

Minutes Supplement for

Scrutiny Committee

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On **Tuesday 9 September 2025** At **6.00 pm**

Minutes supplement: Amended Budget Review Group Scope 2026-27

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The agenda, reports and any additional supplements can be found together with this supplement on the committee meeting webpage.

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Scrutiny Budget Review 2026/27 – Scoping Document

Review Topic	Budget Review 2026/27 and Medium-Term Financial Plan to 2028/30
Lead Member Review Group	Councillor James Fry
Other Review Group Members	Councillor Chris Jarvis; Councillor Dr Christopher Snowton; Councillor Ian Yeatman <i>Members of the Housing and Homelessness Panel will be invited to scrutinise Housing-related budgetary items:</i> <i>Councillor Theodore Jupp (Chair); Councillor Lizzy Diggins; Councillor Edward Mundy; Councillor Rosie Rawle; Councillor Anne Stares</i> <i>Members of the Climate and Environment Panel will be invited to scrutinise the Environmental Sustainability-related budgetary items:</i> <i>Councillor Katherine Miles (Chair); Councillor Judith Harley; Councillor Jemima Hunt; Councillor Kate Robinson</i>
Substitutes	Substitutes will be permitted for Budget Review Group meeting. Members should make every effort to attend meetings to help ensure continuity. However, given the tight timescales within which the Budget Review Group is required to meet (with very limited scope for alternative meeting dates) and the need to ensure cross-party representation at those meetings, advance notice is requested. Should Budget Review Group members be unable to attend one or more of the Budget Review Group meetings, they should contact the Scrutiny and Governance Advisor at their earliest convenience to advise the meeting date(s) they cannot attend and their named substitute. Members must seek their own substitute from their political group as normal.
Officer Support and allocated hours	Scrutiny and Governance Advisor support – approx. 2-3 days per week from mid-December 2025 to mid-February 2026. Additional support from the Group Finance Director and other Senior Officers.
Background	The Budget 2026/27 paperwork will be published for consultation on 2 December 2025 ahead of a final decision by Full Council on 23 February 2026 (<i>reserve date 4 March 2026</i>). Scrutiny has formed a Budget Review Group to scrutinise the budget proposals in detail before reporting to Cabinet in February 2026.
Rationale	To scrutinise the Council's draft budget for 2026/27 and Medium-Term Financial Plan for the following three years and provide public assurance of the Council's budget setting processes and decisions.

Key lines of inquiry	Areas of focus for the Budget Review Group this year to include: • The progress of financial mitigation strategies arising from the various pressures on Council finances • The interaction, robustness and financial impact of the financial returns to the Council from Oxford Direct Services and OX Place business plans – including scrutiny of the ODS and OX Place Business Plans and their importance in relation to the financial sustainability of the Council • Specific consideration of the Council's planning regarding macroeconomic factors such as inflation and the cost-of-living crisis • The robustness of plans and risks to the Council's anticipated income streams, particularly relating to parking, commercial property and the Council's companies • The robustness of the HRA Business Plan • Assessment of overall strategy and individual proposals to mitigate lost income and to reduce costs, including the deliverability of proposals for income generation and savings • Planned borrowing levels and the impact of the changes arising from Minimum Revenue Provision • Levels of contingencies and earmarked reserves • Deliverability of the Capital Programme and its relation to previous iterations of the Medium-Term Financial Plan • The realism of optimism bias assumptions applied to the Capital Programme • The risk of slippage in the revenues projected from commercial properties if new lettings are delayed • Progress with, and opportunities to further exploit, emerging technologies such as Artificial Intelligence (AI) and Robotic Process Automation (RPA) to increase productivity/efficiency, considering both the potential cost savings and associated financial implications • The impact of staff recruitment and retention on the ability to realise the MTFP (e.g. achievement of performance targets, unplanned expenditure on temporary staff, delivery of plans and priorities and increasing pressure on existing staff) • The impact of the new Government on local government finances and plans for Local Government restructure • The impact of budget proposals on service users and the wider community • The impact of discretionary spending on statutory responsibilities, eg. Environmental Health
Indicators of Success	▪ Robust independent scrutiny of budget proposals ▪ Detailed consideration of key lines of inquiry ▪ The production of an evidenced based report with recommendations ▪ Broad agreement on conclusions and recommendations amongst Review Group members ▪ The majority of recommendations are agreed by the Cabinet
Methodology/ Approach	Evidence gathering to include: • A budget briefing by Deputy Leader and Cabinet Member for Finance and Asset Management and the Group Finance Director;

