</b>                             | <b>Districts' evaluation criteria</b>  | <b>Grant Thornton evaluation criteria</b>   |
|--|--|---|
| Better local service delivery                  | Deliver better public services   | Improve local service delivery and outcomes, particularly for the most vulnerable               |
| Greater value for money                        | Provide value for money  | Delivering significant cost savings, improved value for money and long term financial stability |
| Significant cost savings                       | Deliver outcomes in terms of the costs of transition against the efficiency savings the change will generate   |   |
| Stronger and more accountable local leadership | Ensure strong and accountable local leadership and governance  | Provide stronger and more accountable strategic and local leadership                            |
|  | <p>In addition to these tests... it will also be important to analyse whether the proposed options will meet locally defined needs, namely:</p> <ul style="list-style-type: none"> <li>• Help to deal with the demographic pressures on adult social care and improve outcomes through integration with health services</li> <li>• Ensure a system for children's services that delivers a robust approach to child protection and safeguarding</li> <li>• Help support the economic and housing growth being planned for in Local Plans and secure the necessary infrastructure identified in our Devolution Deal proposals</li> <li>• Support the growth of the knowledge economy</li> <li>• Enable development and growth across the area to meet its potential whilst effectively reflecting the different interests of market towns and rural communities</li> <li>• Benefit from potential service synergies from unitary authorities having responsibility for planning and delivering services such as spatial planning, economic development, housing, transport infrastructure, social care and health.</li> </ul> | Improve engagement with local communities and empowerment of local areas                        |

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**CEB response to the Inequality recommendations – Update October 2016**

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| # | <i>Recommendation</i>  | <i>Agree?</i> | <i>Comment</i>  | <i>Update</i>   |
|---|--|---------------|---|---|
| 1 | That the City Council leads on the development of a long-term multi-agency inequality strategy for Oxford. This should be informed in part by the evidence gathered in this Inequality Review and enhanced when Oxfordshire Clinical Commissioning Group produces its report on health inequalities. The Strategy should be supported by an Action Plan that includes any accepted Inequality Panel recommendations. | In part       | The Oxford Strategic Partnership (OSP) has been leading a multi-agency programme entitled 'Tackling the Cycle of Deprivation (now the Stronger Communities Programme)' for a number of years and the Oxfordshire Clinical Commissioning Group (OCCG) review will build on the OSP's work. Many of the recommendations from the Panel are being addressed through existing strategies and action plans, and we would propose to return to the question of whether an overall strategy document and plan when the outcome of the CCG work is published. | <p><b>Val Johnson</b><br/> <b>Policy and Partnerships Manager</b><br/>                     The Clinical Commissioning Group Inequalities Review is currently still in development. A Draft report is expected to go to the Health and Wellbeing Board in November 2016. The City Council has provided a significant amount of written evidence and made presentations to the Commission.</p> <p>Equality Impact Assessments are currently undertaken as a part of the approval process for Policies and Strategies.</p> |
| 2 | That the City Council ensures it has sufficient staffing resources in partnership posts to play a leading role in working with partners to deliver on a multi-agency inequality strategy for Oxford (see recommendation 1). We envisage that savings are achievable from overcoming silos and working in partnership to tackle long terms issues associated with inequality.   | Agreed        | Agreed in principle, but the current pressures on local authority and NHS budgets make it difficult to guarantee that the desired staffing resources can be made available from year to year. Our approach to the influencing and development of strategies and policies is based on a matrix approach and includes influencing strategies and policies for the key strategic Oxfordshire Partnerships, the Oxford Strategic Partnership and ensuring consistency and alignment, where  | <p><b>Val Johnson</b><br/> <b>Policy and Partnership Manager</b><br/>                     The new Assistant Chief Executive is now in post.</p> <p>There is currently a Service Area Review being undertaken of the Policy and Partnerships Team which will consider the functions of the team and its capacity to deliver.</p> <p>The Policy and Partnerships Team are actively engaged in the following partnerships, including:</p>  |

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|  |  |  | <p>appropriate, to Oxford City Council policies and plans. The new Assistant Chief Executive role will provide additional capacity in this area.</p> <p>Policy Officers Group, with representation from all service areas, is used to cascade and share information and best practice in developing our policies internally.</p> <p>Annex 1 attached provides further information.</p> | <ul style="list-style-type: none"> <li>• Oxford Strategic Partnership</li> <li>• Oxfordshire Health and Wellbeing Board</li> <li>• Oxfordshire Health Improvement Board</li> <li>• Oxfordshire Children and Young People’s Board</li> <li>• Oxfordshire Strategic Schools Partnership</li> <li>• Oxfordshire Local Enterprise Partnership</li> <li>• Oxfordshire Skills Board</li> <li>• Oxfordshire Safeguarding Children’s Board</li> <li>• Oxfordshire Safeguarding Adults Board</li> </ul> <p>The Policy and Partnership Team also attend a number of sub groups and task groups that support the work of the partnerships.</p> <p>Relevant officers and members receive regular briefings before and after meetings and support is provided to member representative that sit on the Boards.</p> <p>The Policy and Partnership team manager also coordinates the work of the county-wide partnerships on behalf of all the district councils.</p> |
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| 3 | <p>That the City Council commissions Professor Danny Dorling and the City Council's Social Research Officer to develop an Oxford City Inequality Index based on aspects of inequality that that the City Council can influence either directly, or indirectly to a significant extent. Council Performance should be assessed against the movement of this index.</p> | Not agreed | <p>The Council uses ONS data and small area statistics and publishes these in an accessible form (see the Council monthly charts and other useful information available on the Oxford City Web site:<br/> <a href="http://www.oxford.gov.uk/PageRender/decC/Statistics_about_Oxford_ocw.htm">http://www.oxford.gov.uk/PageRender/decC/Statistics_about_Oxford_ocw.htm</a></p> <p>It is not clear what a specific City Index would add to what is already available and as a stand- alone index it would lack credibility with central government or the EU, who have their own definitions of deprivation and inequality for benchmarking and resource allocation.</p> <p>The Council uses nationally recognised indices which facilitate benchmarking and funding submissions. Deriving a set of local indices would be costly and not have these advantages.</p> | <p><b>Val Johnson</b><br/> <b>Policy and Partnerships Manager</b></p> <p>Although this recommendation was not agreed. The City Council made a significant contribution to the Oxfordshire Clinical Commissioning Group Inequalities Review. This included data analysis and reports on:</p> <ul style="list-style-type: none"> <li>• Services provided by Oxford City Council that impact on health and wellbeing</li> <li>• A report on the Indices of Deprivation in Oxford</li> <li>• Oxford City Council Scrutiny Panel Report on Inequalities on Oxford</li> <li>• Health In Oxford (a summary of the JSNA as it relates to Oxford)</li> <li>• Older People in Oxford Needs Analysis</li> <li>• Review of Older Persons Accommodation in Oxford</li> <li>• Mental Health Indicators in Oxford</li> <li>• Green Spaces</li> <li>• Community Centres - hubs for improving health</li> <li>• Health and Physical Activity</li> <li>• Oxford City Council employee assistance scheme</li> </ul> |
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|   |   |        |  | We also provided a further detailed written submission on the Indices of Deprivation and on Housing Needs in Oxford and we presented our information to the Evidence Session of the Commission on 23 <sup>rd</sup> May.  |
| 4 | That all strategy papers and major decisions should include an assessment of their short, medium and long term impacts on inequality. This assessment could be based on an Inequality Index (see recommendation 3), and guidance should be available to assessing officers. | Agreed | The Council's existing equality impact assessment process requires Officers and Members to consider the impact of decisions and actions on groups with protected characteristics. Currently these do not include socio economic inequalities and including them as a required part of the process will involve careful definition and extensive training. The Corporate Lead (HR / OD) will review the current process in line with best practice during the autumn. | <b>Jarlath Brine, Organisational Development and Learning</b><br>The commitment to review the effectiveness of the current EqIA format and associated processes is included in the Corporate Equality Scheme Internal Equalities Strategy objectives currently being drafted for 2016 to 2020. The review will also look into the viability of including socio-economic inequalities as a factor to consider in future impact assessments. The review will involve the policy and partnerships team, Service Heads and Directors/ Assistant Chief Executive and will be initiated from October/ November 2016. |
| 5 | That the City Council progresses all options for boosting the supply of affordable housing, including by:<br>a) Continuing to push for a review of the Green Belt around Oxford as part of a wider county land review to identify sites for new housing,                    | Agreed | Agreed, with some reservations about the practicality of 5h. Recommendation 5 a) to f) are already part of the Council's normal business. Recommendation 5g) is being taken forward by the Council's Ageing Successfully Group that is working with Age UK Oxfordshire on  | <b>Mark Jaggard Planning Policy and Design, Conservation and Trees Manager</b><br>The City Council continues to actively work to ensure the amount of housing which cannot be delivered within the City's tight administrative boundary is properly  |

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| <ul style="list-style-type: none"> <li>b) Enforcing the City Council's 50% affordable housing policy,</li> <li>c) Considering greater use of Compulsory Purchase Orders to buy derelict land and properties that aren't coming forward for development,</li> <li>d) Evaluating the potential local impacts of the new Government's housing policies, such as the extension of the Right to Buy scheme to housing association properties,</li> <li>e) Encouraging ethical or institutional investors to rent good standard accommodation to people in housing need at affordable rates,</li> <li>f) Aiming to make Oxford a centre of excellence in innovation for new social and affordable housing solutions, ensuring that its own policies (such as the Balance of Dwellings Policy) are compatible with this aim. Affordable Oxford could be asked to provide advice on what options would be viable in Oxford,</li> <li>g) Considering whether there is scope for the City Council or the Universities to promote 'inter-generational shared living'.</li> </ul> |  | <p>a Home Share Programme in Oxford that has been funded by the <a href="#">Lloyds Bank Foundation</a> and the <a href="#">Big Lottery Fund</a>. On 5h) the Council's allocations policies aim to assist 'downsizing' where residents wish but organising transfers on a collective basis would be extremely difficult and unlikely to accommodate many community groups who are characterised by different current housing tenures.</p> <p>However, in light of proposed changes in government policy the Council may be forced to review its Housing and Planning Policies.</p> | <p>dealt with in the local plans of the neighbouring authorities. The Oxfordshire Growth Board in September will agree the apportionment of this level of unmet need between the neighbouring districts.</p> <p>The City Council affordable housing policies are actively negotiated through the development management process. In November the City Executive Board will consider this year's Annual Monitoring Report which amongst other matters will report on the delivery of affordable housing.</p> <p><b>Frances Evans – Strategy &amp; Service Development Manager</b></p> <p>c) Work is ongoing to bring long-term empty homes back into use in accordance with the Empty Homes Strategy. Where all other actions have failed, and where it is considered to be appropriate, the use of Compulsory Purchase Orders is being considered in respect of individual dwellings.</p> <p><b>Frances Evans – Strategy &amp; Service Development Manager</b></p> <p>d) Impact of the new Housing and Planning Act 2016 is being</p> |
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|   | h) Considering whether there is a way the City Council could assist groups of older people in downsizing collectively while staying together as a community, perhaps by creating a group or register that people can join or sign up to. |        |   | <p>considered and scenarios tested based on information available, however the full implications will only be known once the technical guidance and additional details/definitions emerge. These are still awaited. Going forward, where necessary, policies and working practices will be amended to take into account the new legislative requirements.</p> <p><b>Frances Evans – Strategy &amp; Service Development Manager</b></p> <p>g) Evaluation of the Oxfordshire pilot of the National Homeshare Programme is awaited. The Review of Older Person’s Accommodation in Oxford highlighted the accommodation preferences of older people locally, which largely included independent living that has been designed to be suitable for older people. Recommendations within the Review reflect these preferences.</p> <p>h) The City Council continues to operate a removals and expenses scheme for Council tenants should they wish to downsize and relocate to more suitable accommodation.</p> |
| 6 | We note the significant difficulties that schools, hospitals and   | Agreed | Recommendation 6a) is in hand and will form part of a wider review of | <b>Mark Jaggard Planning Policy and Design, Conservation and</b>   |

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|   | <p>universities (as well as businesses) face in attracting workers to settle in Oxford, and recommend that the City Council:</p> <p>a) Gathers evidence as soon as possible to identify the best way of delivering new build keyworker housing within the 20% of affordable housing provided as intermediate housing,</p> <p>b) Seeks to extend its keyworker housing intervention to more teachers (this is currently offered to senior teaching staff),</p> <p>c) Considers whether there is scope to assist key workers (particularly teachers in priority schools) in accessing housing in the private rented sector, for example by encouraging registered landlords to offer 3 year tenancies and agreeing to raise rents by no more than the CPI measure of inflation.</p> |               | <p>affordable housing and planning policies. Recommendation 6b) has been implemented with the scheme open to all teachers from the beginning of July, following consultation with schools. Recommendation 6c) will be difficult to achieve as the Council has no means of practically influencing private sector rents and landlords' letting policies but the proposals could be put forward to key landlords and agents.</p> | <p><b>Trees Manager</b><br/>There are no barriers which would prevent some key worker housing coming forward as part of the 20% intermediate housing (of the 50% affordable housing requirement on large and medium sites).</p> <p><b>Steve Northey, Affordable Housing Development Officer</b><br/>6b The scheme has been extended to encourage younger teachers to develop their leadership careers in schools in deprived communities in the City: it is now open to all qualified staff with 2 years experience and 12 months permanent employment in a qualifying school. The secondary schools serving these communities have also been included because of the same need to reduce turnover of leadership staff.</p> |
| 7 | <p>We note that the City Council is developing a Private Rented Sector Strategy and recommend that this aims to extend the City Council's interventions in the private rented sector to address abuses in the student housing market and poor standards across</p>  | <p>Agreed</p> | <p>We agree to take this recommendation into account in developing the strategy. Work is underway on identifying the most appropriate extension of discretionary licensing following the introduction of legislative restrictions by the government. The HMO</p>   | <p><b>Ian Wright, Environmental Health Service Manager</b><br/>The Private Sector Housing Policy 2016-2019 was approved by CEB in July. The policy confirmed that HMOs remain the top priority for the Council in the Private Rented Sector and with the HMO Licensing</p>  |

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|   | <p>the wider private rented sector. This should include the extension of discretionary licensing to cover more properties where possible, enhanced enforcement of the HMO licensing regime and further promotion of landlord accreditation to encourage take up.</p>   |        | <p>Licensing Scheme is currently being consulted upon and if renewed, the approach to improving compliance with licence conditions in licensed properties will be strengthened and stronger penalties imposed upon the landlords of unlicensed properties. Encouraging Landlord accreditation and improving the rewards available for good landlords will complement this tougher enforcement stance. It would be useful to understand the particular concerns about student housing if this refers to purpose built accommodation rather than general needs housing which just happens to be occupied by students.</p> | <p>Scheme being renewed in January the focus has been on locating unlicensed HMOs. Oxford City Council takes more enforcement action than any other district council in the country and the number of prosecutions has increased further and is expected to remain high to encourage compliance. A proposal to extend licensing into the non-HMO sector is also included in the policy and proposals will be considered in January. Landlord Accreditation has been encouraged by including licence fee reductions for accredited landlords and introducing a free training session.</p> |
| 8 | <p>That the City Council:</p> <p>a) Calls on the new Vice-Chancellor of the University of Oxford to provide reinvigorated engagement in Oxford's housing sector by learning from the Cambridge model and providing new accommodation to house academics.</p> <p>b) Tasks the new Assistant Chief Executive with working closely with the University sector and encouraging a greater degree of input into city matters, including financial contributions where appropriate.</p> | Agreed | <p>This work is already in progress. The new assistant Chief Executive will help take this forward.</p>   | <p><b>Caroline Green, Assistant Chief Executive/ Sebastian Johnson, Strategic Policy and Partnerships Officer</b></p> <p>Both Universities are involved in the development of the Oxford Economic Plan that is key to obtaining Government infrastructure and skills funding for Oxford.</p> <p>Both universities alongside the local authorities, key research institutions, Health and OxLEP developed and are signatories to the <a href="#">Oxfordshire Green Paper</a> that looks ahead 20 years and asks how the county can</p>  |



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|  |  |  |  | <p>build on its status as one of the UK and Europe's leading 'innovation engines'.</p> <p>There has been academic input into the Educational Attainment programme from both universities.</p> <p>Both Universities committed £5k each and staff time to developing the European Capital of Innovation bid in 2015</p> <p>Both Universities have committed £5k each to the Smart Oxford Competition (a total of £50k is being raised). The competition is for the delivery of a project that catches the imagination by being fun; interactive; informative; accessible to all; creative; sustainable; relevant and impactful; smart and innovative.</p> <p>The University of Oxford and Oxford City Council have jointly commissioned the production of a Development Framework Plan, to capture the vision for their Oxford-wide estate ambitions and to assist with informed consultation with the public.</p> <p>Both universities alongside the Student Hub are lead partners in</p> |
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|   |   |         |  | <p>developing and supporting the <a href="#">Oxfordshire Social Entrepreneurs Partnership</a> (OSEP).</p> <p><b>Peter McQuitty, Corporate Lead, Culture and Events</b><br/>The City Council has been working with the County Council and other stakeholders to develop a county-wide strategy for the future development of Culture, Arts and the Creative Industries. One of the aims is to develop skills and employment in these sectors.</p>  |
| 9 | <p>That the City Council builds on its commendable work on addressing fuel poverty by:</p> <p>a) Making a fuel poverty calculator available online that directs people in fuel poverty to contact the City Council for advice on what support they may be entitled to,</p> <p>b) Asking Trading Standards whether they would like the City Council to refer cases to them where an Energy Performance Certificate is required and whether they would be prepared to give the City Council any enforcement powers.</p> | In part | <p>Partially agreed. The Council has developed a fuel poverty model to identify areas of the City which are at greater risk of fuel poverty. This model can be used to target resources and grants to people in fuel poverty. We will increase our advertisement of the help that can be provided to reduce energy costs through the advice centres and the Council.</p> <p>The Council is due to begin taking enforcement against private landlords with EPC ratings of F and G, and this action is included in the Council's Financial Inclusion Strategy and we will undertake this</p> | <p><b>Debbie Haynes, Energy Efficient Projects Officer</b></p> <p>a) Building on the existing fuel poverty model, the Council has developed the EDIS project with Ricardo Energy Services - this is a data platform targeting residents in fuel poverty. Council data is incorporated in this, and Energy Companies are being asked for their annual electricity and gas meter readings. Discussions also ongoing with BEIS (new DECC) re utilisation of this data approach for the new</p> |

