

Wrexham County Borough Council

Self-Assessment

2022/23

This document is also available in Welsh



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1. INTRODUCTION

Self-assessment is important to any organisation and is a way of critically, and honestly, reviewing the current position in order to make decisions on how to secure improvements for the future. New legislation in Wales (Local Government and Election (Wales) Act 2021) requires councils to keep under their performance under review through self-assessment. At its simplest level it ensures we are asking annually:

- How well are we doing?
- How do we know?
- What and how can we do better?

This report reflects our findings from our self-assessment review and in line with the new legislation considers whether we are:

- exercising our functions effectively;
- using our resources economically, efficiently, and effectively; and using governance that is effective for securing the above.

2. OUR APPROACH TO SELF-ASSESSMENT 2022-23

Self-assessment is already an integral part of our performance management framework which helps us to identify areas where support for improvement is most required in order to be able to deliver against our priorities, whilst remaining flexible and innovative in order to respond to the changing environment in which we operate.

Self-assessment as an improvement tool is embedded across the council – from self-assessment at individual service level, to cross-cutting and thematic levels, such as when we assess our performance against our Council Plan or the effectiveness of our governance framework.

In developing our approach to the new Self-assessment requirement as defined in the legislation, we have drawn on the Act's Statutory Guidance. As such, it is structured around the following governance themes:

- **Performance outcomes:** The council's commitment to its vision and achieving performance outcomes across the council, whilst considering the progress made in achieving the Council Plan Well-being Objectives and Improvement Priorities.
- **Corporate planning:** The council's capacity to define and plan sustainable outcomes. Considering if decisions made include views from all stakeholders, further the authority's purpose, contribute to intended benefits and outcomes, and remain within the limits of authority and resources.
- **Leadership & organisational culture:** The appropriateness of the council's structures and leadership capacity to enable the council to fulfil its own mandate while continually developing the skills and experience of the leadership to respond to future demands.
- **Performance management:** The effectiveness of the council's performance management system in facilitating a process to ensure the achievement of intended outcomes by providing a mixture of legal, regulatory, and practical interventions.
- **Financial planning:** The proficiency of the council's system of financial management in underpinning and setting the context of decision-making, implementation of policies and achievement of intended outcomes.
- **Risk management:** The council's risk management processes as an integral part of a performance management system and considering how well risk is addressed as part of all decision making.
- **Workforce planning:** The extent to which the council has systems in place to develop the workforce to ensure it has the capacity to respond to change over time and has the skills and experience of leadership and the workforce to fulfil its functions.
- **Assets:** The effectiveness of the council's assessment management to ensure effective service provision and value for money.

- **Procurement:** The efficiency of the council's procurement process in being sustainable, achieving value for money and generating benefits for local people and the local economy, whilst minimising damage to the environment.

Our assessment process is underpinned by an assessment against the good governance principles set out in CIPFA/SOLACE's 'Delivering Good Governance in Local Government' and our own governance framework, and we have used this framework to define what good performance in each of these areas looks like. Our process has included a review of available evidence, progress made against the areas of development identified in our first [Self-assessment 2021-22](#) and challenge sessions with our Senior Leadership Team, key officers and our elected members.

This report includes an update on progress against the 2021-22 areas of development and also identifies areas for development moving forward, progress against which will be reported in the 2023-24 report.

The Statutory Guidance states that the Self-assessment report should be accessible and succinct, therefore it offers a high level and strategic summary of our performance against the nine themes. It identifies those areas in which the council is progressing well, as well as areas for development and these are set out in each of the themes (section 4).

3. SUMMARY OF OUR SELF-ASSESSMENT 2022-23

In undertaking the assessment, we have judged our performance using the following rating:










GREEN: Consistently good performance with minimal areas for development.

YELLOW: Good performance with strengths outweighing areas for development.










AMBER: Satisfactory performance, but investment and increased capacity may be required in a number of key areas.

RED: Weak performance and actions to improve unclear.

A summary of our self-assessment against the nine themes for the year 2021-22 is set out below.

-  Performance outcomes (Amber)
-  Corporate planning (Green)
-  Leadership & organisational culture (Yellow)
-  Performance management (Yellow)
-  Financial planning (Yellow)
-  Risk management (Yellow)
-  Workforce planning (Yellow)
-  Assets (Amber)
-  Procurement (Yellow)

A summary of our self-assessment against the nine themes for the year 2022-23 is set out below.

