

Overview and Scrutiny Operating Methodology

Functions covered within this document:

1. Performance management (for service areas presenting performance figures below target)
2. Pre-decision scrutiny (also known as pre-scrutiny and identified from the Forward Plan)
3. Ongoing project work (for example as requested or identified by a policy committee or Council)

1. Performance Management

The Committee can request a Service Performance Review (to identify reasons for off-track performance and ways to improve) when:

- ✓ The performance has been off track for at least two consecutive reporting periods
- ✓ Recommendations from the relevant committee have been implemented and allowed time to have an impact
- ✓ At least four committee Members wish to request the review

The following restrictions apply:

- * A maximum of four such reviews can be requested in any municipal year
- * Any service area subject to such a review is excluded from re-examination under any process for the subsequent six month period (ie, further two reporting periods)

Process for a Service Performance Review:

- ✓ The request is to be made in writing, signed by at least four committee Members, set out the reasons for the request and be submitted to the O&S Clerk at least 21 days prior to the next committee meeting.
- ✓ The request will be considered at the next meeting and, if agreed, terms of reference for the review group should be set.
- ✓ Alternatively, where a request for a Service Performance Review is identified during a Committee meeting, and is supported by at least four Members of Committee, this will replace the request in writing.
- ✓ The Chairman (or representative) of the relevant policy committee is to be invited to the meeting where the scope of the review is considered.
- ✓ The findings of the review will be heard by the O&S Committee and presented to the relevant policy committee, where the Chairman (or representative) of O&S shall also attend.
- ✓ If the policy committee does not wish to accept the recommendations of the review group, the decision shall be referred to Council.

2. Pre-Decision Scrutiny

The Committee can identify items for pre-decision scrutiny (also known as pre-scrutiny) from those detailed on the Forward Plan. These could be items which are politically sensitive or of high public interest and where the Committee considers it would be of benefit to scrutinise the proposed decisions in advance.

These items can be selected from the Forward Plan during meetings of the Committee by a proposer, seconder and majority vote.

The following restrictions apply:

- ✗ A maximum of two 'pre-scrutiny' items can be identified per municipal year.
- ✗ The Committee cannot dictate the timeline or prevent the decision being submitted to the relevant policy committee within the pre-agreed timescales.
- ✗ Any decision considered under pre-scrutiny cannot then be called-in under the traditional process.
- ✗ Any item considered under pre-scrutiny is excluded from re-examination under any process for the subsequent six month period.
- ✗ NB: The policy committee is not strictly bound by recommendations from O&S however it is expected that they should be given due consideration.

Commented [E51]: Reduced from four to two for reasons of workload management of cttee workplan

Process for Pre-Decision Scrutiny:

- ✓ The O&S Committee will receive the exact report due to be presented at the policy committee, at least 1 cycle prior to the policy meeting.
- ✓ The O&S Committee will make recommendations to the policy committee where it feels there are areas to be further addressed in order to support the proposed decision.
- ✓ The Officer responsible for the report will work with the Chairman / representatives of O&S to revise the report accordingly (when necessary).
- ✓ The amended report, along with the minute from the O&S meeting and the original report, will be submitted to the policy committee within the original timescale.

3. Ongoing Project Work

The O&S Committee can be requested by either of the policy committees, or Council, to conduct reviews of policy, services or any aspect of a service as identified by the relevant committee.

Any such request will be made to the Chairman of the O&S Committee from the Chairman (or representative) of the requesting committee / Council. The purpose, scope and terms of reference for the review will be agreed by the requesting committee and shared with the Chairman of O&S at the time of the request.

Such reviews will form part of the work plan for the O&S Committee, report timescales will be set out in the Forward Plan and recommendations will be agreed and shared with the referring committee.

Where the Committee chooses to conduct a review of policy or services that has not been referred by a policy committee, or does not fall under items 1 or 2 as detailed above, such reviews are limited to one review per civic year.

Commented [ES2]: Additional clarification re ctee chosen reviews that fall outside of Performance Management and Pre-Decision Scrutiny

Updated Versions / Amendments to Operating Methodology*:

June 2019

May 2022

*the Operating Methodology is reviewed annually by the Committee, however the above dates refer to amendments made.

Commented [ES3]: Additional clarification re document history.