	• Reviewing Budget 2026/27 paperwork, including options or bids presented to Members; • Submitting written questions to CLT and reviewing their responses; • Meetings with CLT and Business Leads		
Specify Witnesses/ Experts	▪ Cabinet Member for Finance and Asset Management ▪ Group Finance Director ▪ Chief Executive ▪ Deputy Chief Executive – Place ▪ Deputy Chief Executive – City and Citizens’ Services ▪ Director of Law, Governance & Strategy ▪ Director of Corporate Strategy (Interim) ▪ Director of Housing ▪ Director of Communities & Citizens ▪ Director of Property Assets ▪ Director of Planning & Regulatory Services ▪ Director of Economy, Regeneration & Sustainability ▪ Head of People ▪ Chief Information & Technology Officer ▪ Community Safety Service Manager ▪ Active Communities Manager ▪ Property Services Manager ▪ Culture and Community Development Manager ▪ City Centre Manager ▪ Strategic Finance Manager ▪ Committee and Member Services Manager ▪ Affordable Housing Supply Corporate Lead ▪ Environmental Sustainability Lead ▪ Managing Director (Oxford Direct Services) ▪ Managing Director (OX Place) ▪ Head of Facilities Management ▪ Finance Business Partners		
Out of scope	N/A		
Projected start date	2 December 2025	Draft Report Deadline	26 January 2026
Meeting Frequency	5 meetings in December 2025 to January 2026	Projected completion date	By 11 February 2026 Cabinet

Draft outline of meetings – all held remotely via Teams

Meeting one – Tuesday 9 December 2025, 6:00 – 8:00pm

1. Introduction from the Cabinet Member and Group Finance Director
Attendees: Cllr Ed Turner and Nigel Kennedy • Current local context • Budget-setting process to date • Overview of the whole budget – including areas of particular risk and/or tension, options presented to Members and potential trade-off options in terms of savings/income, key areas of growth or income generation, impact of particular elements of the budget on local people/groups • How previous discussions with Finance and Performance Working Group and any recommendations associated with those discussions (including Budget Review Group recommendations for the 2025/26 budget) have fed into the budget-setting process for 2026/27 Other Attendees: Clare Paterson
2. Initial inquiry and generation of questions
• An opportunity for BRG to discuss and start generating questions

Meeting two – Tuesday 6 January 2026, 6:00 – 8:00pm

1. Review of budget proposals for service areas
• Place Directorate (Tom Bridgman) ○ Economy, Regeneration & Sustainability (Clive Tritton / Carolyn Ploszynski, Dave Scholes, Jenny Barker) ○ Environmental Sustainability (Tina Mould) • Planning & Regulatory Services (David Butler) • Property Assets (Jane Winfield, Emma Gubbins, Malcolm Peek, David Hunt, Jason Jones) • Capital Programme – General Fund (Paul Swaffield, Malcolm Peek) • OX Place (Kevin Lowry, Tim Bacon (or their successors) and David Watt) ○ OX Place Business Plan ○ OX Place Client (Tom Bridgman) Other attendees: Nigel Kennedy, Clare Paterson, Andrew Friar, Jason Jones and Paul Swaffield <i>Members of the Climate and Environment Working Group will be invited to participate in the Scrutiny of the Environmental Sustainability element of this meeting.</i>
2. Formulation of recommendations
• BRG members to formulate recommendations based on discussions

Meeting three – Wednesday 7 January 2026, 6:00pm – 8:00pm

1. Review of budget proposals for service areas

- City and Citizens' Services Directorate (**Tom Hook**)
 - Communities & Citizens (**Helen Bishop, Hagan Lewisman, Paula Redway**)
 - Leisure Services (**Hagan Lewisman**)
 - Housing (**Nerys Parry, Bill Graves, Richard Wood**)
 - Information & Technology (**Rocco Labellarte**)
 - Community Safety Services (**Richard Adams**)
- Capital Programme – HRA
- Oxford Direct Services (**Simon Howick, Paul Concannon and Chris Urwin**)
 - ODS Business Plan
 - ODS Client (**Mish Tullar**)

Other attendees: **Nigel Kennedy, Clare Paterson, Emma Burson, Andrew Friar, and Paul Swaffield**

Members of the Housing and Homelessness Working Group will be invited to participate in the Scrutiny of the Housing element of this meeting.

2. Formulation of recommendations

- BRG members to formulate recommendations based on discussions

Meeting four – Thursday 15 January 2026, 6:00pm – 8:00pm

1. Review of budget proposals for service areas

- Corporate Services (**Caroline Green**)
 - Law, Governance & Strategy (**Emma Jackman and Jonathan Malton**)
 - Local Government Reform (**Mish Tullar, Lucy Cherry and Clare Keen**)
 - People Services (**Gail Malkin**)
 - Finance Services (**Nigel Kennedy, Clare Paterson, Phil McGaskill, Laura Bessell, Bill Lewis, Annette Osbourne**)

Other attendees: **Nigel Kennedy, Clare Paterson and Andrew Friar**

2. Formulation of recommendations

- BRG members to formulate recommendations based on discussions

Meeting five – Tuesday 20 January 2026, 6:00pm – 8:00pm

1. BRG Final Recommendations

- Members to consider and agree the list of recommendations

2. Draft Report of the Budget Review Group

- To consider the Draft Budget Review Group report

Final Draft of the BRG Report for submission to Scrutiny Committee: Thursday 22 January 2026

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