-  **Performance outcomes (Yellow)**
-  **Corporate planning (Yellow)**
-  **Leadership & organisational culture (Amber)**
-  **Performance management (Yellow)**
-  **Financial planning (Amber)**
-  **Risk management (Yellow)**
-  **Workforce planning (Yellow)**
-  **Assets (Amber)**
-  **Procurement (Yellow)**

Details of how we have reached these judgements, along with the areas we have identified for development are contained in the next section. A list of some of the key sources of evidence we have used in reaching these judgements is available at appendix 1.

4. ASSESSMENT AGAINST OUR SELF-ASSESSMENT THEMES

Theme: Performance outcomes

The council's commitment to its vision and the Well-being Objectives and Improvement Priorities are reflected in the progress made in achieving the agreed outcomes. New actions and interventions should be agreed, to adapt and respond where progress in achieving outcomes is of track or impacted by external challenges. Outcomes that are not on track are highlighted through the performance management framework. In light of the challenge of the pandemic, evidence of progress and decision making in respect of the developing landscape should be evident in pursuing the council's vision.^[1]

Our well-being objectives are set out in the Council Plan (2020-23) which was agreed by Council in 2020, and reviewed in 2022. The Council Plan also demonstrates how our well-being objectives help deliver on Wales' Well-being Goals.

We report on our performance against the objectives quarterly to elected members, twice a year to the Executive Board, and annually to the public via our annual performance report. As a whole, at the end of the Council Plan (2020-23), achievement against the plan is judged to be yellow: good progress made within areas of focus to deliver key milestones with evidence of improvement observed across several key performance measures. A summary of how we have assessed our performance in terms of achieving our objectives in the final year of the plan (2022-23), is set out below. Full detail can be found in the most recent annual performance report.

- Five priorities assessed as yellow (good progress has been made, with evidence of improvement observed across several key performance measures)
- One priority assessed as amber (progress has been made but limited evidence of improvement across key performance measures)
- No priorities assessed as red (little progress has been made and performance is not improving)

| WELL-BEING OBJECTIVE / COUNCIL PRIORITY | RAYG Rating 2020/21 | RAYG Rating 2022/23 |
|--|---------------------|---------------------|
| Decarbonising and Developing our Environment (Improving our Environment in 202/22) | Green | Amber |
| Developing the Economy | Amber | Yellow |
| Ensuring a Modern and Resilient Council | Green | Yellow |
| Ensuring Everyone is Safe | Amber | Yellow |
| Improving Secondary Education | Yellow | Yellow |
| Promoting Good Health and Well-being (with a focus on improving children's services) | Yellow | Yellow |

In comparison with our assessment of performance at the end of 2021-22, two priority areas have sustained progress, two have improved, and two have declined. The Developing and Decarbonising our Environment priority was impacted by the change in focus in the final year (from Improving our Environment) and changes in performance measures, reflecting the Council's commitment to decarbonisation; Ensuring a Modern and Resilient Council was impacted by the addition of actions to improve our cyber-security in the final year of the Plan. Where we have not made the expected progress, these areas have been reviewed as part of the planning for our new Council Plan (2023- 28).

Our Strategic Equality Plan (SEP) and objectives are fully embedded in the Council Plan (2020-23). Full detail on progress at the end of the Plan can be found in the most recent annual performance report. At the end of the Council Plan (2020-23), three equality objectives were assessed as green (very good progress has been made, with strong evidence of improvement observed across the majority of key performance measures) and four assessed as yellow (good progress has been made, with evidence of improvement observed across several key performance measures), demonstrating an improvement towards being a more inclusive council.

In our self-assessment 2021-22, we rated this theme as amber which meant that we demonstrated satisfactory performance, and investment and increased capacity may have been required in a number of key areas. We identified the following areas for development:

- Continue to deliver on our council priorities and improve progress of council priorities assessed as amber.
- Continue our corporate and service improvement journeys evidenced in priorities linked to external regulatory bodies.
- Continue our improvement journey in those corporate or service areas with agreed improvement plans or senior restructures in place – De-carbonisation (corporate); Planning (service); and Housing (service).

Progress made against areas for development 2021-22

- We made good progress with two council priorities assessed as amber at the end of 2021-22, moving to a yellow rating at the end of the Council Plan (2020-23).
- Our Estyn Post Inspection Plan was successfully implemented, we reduced the number of secondary schools in the Estyn 'follow up' categories and we are placed in a strong position for the Estyn monitoring inspection (scheduled for July 2023).
- CIW reported good progress in children's social care during their inspection (June 2022) and as a result the service is no longer considered a significant issue. However, we recognise challenges remain in relation to pressure on social care service budgets due to high levels of expectation and increasing demands.
- In our Planning Service, good progress was made with the implementation of recommendations from the independent Planning Review.
- We completed the proposed Housing Service restructure.