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|     |   |        | work directly..   | <p>ECO3 funding regime due to start April 2017.</p> <p>b) Planning &amp; Regulatory continue to target F and G rated EPCs. They are also engaging with trading standards who recognise that the PRS is a problem sector and they are interested in widening the enforcement approach.</p>   |
| 10a | <p>That the City Council builds on its work with Oxford Clinical Commissioning Group and other health partners by:</p> <p>a) Supporting the delivery of more proactive health interventions in areas of multiple deprivations, such as contacting people who miss appointments,</p> | Agreed | <p>The City Council, Oxfordshire Clinical Commissioning Group (OCCG) and Public Health, have been working toward this in a number of ways:</p> <p>Some GP Practices use text messages to remind patients of upcoming appointments, where they have patients' mobile phone numbers. They also post messages in Practice waiting rooms to inform patients of the impact of missed</p> | <p><b>Maggie Dent, Equalities and Access Officer, OCCG</b></p> <p>Recent examples of supporting the delivery of more proactive health interventions, in areas of multiple deprivations include:</p> <p>General promotion of NHS Health Checks and NHS Screening Programmes forms part of the health plans (see below).</p> <p>There are multi-agency health</p> |

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|     |                                     |        | <p>appointments.</p> <p>In terms of health interventions, where there has been low uptake of NHS initiatives, such as screening programmes and health checks, some focussed work has been conducted by the CCG'S Equality and Access Team. This has included working with patients in some GP Practices to enable them to be booked into appointments.</p> <p>The CCG alongside Public Health and the City Council has established multi-agency Community Partnership Health Groups, based in the city's key areas of deprivation. These help to support health promotion campaigns and activities at a local level. They have also drawn up Health Plans for each area, based on health indicator data, to identify the key issues and provide appropriate interventions and initiatives to tackle them.</p> <p>The development and delivery of the Community Health Plans are supported by the CAN Breaking the Cycle of health Deprivation Working Group (including the CCG, Public Health and CAN staff).</p> | <p>partnership groups in Rose Hill, Barton, the Leys and Wood Farm. Detailed needs analysis have been undertaken and health plans developed for each area.</p> <p><b>Ian Brooke, Head of Community Services</b></p> <p>There have been discussions between the OCCG and the Council with regard to health services based in our community centres</p> <p>There is social prescribing post operating from the soon to be enhanced health space in Barton Neighbourhood Centre and this will be further developed with Barton becoming a Healthy New Town.</p> |
| 10b | That the City Council builds on its | Agreed | Pooling of budgets is not specifically  | See above  |

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|     | <p>work with Oxford Clinical Commissioning Group and other health partners by:</p> <p>b) Working towards the concept of pooled budgeting in areas where evidence suggests that this approach can improve health outcomes.</p>  |        | <p>a City Council issue. However, the Executive Director for Communities and the Executive Board Member, Corporate Assets and Public Health are actively offering to provide City Council premises and other assets to promote better health outcomes. An example of the possibilities in this domain is the proposed use of the health space at the new Rose Hill Community Centre.</p>  |  |
| 10c | <p>That the City Council builds on its work with Oxford Clinical Commissioning Group and other health partners by:</p> <p>c) Utilising the City Council's assets (such as leisure centres) and the agencies we support to facilitate social prescribing, and encouraging more GPs to take up social prescribing.</p> | Agreed | <p>Agree, as above. In addition; the Head of Community Services is represented on the Oxfordshire University Hospital Trust, Public Health Steering Committee and on the Oxfordshire Clinical Commissioning NHS Health Inequalities Commission Steering Group. This is to ensure that Oxford City Council is well placed to identify opportunities for working with other agencies to deliver health promotion services.</p> <p>With reference to Social Prescribing: One Practice, which serves two regeneration areas in the city, has recently initiated a Social Prescribing project. The CCG's Equality and Access Manager has undertaken some research of models across the country. The findings will be presented to GP</p> | <p><b>Ian Brooke, Head of Community Services</b><br/>See above</p> |

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|     |  |            | Leads and a decision will be made as to the potential of a county-wide Social Prescribing Project. This will also be considered for application at the new Rose Hill CC.  |  |
| 10d | That the City Council builds on its work with Oxford Clinical Commissioning Group and other health partners by:<br>d) Working with partners to develop a single online point of access for multiple services in Oxford, including health, housing and social care. | Not agreed | <p>There are a range of points where people can and should access information. It is important however to play our part in ensuring that all the agencies continue to work to improve information sharing and referral processes and to ensure that service signposting is appropriate.</p> <p>The voluntary and community sector have an important role to play in this and the City Council provides funding through its grant programme to a number of agencies providing advice, support, signposting and referral to health, housing and social care services.</p> <p>The CCG are piloting this approach and working with referral agencies to understand demand. It is a matter for them.</p> |  |
| 11  | That the City Council explores how factors around inequality and public health could be designed in to the planning and development of sites. These factors should include   | Agreed     | This is already in hand. For example, the Barton development is considered to be an example of best practice in this regard. Public Health have also been asked to  | <p><b>Mark Jaggard Planning Policy and Design, Conservation and Trees Manager</b></p> <p>A number of the factors which are fundamentals to good planning and</p> |

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|     | <p>cycling and walking provision, the accessibility of parks, and the provision of a variety of housing within the street scene.</p> <p>Consideration should also be given to shaping new communities. For example, new communities should include a centre and shared open space.</p> |        | <p>comment on planning applications with strategic implications for building sustainable communities that support health and help to promote exercise, such as the Northern Gateway master plan.</p> <p>A member of the City Council Planning Policy Team recently attended a Public Health England workshop aimed at improving collaboration between planning and health improvement professionals. Some of the issues raised at this workshop have fed into on-going scoping work that Public Health are undertaking to ensure that health considerations receive more prominence when planning decisions are made across all Oxfordshire authorities.</p> | <p>place making will by their very nature have very positive impacts upon the health and wellbeing of the people who live and visit an area.</p> <p>The City Council has recently strengthened the urban design element of the Planning &amp; Regulation Service with a new Team leader for the Design team.</p> <p>The new Oxford Local Plan 2036 will continue policies which promote great urban design, and the plan will as a whole have a golden thread which promotes healthy communities and lifestyles.</p> <p>The Barton Park development is an excellent example of what can be achieved and has been awarded to be a NHS Healthy New Town.</p> |
| 12a | <p>That the City Council:</p> <p>a) Assists in bringing about negotiations with local health, housing and social care commissioners and providers so that a county wide discharge policy for people experiencing homelessness can be adopted as per best practice guidelines</p>       | Agreed | <p>There is an operational hospital discharge procedure in place, which provides client names and 48 hour notice of discharge to Housing Services. However, this procedure could be strengthened with a more strategic hospital discharge protocol agreed on a countywide basis with all key stakeholders. This would relate to care packages including a broader range of services, for</p>   | <p><b>Dave Scholes, Housing Strategy and Needs Manager</b></p> <p>Work on this is on-going and set out in more detail in the Housing Strategy Action Plan.</p> <p>We have recently input into the development of a protocol on an Oxfordshire Multi-agency Procedure 'Working with people who do not engage with services /or are</p>  |

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|     |   |            | example Hospital Trusts (specialist physical and mental health services) and adult social care. The City Council will try to facilitate the development of this further.   | deemed ineligible to receive services.  |
| 12b | That the City Council:<br>b) Extends interventions aimed at supporting homeless people with complex needs (e.g. substance abuse and mental health issues), who are often excluded from accessing the services they need.  | Agreed     | Officers are already working with the Oxfordshire Clinical Commissioning Group, Public Health and providers to develop a suitable service for single homeless customers with complex needs, including when substance misuse limits effective treatment options for mental health. The Council is also part of a Complex Needs network which seeks to improve the access that people with complex needs have to current services. This aims to build on outcomes for people with the most complex needs through intensive support and a flexible systemic approach. | <b>Dave Scholes, Housing Strategy and Needs Manager</b><br>There has been a significant reduction in funding for supported housing from Oxfordshire County Council. This has resulted in an Oxfordshire wide review of provision, which will maintain some complex needs beds across the county. Details of this are provided in a report to CEB on 15 <sup>th</sup> September 2016.<br><br>We have also commissioned a small pilot scheme for complex needs based on 'First Housing' model, providing intensive support if required. |
| 13  | Oxford City Council is leading the way in defining, measuring and tackling fuel poverty and we recommend that the same priority should be given to the issue of food poverty. A part-time role should be created to tackle food poverty, which should involve facilitating the work of the not-for-profit and voluntary sector to | Not agreed | The OSP Breaking the Cycle of Deprivation Group has been working with Good Food Oxford to see how this work can be taken forward.<br><br>The Breaking the Cycle Group (including representatives from the Oxfordshire Clinical Commissioning Group and Public Health) funded   | <b>Val Johnson, Policy and Partnerships Manager</b><br>Following on from the funding previously provided to Good Food Oxford.<br><br>A report has been provided setting out the findings of the work undertaken with community groups within their local communities. It has  |



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|     | <p>maximise their impact, and developing a food poverty strategy for Oxford. This strategy should aim to replicate best practice established by Bristol to reduce food bank demand and increase access to good and affordable food across the city.</p>   |         | <p>Good Food Oxford to carry out community activities on Blackbird Leys, to introduce food poverty and healthy eating elements to the work that food oriented Community Action Groups already do within their local communities. This has proved to be extremely effective. The aim is to continue to work with Good Food Oxford and other partnerships to build the capacity of local communities.</p> <p>Clarity is needed on whether the bid will address this and this recommendation will be kept under review.</p> | <p>highlighted concerns with regard to food poverty and access to fresh food.</p> <p>The Stronger Communities Group (previously the Breaking the Cycle of Deprivation Group) has supported Good Food Oxford and Resource Futures to undertake a mapping exercise of the support and services available which addresses food poverty, with the aim of producing an Oxford Food Poverty Action Plan (along the Brighton Model).</p>   |
| 14a | <p>That the City Council:</p> <p>a) Identifies how it can provide a greater degree of funding security to Asylum Welcome. Consideration should be given to including their work within the remit of the Council's Community Grants commissioning programme, which awards funding for 3 years rather than annually. This will reduce Asylum Welcome's administrative workload and help to ensure that they remain viable over the medium term.</p> | In part | <p>Noted. This recommendation will be considered as part of the annual review of the Council's grants programme in the budget round. We are in active discussions with Asylum Welcome and other charities in this area with regard to the refugee crisis and how we can assist them in making a fully effective response.</p> <p>The Council is currently in discussion with AW as part of its response to the refugee crisis. The Board is very appreciative of the work of Asylum Welcome.</p>                         | <p><b>Val Johnson, Policy and Partnership Manager</b></p> <p>The Council awarded Asylum Welcome £10,000 in 2016/17 Grant Programme (an increase from £7,500 2015/16).</p> <p>The Commissioned Grants Programme operates for 3 Years and Asylum Welcome's position will be included in the review of this Programme in 2018.</p> <p>The Council has established a Refugee Coordination Group to advise on the delivery of the Syrian Resettlement Scheme in Oxford and</p> |

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|     |  |        |   | <p>Oxfordshire and to seek to improve service provision generally to refugee and asylum seekers.</p> <p>This group includes Voluntary, Community and Faith Groups and the local authorities. It has developed an Action Plan which includes improving access to ESOL, Translation and Specialist Advice Services. The Council has allocated £10,000 2016-17 to support the delivery of these actions.</p>   |
| 14b | <p>That the City Council:</p> <p>b) Explores whether it could provide low cost accommodation to third sector organisations by utilising unused capacity in Council-owned assets such as Community Centres.</p> | Agreed | <p>The Council supports and funds a number of voluntary and community groups, some of which have accommodation in City Council premises and some in the private rented sector. All registered charities are eligible for rate relief</p> <p>Reduced hire rates for the Town Hall and some community building are available to voluntary and community sector organisations.</p> | <p><b>Catherine Hine, Communities Manager</b></p> <p>The Communities Team are in contact with Asylum Welcome about their accommodation situation given the need to expand their services.</p> <p>The council already provides reduced rents and grants to a wide range of third sector organisations that then help them pay for aspects of their operations.</p> <p>The Communities team also work with Community Associations (to whom we often provide low cost accommodation), to reach out to under-represented groups through their activities and volunteer recruitment.</p> |

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| 15 | <p>We strongly endorse the City Council's approach to combatting financial exclusion and recommend that the City Council:</p> <ul style="list-style-type: none"> <li>a) Ensures that the Welfare Reform Team are fully and best deployed in order to provide greater assistance and proactively reach more people, particularly those moving on to Universal Credit,</li> <li>b) Moves towards implementing a 'single view of debt' in order to identify multiple debts owed to the Council, and where possible, consolidate these,</li> <li>c) Gives a high priority to continuing to protect the current level of funding for the advice sector over the medium term,</li> <li>d) Explores longer term funding options for a housing needs money advice caseworker, and evaluates the impact of this provision over time,</li> <li>e) Continues to work closely with CAB and other agencies to encourage the take up of unclaimed benefits.</li> <li>f) Aims to make full use of its Discretionary Housing Payments budget.</li> </ul> | Agreed | The Financial Inclusion Strategy supports this work. | <p><b>Paul Wilding, Programme Manager, Revenue and Benefits</b></p> <ul style="list-style-type: none"> <li>a) The WRT currently has two additional temporary posts funded by grant money received from the Department of Work &amp; Pensions. These are being used to support people who will be affected by the lowering of the Benefit Cap from £26k to £20k in Nov 16. People moving on to Universal Credit are being supported, but numbers are currently very low.</li> <li>b) This is still in progress</li> <li>c) Funding is currently due to be maintained until 2018. Over the next year, proposals for funding from 2018 onwards will be made to Members.</li> <li>d) The money advice caseworker based at St Aldates is now funded from the Welfare Reform Team instead of Housing Needs. This post will be included in considerations for advice funding from 2018 onwards</li> <li>e) The Council currently enjoys a very close working relationship with the advice</li> </ul> |

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|    |  |         |  | <p>sector, and supports the take-up of benefits.</p> <p>f) The Council aims to make full use of its Discretionary Housing Payments, but the priority for awarding these payments is to support customers to become independent of the need for this financial support. This has enabled a greater number of customers to be supported despite not spending the full grant allocation.</p>   |
| 16 | That the City Council establishes a reliable directory of charities for Oxford, setting out the aims, principle client groups and types of relief provided. This will help to ensure that local charities have a greater awareness of what other charities do. | In part | The OCVA have a register of Charities and are funded by the City Council. We will raise concerns about the register with OCVA and seek to address them with OCVA colleagues. | <p><b>Cathy Hine, Communities Manager</b></p> <p>OCVA use their annual charity awards and Pulse newsletter to share information between charities and voluntary groups. They also regularly connect different organisations with each other in the city using their database.</p> <p>There are also city or county-wide networks to co-ordinate on specific issues e.g. ageing, youth. These are often co-ordinated by an agency working on the issue, although may access support from OCVA.</p> <p>OCVA and Communities Team have established referral mechanisms for</p> |

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|    |   |            |   | <p>community groups working in localities, communities of identity and community associations to access OCVA specialist advisory services. Communities Team and OCVA are also developing more effective systems to identify volunteering gaps, particularly for smaller organisations.</p> <p><b>Val Johnson, Policy and Partnerships Manager</b><br/>The Policy and Partnerships Team have recently supported OCVA in mapping the services available which support Refugees and Asylum Seekers. We are looking to do this for Food Poverty and ESOL services.</p> |
| 17 | <p>We recommend that the City Council continues to prioritise improving educational attainment in the city by:</p> <p>a) Offering a new educational grant programme to which Head Teachers from schools serving deprived areas can apply. This programme would provide tangible output-based funding to reduce educational inequalities in city schools. The criteria for awards should be non-prescriptive but grants could be used to fund specific</p> | Not agreed | <p>The Council is currently working through the Oxford Strategic Partnership (OSP) to see if a stronger partnership approach to raising education attainment can improve attainment levels in the city. An OSP Sub Group has been established to develop a set of actions for educational attainment improvement in the city. There have also been meetings with the head teachers of schools in the south of the City and discussions on how the regeneration of Blackbird Leys might contribute to the raising of</p> | <p><b>Ian Brooke, Head of Community Services</b><br/>The City Council has actively participated in the Oxfordshire Strategic Schools Partnership to ensure a joined up approach.</p> <p>A review has been undertaken on the City Council Education Programme which will be reported to Scrutiny Committee.</p> <p>Consideration will then be given to how best head teachers and senior managers can best be supported.</p>  |

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|  | <p>line items in School Improvement Plans focused on Pupil Premium and Special Educational Needs pupils, for example.</p> <p>b) Engaging with partners and considering whether it has a role in ensuring that eligible year 1 and 2 pupils are registered for the Pupil Premium so that their schools receive the additional funding they are entitled to.</p> |  | <p>attainment levels.</p> <p>The County Council has now established a Strategic Schools Partnership Education Commissioning Shadow Board. This Board is in the process of establishing the grant criteria for support. The City Council has representation on this Board. The aim is to ensure any activities funded/provided by the City Council which contributes towards education attainment is additional and complementary to the County Council Commissioning Strategy and Plan.</p> <p>The Council's financial and human resources are constrained and these recommendations are ones which would be difficult to fund within the known future budget envelope.</p> <p>This proposal does have a cost implication, as whilst the Council has some information in relation to benefits claimants it does not hold any data on schools children attend and as the roll out of Universal Credit continues it will hold no relevant benefit data.</p> | <p>A Grant has been allocated to the key Secondary Schools in Oxford to support access to cultural activities for pupils who qualify for free schools meals.</p> |
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|     |   |        | A new grant programme is something for Councillors to bear in mind during the budget setting process.  |  |
| 18a | <p>That the City Council utilises skills within communities and works with partners to maximise every opportunity to provide employment and career paths for more residents living in areas of multiple deprivation, including by:</p> <p>a) Seeking to influence and improve the provision of targeted careers advice in schools, extending this to younger pupils (years 7-8), as well as offering mentoring into adulthood</p> | Agreed | <p>Skills, employment and career paths are not the statutory responsibility of the City Council. However, through the Leader, officers are working with the Oxfordshire Local Enterprise Partnership and the Oxfordshire Skills Board to improve services within the city.</p> <p>Oxfordshire County Council has established a service bringing together schools and businesses called O2i. This includes career advice, work placements and promoting apprenticeships. This work is overseen and monitored by the Oxfordshire Skills Board and information is circulated by the Policy and Partnerships Team Leader to the City Council Employment and Skills Group</p> <p>There is a cross City Council Employment and Skills Group, which meets to share information and to ensure services are coordinated. This group includes officers from the Economic Development, Communities and Neighbourhoods, Policy and</p> | <p><b>Matt Peachey, Economic Development Officer / Jarlath Brine, Organisational Development and Learning</b></p> <p>BITC - Educating the Educators<br/>Oxford's Economic Landscape and Labour Market: workshop delivered by Matt Peachey on 13/07/2016 to assist careers advisors across the City to understand the current state of the labour market in Oxford, the skill gaps, the skills in demand and the future opportunities across the City and County.</p> <p>The outline for this workshop is likely to form part of future workshops to be delivered to parents/ careers advisors in each City cluster school from the autumn of 2016 onwards.</p> <p>The City Council partnership with Cherwell School continues to be a proactive relationship and the programme of mentoring and other soft skill workshops and career interventions for 2016 have been agreed, with final scoping meetings in place for early September 2016</p> |