Our assessment 2022-23: Yellow (improved)

We have reached this conclusion because of good performance with strengths outweighing areas for development.

Strengths

- Continued improvements seen in priority improvement areas, with Planning and Housing improvement areas removed as significant issues.
- Good progress in services identified by External Regulatory Bodies as needing significant improvement:
- CIW inspection in June 2022, reporting good progress and a return to business as usual for performance review activities.
- Good progress in the Education and Early Intervention Service with the service in a strong position for the July 23 monitoring visit by Estyn.
- Improvement seen in two council priorities rated as amber overall in 2021/22.
- Equality objectives overall have seen good progress with particular success achieved in schemes supporting involvement and inclusion within the County Borough and events to support community cohesion.

Areas for development

Carried Forward

- Education and Early Intervention Service to be removed from the 'follow up' Estyn category of causing significant concern. *(AGS)

New

- Continue improvement journey in those corporate or service areas with agreed improvement plans; Decarbonisation (corporate) and Social Care (service).

Theme: Corporate Planning

The long-term nature and impact of many of local government's responsibilities mean that it should define and plan outcomes and that these should be sustainable. Decisions should further the authority's purpose, contribute to intended benefits and outcomes, and remain within the limits of authority and resources. Input from all groups of stakeholders, including citizens, service users, and institutional stakeholders, is vital to the success of this process and in balancing competing demands when determining priorities for the finite resources available.^[1]

We have a clear vision, for the County Borough, which informs our ambition, our well-being priorities and our corporate planning processes

- We publish our Council Plan which clearly sets out our vision for the County Borough and our well-being objectives, and identifies how they contribute to Wales' Well-being Goals. The Plan sets the context and focus of the objective, defines what success will look like and sets out clear milestones and measures. The Plan includes a section on our finances which clearly reflect the challenges the council is facing and helps set the context within which we are operating. A robust process to review and agree our well-being objectives for the next Council Plan 2023-28 began in autumn 2022, including a review of data and intelligence, Priority Boards, Elected Members and involvement with the public, stakeholders and less well-represented groups.
- We work regionally and in partnership to ensure that our corporate planning reflects regional issues and priorities – for example Public Services Boards, North Wales Economic Ambition Board, Mersey Dee Alliance and Regional Leadership Board.
- Wrexham and Flintshire Public Services Boards, having worked together closely to jointly address cross-border issues during the pandemic, formally merged, with a view to strengthening leadership and governance, reducing duplication and focusing on delivering long term well-being outcomes for both communities. The PSB Well-being Plan (2023-28) was agreed.
- We have comprehensive service planning guidance to support services in their own planning processes.
- Our Performance Review and Development (PRD) processes ensure that service activities are focussed on achieving objectives and service requirements.
- We involve the public and our stakeholders in our planning, and understand the intended impact of achieving our outcomes upon them.
- Our Strategic Equality Objectives have been embedded in our well-being objectives to ensure we remain focussed upon them in the way we design and deliver our services.
- The Council voted against the adoption of a Local Development Plan and now needs to consider and mitigate the implications of this decision.

We take a long-term view and plan sustainable outcomes within resources and manage risks to the achievement of our outcomes.

- The Council Plan for the period covered by this self-assessment is a three year Plan. Planning for our next Council Plan commenced during 2022-23 following the establishment of our new Council (local government elections May 2022): this Plan will be for a five year period, which recognises the long term nature of our objectives. Our annual review process provides the flexibility to allow us to refocus and adjust objectives and targets as appropriate, to ensure that the Plan remains realistic and achievable.
- Decisions about budgets and resources are aligned to the achievement of objectives.
- We have effective performance management processes in place to develop and deliver our objectives – this is underpinned by six Priority Boards who have responsibility for challenging performance and enabling the achievement of our aims and objectives. Priority Boards consider interventions for objectives that are off track to ensure that resources are realigned where appropriate, and consider risks to the achievement of our objectives as part of our established risk management arrangements.
- The sustainable development principle is embedded within our approach to corporate planning and we recognise that making the best use of our resources requires a broader definition than ‘finance’ – we need to balance the economic, social and environmental impacts of our policies and plans. Equality Impact Assessments are embedded in our decision making.
- We continue to make good progress to make decarbonisation integral to everything we do, and recognise the need to accelerate this. Work to identify and develop costed proposals for appropriate interventions in our assets is underway.
- We work in partnership to maximise resources and capacity and minimise risks – for example in developing a Local Area Energy Plan and North Wales Energy Strategy in support of our Decarbonisation Priority and the development of the Prevention & Early Help Strategy in support of children and families.
- There is a clear vision for key projects and improvement areas, with clear and accountable arrangements in place to ensure deliverability – our ‘Ensuring a Modern & Resilient Council’ priority and our ICT and Digital Strategy directs the supporting framework to allow us to deliver significant projects to modernise services and the ways in which our communities and customers interact with us; Care Inspectorate Wales has recognised the development of a strategic vision for children’s services.

We invite and facilitate constructive challenge and debate on priorities, outcomes and targets, including consulting with the public and our stakeholders.

- A robust process to review and agree our well-being objectives for the next Council Plan 2023-28 began in autumn 2022, including a review of data and intelligence, Priority Boards, Elected Members and involvement with the public, stakeholders and less well-represented groups.
- We have a clear, high level Involvement Strategy in place which emphasises the importance of working collaboratively with residents through consultation, engagement and co-production, and external regulators have provided assurance that involvement is embedded within our culture.
- We involve the public and our stakeholders in developing our objectives and outcomes – developing our objectives for 2023-28 included opportunities to engage with our communities and equality protected groups in person, as well as online.
- We use available information from our own and our partners' involvement activities, as well as consulting specifically on our proposed objectives. The Wrexham Public Services' Board's Well-being Assessment (May 2022) was a key source of evidence we have used to develop our next Council Plan and our service planning more broadly. We continue to work regionally through the Public Services Board to improve the co-ordination and use of involvement activities across North Wales.
- Our well-being objectives are reviewed annually to ensure that they remain realistic and achievable – this involves target challenge sessions with Priority Boards and elected members.
- Our six Priority Boards provide challenge on a quarterly basis ensuring interventions are identified and opportunities maximised. We make performance information available to elected members quarterly, twice a year to Executive Board and scrutiny, and publish an Annual Performance Report on our website.
- Our 'Modern Ways of Working' programme is now embedded across the council and continues to expand the opportunities for remote access to involvement activities.
- Our Strategic Equality objectives include a focus on improving diversity in local government and ensuring under-represented groups are able to play a full role in supporting and representing their communities' voices.

In our self-assessment 2021-22, we rated this theme as green which meant that we demonstrated consistently good performance with minimal areas for development. We identified the following areas for development:

- Enabling organisational and community resilience.
- Improve the coordination and evaluation of involvement activity to ensure the public and stakeholders are effectively involved in our corporate and service planning.

- Improve information and evidence available to decision makers to make it clear how decisions will contribute to intended benefits and outcomes, including the climate and carbon implications of all decisions.

Progress made against areas for development 2021-22

- Our actions to improve organisational and community resilience:
 - Work to review pay and reward benefits commenced during the year and is ongoing. Planning for the new 'People' Strategy is underway (to be aligned with the new council priorities) and includes the implementation of work streams to mitigate against recruitment and retention issues being experienced across services.
 - Work in relation to community resilience focussed on ensuring we maximised the economic opportunities available to offset the impact of the pandemic. Wrexham was awarded City Status in September 2022, the Shared Prosperity Fund is being administered and the Wrexham Gateway Project is progressing despite an unsuccessful bid for 'Levelling Up' funds.
- We agreed our new Involvement Strategy (2022-27) and we have made good progress with work to support departments' abilities to implement its principles in the ways that they work. An Involvement e-learning module is now available, there is a co-ordinated Involvement Work Programme that is available internally and shared with our partners, and a process to evaluate 'involvement' will be implemented in 2023-24.
- We continue to work on developing an Integrated Impact Assessment Tool, which will improve how we present relevant information to decision-makers. An internal audit advisory review (due early 2023-24) will be used to provide quality assurance prior to the tool being finalised. A Carbon Impact Assessment Tool is now available to support the consideration of carbon in all decisions, and this will be rolled out in 2023-24.

Our assessment 2022-23: Yellow (declined)

We have reached this conclusion because of good performance with strengths outweighing areas for development.

Strengths

- Our vision for the County Borough provides a clear focus for our well-being objectives and services.
- We are active at a regional level in key partnership bodies and our corporate planning reflects regional issues and priorities.
- We have robust corporate planning processes in place, which are long term, but which are flexible to enable us to be responsive.
- We use intelligence from a range of sources to inform our corporate planning and involve our stakeholders.
- We have effective performance and risk management processes in place.

Areas for development

Carried Forward

- Improve information for decision makers to make it clear how decisions will contribute to intended benefits and outcomes, including the climate and carbon implications of all decisions.