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|  |  |  | <p>Partnership, Welfare Reform Team and Human Resources.</p> <p>The City Council has undertaken a robust needs analysis of skills and employment issues. This is available in the link below.</p> <p><a href="http://www.oxford.gov.uk/Library/Documents/Statistics/EmploymentAndSkillsSupplementaryPaperAug2014.pdf">http://www.oxford.gov.uk/Library/Documents/Statistics/EmploymentAndSkillsSupplementaryPaperAug2014.pdf</a></p> <p>A review of services was undertaken and an action plan was developed to fill the gaps. This is set out in the Employment and Skills report August 2014. City Council activities include:</p> <ul style="list-style-type: none"> <li>• Working with Business in Community to provide business links with secondary schools, mentoring and work placement opportunities. Currently the City Council is linked with Cherwell School.</li> <li>• The Youth Ambition Programme which aims to build the confidence and skills of young people and ease the transition</li> </ul> | <p>The Council continues a commitment to run an apprenticeship programme targeted at areas of social deprivation.</p> |
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|     |   |        | <p>between school and work.</p> <ul style="list-style-type: none"> <li>• The development of Employment and Skills Plans for key physical regeneration schemes,</li> <li>• Apprenticeships within city council services</li> <li>• Support to Job Clubs on estates</li> <li>• Influencing and supporting the delivery of European Structural Funding Programmes.</li> </ul>  |  |
| 18b | <p>That the City Council utilises skills within communities and works with partners to maximise every opportunity to provide employment and career paths for more residents living in areas of multiple deprivation, including by:</p> <p>b) Extending the use of social clauses to create more and better opportunities for young people. Clarity is required as to how the City Council will ensure that developers deliver social clauses.</p> | Agreed | <p>The City Council Skills and Employment Group ensure that the Employment and Skills Plans are linked into the Job Clubs that are based on estates. A recent Job Fair, arranged with Job Centre Plus, in Barton attracted over 400 potential job applicants and 20 businesses (mainly in the retail and construction sectors). Similar events will be rolled out to Rose Hill and Blackbird Leys. The Council's procurement policies are geared specifically to encouraging suppliers to offer training, apprenticeships and guidance to young people.</p> | <p><b>Matt Peachey, Economic Development Manager / Tom Morris, Principle Planner</b><br/>An Employment and Skills Plan Technical Advice Note (TAN) was prepared by the Economic Development Team together with the Planning Policy Team to provide advice to planning colleagues on the need to secure and implement Skills Plans. This has now been approved and supported by the Growth Board. Skills Plans have been approved and are currently being implemented for Westgate, Barton and Wilmot Dixon (Blackbird Leys).</p> <p>The Oxford Business Forum organised by the City Council but supported jointly by the County and OxLEP have held recent events with</p> |

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|     |  |        |   | the business community specifically focused around skills, training and apprenticeships. A future event is likely to focus on the 'New Apprenticeship Levy' to promote awareness and joint working with the Business Community. The role of other partners such as the Oxfordshire Skills Group will be crucial.  |
| 18c | <p>That the City Council utilises skills within communities and works with partners to maximise every opportunity to provide employment and career paths for more residents living in areas of multiple deprivation, including by:</p> <p>c) Extending the offer of reduced fees for tutors to all Community Centres situated in areas of multiple deprivations. The City Council should also continue to make better use of Community Centres and promote them as vibrant local hubs.</p> | Agreed | Agreed for consideration as a part of the development of the Community Centre Strategy.   | <p><b>Catherine Hine, Communities Manager</b></p> <p>Tuition to develop skills for work is provided at many of the community centres around the city. Aspire, WEA, EMBS access community facilities for free or substantially reduced rates. In some instances these courses are targeted at refugees or non-native English language speakers.</p> <p>Most community centres already offer a discounted rate for community use.</p> |
| 18d | That the City Council utilises skills within communities and works with partners to maximise every opportunity to provide employment and career paths for more   | Agreed | Agreed. City Council Officers have been represented on the European Structural Investment Steering group and helped shape the European Social Fund Strategy and | <p><b>James Pickering, Welfare Reform Manager</b></p> <p>Oxford City Council has been selected to manage the Community</p>  |

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|    | <p>residents living in areas of multiple deprivation, including by:</p> <p>d) Maximising links with universities, private schools, the student hub and businesses to get more volunteer help for appropriate programmes. These opportunities could include coaching and mentoring to help vulnerable people into work, assisting young people to whom English is not a first language, and broadening access to resources such as arts provision.</p> |               | <p>proposals. This included funding for two NEET programmes (to support those who are NEET and those at risk of becoming NEET) and Building Better Futures Funding aimed at long term unemployed. The City Council has submitted an application to deliver the Building better Futures Programme.</p> <p>City Council Officers have been working with the County Council, Employment and Economy Team and Job Centre Plus to look at how teaching language services can be improved. The Oxford Community and Voluntary Alliance was commissioned to undertake a review, which identified that there is a range of good work being undertaken but that the sector needs improved coordination. Officers are currently in discussion with one of the colleges to see if they can take on this role, which has become even more important given the recently announced cuts in in this service.</p> | <p>Grants Scheme an ESF/Skills Agency Funded Programme (subject to contract).</p> <p>The European Social Fund (ESF) Community Grants is a small grant pot for the third sector and other small organisations that would not otherwise be able to access ESF.</p> <p>The Grant is aimed at supporting disadvantaged or excluded unemployed and inactive people towards employment. The total grant available is £387K. The Grants allocated will be between £5K and £50K.</p> <p>Please note the response in Question 14 with regard to ESOL provision.</p> |
| 19 | <p>That the City Council calls on local employers to put an end to exploitative employment practices in the city. These practices include employers charging restaurant staff to wait tables, paying less</p>   | <p>Agreed</p> | <p>The Council will continue to lead by example by offering good terms and conditions of employment to all staff including agency workers. Our contractors are required to commit to paying the Oxford Living Wage</p>  | <p><b>Jarlath Brine, Organisational Development and Learning</b></p> <p>The Welfare Reform Team actively promotes the benefits for employers in paying the Living Wage at every Job Fair they co deliver with Aspire</p>   |

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|    | than the minimum wage, and employing workers on zero hours contracts against their will.  |         | and we have encouraged employers across the city to adopt the Oxford Living Wage with some success. We will continue to lead by example and try and influence other employers in good employment practice through normal channels. The Council will continue to promote best practice and support national initiatives such as Living Wage Week.   | and JCP.  |
| 20 | <p>That the City Council continues to look to raise wages by:</p> <p>a) Creating a Living Wage Hub in Oxford based around the Oxford Living Wage. This should involve a programme of activities to promote the Oxford Living Wage, and a distinct logo that Oxford Living Wage employers are encouraged to display. Ideally these activities should be led by engaged citizens but they may initially require some officer resource. The Hub could also look at other related employment issues such as pay ratios.</p> <p>b) Identifying a public face of the Oxford Living Wage. This could be a member champion.</p> <p>c) Working constructively with the Living Wage Foundation in promoting Living Wage Week and seeking to raise wages and</p> | In part | <p>Partially agreed. The Council has already undertaken a number of initiatives including achieving Living Wage accreditation, campaigning in the city for other employers to adopt the Living Wage and speaking in support of the benefits of the OLW in various forums. We will continue to make use of the benefits of being a nationally accredited Living Wage Employer through Living Wage research, campaigns (such as Living Wage Week), etc. We will review the resource implications of the more extensive approach recommended in 20 a) and b).</p> <p>In addition to the above the Council will continue to pay its staff the Oxford Living Wage and require its contractors operating locally to do the same.</p> | <p><b>Jarlath Brine, Organisational Development and Learning</b><br/>National Living Wage week material and digital communications package will be forwarded to the OCC communications team to promote wider engagement with the Living Wage &amp; National LW week 31<sup>st</sup> October to 4<sup>th</sup> November 2016</p> |

|    |  |        |   |   |
|----|--|--------|---|---|
|    | improve working conditions in Oxford, particularly in low paid sectors such as hospitality, health and social care.  |        |   |   |
| 21 | <p>That Oxford City Council is a major employer in the city, and recommend that the City Council continues to develop its own employment practices through:</p> <ul style="list-style-type: none"> <li>a) More flexible recruitment practices such as accepting CVs and more widespread use of assessment centres,</li> <li>b) An annual managed calendar of interventions targeting black and minority ethnic communities and other underrepresented groups,</li> <li>c) Better targeting of constructive feedback to unsuccessful applicants,</li> <li>d) Interactive and accessible recruitment webpages with guidance for applicants,</li> <li>e) Uplifting the salaries of lower paid staff at a higher rate than those of higher paid staff to ensure that the pay gap between them doesn't increase over time.</li> </ul> | Agreed | <p>The Council is already progressing an action plan to improve its recruitment practices. This includes giving more attention to job descriptions, person specifications, selection testing which tests criteria more effectively than interviews alone, inviting CVs as part of the application process, etc. It is increasingly rare for a selection process to comprise only of an interview. We have also run initiatives such as targeting unsuccessful BME candidates to review their experience of the recruitment process, consider the shortlisting decisions, ensure they receive feedback, etc. We have an electronic recruitment system and a series of pages which include assistance for candidates in the application process and presenting the benefits of working for the Council. We have previously addressed the issue of low pay by introducing the Oxford Living Wage and deleting the lowest pay grades. Further consideration of low pay will feature in consultation and negotiation for a new pay deal to run</p> | <p><b>Justin Thorne, HR and Payroll Manager</b></p> <p>Significant improvements have been made to the organisations recruitment processes in the last 12 months. Revised templates, training for managers and extensive use of selection testing beyond interviews are all in place. We also advertise roles using a wider range of medium to attract a greater and hopefully more diverse pool of candidates. We have successfully run two open evenings, held in the community and will look to hold these on an ongoing basis. We use CV's for appropriate roles and will be exploring how the HR information system can help support us with this moving forward. All candidates are offered the opportunity for feedback and recruiting managers are required to contact all candidates that attended interview in person to provide this opportunity, following the selection process. We continue to keep under review our guidance to job applicants and have recently revised the internet</p> |

|  |  |  |   |  |
|--|--|--|---|--|
|  |  |  | after the current one expires (March 2018). Although recommendation 21 e) has generally been the case in recent years, no long term commitment can be made to it as our wage bargaining structures are not necessarily always going to be under our direct control. | pages to make them easier to navigate for job applicants. Salaries and pay scales will be reviewed as part of the pay negotiations moving forward. |
|--|--|--|---|--|

## REPORT TO OXFORD CITY COUNCIL

### Review of the Impact of Oxford City Council's Education Attainment Programme (2012 – 2014)

**Authors:** Professors Debra McGregor and Liz Browne

**Date:** April 2016

OXFORD  
**BROOKES**  
UNIVERSITY

**School of Education**

Report prepared for Oxford City Council



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## Review of the Impact of Oxford City Council’s Education Attainment Programme (2012 – 2014)

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## **SECTION 1 : EXECUTIVE SUMMARY**

This report sets out to describe the legacy of the Education Attainment Programme (EAP) on attainment and cultural development related to learning and leadership that emerged as a result of the Oxford City Council (OCC) 2012 – 2014 project.

The OCC EAP was comprised of three interventions KRM literacy (reading and writing), KRM numeracy (mathematics) and Leadership for Learning (L for L).

In the period leading up to, and including 2011, there were a significant number of Oxford City primary schools that were performing ‘below-the-floor’ by national Department for Education (DfE) and local Oxfordshire standards in KS1 and 2 reading, writing and mathematics. Academic attainment in these key curricular areas was recognised to influence success in secondary school, as well as later life (after compulsory education) and therefore became a focused concern of the Oxford City Council.

The initial 11 city schools involved at the beginning of the EAP were all performing at a below-the-floor (DfE 2011) standard of fewer than 60% of children at age 11 (when they finish primary school) achieving level 4 or above in reading, writing and maths. The progression in reading, writing and maths was also below the national median expected as children progress through their KS 1 to 2 of their primary school journey.

External educational advice was sought (from various sources including a consultant, the local universities and a local educational service) to suggest how this situation might be remedied to better support children in these schools to academically improve beyond the failing levels.

To support schools in the academic challenge to improve pupils’ attainment it was decided that there would be two specific areas of activity. One related to teaching important aspects of the curriculum, the other was devised to support development of senior leaders’ leadership skills. The core subjects of literacy (reading and writing) and numeracy (mathematics) were the curricular focus of the interventions. There was an aspiration that key indicators of attainment recognised by the DfE and Ofsted (reading, writing and numerical performance at the end of KS 1 and KS 2) would improve as a result of the focused interventions.

To develop the three strands of specific activity (literacy, numeracy and leadership) the External Education Advisor in conjunction with some Headteachers undertook to implement the KRM literacy and numeracy programme. University Educators (from Oxford University and Oxford Brookes) tendered for and won, in line with specifications, the nature of the L for L strand. These three strands of focused activity were fashioned to comprise a two-year interventional project that supported the schools’ development between January 2013 to December 2014.

The KRM literacy (reading and in some schools also writing) and numeracy intervention programmes were adopted because they offered an evidenced-based pedagogy. This approach, involving a particular kind of prescriptive teaching, was shown to improve academic attainment in reading, writing and mathematics for schools in challenging circumstances (Shapiro and Solity, 2008; 2009). The

implementation of this programme, however, was variable and it was not retained throughout the two-year intervention for the majority of the schools involved in the project.

The L for L intervention, a bespoke programme designed to support Headteachers and middle leaders offered a range of supportive activities throughout the two years. These included various lectures, seminars and workshops led by renowned, established and experienced school leaders and well-known academic researchers working in school improvement, coaching and/or leadership.

This intervention enabled school leaders to develop their confidence and competence to improve the children's attainment, increase engagement with families and develop effective collaboration with other city schools (Menter and McGregor 2015). The successful networking between schools at different levels of leadership facilitated the sharing and dissemination of a range of effective classroom and leadership strategies to tackle some common challenges faced by the City schools.

The discussion about impact in this report involves scrutiny of a range of information (from publicly available data and interviews with senior leaders) to provide more detail regarding the impact of the EAP interventional activities.

The first strand of evidence reviewed is drawn from publicly available attainment data. Academic performance achieved by the pupils in the various schools funded to engage in the three projects has been examined to establish evidence of impact. This has included consideration of different kinds of data including; attendance, numeracy and literacy achievement (available through websites such as the DfE for standards and data-dashboard information as well as Raise-on-line). Ofsted (and other external agency) reports have also been reviewed for attainment data and indications of cultural changes (such as leadership and management of teaching and learning). These data have been mapped over a 4 year period between 2011 and 2015 representing a period prior to, and for a year after, the two year EAP interventional project.

The second strand of the review has focused on Senior Leaders (including Headteachers) recollections and reflections of the impact of the project. This has provided more personal insights into accounts of cultural and attitudinal changes resulting from the three interventions. Interview data has drawn on senior leaders' reflections, including seven headteachers, a deputy head and the former education consultant leading the project. The emergent information from the review has been organised using a Guskey framework (Guskey 2000) to suggest the extent and nature of impact of the projects. This also includes consideration of more immediate and medium-term effects (after two years) on school policy, teaching and learning.

The emergent picture of impact is complex. All the schools did not engage in, and respond to all three of the interventions. The varied levels of commitment to (and engagement in) the interventions are quite closely mirrored by the extent of improvement in attainment. However, there are some anomalies where one school has significantly improved their average level 4 or above at KS 2 to 90%<sup>1</sup>. This is 10% above the national average and a 20% increase in performance over the last

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<sup>1</sup> This is from 2015 data released in February 2016. Available at <http://www.raiseonline.org> (accessed 15.4.16).

three years. Paradoxically this school did not participate in either the KRM literacy or numeracy interventions. The senior leadership team did, however, fully engage with the L for L programme.

One other school has also managed to achieve above the national average at KS 2, with the average level 4 or above reaching 85%<sup>2</sup>. This school still retains the KRM numeracy philosophy. This represents a 17% increase in performance over the last three years. The impact of KRM in this school may be as a result of a synergistic effect, as the school also participated fully in the L for L programme.

The evidence of improved attainment in the other schools suggests there are some foundational developments that were underpinned or catalysed by the interventions. Comments from senior leaders suggest a range of activities within the two-year L for L programme promoted significant changes in school policies and practices. Reflections on the KRM approach also appeared to inform pedagogic developments in some schools. The schools that maximised the opportunities afforded by the EAP interventions revealed quite significant cultural shifts in their ethos, beliefs and actions that have permeated down to impact on pupil achievement. Where there is less impact, there has been significant staffing (including senior teacher) 'churn', e.g.: Headteacher retiring or moving to a different school.

Currently (in 2016) there are four schools that have improved their Ofsted grade. Given that this has occurred during a time when Ofsted have implemented a new inspection framework which is far more exacting than the previous one, this is a significant achievement. One school has even moved from a Grade 4 (Unsatisfactory) to Grade 2 (Good) in four years. This is a very impressive improvement noted by the local press and acknowledged nationally by the DfE with the school being recognised as one of the ten most improved schools in the country. This school did not participate in the KRM programme. The other three schools now recognised as Grade 2 (Good) were previously recorded as Grade 3 in 2010.

There is also a significant improvement in the percentage of pupils 'making progress' in the Oxford City schools. In all schools except one, they have now reached 100%<sup>3</sup> in either reading, writing or mathematics.

Reports from Ofsted inspections, interviews with Headteachers and inferences from other external sources indicate how less explicit leadership skills have been improved. There has been impact involving 'softer skills' such as leader confidence; leader's self-belief; more effective collaboration through-out the schools; more focused diagnostic skill development; more effective problem-solving; better understanding of performance data; tacit Professional Development (PD); more effective communication skills and even more effective distributed leadership.

A range of factors have heightened the academic challenge for the City primary schools. These include a rise in attainment targets set by the Government, an increase in pupil numbers (most well beyond the national average), additional

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<sup>2</sup> This is from 2015 data released in February 2016. Available at <http://www.raiseonline.org> (accessed 15.4.16).

<sup>3</sup> This is from 2015 data released in February 2016. Available at <http://www.raiseonline.org> (accessed 15.4.16).

demands for SEN provision, higher percentages of FSM children and also large numbers of youngsters that do not use English as their first language. Despite this there is clear evidence presented in this report that suggests how many different aspects of academic improvement is on an upward trajectory, with several schools performing beyond DfE expectations. These developments have been strongly influenced and supported by the OCC EAP and should be celebrated.

## SECTION 2 : INTRODUCTION

In January 2016 Oxford City Council commissioned Oxford Brookes University to carry out an evaluative review designed to investigate two specific questions :

*What impact did Oxford City Council's Education Attainment Programme (OCC EAO) which involved the KRM literacy and numeracy programme and the Leadership for Learning programme) have on:*

- (1) the culture around attainment  
and*
- (2) schools' ambitions for students' attainment?*

*The review also includes the mapping of trends in data over a four-year period between 2011 and 2015 and includes some aspects of personal accounts from interviewed Headteachers or senior leaders.*

This evaluation draws on the reports already presented to the City Council (regarding KRM literacy and numeracy and L for L) which is supplemented by more recently available evidence (regarding 2015 performances in 2016) from OfSTED reports, DfE (Department for Education) performance tables, including the DfE data dashboard information and raise-on-line. and interviews with a range of senior leaders involved in and/or aware of the impact of the Attainment Programme. The interviewees included a former Educational Advisor to the City Council, two former Headteachers involved in the interventions for the first year, a current head and deputy head who were more involved latterly in the interventions. These accounts were supplemented by the views of four leaders who have been heavily involved through-out the 2011 – 2015 period.