New

- Consider and mitigate implications of Council decision not to adopt the Local Development Plan.*(AGS)
- Prioritise and embed Decarbonisation across the organisation. *(AGS)
- Establish an Involvement & Diversity Champions Group to identify and embed best practice across the organisation.
- Council agrees well-being objectives and adopts Council Plan (2023-28).

Theme: Leadership and Organisational Culture

Local government needs appropriate structures and leadership. The council should ensure that it has both the capacity to fulfil its own mandate and to make certain that there are policies in place to guarantee that its management has the operational capacity for the organisation as a whole. As both individuals and the environment in which an authority operates will change over time, the council should continually develop its capacity as well as the skills and experience of the leadership of individual employees. Leadership in local government entities is strengthened by the participation of people with many different types of backgrounds, reflecting the structure and diversity.^[1]

We are a strong community leader – at both local, regional and national levels. The council welcomes engagement with partners, with partnership working embedded at all levels within the council to achieve shared objectives and improve services.

We have maintained our focus on our corporate and service improvement journey – including the development of improvement plans, senior management restructures and the commissioning of independent reviews. There is an ambitious approach to ensuring that current and future economic opportunities are maximised, with a focus on community resilience.

We have ensured that we have appropriate structures and leadership in place to operate efficiently and achieve intended outcomes and there are effective relationships between senior leaders and Lead Members.

- Succession planning for Senior Leadership Team (SLT) – a skilled leadership team and restructure of Chief Officers' responsibilities was fully implemented in 2022. Structured to drive forward Council Plan and priority areas.
- Structures are in place to support senior leaders and elected Members, SLT and Lead Members to work closely to agree direction – expectations of respectful working relationships set out in clear principles and terms of reference.
- Officer / Elected Member Protocol, encouraging effective relationships and leading with integrity, reviewed and in place and supported by the Monitoring Officer role.

Our decision-making processes are clear and we are committed to developing the capabilities of elected members and senior management to achieve effective leadership.

- The council's Constitution sets out the council's decision-making processes. A forward work programme of upcoming decisions is published on the website.
- A comprehensive induction for new and returning elected members was delivered in summer 2022, focused on responsibilities and expectations of a supportive and respectful culture, with work ongoing.

- Member Development Strategy promotes a clear and shared understanding of elected members' roles and provides for an ongoing skills and knowledge programme of development opportunities for all members.
- All Members have attended training on the Code of Conduct for Elected members and the Ethical Standards Framework, however there is low take up of core training and e-learning modules (which cover key governance areas) by elected members.
- We have good resources and processes in place to support high standards of behaviour, ethical standards and adherence to the rule of the law, included within core training. Monitoring Officer and Section 151 Officer advice operates in practice in all cases.
- Workforce Development provide support and development to ensure leaders have the right skills to implement change and achieve outcomes – including the continued delivery of a Leadership Academy for senior leaders.
- External regulators' recognition of improved leadership in service areas identified as requiring improvement – Estyn / CIW.
- Focus on developing a coaching management culture to ensure capabilities are developed to support succession planning.

Our leadership is committed to an open culture, has a strong commitment to ethical values and achieving improved outcomes.

- Maintained good practices in transparency of reporting and audit throughout the year and arrangements for the open sharing of information through committees has been fully implemented.
- Robust policies, induction and training regarding expectations of and codes of conduct for employees and elected members. Employees' Performance Review & Development (PRD) processes provide an opportunity for the council's cultural expectations to be communicated with the workforce on an individual basis via its behavioural competencies, as well as demonstrating how an individual contributes to the achievement of the council's priorities.
- Organisational Development and Workforce Strategy (OD&WS) in place to support us in developing a culture where employees and elected members feel involved, valued and empowered and have the right skills to enable them to deliver efficient services.
- Mandatory training for all employees on key areas of legislation (such as equalities and diversity, Welsh Language Standards, etc.) however we have identified the need to improve our monitoring and reporting mechanisms to provide assurance on completion rates.
- Our leadership is committed to openness and constructive feedback. The latest available employee survey in 2022 shows an overall positive response to senior leadership: it illustrates a stable trend in overall leadership openness and communication and the workforce's view that the council has a clear sense of direction.

- We work in partnership with the Trade Unions, meeting monthly, regularly sharing, discussing and consulting on our workforce policies and practices.

In our self-assessment 2021-22, we rated this theme as yellow which meant that we demonstrated good performance and our strengths outweigh our areas for development. We identified the following areas for development:

- Foster a supportive and respectful culture.
- Ensure clarity of roles and responsibilities (elected members and officers).
- Ensure all elected members are supported to develop skills and knowledge to support them in their roles.
- Meet the requirements of the Local Government & Elections (Wales) Act to ensure an effective new Council.
- Continue to develop the capabilities of senior management to achieve effective leadership.
- Manage demands and capacity across services and ensure leaders have the capacity to lead.
- Further develop workforce planning arrangements to ensure leadership capacity supports council priorities.

Progress made against areas for development 2021-22

- Welsh Local Government Association and Audit Wales delivered joint sessions between SLT and all elected Members on good governance, values and behaviours.
- We met the requirements of the Local Government & Elections (Wales) Act and Audit Wales review provided assurance of our compliance.
- Continued delivery of a Leadership Academy for senior leaders.
- A new 'People' Strategy is in development that will align to the new Council Plan to support management of demand and capacity across services.

Our assessment 2022 - 23: Amber (declined)

We have reached this conclusion because of satisfactory performance, but investment and increased capacity may be required in a number of key areas.

Strengths

- A strong, stable and skilled Senior Leadership Team who are committed to improving outcomes.
- Continued strong leadership and direction from Chief Officers and Heads of Service in service areas requiring improvement.
- Expected behaviours and values are led from the Senior Leadership Team and communicated through the Performance Review and Development process.
- Ongoing work to support elected members and officers in understanding roles and responsibilities to support positive values and behaviours.
- Leadership with the council maintained good practices in transparency reporting and audit throughout the year.
- A commitment to develop the capabilities of Members and Senior Management to achieve effective leadership.

Areas for development

New

- Improve culture, values, behaviours and ways of working in public meetings. *(AGS)
- Significantly improve Elected Member take up of core training and key governance e-learning modules *(AGS)
- Improving workforce uptake of mandatory learning topics and improve reporting of uptake to improve monitoring across the organisation (also Workforce Planning Theme)

Theme: Performance management

The performance management system facilitates a process to ensure that local government achieves its intended outcomes by providing a mixture of legal, regulatory, and practical interventions. Local government needs to ensure that the organisations and governance structures that it oversees have implemented, and can sustain, an effective performance management system that facilitates effective and efficient delivery of planned services. Decisions made need to be reviewed continually to ensure that achievement of outcomes is optimised.

Risk management and internal control are important and integral parts of a performance management system, along with a strong system of financial control. It is also essential that a culture and structure for scrutiny is in place as a key part of accountable decision-making.^[1]

We have effective governance structures in place to sustain effective performance.

- Continued progress made to ensure that the council has clear arrangements in place to support improvement recommendations arising from 2021 Audit Wales reviews of financial sustainability and performance management – all are either completed or underway.
- Priority Boards (including two Chief Officers, two Lead Members, and key officers) are in place to support the achievement of each of the well-being objectives and are accountable to Senior Leadership Team, Lead Members, Executive Board and Council.
- Our 2022-23 annual performance report concludes that achievement at the end of the Council Plan (2020-23) is judged to be yellow, with good progress made to deliver key milestones, with evidence of improvement observed across several key performance measures.
- Priority Board Terms of Reference (ToR) were reviewed at Board level in April 2022 for the final year of the Council Plan, to ensure that individual Board ToR focus remains on the delivery of the corporate priorities. These include considering priority risk registers and key project highlight reports.
- Performance scorecards include an 'interventions' card which ensures that corrective action are identified to address any underperformance. This provides a clear link between the performance indicators and actions and supports Priority Boards in focusing on sustainable performance improvement.
- Established project management reporting procedures in place and work ongoing to align capital and non-capital project management processes.
- Evidence that learning is used to improve performance. Public Services Ombudsman for Wales Annual Letter reflects on the constructive learning taken from complaints relating to service failure.

We report regularly on progress towards achieving our objectives.

- Priority Boards meet quarterly to review progress against the well-being objectives, with 6 monthly reporting to Executive Board and annual reporting to Council. In 2022-23 we improved availability of all quarterly scorecards to elected members on the council intranet. Scrutiny considers Council Plan performance reports at quarter two and four, as recommended by Audit Wales.
- Senior management, Lead Members and scrutiny undertake a valuable challenge function. Scrutiny Chairs and Vice Chairs review performance reports at their co-ordinating group meetings to inform their work programmes, and processes are in place for elected members to refer performance concerns for scrutiny challenge.
- A new corporate performance and risk management system was procured in 2022-23, with implementation planned for 2023-24. The new system will improve our ability to analyse and report on achieving our priorities and determining necessary interventions.