Two of the leaders interviewed are from schools that have continued to use the KRM philosophy in their Numeracy teaching. One deputy head was from a school that began to use KRM literacy and then withdrew (ceased in its involvement) as the Headteacher and other trained staff moved to different schools (some beyond Oxford). Four other leaders interviewed were heavily committed to the L for L programme and shared their views of the impact of this in their schools.

### **i. National Context :**

The OCC EAP project took place during a period of major national educational change. In 2010 a new Coalition Government was elected, they were (and the subsequent Conservative Government is still) focused heavily on the goal of raising standards in Schools. During the project period there were several significant changes in national policy that presented leadership and management challenges, for example :

- More rigid and challenging Ofsted grading criteria were introduced placing greater requirements on schools to reach the required 'Good' category. BBC

News (2010) reported that revised inspection criteria, which were introduced in September 2009, resulted in a reduction from 19% to 9% in the number of schools judged to be Outstanding, and an increase from 4% to 10% in the number of schools judged to be Inadequate.

- During this period there were many changes to the Ofsted focus of inspections as well as the criteria that needed to be reached to achieve the various categories. In 2012 wider ranging criteria were introduced which, for example, looked more specifically at levels of attainment of pupils, their rate of academic progress through the key stages and their behaviour and attendance. The third Ofsted category 'Satisfactory' was altered to 'Requires improvement' (that instigated more regular inspections). The criteria that had to be met to achieve 'Outstanding' or 'Good' outcomes from inspections required more effective leadership and management from Headteachers. During this time 'Coasting' schools were identified as those that may be compelled to become Academies. The picture since 2015 has become even more complex with the prospect that even 'Good' schools may be involved in more frequent inspections.

There were many other external factors (related to Educational Policy changes during the two-year period 2012 - 2014) that also impacted on the Schools participating in the projects and compounded leadership, teaching and learning challenges. Some of these included :

- Preparation and planning for a new revised national curriculum (documentation issued by DfE in 2013 for implementation in September 2014)
- Changed national testing and assessment arrangements (the introduction of new baseline testing etc)
- The new Children and Families Act that significantly changed SEN policy (requiring rapid changes in provision during 2015 to offer better support **all** learners)
- New (and more regular annual) measures of children's progress (since 2012)
- Performance related pay (examining teacher performance and achievement of their pupils to determine their pay)
- General recruitment and retention issues to secure quality teaching staff to work in schools in challenging circumstances.

Not only did the Headteachers have to contend with a changing and challenging national political landscape, there were also local issues that they needed to take account of in leading their schools.

## **ii. Local Context:**

Within Oxford City Headteachers also needed to contend with a range of local issues including :



- Rising numbers of children of primary school age (well above the national average, see Table 1);
- Significant increase in the proportion of English not as a first language pupils (see Appendix 2);
- Increase in the demand for SEN provision (see Appendix 3);
- Increase in the numbers of FSM children (see Appendix 4);
- Increased devolution of funding to schools, whose leaders are not necessarily experienced managers of significant public funds.

The general provision of primary education for a growing pupil population (see Table 1 illustrating the Numbers) meant that in 2012 only two schools enjoyed a lower than average number of pupils in their school. Five schools had over 150 more children than the national average to cater for. In 2014, all the City schools (apart from one) were educating (between several and even hundreds) more children than the national average primary school population!

| <b>School</b>   | <b>Pupil Number (2012)</b> | <b>Difference to National average</b> | <b>Pupil Number (2014)</b> | <b>Difference to National Average</b> |
|---|----------------------------|---------------------------------------|----------------------------|---------------------------------------|
| School A  | 404                        | +153                                  | 432                        | +169                                  |
| School B  | 476                        | +225                                  | 465                        | +202                                  |
| School C  | 241                        | -10                                   | 267                        | +4                                    |
| School D  | 321                        | +70                                   | 318                        | +55                                   |
| School E  | 445                        | +194                                  | 456                        | +193                                  |
| School F  | 345                        | +94                                   | 382                        | +119                                  |
| School G  | 488                        | +237                                  | 488                        | + 225                                 |
| School H  | 301                        | +50                                   | 322                        | +59                                   |
| School I  | 244                        | -7                                    | 244                        | -19                                   |
| School J  | -                          |                                       | 365                        | +102                                  |
| School K  | 287                        | +36                                   | 330                        | +67                                   |
| <b>National average (England) for primary schools</b> | <b>251</b>                 |                                       | <b>263</b>                 |                                       |

Table 1 : To show the changes in number of pupils in the 11 City schools over the two years of the OCC EAP interventional project. Source : <http://dashboard.ofsted.gov.uk/>.

## Attendance challenges

This still remains problematic in most Oxford City schools. The 2014/5 (DfE 2014/5) data showed that attendance at School J fell into the bottom 20% percent for all schools in the Country at 94.7%. School K was also in this lowest category (the fifth quintile) for attendance. The data for School G indicated a slight improvement placing it in the bottom 40% of schools in the Country. The data for School H showed an improvement and it was in the middle 20% for all schools. School I is the only one where levels of attendance have been good, they have shown year-on-year improvements.

### **Changes in Headteachers during and since the OCC EAP**

During the two-year interventional project there were many changes of Headteacher. Table 2 (below) indicates the extent to which Headteachers reportedly changed. Only three (however one took maternity leave for several months, therefore requiring a different interim Head) retained the same Headteacher over the interventional project period of two years. The Headteacher's leadership in decision-making and commitment to the KRM and L for L interventions influenced the extent to which schools engaged with and implemented the OCC professional development provision. At several schools, changes in Head, resulted in the cessation of involvement in the interventions. This is discussed later in the report.

| Oxford City Schools involved (at varied levels) in the attainment project | Number of Headteacher changes since 2012 |
|---|--|
| School A  | At least 1                               |
| School B  | At least 1                               |
| School C  | 0  |
| School D  | At least 2                               |
| School E  | 1  |
| School F  | At least 4                               |
| School G  | At least 2                               |
| School H  | 0 (temporary interim)                    |
| School I  | At least 1                               |
| School J  | At least 3                               |
| School K  | 0  |

Table 2 : Indications of changes in Headteacher during the period of the OCC EAP project. \*As of February 2016. Source : Raise-on-line available at <https://www.raiseonline.org>.

### **Teacher staffing issues**

During the project many schools experienced several staff shortages limiting the availability of staff to attend the EAP interventional project events. Between 2013 and 2014 one school appointed 11 new members of staff. In Oxford, specifically and nationally, there appears to be a very high staff turnover in schools placed in challenging circumstances, e.g. : the three schools comprising the Blackbird Academy, where there was a turnover of 75% of staff over a summer period (Wright 2014 : 67).

The impact of staff turbulence in many of the participating Schools is reflected in the extract below, taken from the OfSTED report for School B School.

“School B is a larger than average primary school serving the Cowley area of Oxford with approximately 470 children on roll including 60 nursery places. Over half the children are from minority ethnic backgrounds. The number of pupils with specific needs is above average. Since the last inspection there have been major changes in staffing, a large number of the teaching staff having been appointed within the last three years. Most significant are the changes in leadership as, following a period of instability, the present head teacher has been in post since September 2013 and most members of the governing body are new. Following **a recent period of turbulence within both leadership and staffing**, the new headteacher, working in close partnership with governors, parents and children has created within the school a warm and embracing culture”

A recent report (Weale 2016) in the Oxfordshire Guardian contained a report on teacher shortage in the County. This is an issue that obviously compounds and exacerbates all the previous factors influencing the challenges in running an effective school.

### **Re-organisation and restructuring**

Alongside all the previously mentioned challenges, a number of Oxford City schools had been involved in major restructuring (and significant building works during the 2012 – 2014 period). Six of the eleven schools involved in the Leadership for Learning (L f L) project now operate as Academies.

| Oxford City Schools involved (at varied levels) in the attainment project | 2012                                       | 2014/15  |
|---|--|--|
| School A  | LA Primary School                          | Part of the Cheney School Academy Trust                                |
| School B  | Voluntary Controlled C of E Primary School | Voluntary Controlled C of E Primary School                             |
| School C  | LA Primary School                          | Part of the Cherwell School Academy Trust now the River Learning Trust |
| School D  | LA Primary School                          | State Primary School   |
| School E  | LA Primary School                          | State Primary School   |
| School F  | LA Primary School                          | Part of Blackbird Leys Academy Trust                                   |
| School G  | LA Primary School                          | Part of Blackbird Leys Academy Trust                                   |
| School H  | C of E Primary School                      | C of E Primary School  |
| School I  | Catholic Primary School                    | Catholic Primary School  |
| School J  | LA Primary School                          | Part of Blackbird Leys Academy Trust                                   |
| School K  | LA Primary School                          | State Primary School (whole school rebuilt)                            |

Table 3 : To indicate the process of re-organisation of the school's status during the 2012 – 2014 interventional project period.

### **Below-the-floor performance of the Oxford City Schools**

The academic performance that children in primary schools were expected to achieve (DfE 2012) were laid out as targets that were measurable at the end of primary school (KS 2) in terms of attainment in English (reading and writing) and mathematics. The performance of the schools prior to being involved in the OCC project is summarized below :

|          | 2008 English<br>and Maths | 2009 English<br>and Maths | 2010 English<br>and Maths | 2011 English<br>and Maths |                         |                                   |
|----------|---------------------------|---------------------------|---------------------------|---------------------------|-------------------------|-----------------------------------|
|          | 2008                      | 2009                      | 2010                      | 2011                      | Average over<br>4 years | Number of<br>times below<br>floor |
| School A | 47                        | 39                        | 37                        | 65                        | 47.00                   | 3                                 |
| School F | 54                        | 44                        | -                         | 43                        | 47.00                   | 3                                 |
| School J | 49                        | 43                        | 43                        | 58                        | 48.25                   | 4                                 |
| School D | 58                        | 58                        | 51                        | 36                        | 50.75                   | 4                                 |
| School K | 40                        | 40                        | 62                        | 68                        | 52.50                   | 2                                 |
| School E | 49                        | 61                        | -                         | 48                        | 52.67                   | 2                                 |
| School B | 55                        | 44                        | 53                        | 74                        | 56.50                   | 3                                 |
| School I | 67                        | 59                        | 44                        | 63                        | 58.25                   | 2                                 |
| School H | 66                        | 63                        | 54                        | 62                        | 61.25                   | 1                                 |
| School C | 72                        | 67                        | 61                        | 58                        | 64.50                   | 1                                 |
| School G | 58                        | 69                        | 69                        | 65                        | 65.25                   | 1                                 |

Table 4 : The Below-The-Floor performance of the Oxford City Schools (organized according to average attainment score).

The (averaged) attainment levels at KS 2 in English and mathematics of Oxford City Schools prior to the OCC EAP interventional project are shown in Table 4. The final column indicates the number of times the school had failed to reach the expected level of achievement with 60% or more of learners achieving the expected level of attainment in the Key Stage 2 tests. Source : Report to Oxford City Council Scrutiny Committee. May 2013.

### **SECTION 3 : THE AIMS OF THE EDUCATIONAL ATTAINMENT PROGRAMME (EAP)**

With at least 11 city primary schools performing 'below-the-floor' (DfE 2011) level in their KS 2 performance the determination to support and improve the academic attainment of the children in the city resulted in the setting of ambitious targets. The challenge of the EAP was for primary schools which serve the most disadvantaged communities to improve attainment at the end of KS 1 and 2, by 10% above the national average. This meant aiming for :

- 95% achieving level 2 in Reading at age 7 (at the end of Key Stage 1) and
- 84% achieving Level 4 in English and Maths at age 11 (at the end of Key Stage 2)

These targets were to be achieved by 2016 or 2017.

The decision taken at City level (in consultation with some headteachers) to adopt the KRM Literacy and Numeracy instructional programmes to facilitate this improvement was because the research evidence indicated the approach could enhance reading, writing and numeracy skills in children from disadvantaged communities (Shapiro and Solity 2008; 2009). The evidence base suggested that the KRM approach using real books and focusing on phonics could result in :

- raised attainment of all children, not only lower achieving pupils;
- approximately 80% of children developing reading ages ahead of their chronological ages instead of the expected 50%;
- the incidence of reading difficulties should be reduced from the expected 20-25% to approximately 2-3%;
- more children than expected will have a reading age 12 months or more ahead of their chronological age.

To develop school leaders' leadership skills, the two local Universities and a Local Educational Consultancy (formerly Education Excellence in Oxfordshire) designed a leadership programme to assist school leaders in delivering on the ambitions for raised attainment in the City.

The objectives achieved in this aspect of the EAP programme have already been reported to the City Council (Menter and McGregor 2015). There was evidence that the L for L intervention :

- i. Raised attainment through enabling Headteachers to become more effective in leading improvements in teaching and learning and in developing school-community partnerships.
- ii. Raised engagement with families through various strategies.
- iii. Significantly improved confidence in school leaders: through the development of inquiry-led, research-informed leadership, through collaboration both within and

outside the school. Their learning emerged through action-based developments, that set out manageable targets for improvement that could be reviewed and disseminated within the project.

iv. Increased strength and depth of leadership: through the involvement of school leaders at core events, seminars and other participatory events.

v. Promoted a strong collaboration across schools whereby the leaders worked effectively with each other on shared or mutual concerns creating collective understanding of possible solutions to common issues.

## SECTION 4 : THE NATURE OF THE INTERVENTIONAL PROJECT

- i. **THE KRM Initiatives**
  - a. **Literacy**
  - b. **Numeracy**

The outline of the KRM programme (literacy and numeracy) was presented to the scrutiny committee report (Wright 2014 : p.66).

It is indicated here that there was variation in the extent to which schools were involved in the KRM initiative. The dates (and terms) they were noted to engage with the training are summarised below :

| Schools  | Programme               | Dates in the KRM programme | Number of terms |
|----------|-------------------------|----------------------------|-----------------|
| School D | KRM Reading and Writing | Jan 2013 to July 2014      | 5               |
| School E | KRM Maths               | Nov 2012 to Sept 2014      | 5.5             |
| School H | KRM Maths               | Jan 2013 to Sept 2014      | 5               |
| School F | KRM Reading             | April 2013 to July 2014    | 4               |
| School G | KRM Reading             | April 2013 to July 2014    | 4               |
| School J | KRM Reading             | April 2013 to July 2014    | 4               |
| School I | KRM Reading             | April 2013 to Dec 2013     | 2               |

Table 5 : The schools involved in KRM training. Source : Public Reports Pack 06102014 1800 Scrutiny Committee p.66

There were a number of organisational changes required (such as timetabling the teaching of literacy and numeracy 3 times a day) to implement KRM successfully in the schools. It was problematic for some of them to ensure all teachers were able to engage with the training programme. There were also tensions with the LA support that was being provided for Oxford City and Oxfordshire schools regarding the alternate approaches to teaching and learning in maths. The county approach did not chime with the philosophy and pragmatics of the KRM strategy for improving mathematical attainment.

One school also indicated how the resources for the literacy (reading and writing) intervention were well documented and provided in good time, but that the mathematics programme had perhaps not been running as long and did not have readily available the same extent of substantial teaching materials. There was also comment about the lack of electronic resources for the KRM programme. Some teachers were surprised that the materials were only available in printed form.

A real highlight for many learning how to apply the KRM materials was a visit to a Brixton school where the teachers were able to watch KRM being taught. Visiting a

Educational Advisor describing the visit to see KRM in-action :

during the second year was a visit to a school in Brixton, in one of the poorest areas of Brixton who had been doing KRM for three years and then getting a hundred percent of their children through English and maths. And I think nearly all of the KRM schools came on that visit, and we saw the KRM teaching in every classroom, they were doing English, reading,



school to see a new way of doing something ‘in situ’ was very useful professional development.

One headteacher indicated, however, she had to organise (and fund) additional training for her staff to feel competent and confident to ‘deliver’ with the new KRM philosophy.

## ii. LEADERSHIP FOR LEARNING

This programme took place over two years from January 2012 to January 2014.

The report of the implementation and immediate impact of this programme was documented in a previous report to the OCC scrutiny committee by Prof Menter and McGregor in January 2015. It is, however, useful to reiterate the extent to which the schools engaged with the L for L programme (see Table 6).

Great efforts were made to re-engage the three schools in the Blackbird Leys Academy Trust schools, but the continuing changes in staff and the need for new leadership teams to establish themselves *in situ*, prevented colleagues taking up the programme. Similarly School D participation did not continue into the second year, following changes to its leadership team.

| Oxford City Schools involved (at varied levels) in the attainment project | Participated in Leadership for Learning  |
|---|--|
| School A  | Participation 2012 - 2013  |
| School B  | Participation 2012 - 2014  |
| School C  | Participation 2012 - 2014  |
| School D  | Participation 2012 - 2013  |
| School E  | Participation 2012 - 2014  |
| School F  | Participation 2012 - 2013  |
| School G  | Participation 2012 - 2013  |
| School H  | Involved throughout the two years, but a little disrupted by Head’s maternity leave. |
| School I  | Full participation 2012 - 2014   |
| School J  | Some involvement 2012 - 2013   |
| School K  | Participation 2012 - 2014  |

Table 6 : To indicate the relative extent of engagement with the L for L programme.

### Critical issue of involving Headteachers who moved on

The cessation of involvement of schools in both programmes (see Tables 5 and 6) occurred as a result of some Heads leaving their schools. New in-coming Headteachers who did not have experience of the KRM Literacy or Numeracy training or the L for L were unlikely to continue to support the staff implementing the

new approaches and innovative ideas because they were unfamiliar with them, as the former Educational Advisor (2016) explained, “some of them had two heads a year, they put in an interim head...those were quite important because [..in some cases...] the interim head stopped the program. I think that was one of the critical challenges. People we engaged at the beginning ..... they weren't the same people at the end”.