We use a 'golden thread' approach to performance management and review interventions at all levels when progress is not on track.

- Our performance management framework toolkit supports a consistent service planning approach. It provides comprehensive guidance to all services in the planning for service improvements, ongoing performance monitoring and the review and self-assessment process.
- Our Performance, Improvement & Partnerships Team support our services in embedding these approaches.
- Our well-being priorities and service plan outcomes are used to frame Performance Review and Development objectives for our workforce.
- A range of involvement activities were undertaken in 2022/23, to gather feedback from customers and inform performance reporting. All surveys now include equality monitoring questions as standard, enabling the council to evaluate differences in views and satisfaction between those representing different protected characteristics.

In our self-assessment 2021-22, we rated this theme as yellow which meant that we demonstrated good performance and our strengths outweigh our areas for development. We identified the following areas for development:

- Continue the improvement seen in good practice so far, linking all plans together including team plans and PRDs and ensure this is consistently applied across all services, departments and teams.
- Procure and implement a new Performance and Risk Management System to improve data collection and recording arrangements to improve their effectiveness, minimise risk of data errors and improve accessibility of information.

- Ensure that our new Council Plan priorities are performance managed using outcome focussed indicators and that we continue to use comparative performance information to identify and drive improvement and deliver value for money.

Progress made against areas for development 2021-22

- The contract for a new Performance and Risk Management System was awarded at the end of 2022/23 with implementation planned for 2023/24.
- Improved data quality practices through the development of templates for the collection of new measures for the new Council Plan (2023-28) include enhanced detail requirements. Providing a standard for all new performance measures prior to integration into the new Performance and Risk Management System.
- The council has maintained its focus on its corporate and service improvement journey, working closely with regulators, developing improvement plans, service plans and delivering restructures, aligning these through a golden thread approach.
- Positive feedback from the Employee Engagement Survey in 2022 on individuals' opportunities to develop, improve and reach their potential identified through the PRD process.

Our assessment 2022-23 - Yellow (sustained)

We have reached this conclusion because of good performance with strengths outweighing areas for development.

Strengths

- Continued improvements seen across the council in performance management arrangements including at corporate level and service level.
- The council has maintained its focus on its corporate and service improvement journey, including the development of improvement plans, senior management restructures and the commissioning of independent reviews as required.
- The internal control environment for performance operated as planned during the year. The council maintains its transparency in its reporting throughout the year and within agreed timescales.
- Continued progress towards addressing Audit Wales recommendations arising from the 2021 reviews of performance management: implementation of a new performance and risk management system planned 2023/24.
- Improved focus on improving the robustness and quality of outcome measures and the use of benchmarking data in the planning stages of the new Council Plan performance management framework.
- Improvement in the direction and overarching approach to involvement activities, ensuring a consistent approach across the council, and improved participation by underrepresented groups.

Areas for development

Carried Forward

- Implement the new Performance and Risk Management System to improve data collection and recording arrangements to enhance effectiveness, minimise risk of data errors and improve accessibility of information.

New

- Develop and implement outcome focussed indicators for the new council plan priorities and the use of comparative and benchmarking performance indicators.
- Focus on use of service user outcomes performance information to further inform future service planning and meet service users' needs (to be informed by Audit Wales review due autumn 2023).

Theme: Financial Planning

A strong system of financial management is essential for the implementation of policies and the achievement of intended outcomes, as it will enforce financial discipline, strategic allocation of resources, efficient service delivery, and accountability.^[1]

We take a long term view and ensure that our medium term financial strategies, as far as possible, set the context for ongoing decisions on significant delivery issues and changes in the external environment.

- We are focussed on meeting future demands and building sustainability, through working to identify future trends, risks and opportunities, however Welsh Government funding frameworks and the impact of unanticipated external factors (e.g. Covid-19, Ukraine crisis, inflation and cost of living increase) continue to impact financial resilience make long term planning difficult.
- Our current Medium Term Financial Plan is for 3 years (2023-26) and includes indicative figures from Welsh Government for 2023-24 and 2024-25 funding.
- The council's Medium Term Financial Plan (MTFP) and budget approved by Council on 15th February 2023 sets the framework for future spending and investment requirements against a range of potential funding scenarios.
- Financial pressures for 2023/24 have been forecasted and reported early (July Executive Board). Work to identify mitigation measures to control pressures and overspend, and a review of all areas of expenditure and income commenced immediately and the council continues to plan for this operationally in order to deliver council priorities within or close to agreed cash limits in a challenging economic environment.
- We work collaboratively at a regional level to ensure early identification of regional factors.
- Financial risk is incorporated into all risk assessments.
- Review of the Capital Programme to 2026/27 is underway, on a rolling 3 year cycle.