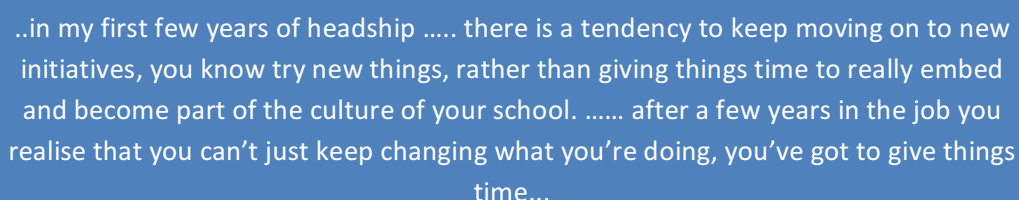
## **SECTION 5 : THE APPROACH TO REVIEWING IMPACT OF THE INTERVENTIONS FOR THIS REPORT**

A well used and widely recognized approach to judging the effect of an intervention is the Guskian (2000) model of impact. The Guskian model involves assessing impact at five different levels. These include :

- i. Participant reaction to the intervention(s)
- ii. Participant learning from the intervention(s)
- iii. Organisational support and change that emerges from implementing the intervention(s)
- iv. Participants use of new knowledge and skills developed through the intervention(s)
- v. Pupil learning outcomes as a result of (implementing) the intervention

This section of the report will consider first the five levels of impact of the KRM Literacy and Numeracy jointly and then Leadership for Learning. To describe these differentiated levels of impact, several existing documents were scrutinised, provided by OCC that reported on the KRM and the Leadership for Learning projects; publicly available data (from the DfE; Raise-on-line etc) and interviews (including a former Educational Advisor; two heads who were familiar with (and part of the first year of the projects), a current head and a deputy head who were involved throughout the two years. Information from previous interviews with an additional four Headteachers were also drawn upon to inform this report.

At this point in the report, it is worth mentioning that several Headteachers who were interviewed, re-iterated that when embarking upon some new policy or practice in their school, they had to consider not only whether the new initiative was appropriate to take on but to also be prepared to embed the change and then wait sometime for subsequent outcomes to improve learning. This is indicated below by a Headteacher who has been in post for several years.



..in my first few years of headship ..... there is a tendency to keep moving on to new initiatives, you know try new things, rather than giving things time to really embed and become part of the culture of your school. .... after a few years in the job you realise that you can't just keep changing what you're doing, you've got to give things time...

### **a. The KRM Literacy and Numeracy**

#### **i. Participant reaction to the programmes**

When the Headteachers, classroom teachers, literacy and numeracy co-ordinators and governors were first introduced to these programs they were provided with

evidence that the application of KRM in the classroom could potentially improve the below-the-floor levels of attainment.

The documented evidence of impact of the intervention provided persuasive indications that it could enable poorly performing Oxford City schools to significantly improve their children's academic performance in literacy and numeracy.

Several schools that initially embarked on implementing KRM (for example School I and School D applied KRM literacy; School H and School E adopted KRM numeracy) but did not necessarily continue beyond the two year intervention with it. Teachers from all the schools initially engaged in the introductory sessions and could then opt to be involved in further training sessions provided to become familiar with the materials and appreciate how to teach literacy/numeracy using the KRM methodology and methods in their particular school. Some schools chose not to implement the complete KRM approach after attending the introduction/workshop/INSET sessions when they had time to consider fully the practical implications of implementing the new methods their particular classrooms.

Although some Heads had some reservations about the highly structured KRM approach, the prescriptive nature of the lessons and the three-times a day requirement, several (including School I and School D) tried to implement it as directed.

Many teachers, though, were resistant to the precise and very specific way of teaching that KRM insisted was necessary to implement the approach successfully. Tensions developed because there were quite different existing philosophies in the schools where County wide initiatives, such as the 'Oxfordshire Reading Campaign' or the 'Story telling' approach were being implemented.

KRM provided for some teachers an effective *teaching* programme, especially new entrants to the profession. The materials and lesson structures were very clear and provided immediately usable resources, gave precise and explicit instructions to be followed to teach literacy/numeracy. Younger, less experienced teachers were therefore confident in delivering this approach (because the classroom resources materials were already prepared).

Younger (and SEN) children appeared to respond particularly well to the iterative, tightly prescriptive and progressively incremental way that phonics knowledge and skills were presented and then practiced (three times a day) in the KRM classes.

The numeracy programme had not been quite so extensively researched and the teaching materials so robustly tried and tested with children of a range of abilities. This appeared to offer (mathematics) subject co-ordinators some flexibility to 'make-it-work' in their schools by generating additional guidance for their teaching staff where there were few KRM resources.

However, some more experienced teachers found the tightly prescribed KRM approach too constraining and felt they lost autonomy in making curricular and pedagogical decisions about what was best to teach their children (and how to effectively differentiate for the diversity of learners in the classroom). They felt they were not able to exercise their professional know-how as they were not able to

choose the reading resources to focus, for example, on developing *their* childrens' phonics skills.

The experience, though, of engaging in (or considering) quite a 'different' teaching programme that involved quite distinctive perceptions (and measures) of learning is very useful professional development activity for the teachers. For all reflective teachers involved there would be pedagogical, management and leadership learning outcomes from the experience, even if they did not continue to implement the literacy (and numeracy) intervention in the longer term.

## **ii. Participant learning**

The teachers and Heads involved in the KRM training became aware of the clear evidence regarding improvements in reading and writing attainment that a precise and prescriptive approach to teaching could bring about.

Previously there appeared to be an attitude that nothing could be done for these pupils. Schools appeared to adopt a view that '...the children couldn't succeed for a huge range of reasons, that they [the schools] didn't have enough money, that the areas were too poor and the children [...had...] such a low level of skill and had so many challenges in their lives that they couldn't be expected to reach the standards that the government, the City and the County were expecting" (Former Education Advisor to the City Council 2016).

Professional discussions about the different ways that various teaching approaches could improve performance became more prevalent. On a "visit to ... Brixton one of the poorest areas [a school] who had been doing KRM for three years and ... getting a hundred percent of their children through English and maths [...] we saw the KRM teaching in every classroom, they were doing English, reading, writing and maths.... we could see this was an incredibly poor community with high-rise flats .... a hundred languages were spoken, [...] Anyway you know it was clear it was possible to achieve [better] results with children" (former Oxford City Council Education Advisor 2016).

More Heads and teachers, therefore became aware that it was possible to develop pedagogies to help children from poorer, deprived and impoverished backgrounds to succeed academically. This is echoed later by the significant 'making progress' achievements (in Table 11) evidenced in the schools.

## **iii. Organisational support and change**

To implement these two interventions, a daily (and weekly) change in classroom organisation, practice and resources was required because the approaches were so prescribed that three distinct short sessions (of varying lengths were to be taught within the same day). There was a very structured taught programme that has to be presented at a particular pace and specific content. This created tensions in some of the schools.

Although the schools were each invited to participate in professional development to support this initiative, these events were 'presentational' and held centrally. The schools who wished for support to have customised advice and individual teacher support had to fund this additional professional development themselves. Where

headteachers (and their staff) felt this was appropriate resources could be found). However, many experienced teachers found the KRM approach did not resonate with their beliefs about good practice, where they knew they needed to differentiate for particular pupils rather than teach as if 'one size fits all' (Head's quote).

Another tension in the implementation of the KRM, was exemplified by a request from a Headteacher who had been very keen on the KRM reading program. However, her school later discontinued the KRM because it was not appropriate to continue with guided reading in the school at the same time. Having to make choices about one intervention over another, rather than 'blending' pedagogies, meant that the continuation of KRM was difficult for schools wishing to use additional and/or alternate materials for reading.

#### **iv. Participants use of new knowledge and skills developed through the intervention**

The experience of considering how to implement a philosophically very different teaching and learning programme enhanced the pedagogical (and professional) know-how for managing and leading change with other new (curricular or resourcing) initiatives.

It also appeared that younger children responded better to the 'chanting', fast-paced and at times rote-learning type of KRM approach.

Although the philosophy of KRM is still followed by two schools, there has been a need to develop 'follow-on' material that relates the focus of those lessons to the current demands of the National Curriculum.

#### **v. Pupil learning outcomes**

One headteacher (of a 'Good' school) explained how "Our year six results last year were very low but we kind of knew about that and we had a difficult time, we got six children moved into us from other schools in the area who were struggling and they were all the lowest children. So if you just [reviewed] league tables it would look like our year 6 results have gone down a lot. However, our in-school-progress is much better. If you are looking at year 2, across year 2 they made the most amount of progress, then year 3, and therefore attainment in year 6 should improve over the next 3 - 4 years".

So, although there wasn't an immediate positive impact of the intervention on pupils' performance, there were signs of improvement and the beginnings of more upward trajectories. The ways that headteachers strategized for longer-term gain, is explained by this Headteacher of a 'Good' school, "our focus was never on that year six because we knew we had very low KS1 results so the expectation was that that would be low but what we needed to do was to make sure that we raised expectations in years 5, 4, 3 so that we could sustain and raise achievement over time". This appears to be slowly coming to fruition now for several of the schools.

The performance of Key Stage 1 children (aged 5 – 7) at the end of 2014 are summarised in Table 9. There are obvious indications here that the younger children appear to be benefitting, from changes implemented in these classes and are able to perform at increasingly higher levels. The Oxford City schools' performance has

improved (by 2014) at Key Stage 1, with 81% of pupils overall academic performance at level 2 or above in reading, writing and maths. Pupils academic attainment varies from school to school, but the children at School C, School K and School E all achieved greater than 90%. This reflects significant progress given three schools (School C, School K and School E) previous below floor performances (evidenced in Table 6).

| Programme                       | KS1 Level 2+ Reading |           |           |           | KS1 Level 2+ Writing |           |           |           | KS1 Level 2+ Maths |           |           |           |
|---------------------------------|----------------------|-----------|-----------|-----------|----------------------|-----------|-----------|-----------|--------------------|-----------|-----------|-----------|
|                                 | 2011                 | 2012      | 2013      | 2014      | 2011                 | 2012      | 2013      | 2014      | 2011               | 2012      | 2013      | 2014      |
| Leadership for learning only    | 71                   | 77        | 81        | 63        | 71                   | 71        | 73        | 79        | 83                 | 81        | 86        | 87        |
| Leadership for learning and KRM | 67                   | 78        | 78        | 81        | 60                   | 67        | 77        | 80        | 67                 | 84        | 86        | 92        |
| <b>Project schools</b>          | <b>69</b>            | <b>78</b> | <b>79</b> | <b>82</b> | <b>62</b>            | <b>68</b> | <b>76</b> | <b>78</b> | <b>78</b>          | <b>82</b> | <b>86</b> | <b>90</b> |
| <b>Oxford</b>                   | 78                   | 83        | 85        |           | 82                   | 77        | 83        |           | 87                 | 86        | 90        |           |
| <b>Oxfordshire</b>              | 86                   | 88        | 89        |           | 80                   | 83        | 86        |           | 90                 | 91        | 93        |           |
| <b>England</b>                  | 85                   | 87        | 89        |           | 81                   | 83        | 85        |           | 90                 | 91        | 91        |           |

Table 7 : Table to summarise generalized improvements at KS 1 in Reading, Writing and Mathematics. Source : Scrutiny Committee Meeting Report : Review of the Educational Attainment Programme including KRM (Wright 2014 p. 6).

This table of data indicates how progress has been initiated during the 2011 to 2014 period, but the target of 95% achieving level 2 in reading has not yet been reached. Scrutiny of the ‘making progress’ data, indicates a very much more mixed picture at KS 1 in 2014.

Table 8 illustrates how, in 2014, there was some progress in supporting the attainment of disadvantaged pupils. Table 10, a year later, demonstrates how changes in teaching (that can support progression in learning) take time to embed and result in improved performance!

| School   | Intervention            | Nature and Length of Engagement   | Progress in 'closing the gap' for disadvantaged/others in 2014 (%)      |
|----------|-------------------------|---|---|
| School E | KRM Maths               | Engaged in training from November 2012 and continues to use the programme | 80/93 in reading<br>95/97 in writing<br><b>90/85 in maths</b>           |
| School D | KRM Reading and Writing | Engaged in training from January 2013 to July 2014                        | <b>100/80 in reading</b><br><b>100/93 in writing</b><br>100/93 in maths |
| School H | KRM Maths               | Engaged in training from January 2013 and continues to use the programme  | 85/100 in reading<br>92/100 in writing<br><b>85/82 in maths</b>         |
| School G | KRM Reading             | Engaged in training from April 2013 to July 2014                          | <b>96/93 in reading</b><br>96/93 in writing<br>100/100 in maths         |
| School F | KRM Reading             | Engaged in training from April 2013 to July 2014                          | <b>81/73 in reading</b><br>80/79 in writing<br>73/71 in maths           |
| School J | KRM Reading             | Engaged in training from April 2013 to July 2014                          | <b>69/79 in reading</b><br>85/86 in writing<br>77/79 in maths           |

Table 8 : Data to indicate progress in 'closing the gap'.

| School   | KRM training            | Extent and nature of KRM training   | Proportion (%) achieving Level 2+ in 2014 |         |             |
|----------|-------------------------|---|---|---------|-------------|
|          |                         |   | Reading                                   | Writing | Mathematics |
| School E | KRM Maths               | Engaged in training from November 2012 and continues to use the programme | 93  | 87      | 96          |
| School D | KRM Reading and Writing | Engaged in training from January 2013 to July 2014                        | 76  | 78      | 78          |
| School H | KRM Maths               | Engaged in training from January 2013 and continues to use the programme  | 90  | 87      | 92          |
| School G | KRM Reading             | Engaged in training from April 2013 to July 2014                          | 71  | 75      | 93          |
| School F | KRM Reading             | Engaged in training from April 2013 to July 2014                          | 78  | 64      | 93          |
| School J | KRM Reading             | Engaged in training from April 2013 to July 2014                          | 73  | 62      | 84          |

Table 9 : Data to indicate in 2014 where KRM training (and subsequent adoption of the programme) may have influenced childrens' academic progress in Literacy (Reading and Writing) and Mathematics. Source : Ofsted Data Dashboard available at <http://dashboard.ofsted.gov.uk/>.



Breaking down the performance into achievement of level 2+ in reading, writing and mathematics, the following pattern (see Table 9) clarifies how School E and School H are close (reaching 93% and 90% respectively in reading).

This kind of dramatic impact, that is focussed in particular areas, rather than an improved performance across and at the culmination of KS1 and KS2 (Reading, Writing and Mathematics) requires sustained and persistently good teaching supported in various ways by visionary leadership. All the national and local mitigating factors (of rising numbers of children, more classes needing more teachers, building developments to provide sufficient classrooms, increasing numbers of lower-income families, increasing cases requiring special needs provision) all place both financial and professional strain on the school and the teachers. Effective leadership (from the Head, senior and middle leaders) demands that all these factors are considered and choices made about where to prioritise efforts. Leading a school is therefore a very complex, challenging and exacting business. Interventions such as KRM are consequently 'another' factor to explore and deliberate over to determine whether or not the 'investment' in Professional Development (PD) and altering the organisation of the day as well as the teaching approach and materials are the 'best' solution for any particular school.

The data above shows that all the schools have still missed the OCC EAP Reading at age 7 (KS 1) target of 95% achieving level 2 or above in 2014. However, given all the factors described in the background context, the following offers indications that the schools are on an upward trajectory and may be able to meet that target by 2017.

Table 10 (compared to Table 9) shows how in 2015, a year later, there are much stronger indications of improvement in the 'making progress' data. Generally performance in reading, writing and mathematics has improved a year later. Table 10 also highlights, in the final column, where there has been a 100% improvement in (valued-added) performance of some subgroups of children previously not doing so well! In all but one school, this has been achieved. Academic attainment has therefore, been improved across the ages and stages (and not just focused at the end of Key stage 1 or Key stage 2).

| School   | Percentage making progress |         |       | Highlight where 100% children make 2 levels of progress as evidenced from publicly available data                |
|----------|----------------------------|---------|-------|--|
|          | Reading                    | Writing | Maths |  |
| School A | 71                         | 100     | 76    | <b>100%</b> of all pupils (including low, mid and high attainers) make at least 2 levels of progress in writing. |
| School B | 89                         | 93      | 93    | <b>100%</b> of disadvantaged pupils make at least 2 levels of progress in maths.                                 |
| School C | 96                         | 100     | 78    | <b>100%</b> of all pupils (including low, mid and high attainers) make at least 2 levels of progress in writing. |
| School D | 93                         | 100     | 97    | <b>100%</b> of disadvantaged pupils make at least 2 levels of progress in writing.                               |
| School E | 95                         | 98      | 93    | <b>100%</b> of high and low attainers make at least 2 levels of progress in writing.                             |
| School F | 88                         | 95      | 76    | <b>100%</b> of all low and mid attainers make at least 2 levels of progress in writing.                          |
| School G | 96                         | 93      | 91    | <b>100%</b> of all low attainers make at least 2 levels of progress in writing.                                  |
| School H | 87                         | 100     | 92    | <b>100%</b> of all pupils (including low, mid and high attainers) make at least 2 levels of progress in writing. |
| School I | 100                        | 97      | 76    | <b>100%</b> of low and mid attainers make at least 2 levels of progress in reading                               |
| School J | 89                         | 89      | 85    | <b>94%</b> middle attainers make 2 levels of progress in reading and writing.                                    |
| School K | 100                        | 100     | 97    | <b>100%</b> of disadvantaged pupils make at least 2 levels of progress in reading and writing.                   |

Table 10 : To show the latest academic performance, of Oxford City schools, in 'making progress' in 2015 and also highlighted groups (where 100% of the) children have made 2 levels of progress (Source : Raise-on-line data available at <https://www.raiseonline.org>. Accessed between 13 – 15th April 2016).

A year later, scrutiny of the end of KS 2 tests indicate even more improvements on previous performances. School H and School K achieve the 84% reaching level 4 or above at age 11! School C and School G are at 81%, only 3% points behind the target set for 2016/17.

| School                  | Percentage pupils achieving level 4 or above in reading, writing and mathematics |      |      |           |
|-------------------------|--|------|------|-----------|
|                         | 2012   | 2013 | 2014 | 2015      |
| School A                | 45   | 62   | 48   | 51        |
| School B                | 67   | 75   | 67   | 73        |
| School C                | N/A  | N/A  | 77   | 81        |
| School D                | 56   | 71   | 72   | 73        |
| School E                | 65   | 54   | 76   | 75        |
| School F                | N/A  | N/A  | 50   | 60        |
| School G                | 79   | 75   | 74   | 81        |
| School H                | 68   | 55   | 67   | <b>85</b> |
| School I                | 75   | 61   | 66   | 66        |
| School J                | N/A  | N/A  | 40   | 63        |
| School K                | 70   | 67   | 85   | <b>90</b> |
| <b>National Average</b> | 75   | 75   | 78   | 80        |

Table 11 : The percentage pupils achieving level 4 (at the end of KS 2) year-on-year is much more positive in 2015! (Source : Raise-on-line data available at <https://www.raiseonline.org>. Accessed between 13 – 15th April 2016).

The general trajectory of all the schools (except for School A) appears to be on the increase.

## b. Leadership for Learning

The impact of this project is detailed in Menter and McGregor (2015). Some of the highlights are indicated here.

### i. Participant reactions to the programme

There was a generally positive response to the L for L programme, because nothing had previously been available for Heads and middle leaders in the locality. Several Heads thought it 'excellent' and offered something 'not previously available'.

The whole day workshops were very well received and participants thought that the materials and focus were most appropriate and covered aspects of leadership that were timely and useful.

#### Quotation from an experienced Head teacher:

"We valued the opportunity afforded to us through the projects to come together as leaders of teachers working in the City. The City Council are to be praised for investing in City Schools and making us feel valued and not alone in the challenges we face."

### ii. Participant learning

The Action Learning Sets (ALS) were also very well received and unexpectedly led to many positive outcomes, beyond just sharing challenges and experiences that each school faced. Participants found that they benefitted from the networking that this offered, not only to address ways of improving childrens' academic performance, but also involving parents and communities in countless ways to support learning. One of the 'softer' benefits of the interactive (and coaching-like) conversations were that all the school leaders (at all levels) became more confident and competent in their roles within school.

The culminating posters that summarised the impact of the projects for each of the participants in the ALS revealed very interesting developments in school policy and teaching practices which included looking at quality of questioning; using video to improve feedback to teachers; how to develop shared tasks; improving speaking and listening; taking celebratory approach to storytelling; culminating activities at transitions points involving Mad Hatters Tea Party (see Menter and McGregor 2015 for more details).

#### Quotation from one Head Teacher who now manages a Grade 2 (Ofsted) *Good* School which was previously Graded as a Grade 4 *failing* institution :

The project has changed the language we use in the City Schools from one of defeat and blame to a *can do, can impact and can make a difference to the lives of the children in our care*".

### iii.Organisational support and change

Shifts in the ways that Headteachers created more structural and specific kinds of ‘spaces’ for professional discussion and consideration of the challenges that each school faced were interesting. Leadership became more distributed and democratic (rather than autocratic and authoritarian). Many heads noted how their middle managers ‘grew’ in stature and capability.

### iv.Participants use of new knowledge and skills

The Heads and Middle leaders generated a range of new skills (that included how to review, mentor, coach and develop other teachers’ practices; understanding data and making informed decisions from public and within school information and generally recognising how the challenges Oxford City schools face can be tackled in a wide variety of ways).

Evidence of the ways the new skills and developing expertise was applied to leadership for learning through the L for L programme is shown in Table 12 below:

| School   | Ofsted Early in project   | Ofsted Later in project   |
|----------|---|---|
| School B | <p><b>Grade 3 Satisfactory</b><br/>June 2010</p> <p>Raise attainment &amp; accelerate progress in writing and maths throughout the school – particularly Reception &amp; KS1<br/>Improve the consistency &amp; quality of teaching<br/>Develop the skills of leaders &amp; managers at all levels in contributing to whole school improvement</p> | <p><b>Grade 2 Good</b><br/>March 2013</p> <p>The <b>headteacher has led</b> the school <b>successfully through a period of considerable change</b>. He is ably <b>supported by an ambitious leadership team</b> that has made <b>strong contributions to improving</b> the school.<br/>Teaching is good and occasionally <b>better because teachers follow the progress of pupils very closely and accurately</b>. They <b>plan effectively</b> for their learning needs, especially in <b>literacy and numeracy</b>.<br/>The governing body is very <b>well led</b>, and plays a significant role in <b>school improvement</b>, particularly through its involvement in the <b>performance management</b> of staff.</p>                                      |
| School C | <p><b>Grade 4 Unsatisfactory</b><br/>November 2011</p> <p>Accelerate pupil achievement and improve the quality of teaching<br/>Consolidate the work of senior leaders and managers</p>  | <p><b>Grade 2 Good</b><br/>March 2015</p> <p>i.<b>Senior leaders have successfully focused on raising pupils’ achievement and improving the quality of teaching</b> so that it is usually good with examples of outstanding practice.<br/>ii.<b>Teachers use marking effectively</b> to help pupils know how well they have done and how they can <b>improve</b> their work.<br/>iii.<b>Subject and key stage leaders have a good knowledge of how individual pupils are progressing</b> in their areas of responsibility. They <b>produce clear plans for further improvement</b>.<br/>Children in the early years provision have a good start to school. <b>They make good progress in all areas of learning</b> and are well prepared to enter Year 1.</p> |
| School D | <p><b>Grade 3 Satisfactory</b><br/>November 2010</p>  | <p><b>Grade 2 Good</b><br/>February 2015</p>  |

|          |  |  |
|----------|--|--|
|          | Accelerate progress and lift attainment at the end of year 6<br>Lift attendance levels to get them as close as possible to broadly average   | Since the last inspection, the <b>relentless focus of the previous and current headteachers on improving the quality</b> of teaching has been key to the school's <b>rapid improvement</b> .<br>Most pupils make good progress because teaching is predominately good. <b>Teachers' expectations are much higher</b> and they now plan interesting lessons so pupils quickly make up for the lost ground of previous years.<br>Governors are <b>skilled, knowledgeable and dedicated</b> to making the school the best it can possibly be. They frequently make their own checks on the <b>school's performance</b> through regular visits to classes to see pupils at work. |
| School E | <b>Grade 3</b><br><b>Satisfactory</b><br><b>February 2010</b><br>Improve the quality of teaching from Good to Outstanding and further accelerate pupils' progress<br>Ensure that the progress made by all pupils is consistently good, and particularly those in Key Stage 1<br>Improve communication with parents | <b>Grade 2</b><br><b>Good</b><br><b>February 2013</b><br>The <b>strong leadership</b> of the headteacher, deputy headteacher and governors has successfully created a <b>skilled, dedicated and enthusiastic team</b> . <b>Significant improvements</b> have been made since the previous inspection. Nearly all pupils make good progress with attainment at the end of Key Stage 2.  |

Table 12 : Extracts from Ofsted inspection reports.

In these reports that are indications that highlight the kinds of leadership skills that were developed during and after the OCC EAP.

## **SECTION 6 : THE PAST, PRESENT AND EMERGING EVIDENCE FROM PUBLICLY AVAILABLE DATA**

There is evidence of what can only be described as a seismic shift in one school which has been given an award as 'one of the most improved schools in the Country'. The Head of the School attributes this change to the opportunities afforded to his staff, in part, through engagement in the Leadership for Learning Programme. This School (School C) did not participate in the KRM intervention.

There is also clear evidence of the significant improvement in the (2015) KS 2 SATS performance (90% attaining level 4 or above) in a school that did not participate in the KRM programme. This achievement was closely followed by another school's performance (85% attaining level 4 or above). This school still follows the KRM philosophy.

In one School a recent Ofsted report has identified the following:

The academy does not meet the government's current floor standards, which set the minimum expectations for pupils' attainment and progress in reading, writing and mathematics

**However, they also note that:**

Senior leaders demonstrate the capacity to drive improvement. They have taken actions to raise the quality of teaching, although these measures have only recently had a positive impact on improving standards. Senior leaders have a realistic understanding of the academy's performance and know what needs to be done to raise pupils' achievement.

This is evidence of a culture of change found even in the least improved school that participated in the project. Following engagement with the EAP leaders are 'driving improvement' and 'taking action'. Interview data highlights how Headteachers talk about an improved confidence to make tough decisions, a greater awareness of what needs to be done and the self-belief that they have the skills to do it.

The general pattern is that of gradual year-on-year improvements as indicated by the tables of data included in this report. This upward trajectory is evidenced by :

Table 7 which summarises the year-on-year (2011 to 2014) improvement in reading, writing and maths at the end of KS 1 (of children aged 7).

Table 8 which indicates a mixed picture in terms of those involved in KRM and progress in 'closing the gap' for disadvantaged and all the other children. There is, however, in some indication of improvements in some schools (in 2014). For example, there were generally excellent performances at School G in Maths. At School D 100% of disadvantaged children in reading, writing and maths met expectations!

Table 9 which indicates how KRM training may have influenced the best performance at the end of KS1 in maths at School E where their numeracy programme is still followed.

Table 10 which shows the general 'developing progress' in reading, writing and mathematics (compared to 2014). It also illustrates where there is 100% improvement (through two levels) of children (final column) in all but one school.

Table 11 which illustrates how (in 2015) School K and School H have surpassed the OCC target (of 84% achieving level 4 at the end of KS 2, aged 11 years)! They as well as School C and School G are performing above the national average!

Table 12 which clearly shows the development of leadership within four schools that have improved their Ofsted grades to 'Good'.



## SECTION 7 : SUMMARY : CULTURAL CHANGES AS INDICATED BY REFLECTIONS FROM SCHOOL LEADERS

Without a cultural and attitudinal shift in the schools, the improvement in attainment described in the earlier section would not be possible. What is outlined here, are additional examples of the mind-set changes that have not been previously mentioned.

### *i. Building Leadership capacity*

This 'softer' less easily measured aspect of impact was indicated throughout the schools, from the Heads, within senior leadership teams, year co-ordinators, subject co-ordinators and even Teacher Assistants (TAs). One Headteacher reported that the L for L programme had enabled them to support "TAs looking at developing their own practices and [...] become their own leaders so you move from a top down approach into a bit of versatility to be able to allow ..... people [..autonomy..] to fail sometimes and learn from their mistakes and take risks" (Headteacher of a successful school).

Other leadership skills, such as communication, awareness and empathy of others' viewpoints have also been developed as a result of the Lfor L programme, as one Headteacher said, I "think because when you first start to lead something you think it might be relatively easy but then of course when you come to an issue you then sometimes have to change your style of leadership and how you communicate ..[...] ...not presume that you have been understood."

The recognition that professional space is needed for leadership teams to discuss, deliberate and decide what to do to improve the children's academic performance, as one headteacher described, "we've given our SLT ...[...] a lot of management time, a lot more than other schools and so they get one day a week completely for management which for middle leaders in a school this size is a lot" (Headteacher of an Ofsted rated Good school). Other schools realise that staff can be freed up from teaching commitments to support staff development, and as another Good school Headteacher, explained, "We have a non-teaching Deputy".

The L for L programme afforded schools real opportunities to reflect and become pro-active rather than reactive in the ways they decided to implement change and development.

The style of leadership within the project schools has generally become much more *distributed* amongst senior staff as well as middle leaders. Leadership has tended to develop more widely from the previously directive or authoritarian forms. Schools have developed leadership 'teams' for a range of purposes and begun to use them in a way that was modelling ALSs in the L for L programme. One school has developed 'change teams' based on the ALS model. These teams are often comprised of a senior leader in the school, as well as more junior teaching and support staff. These teams are responsible for leading and developing new initiatives in the school. One successful example of this has been the introduction of a

Storytelling approach within a school (requiring fresh curricular and teaching materials to be developed throughout each year groups and across all the subject areas).

The collective determination to contribute to the schools success is echoed by an established Headteacher, who comments that :

Quotation from Headteacher who has improved the school Ofsted Grade to 'Good' :

"What has really helped is the attitude of our staff, who really want to be better teachers and make a difference for our pupils"

**ii. In-depth discussion about the quality of teaching and learning**

The previously mentioned examples of discussion centred around impact of a 'different' pedagogy, engages teachers in thinking about the characteristics (and pragmatics) of effective practice. The sharing of experiences and exchanging ideas about different kinds of teaching, meant that ALSs offered a forum whereby, "it was just about the teaching and learning so you could formulate quality from what other people had done" (Head of a Good school). Trying out and testing new ideas and reflecting on the evidence of impact through the ALSs has really drawn staff into

One less experienced middle school leader noted:

Engagement with the project has given me an improved confidence to make tough decisions, a greater awareness of what needs to be done and the self-belief that I have the skills to do it

examining what quality teaching and learning looks like.

A Head teacher from one of the 'Good' schools highlights how, "our early years

coordinator, she's, I

because of it .....I

leadership for

mean, she's re-engaged in learning mean she wouldn't be doing a masters if it wasn't for learning she wouldn't even be considering it".

**iii. Developing and applying 'coaching' strategies**

Several schools have indicated how they have adopted a coaching 'attitude' to support change. Another Head teacher of a Good school has highlighted coaching saying, "it impacted a lot" and worked best where they gradually developed year on year their approach to using coaching. They also reviewed what worked well to identify what constituted 'good practice'. This school now has two specific members of staff who are responsible for coaching throughout the school.

iv. ***Networks and Collaborative working***

This appears to have been a real strength of the project. Networks and collaboration has been enhanced both within schools and across the City. There has been immediate, medium and longer term benefits from the networks developed between leaders in schools (within Oxford, Coventry and Leicester).

The ALSs (sets of leaders from different Oxford schools including a Head teachers group) were noted to be of particular use, “They were very beneficial, just to get heads out of schools and discussing cross ... lots of issues and challenges” (Head of a previously ‘Satisfactory’, now ‘Good’ school).

The networks within school and across the City, can offer a way of validating potential ideas or even exploring others’ experiences. As this Head teacher shared, “as an ideas sounding board and a development of a policy and plan it’s still the best thing”. The opportunity for discussions with other Head teachers, in a similar position, offers ways of checking out the feasibility of new ideas and possible projects or developments.”

There is still networking within Oxford for the head teachers through a termly networking series of seminars run by the Oxford Collaborative Learning Project providing breakfast meetings that promote professional consideration and dialogue of current issues. It appears that the positive impact of regular meetings for Headteachers has been recognised beyond the EAP.

Within schools, senior leaders have realised how regularly creating space for staff to discuss, plan and consider (drawing on evidence to support potential projects or innovations in school) is more likely to succeed, rather than the Head teachers making isolated or individual decisions about new developments within the schools.

Across the City, one head echoed others views about the impact of the project, saying “partnership I feel at the moment is really strengthening, and ..... for me what it ....it has promoted school-to-school support and the sense of sharing. We are serving the same community and actually there’s so much more that we can do together”.

Visiting other schools with particular strengths or expertise has also enabled developing or satisfactory schools to see how to (re)design their curriculum, teaching day or hone their parent/home communications.

**v. Recruitment (and city wide retention)**

Several heads have indicated how the Leadership programme, not only supported their personal development, but also enhanced the capabilities and skills of deputies or other senior in the schools. One said “I was growing two leaders at the time in literacy and as a have moved on in because of and other development

looking at the data ..... planning from the data how the budget should be spent, how the intervention should be organised and looking [carefully] at something that seemed a brilliant idea if it's not actually affecting the data then it's not actually fulfilling the purpose

their leaders head new terms of deputy, both of whom now one way or another...they really enjoyed it the networking element with other literacy leads deputies. They found [L for L] was good for their early and early career development.

**vi.Evidence-based decision-making**

Headteachers and middle leaders, recognising how looking at evidence can inform what might and can be done. “We look at a lot of evidence-based information now, alot more than we ever did, and one of the things that we were looking at at the moment is Homework. It is one of the most difficult things because you can't find the want”. For some

A new in post Head said that she had learnt :

“understanding that everyone must have that understanding within the school and that dissemination of the understanding will take a period of time, say up to 2-3 years

Headteachers it has been a challenge when they professionally know what they want to do, but they can not find the evidence to back up their ideas. In these cases, though, the network offers the opportunity to discuss with other schools what they have done and explore “what they have learnt”. Talking to other Headteachers about how they have initiated change

The SLT need a really good understanding and there needs to be a drive [for change]. There needs to be a key driver [the idea then] has to be disseminated, shared, [staff] mentored and coached through staff meetings, team meetings...the school improvement plan, communication with staff and that you need to return to it and support people. Its fine saying it, but it needs to become a whole school practice and again you are going to have to plan how you are going to do that

and what they have learned from doing it is a form of evidence-based decision-making that school leaders recognise they can use “to develop themselves” (Headteacher from a *Good* school).

Recognising the value of evidence from performance data is invaluable to inform classroom teachers how they might direct and invest their energy and focus to progress specific children (or cohorts) in particular directions. This has meant some schools now collect data more than nationally required, even up to “four times a year ..[...] because we want to have the conversation”, to finely tune the actions of the teachers, ensuring the best possible performance is reached in “term 5 because that is when the data has got to be in” (Headteacher from a *Good* school).

***vii. Recognising change takes time.***

This has been mentioned earlier in the report, but Headteachers realising that they don’t have to make an immediate difference, and that taking a longer term view is likely to be more effective to sustain the improvement in attainment is a significant learning outcome from this project. The realisation, too, that there are many steps on the route of making changes and that this is the reason, change can not happen quickly, as explained from this Headteacher of a *Good* school.

## SECTION 8 : CONCLUSIONS

There have been some significant improvements in pupil attainment in Oxford City Schools. The KS 1 and KS 2 'making progress' measures have improved to 100% in all but one school!

The end of KS 2 level 4+ performance has improved significantly, and two schools have met or surpassed the EAP target.

These improvements, however, are not consistent across schools. They are influenced by a range of factors, including, but not solely :

- The extent to which Headteachers have changed during the two years of the interventions;
- The extent to which teaching staff have left and been replaced by those not involved in the intervention training and development;
- The extent to which the schools have had to wrestle with national curricular changes (e.g.: the curriculum re-written for implementation in September 2014; the significant change in the SEN provision dictated by government etc etc);
- The high number of children in Oxford City primary schools;
- The increase in transience of school populations;
- The increasing proportions of FSM children; SEN children and EAL children;
- The tougher Ofsted inspection judgements informing the 'new' categories.

The above list of influencing factors are more prominent for schools in challenging circumstances (typical for some of the Oxford city schools). They understandably add complexity to the way that teaching has to be planned so that learning is successfully inclusive (and potentially maximised) for all children.

### Headteachers advice for implementing new initiatives in schools :

Anything going forward there's got to be a phase... rather than rush it there's got to be a really clear phase of talking to all relevant people

Where the schools have longer serving Headteachers (or within school deputy) and the senior staff have not changed significantly there has generally

been more of a legacy of impact.

Schools such as School C, School K, School B and School E where staffing has remained relatively stable there have been notable improvements, not only in their Ofsted grades, but also the progress within school *and* the final key stage performances in numeracy and literacy.

Where schools also engaged fully with the L for L programme there appears to have been a more significant, positive and sustained impact (eg: School C, School E, Woodfarm, School H) over (and beyond) the two years of the EAP.

Where Heads fully supported their staff to be involved in the L for L activities there was (initially) more impact (e.g: School I), but this engagement (and thus influence) waned once the Headteacher left.

The significant improvements in these schools may not be solely down to the OCC project, but have been augmented and substantially developed because of it.

Aspects of the legacy that are not directly measured through pupils' attainment and Ofsted scrutiny to determine grades, are the softer skills of :

- selecting good quality teaching (and support) staff;
- extending distributed leadership (from formerly more directive approaches);
- developing more focused 'teams' of staff for change and development;
- 'reading' and understanding (performance) data;
- diagnosing what needs to be addressed and considering what could be done;
- reviewing evidence that relates to the situation the schools are in;
- considering, contacting and networking with others in similar situations and those that are engaged with similar teaching programmes (eg: KRM mathematics; storytelling etc);
- feeling confident about data-informed-decision-making;
- self belief that improvements are possible;
- communicating more effectively with parents and the wider community.

## SECTION 9 : RECOMMENDATIONS

To maintain the upward trajectory of pupils' academic performance (in reading, writing and mathematics) at KS1 and 2 the following requires ongoing consideration. Attention and active focus on the suggestions below should also support more schools achieving Good or Outstanding in Ofsted inspections.

- Maintaining the recruitment of good primary Headteachers with appropriate skills for schools in challenging circumstances within Oxford City Schools.
- Retaining good, experienced primary classroom teachers within the Oxford City area.
- Ensuring Oxford City Schools are attractive to new enthused qualified teachers.
- Continuing the increasing number of schools becoming *Good* and even *Outstanding* (according to Ofsted).
- Supporting the schools retaining *Good* and *Outstanding* once those gradings have been achieved.
- Ensuring there is *ongoing good quality* PD offers for Headteachers and classroom teachers in Oxford City schools (focused on teaching, learning *and* leadership).
- Consider more collaborative city wide (and County-wide) PD that is responsive to the schools needs. The focus of these could include :
  - Teaching (literacy and numeracy) effectively in schools in challenging circumstances
  - Understanding how formative assessment (without levels) can improve academic attainment
  - Leadership of schools in challenging circumstances
  - Sharing effective practice(s)
- Consider more regular 'networking' meetings that provide space for professional dialogue that is timely, focused and supportive for school leadership and development.
- Consider supporting leaders and teachers focused visits and/or exchanges to other Outstanding schools (locally, regionally and nationally) in challenging circumstances.
- Consider a programme of ongoing leadership-related lectures or seminars featuring eminent guest speakers that have a proven track record and are current, relevant and timely for school Headteachers, middle leaders and classroom practitioners.
- Consider ways of funding schools to develop collaborative projects that address (and seek solutions to problem-solve and remedy) their current issues.



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## Appendices

| School         | School pseudonym within the report |
|----------------|------------------------------------|
| Bayards Hill   | School A                           |
| Church Cowley  | School B                           |
| Cuttleslowe    | School C                           |
| East Oxford    | School D                           |
| Larkrise       | School E                           |
| Orchard Meadow | School F                           |
| Pegasus        | School G                           |
| St Francis     | School H                           |
| St John Fisher | School I                           |
| Windale        | School J                           |
| Wood Farm      | School K                           |

Appendix 1 : The pseudonyms used for the 11 city primary schools involved in this report.

| School  | % SEN (2012) | % SEN (2014) |
|---|--------------|--------------|
| School A  | 21           | 12.7         |
| School B  | 8.6          | 9            |
| School C  | 10.4         | 14.2         |
| School D  | 8.4          | 7.5          |
| School E  | 4            | 3.5          |
| School F  | 13.9         | 9.7          |
| School G  | 15.6         | 22.1         |
| School H  | 14.3         | 9            |
| School I  | 11.1         | 11.5         |
| School J  | 14.3         | 16.7         |
| School K  | 10           | 44.5         |
|   |              |              |
| <b>National average (England) for primary schools</b> | <b>7.9</b>   | <b>7.7</b>   |

Appendix 2 : To show the changes in SEN support required in the 11 City schools over the two years of the OCC EAP intervention. Source : <http://dashboard.ofsted.gov.uk/>.

| School   | Proportion (as a %) of English not as a first language pupils in the school (in 2015) |
|----------|---|
| School B | 36.4  |
| School C | 32.2  |
| School D | 39.8  |
| School E | 26.6  |
| School F | 55.6  |
| School G | 46.6  |
| School H | 38  |
| School I | 28.4  |
| School J | 25.5  |
| School K | 41.2  |

Appendix 3 : To show the proportion of English not as a first language students in Oxford City Primary Schools in 2015. Source : Raise-on-line available at <https://www.raiseonline.org>

| School  | % FSM (2012) | % FSM (2014) |
|---|--------------|--------------|
| School A  | 43           | 12.7         |
| School B  | 22.6         | 9            |
| School C  | 29           | 35.9         |
| School D  | 31           | 38.6         |
| School E  | 19.1         | 30.5         |
| School F  | 49.8         | 51.7         |
| School G  | 44.4         | 49.6         |
| School H  | 36           | 33.7         |
| School I  | 34           | 33.8         |
| School J  | 43.6         | 42.3         |
| School K  | 49.8         | 44.5         |
| <b>National average (England) for primary schools</b> | <b>26.2</b>  | <b>26.6</b>  |

Appendix 4 : To show the changes in FSM required by the children in the 11 City schools over the two years of the OCC EAP interventional project. Source : <http://dashboard.ofsted.gov.uk/>

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**To:** City Executive Board  
**Date:** 13<sup>th</sup> October 2016  
**Report of:** Head of Direct Services  
**Title of Report:** Tree Management Policy

| <b>Summary and recommendations</b>                                   |  |
|--|--|
| <b>Purpose of report:</b>  | To approve the updated Tree Management Policy                  |
| <b>Key decision:</b>   | Yes  |
| <b>Executive Board Member:</b>                                       | Councillor Linda Smith, Leisure, Parks and Sport               |
| <b>Corporate Priority:</b>   | A Clean and Green Oxford & An Efficient and Effective Council. |
| <b>Policy Framework:</b>   | None.  |
| <b>Recommendation(s): That the City Executive Board resolves to:</b> |  |
| 1. Approve the Draft Tree Management Policy                          |  |

| <b>Appendices</b> |                                  |
|-------------------|----------------------------------|
| Appendix 1        | The Draft Tree Management Policy |
| Appendix 2        | 2016-17 Tree Planting List       |

## Introduction and background

1. The Draft Tree Management Policy is a revised version of the original Oxford City Council Tree Management Plan agreed in 2008.

2. The Draft Tree Management Policy sets out how Oxford City Council proposes to manage trees within Oxford City Councils ownership. The amendments to the Policy have been derived from feedback from Members, Scrutiny Committee and the Parish Council Forum.

### **Amendments to the Policy**

3. Feedback from members suggested that the original Policy was too negative and that the Council should do more to help residents and tenants. Therefore the new Policy has been amended to address these concerns. These are summarised below:
  - a. It has been written with a 'friendlier' albeit still informative tone to improve customer perception of the Policy.
  - b. A new Common Law Right Section. This section aims to provide the public with more information regarding their Rights and what they are able to do.
  - c. A new Arbitration & Review Section. This has been added to formalise how we deal with customers who are unhappy with the decisions of the Tree Team.
4. In addition to the above amendments a Customer Advice Guide will be drafted once the Policy has been approved. This guide will provide the public with further details of options to resolve tree related problems that do not necessarily involve undertaking tree works.

### **Financial implications**

5. The Policy has no financial implications

### **Legal issues**

6. There are no legal implications

### **Level of risk**

7. There are no additional risk implications

### **Equalities impact**

8. An Equalities Impact Assessment is not necessary as the Tree Policy provides an equal service to everyone.
9. However, where individual mobility or disability needs arise we will adopt a pragmatic approach on a case by case basis.

### **Conclusion**

10. The Policy provides the framework within which Oxford City Council will manage its tree stock safely and effectively, how we reduce the risk that certain trees pose to the public and how we intend to increase the number of trees in Oxford.

|                            |  |
|----------------------------|--|
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**Background Papers:** None

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**DRAFT**

# **Tree Management Policy**

August 2016

## **Introduction**

This Tree Management Policy is a revised version of the original Oxford City Council Tree Management Plan agreed in 2008.

Oxford's trees are of immense environmental and aesthetical value to the City and its residents.

Urban trees offer the following benefits:

- They can enhance the character and appearance of urban areas and can add value to surrounding properties.
- They provide a habitat for wildlife and provide a source of food for bees and other pollinators.
- They produce oxygen and improve air quality by absorbing pollutants.
- They help to reduce the rising temperatures caused by climate change and can mitigate the risk of flooding.
- They cool urban areas by providing shade and reducing heat radiating from hard surfaces.
- They deflect, and therefore reduce noise.

Oxford City Council recognises these benefits, seeks to preserve healthy trees and encourages the planting of new trees where possible. Whilst the majority live and grow without incident, a number of trees located in densely populated cities pose challenges and risks that need to be managed.

This revised policy provides the framework within which Oxford City Council will manage its tree stock safely and effectively, how we reduce the risk that certain trees pose to the public and how we intend to increase the number of trees in Oxford.

This tree policy does not cover trees in private ownership which are outside Oxford City Council's control. Trees in private ownership are the responsibility of the private landowner. If a Tree Preservation Order or a Conservation Area protects trees, the Council's Planning Department administers these controls together with high hedge legislation.

## **Aim of the Tree Management Policy**

The overall aim of the Tree Management Policy is to ensure that Oxford's tree stock is retained, enhanced and increased in the most proactive manner whilst ensuring the health, safety and well being of the public and property.

## **Management of the Council's Trees – Routine Inspections**

Oxford City Council undertakes a tree inspection programme based on industry best practice.

Industry guidelines outlined in 'Common Sense Tree Risk Management' by the National Tree Safety Group ([http://www.forestry.gov.uk/pdf/FCMS024.pdf/\\$FILE/FCMS024.pdf](http://www.forestry.gov.uk/pdf/FCMS024.pdf/$FILE/FCMS024.pdf)) states the following management for a City Council with approximately 200,000 residents is the following:

*'Street trees are inspected and managed on a three-year cycle. This obviously includes highlighting any trees found in a poor condition. Schools and parks are inspected every two years and housing trees every four. The areas described above are managed proactively throughout the year. The tree officers record all tree inspections and any emergency work carried out. If they remove a street tree, they assess the location for replanting to keep in line with the council's stated strategic increase in its tree stock.'*

Accordingly, Oxford City Council undertakes a regular inspection programme of between 2 and 4 years depending on the trees' location and site usage.

It was estimated in 2004 that Oxford City Council has over 100,000 trees. To ensure that we survey these as per this best practice, we will undertake a Zoning\* exercise on Council sites to highlight areas where trees are present. This method is now being used by many Local Authorities. The method is to:-

- Identify areas of sites that are high risk and require surveying more frequently
- Identify areas of sites that are low risk therefore reducing the inspection frequency of these areas. We believe a number of our trees will not be classed as high risk and will reduce the frequency of inspection required i.e. Shotover Country Park and Magdalen Wood.

\* Zoning – The following extract is copied from the 'Common Sense Tree Risk Management' by the National Tree Safety Group ([http://www.forestry.gov.uk/pdf/FCMS024.pdf/\\$FILE/FCMS024.pdf](http://www.forestry.gov.uk/pdf/FCMS024.pdf/$FILE/FCMS024.pdf)).

*'Zoning is a practice whereby landowners and managers define areas of land according to levels of use. This practice prioritises the most used areas, and by doing so contributes to a cost-effective approach to tree inspection, focusing resources where most needed. It contributes to sensible risk management and a defensible position in the event of an accident. It may be a reasonable outcome of the zoning*

*process to decide that no areas require inspection. Classifying levels of use in this way requires only a broad assessment of levels of use. Typically, two zones, high and low use, may be sufficient. High use zones are areas used by many people every day, such as busy roads, railways and other well-used routes, car parks and children's playgrounds or where property may be affected. While owners and managers may deem it appropriate to use a more sophisticated approach, designating three or more zones, in the event of an accident whichever system is adopted may require justification according to the standard set.'*

Zoning, inspection schedules and the inspections will be undertaken by the Council's own Tree Team. This information is held on a database of trees (Ezytreev) and plotted on a geographical information system (ArcGIS).

### **Tree Inspection Procedure**

The routine inspection programme is designed to assess the tree's condition and health. The inspection highlights any work that may be required on a risk basis to ensure that the tree is retained in the best possible condition.

The decision to prescribe work to a tree is calculated on a risk basis. Risk is assessed using the VTA (Visual Tree Assessment) method outlined in *The Body Language of Trees: A handbook for failure analysis* – C. Mattheck & H. Breloer.

An evaluation of the tree takes into account factors including:

- Size
- Species and characteristics
- Presence and extent of structural and physiological defects including the relationship to any pathogens present.

All of these factors are considered in relation to the potential target, the damage that could be caused if the tree were to fail and the likelihood of it doing so.

If defects are observed, further detailed examination may be carried out using a range of decay detection equipment before any decision is taken regarding the trees future management.

The inspection, including further examination if required, will determine if any works (i.e. pruning or felling) are required. A tree will only be highlighted for felling through routine inspection if it is identified as:

- Dead
- Dying
- Diseased
- Dangerous and is posing an unacceptable risk to public safety
- Damaging property (e.g. subsidence when confirmed by technical evidence)

## **Tree works**

Following an inspection a priority will be given for the works recommended. This will enable the council to organise a balanced schedule of works.

The Council will maintain a rolling maintenance programme of cyclical works highlighted by the Tree Team. This rolling programme will reduce or remove avoidable tree related issues, for example:

- Vehicle and pedestrian collision
- Identified hazards
- Trees where its relationship to a property causes excessive problems
- Obstructing footpaths or driveways by branches or epicormic growth

All tree works will be carried out according to the British Standard BS3998: 2010 Tree Work – Recommendations.

In accordance with good arboricultural management the removal of trees may be carried out when it will benefit the long-term development of adjacent better quality trees i.e. woodland and copse management. Furthermore, pruning may be carried out following the Tree Team's inspections, for example:

- Crown reduction
- Dead wood removal
- Crown lifting
- Crown thinning including the removal of crossing, weak or competitive branches
- Pollarding
- Coppicing

## **Management of the Council's Trees – Customer derived Inspections**

Oxford City Council receives a high volume of customer requests associated with trees. We aim to provide high quality customer service with all requests for service; however the Tree Team is not resourced to undertake all the work that is requested from the public.

Following an appropriate request, an inspection will be arranged for a member of the Tree Team. The council may undertake a variety of pruning operations to remedy complaints provided that the long-term health, appearance, or potential development of the tree is not affected

Where pruning or felling works are required due to an unacceptable risk (as outlined above), this will be programmed into the work schedule based on that risk.

Work to trees will not normally be undertaken for the list of reasons below:

- Blocking light
- Television or satellite signals
- Residents do not *'like'* the tree
- Leaf or fruit drop
- Unproven allegations of subsidence or direct damage
- Construction of dropped kerbs or new driveways
- Perceived threat
- The tree's size; *'its got too big'*
- The tree *'moves in the wind'*
- Bird droppings
- Aphids
- Perceived to be causing medical issues
- Erection of fencing, walls, play areas and sports pitches

There are other solutions available to a number of these issues. These solutions can be found in the Customer Advice Guide for Trees.

The public may be able to resolve or reduce the issues above by exercising their Common Law Right which is explained in the next section.

### **Common Law Right**

1. Common Law Right – Property owners have a Common Law Right to remove (abate) the nuisance associated with trees encroaching onto their property. The following advice is given if property owners wish to exercise their Common Law Right with respect to encroaching trees:
  - a) As the property owner you can only consider removing those parts of the tree from the point where they cross the boundary of your property. You have no legal right to access, cut or remove any part of a tree that does not overhang your property;
  - b) You are strongly advised to consult a professional tree surgeon for guidance on how best to prune back encroaching trees, unless the works are trivial meaning you could do the works with hand secateurs or similar;
  - c) You are strongly advised to tell the owner of the trees what you plan to do. You can find out if the trees are owned by the Council by contacting the Parks Service Tree Team at [trees@oxford.gov.uk](mailto:trees@oxford.gov.uk).
  - d) You are strongly advised to find out if the trees you wish to prune are covered by a tree preservation order or are within a conservation area. If they are, you will need to seek permission from the Tree Officer in the Council's Planning Department. You can find this information by following the link below – [www.oxford.gov.uk/tpo](http://www.oxford.gov.uk/tpo)

## **Wildlife and Conservation**

Trees are essential to the biodiversity and wildlife of Oxford and support other species such as insects, invertebrates, birds and mammals.

Tree works shall be carried out whilst ensuring adherence to all wildlife and conservation laws and regulations including:

- Wildlife and Countryside Act 1981 (amended 1996)
- Wildlife and Countryside (Amendment) Act 1999
- Countryside Rights of Way Act 2000
- Town and Country Planning Act (Trees) Regulations 1999 (amended 2008)
- Conservation (Natural Habitats) Regulations 1994 (amended 2010)
- European Habitats Directive 1992 (amended 2007)
- Biodiversity Act 2005 (amended 2008)

In the case of areas with low access and high biodiversity value risk will be managed in accordance with ecological benefits. Management may include restriction of access, which will allow the retention of veteran trees or standing dead wood which will encourage biodiversity via habitat retention/and or creation.

## **Conservation Areas**

When any works are recommended for trees within a Conservation area, the Tree Team will liaise with the Council's Planning Department, although there is no legal obligation to do this.

## **Communicating with the Public and Members**

The Council will inform Ward Councillors and appropriate 'Friends Groups' of any major tree works such as pollarding or felling before any works are carried out in their ward/park. If there are a large number of trees to fell in one location, the Council may also erect notices to inform the public of the proposed works.

In the event of emergency safety work that must be carried out immediately (e.g. storm conditions), the Council will notify Ward Councillors retrospectively.

Felling is the last resort and will only be carried out when deemed necessary by the Tree Team. However, public safety is paramount and for this reason the public will be informed of tree works, via Ward Councillors and notices, but will not be consulted for approval.

## **Council Trees affected by Planning Applications**

Requests for tree works and/or removal of trees from Council owned land to allow development shall be considered by the elected members as part of the decision as to whether to approve the planning application and any conditions that they think appropriate. Officers will not take this decision, although advice will be provided to the elected members.

Members are encouraged to consider when dealing with planning applications for privately owned land, whether there are Council owned trees on adjacent plots that may be affected by the development before approving the application (e.g. for site access, dropped kerbs or storage of materials).

## **Subsidence & Heave**

Subsidence is a complex interaction between the soil, the building (including foundations), climate and vegetation that occurs on highly shrinkable clay soils when the soil supporting all or part of a building dries out and consequently shrinks, resulting in part of a building moving downwards.

Trees lose water from the leaves through transpiration that is replenished by water taken from the soil by the roots. If the tree takes more water from the soil than is replaced by rainfall, the soil will gradually dry out. Trees can have large root systems and can dry the soil to a greater depth, critically below the level of foundations.

The amount of water trees can remove from the soil can vary between different species. This policy seeks to set out the Council's response to subsidence claims against its own trees.

The opposite of subsidence is a process called 'heave' and this occurs when a shrinkable clay soil re-hydrates (becomes wet again) and begins to increase in volume exerting upward pressure. Heave can also cause damage to buildings but generally occurs less frequently.

All claims regarding subsidence or heave against Council owned trees will be referred to the Council's Insurer along with a brief report from the Council's Tree Team. The report will highlight if the tree(s) is the responsibility of the Council, the age, type and condition of the tree(s) and any other factors that may be of importance to the claim.

The insurers for the claimant or their consultants must provide evidence of ALL the following items before any works will be considered to Council owned trees.

- Evidence of physical damage
- Presence of live roots of a specific species



- Seasonal movement or variation of the damage during different seasons.

If the above evidence is provided, the Council will adhere to the advice supplied by insurers with regard to what, if any, works are required to the trees. If evidence is insufficient the claim will be dismissed.

Where there is a subsidence or heave concern regarding a Council owned property, we must also provide evidence of ALL the following items before any works are carried out to Council owned trees.

- Evidence of physical damage
- Presence of live roots of a specific species
- Seasonal movement or variation of the damage during different seasons.

### **Arbitration & Review of Decisions**

If the decision of the Council's Tree Team is subject to a challenge the decision will be reviewed by the Parks and Open Spaces Manager and/or the Head of Direct Services.

Any challenge to this decision will be dealt with via the Council's Complaints Procedures.

### **Waste & Recycling**

All waste created by working on trees will be recycled. This will be used in a variety of situations, including: mulches for shrub beds, power station fuel, firewood, donated to charities, habitat piles or dead standing timber where suitable, thereby avoiding the use of landfill sites.

### **Replacement Trees**

It is the City Council's policy that every tree felled should be replaced to ensure that over the years the City retains its tree stock for future generations, although it is recognised that it is not always practical or prudent to replace a tree in the same location or with the same species that was previously planted.

The Council will work proactively to manage or facilitate replacement tree planting, which may include but not be limited to, working with the community and friends groups, considering new planting schemes, including memorial trees, community woodlands and by encouraging funding from new developments for tree planting through working with the Planning Department.

The Council will update and publish a programme for planting in the upcoming season that reflects the approved budget for that year.

The Council is committed to planting trees that will benefit pollinating insects e.g. bees, and if possible are native to Britain.

The planting season is from October through to March. This may vary depending on seasonal change and changes in climate. Planting outside these timescales is not generally recommended due to the increase in failure rates.

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## **Definitions**

**Arboriculture** – the management of trees in the urban environment

**Cyclical Works** – removal or adjustment of stakes and ties from young trees, removal of basal or epicormic growth, crown lifting to clear footpaths or highway vision splays.

**Dangerous** – a tree can be classified as dangerous, posing a more than acceptable risk to persons or property, having been assessed of its chance of collapse and the potential damage that may result if it collapsed.

**Dead, Dying, Diseased** – see Dangerous

**Decay Detection Equipment** – a range of tools specifically designed to measure the extent of decay or remaining healthy timber in an individual tree. Tools currently owned by Oxford City Council include sounding mallet, probe, resistograph micro-drill, core sampler, fractometer, Picus sonic tomograph.

**Failure Risk Assessment** – An assessment based on:

How could the tree fail, what defects are present, probability of failure?

Followed by

Consequential Damage – what damage would the failure cause?

Followed by

Hazard Reduction – if an acceptable risk is present and the impact can be reduced via tree pruning, removal, or relocation of potential targets appropriate to each situation.

**Geographical Information System (G.I.S)** – Computer database usually represented as a map with linked tables of data.

**Good Arboricultural Practice** – tree surgery operations carried out in accordance with industry best practice.

**Major Works** – works including felling or work concentrated on many trees in a localised area.

**Minor Roads** – Footpaths, bridleways and ‘urban roads’ that are neither ‘trunk’ nor ‘classified’, usually with a speed limit of 30mph. These roads are the responsibility of the City Council as outlined in the Section 42(Highways Act 1980) agreement with Oxfordshire County Council.

**Physical Damage** – damage, usually cracking, to structures caused by incremental growth of stems or roots, or soil shrinkage due to water extraction.

**Pollarding** – the removal of all (or nearly all) branches leaving a trunk from which new branches will grow in successive seasons. Usually on a 5 – 15-year cycle, limited to a small number of species.

**Presence of live roots** – taken from test boreholes dug in the area adjacent to property damage as evidence towards proving subsidence of a property.

**Seasonal Movement** – physical damage to structures that increases with annual growth relating to direct damage. If subsidence is present the cracking will increase in summer and reduce in winter. (Deciduous trees extract large volumes of water during summer months and dramatically less in winter when trees are without leaves.)

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Oxford City Council

Tree Planting List 2016/17

| <u>Genus</u> | <u>Species</u> | <u>Variety/Sub-species</u> |
|--------------|----------------|----------------------------|
|              |                |                            |
| Acer         | platanoides    | Deborah                    |
| Amelanchier  | arborea        | Robin Hill                 |
| Morus        | nigra          |                            |
| Arbutus      | unedo          |                            |
| Betula       | pendula        |                            |
| Cornus       | mas            |                            |
| Cedrus       | libani         |                            |
| Crataegus    |                | x prunifolia               |
| Pyrus        | calleryana     | "Chanticleer"              |
| Fagus        | sylvatica      |                            |
| Quercus      | robur          |                            |
| Larix        | decidua        |                            |
| Pinus        | nigra          | Austriaca                  |
| Prunus       |                | Tai Haku                   |
| Platanus     | orientallis    | Minaret                    |
| Ulmus        | lutece         |                            |
| Taxus        | bacata         | fastigiata                 |
| Tilia        | plataphyllos   |                            |
| Pinus        | sylvestris     |                            |
| Zelkova      | serrata        |                            |
| Tillia       | Cordata        | Greenspire                 |
| Liquidambar  | styraciflua    | Worplesdon                 |

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**To: City Executive Board**

**Date: 13 October 2016**

**Report of: Finance Panel (Panel of the Scrutiny Committee)**

**Title of Report: The implications of Brexit on the Council's finances**

## **Summary and Recommendations**

**Purpose of report:** To present recommendations of the Finance Panel on the financial implications of Brexit on the Council's finances.

**Scrutiny Lead Member:** Councillor Craig Simmons

**Executive lead members:** Councillor Ed Turner, Board Member for Finance, Asset Management and Public Health

**Recommendation** of the Finance Panel to the City Executive Board:

**That the City Executive Board states whether it agrees or disagrees with the recommendations set out in the body of this report.**

## **Introduction**

1. The Finance Panel requested a report from the Head of Financial Services on the implications of Brexit for the Council's finances. This followed the outcome of a public referendum held on 23 June 2016, which resulted in a decision for Britain to leave the European Union. The Finance Panel considered this item at a meeting on 7 September 2016 and would like to thank Nigel Kennedy for presenting his report and supporting the discussion.

## **Summary of the discussion**

2. The Head of Financial Services advised that many impacts of Brexit had not yet played out but that there were some immediate impacts on the Council that were already known, most notably:
  - Lower interest rates would hit the Council's annual treasury income by approximately £400k.
  - Property fund appreciation values had dropped but remained well above purchase values and dividend income had not been affected.

- An Oxfutures Programme target for achieving leveraged income of €23m had increased by £1.8m since the Brexit decision and the fall in the exchange rate. This target would now be significantly harder to achieve and in the event that it isn't achieved, a portion of the £1.2m grant is repayable to the EU.
3. The Panel suggested that the Council could face higher procurement costs and potentially difficulties in achieving planned levels of trading income following the Brexit decision and any resulting economic downturn. The Panel noted that it would be helpful for the Council to track these impacts over time, in addition to income from car parking, commercial rents, investments and planning fees.
  4. The Panel noted that on the upside, the cost of borrowing was cheaper and the Council did have a borrowing requirement within its Medium Term Financial Plan, which was expected to be met from a combination of internal and external borrowing. The Head of Financial Services advised that officers would explore whether or not it would be advantageous to bring planned borrowing forwards to take advantage of historically low interest rates, given that there would be a cost of carrying borrowing that was not yet needed.
  5. The Panel questioned whether there would be a case for closing and refinancing some or all of the Council's £198.5m Housing Revenue Account debt, which was originally borrowed at preferential rates. The Panel heard that the Council would look again at whether or not to refinance the first £20m repayment due in 2021. Officers had looked at whether there was an opportunity to refinance the debt outside of the repayment tranches but had found this option to be too punitive.
  6. The Panel also considered whether there was a strong case for increasing council borrowing in order to increase investment spending. The Head of Financial Services advised that this would be kept under review but that the Council was already taking a lead in many respects compared to benchmarked authorities, for example by investing significantly in commercial property and new build housing. Going even further would depend on the Council's appetite for borrowing and risk. The Panel agreed to encourage new borrowing to fund revenue generating opportunities, including potentially renewable energy schemes, where there is a strong business case for doing so.

***Recommendation 1 - That the Council explores whether there are opportunities to increase its levels of borrowing at historically low interest rates in order to fund additional revenue generating schemes.***

7. In terms of the wider economy the Panel suggested that Brexit could reduce inward investment and joint funding opportunities. The Panel noted that the impact on Business Rates income of one or two major employers relocating away from the City could be very high, with the Council liable to lose £500k before government safety net payments kicked in. The Panel heard that 19 business premises accounted for 22% of rateable values in the City. The Panel noted that the Government was consulting on proposals to grant local authorities 100% Business Rates retention. It was expected that this would only apply to growth above a baseline not the full Business Rates take but there was a lot of



uncertainty around what these changes would mean for the City, including whether safety net payments would still apply in future.

8. The Panel suggest that the Council should look to partner with local organisations in commissioning a study of the expected impacts of Brexit on the local economy. The findings of such a study could help to inform scenario planning by the Council and other local bodies such as the Local Enterprise Partnership.

***Recommendation 2 - That the Council looks to partner with local Universities or economic institutions to study the wider impacts of Brexit on the economy of Oxford.***

**Name and contact details of author:-**

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Scrutiny Officer  
Law and Governance  
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**List of background papers: None**  
**Version number: 1.0**

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## MINUTES OF THE SCRUTINY COMMITTEE

**Monday 5 September 2016**



**COUNCILLORS PRESENT:** Councillors Gant (Chair), Hayes (Vice-Chair), Azad, Chapman, Coulter, Henwood, Pegg, Simmons, Taylor, Tidball, Wilkinson and Pressel.

**BOARD MEMBERS PRESENT:** Councillor Bob Price (Leader of the Council)

**OFFICERS PRESENT:** David Edwards (Executive Director City Regeneration and Housing), Pat Jones (Committee and Member Services Manager) and Sarah Claridge (Committee Services Officer)

### **29. APOLOGIES FOR ABSENCE**

Apologies for absence were received from Councillor Fry (substitute Councillor Pressel).

Councillor Wilkinson sent apologies for lateness

### **30. DECLARATIONS OF INTEREST**

There were no declarations of interest made.

### **31. WORK PLAN AND FORWARD PLAN**

The Chair presented the report.

#### **Work Plan**

The Committee reviewed and noted the change in its work plan for the 2016/17 council year.

#### **Standing Panels**

Cllr Henwood updated the Committee on the work of the Housing Panel. They had met once and had had two reports considered and approved by CEB. The panel are busy putting together a work schedule for the year.

The Finance Panel are meeting on Wednesday 7 September. Cllr Simmons listed the panel's work schedule which included; reviewing the council tax

support scheme, the implications of Brexit for local government, budget monitoring annual report, and scoping the Panel's budget review.

### **Review Panels**

Cllr Tidball updated the Committee on the work of the Devolution review group which is meeting on 19 September before reporting back in October with a tighter scope. The first meeting will review both the City and the County's devolution reports and two subsequent meetings could focus on the proposals for children services, and adult social care and how to move these findings forward in partnership.

Cllr Coulter said that as there is no agreement between the Oxfordshire councils (on the current proposals). The review group should focus on the decision reached (by the councils) in December.

Cllr Tidball said that any review of the devolution reports could help to push the City and County into future negotiations. She felt that the review group should focus on children services as it was the City's greatest need. The panel could focus on the effect of children services and adult social care within both proposals.

Cllr Hayes felt that regardless of the current situation any review would contribute to future devolution discussions in Oxfordshire.

### **Forward Plan**

The Committee wishes to pre-scrutinise the following CEB reports in October:

Digital strategy - November

Sustainability report – during consultation between December and April 2017

## **32. REPORT BACK ON RECOMMENDATIONS**

The Chair presented the report on recommendations.

CEB had asked the Committee to reconsider the Equality and Diversity group's recommendation 15 in light of a submission from Stonewall Diversity Champions.

Recommendation 15 sought the council to seek better value from its status as a Stonewall Diversity champion and failing that to stop membership.

Cllr Hayes, Chair of the Equality and Diversity review group felt that despite the new information, the recommendation should stand. He said that officers had said that engagement with Stonewall was on occasions problematic and did not produce outcomes of value. The money, however small, could be spent more productively elsewhere.

The Scrutiny Committee resolved to agree that the Equality and Diversity recommendation 15 should stand in light of the attached submission from Stonewall.

Cllrs Simmons was unhappy that recommendations 17 and 20 were refused by CEB; he felt that further clarification was needed to explain them to the Board. The Committee Services Manager said that the Committee had no right to send the recommendations back to CEB, however given that a report on recommendation 15 was to be presented to CEB further clarification for the recommendations could be sought.

### **33. PERFORMANCE MONITORING - QUARTER 1**

The Chair presented the report and directed the committee to the error in the report – CE001 end of year 2015/16 figure should read £7.3 M not £73M. The Chair explained that Cllr Fry had put himself forward to be the lead member for performance monitoring.

The Committee Services Manager explained that a lead member is a member of the Scrutiny Committee who works with the Scrutiny Officer between meetings and gives a members perspective to commentary. Other members could approach Cllr Fry directly if they had queries on the information.

The Committee Services Manager explained that Cllr Fry had suggested four additional performance measures:

Members queries,

Empty units in the covered market

Empty units in the town centre

Performance of ICT services – officers and councillors.

The Scrutiny Committee resolved to appoint James Fry as lead member on Performance Monitoring.

### **34. RESPONSE TO QUESTIONS ON FUSION LIFESTYLES SERVICE PLAN**

The Scrutiny Committee noted the additional information report but were not happy with the quality and content of the response. They felt it was thin and lacked detail.

The Committee would like more details on all the questions in terms of outcomes measured and wished to invite the Community Services Manager and Board member for Leisure, Parks and Sports to discuss the questions with the committee, at a date to be determined.

### **35. DRAFT 2015-16 ANNUAL REPORT OF OXFORD CITY COUNCIL'S SCRUTINY COMMITTEE**

Cllr Simmons presented the report. The Committee agreed to insert the following paragraph into the Chair's report:

"There is an increasing need for scrutiny and in particular "critical friend" challenge within the current climate. Members across the Council recognise the importance of this and regularly present more topics for scrutiny than can be accommodated within the officer resources available. This restriction on influence remains a challenge and frustration for non-executive councillors."

The Scrutiny Committee resolved to approve the Scrutiny Committee Annual Report 2015-16, subject to any stylistic changes to be agreed by the Chair. The report will be submitted to Council on 29 September 2016.

### **36. FINANCE PANEL REPORT ON CREDIT UNION SERVICES**

Cllr Simmons, Chair of Finance Panel presented the report.

The Scrutiny Committee resolved to approve the report of the Finance Panel to be submitted to the City Executive Board on 15 September 2016.

### **37. EUROPEAN REGIONAL DEVELOPMENT FUND (ERDF) INNOVATION PROJECTS - MATCH FUNDING**

The Director for Regeneration and Housing presented the report. It is an opportunity to bring an empty space back into use in the town hall and to pitch for EU funding. The space will be transformed into office space for small high tech or innovative business start-ups.

The Council will pay for the capital works and will get the money back from the rent. The EU match funding (if secured) will pay for a programme manager for 3 years.

The Chair asked whether the EU funding was under threat by Brexit or guaranteed if received before the Autumn statement. The Director for Regeneration and Housing didn't know the status of the funding but said if the EU funding wasn't awarded then the management element of the project would not happen.

Cllr Taylor asked whether there was a chance of such a venture happening outside of the city centre. The Director for Regeneration and Housing said that in terms of the principle absolutely – however it tends to happen in property the city council owns and businesses are more attracted to venues in the city centre so they're close to collaborators.

Cllr Simmons asked why a 5 year lease had been agreed when most are 3 years in length

The Director for Regeneration and Housing said 5 years was agreed by the partners. Lease terms would be favourable and the Council expects the manager to actively manage the space.

The Chair asked whether the project maximised best value for council. The Director said that it's not ideal office space and the Council could get more money for it but doing so would not yield the same social value.

The Committee noted and endorsed the recommendations in the report.

### **38. OXLEP STRATEGIC ECONOMIC PLAN REFRESH**

Cllrs Pressel and Azad left the meeting

Cllr Price, Board Member for Corporate Strategy and Economic Development presented the report. He outlined the four themes of people, place, enterprise and connectivity outlined in the plan and explained that the SEP provided a framework for how local plans are developed and a basis for funding bids.

The Chair asked how the devolution proposals and the scrutiny function fitted into the work of the LEP. Cllr Price said that if there was a restructure of local authorities in Oxfordshire then there would be a requirement for a new agreement between the LEP and any new authority.

The draft plan has been publically consulted on and it now required approval from each authority, which required it going through the scrutiny process.

The Committee made the following comments on the SEP:

Cllr Simmons was concerned with the measure identifying climate change as a risk to sustainable development but not providing any conclusions for how climate change could be addressed.

Cllr Wilkinson asked why there had been such a low response from businesses during the consultation. Cllr Price said that there were several well attended workshops for businesses had taken place, but they hadn't necessarily resulted in business owners making a submission. The LEP had also consulted business organisations such as the chamber of commerce and had incorporated their ideas into the plan.

Cllr Hayes asked that the report be amended to say that businesses have been consulted and their views have been captured through workshops and that business owners preferred the workshops approach.

Cllr Tidball asked about the connectivity theme, in particular how intercity bus connectivity could be improved. She felt there was a gap in investing in connecting the city's bus routes and the use of the ring road and maximising the use of the Park and Ride system.

The Committee discussed the demands of growth and the pressures it causes on housing and infrastructure. Unaffordable housing affected businesses ability to expand, as they struggle to attract employees who can afford to live in the city.

There is an on-going need for councils to work together within the planning parameters to encourage housing developments whenever possible.

At the same time it is equally important for councils to encourage people to learn skills which are in demand by city businesses.

The Scrutiny Committee AGREED the following recommendations to the City Executive Board:

1. The report sets a clear goal on page 19 to deliver sustainable growth in line with the Brundtland Commission definition. The SWOT analysis (p29) identifies the risk that, as it stands, this will not be achieved with regard to climate change targets - a key indicator of sustainable development. Nowhere are the conclusions of this aspect of the swot analysis addressed. Where is the detail of how the climate change targets are to be met?

2. The report and framework should make it clear that whilst the formal response from the business community was low this does not mean that views were not given and captured as part of this exercise. Businesses engaged through workshops and other informal channels with representatives of OxLEP.

3. The poor connectivity of buses across the City is identified as a threat but not closed off. This position has been made worse by the reduction in subsidised bus services. The document should include actions and solutions in this area including better use of trips around the ring road and additional stops along established routes

Cllr Price suggested the Committee review the LEP's revised Skilled Strategy due out in November and the Local Growth fund report.

### **39. MINUTES**

The following corrections to the minutes were made:

Declarations of Interests:

Cllr Tidball – Trustee of the South Oxford Community Association

Cllr Taylor – Board Member of Agnes Smith Advice Centre

Minute 26 – paragraph 2 correction of Cllr Simmons name

The Committee resolved to APPROVE the minutes as amended of the meeting held on 4 July 2016 as a true and accurate record.



#### **40. DATES OF FUTURE MEETINGS**

The next meeting will be held on 6 October 2016 at 6.00pm.

**The meeting started at 6.00 pm and ended at 8.15 pm**

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