We recognise that we need to manage service pressures effectively to secure long term financial resilience and sustainability

- The Medium Term Financial Plan includes an assessment of key pressures across the council to ensure a closer alignment of activity and funding, as well as the potential to invest in council priorities going forward. Over the last two years, the council has seen a significant increase in the demand and cost of its social care provision for children, as well as an overall increase in social care provision for adults. This is recognised in the medium term financial plan – the 2023/24 budget includes significant additional funding for social care as part of a longer term strategy to ensure demand can be met within a sustainable financial position for the wider council - but is an ongoing financial risk.
- We review budget pressures identified through budget monitoring processes and the development of business planning approach to support medium term budget decisions.

- We recognise the need to 'future-proof' and underspends are set aside in reserve for future budget mitigation.
- We recognise the need to 'future-proof' and underspends are set aside in reserve for future budget mitigation.

We have sound financial management and reporting arrangements

- A review of our compliance with the Financial Management (FM) Code (which aims to improve the financial resilience of organisations by embedding enhanced standards of financial management) was undertaken in 2021 with an overall assessment that compliance was good. Full compliance was completed by July 2022.
- We undertook a review of our core financial system and related processes with a health check, engagement and market testing completed in 2022/23. Plans agreed to procure a new system in 2023/24.
- We report to Council, Executive Board, scrutiny committees as required, Governance & Audit Committee and Senior Leadership Team. Regular member workshops have been held throughout the year on local government finance, budget assumptions, national budgets and economic forecasts, as well as service pressures, risks and council reserves.
- We have continued to engage with departments to improve the quality of online information available to support officers with financial management.
- Following the awarding of a contract for a new performance management system, there should be scope for financial and non-financial outcomes to be reported together.

We have an inclusive budget process that ensures budgets are prepared in accordance with intended outcomes

- We involve our stakeholders and the public in our budget setting decisions although the timing of Welsh Government settlements sometimes prevents or impedes our ability to do this in a meaningful way.
- We involve stakeholders and the public in the development of our Council Plan priorities, which inform our resource decisions: the Council Plan is not costed however financial priorities, commitments and pressures are linked to priorities and feed into proposals in relation to budget pressures and to determine final budgets.
- Reserves are reviewed annually as part of the budget process, and additional workshops are held with elected members' in-year. Reserves and balances are included in budget monitoring reports to the Executive Board and Council.
- A stronger business partnering approach is being embedded with finance officers regular attendance at service Departmental Management Team (DMT) meetings and increased input into service planning

- All financial proposals and decisions are subject to Equality Impact Assessments (EIA).

In our self-assessment 2021-22, we rated this theme as yellow which meant that we demonstrated good performance and our strengths outweigh our areas for development. We identified the following areas for development.

- Ensuring the council is financially resilient and dynamic in meeting the post Covid-19 financial risks and improving budget reporting to elected members.
- Ensure our processes and finance team resources are integrated at all levels of financial planning and support good financial management.
- Continue to ensure that we are sustainable in key areas such as social care.

Progress made against areas for development 2021-22

- Improved budget monitoring for Executive Board (quarterly) was introduced in 2022/23, improving the ability to link budget information with performance reporting.
- Recommendations from the new Financial Management Code implemented, with full compliance since July 2022.
- Continued to develop and strengthen support and scrutiny arrangements around Social Care and Environment Service finance, with improve monitoring of spending commitments and a more robust approach.
- Review of workforce structure within Finance Team to improve resilience, with additional resources diverted to provide enhanced service support in areas facing budgeting challenges.

Our assessment 2022-23: Amber (declined)

We have reached this conclusion because of satisfactory performance, but investment and increased capacity may be required in a number of key areas.

Strengths

- Robust financial governance framework always been in place. This has been strengthened in response to a more challenging economic and financial environment.
- Successfully managed the transition of new staff into senior management positions this last year across several functions. Identified the need to carefully manage turnover below senior management levels.
- Continued strong working relationships with external bodies and departments.
- Good relationships with members have continued through a challenging financial context.

Areas for development

New

- Improve financial resilience through better financial forecasting and closer links between services and financial management (due to increased pressure on service budgets due to high levels of expectation and increasing demands and costs, particularly in social care) *(AGS)
- Appraisal of budget planning and monitoring processes in light of continued challenging economic environment.
- Ensure we have Budget Mitigation Measures to enable a 23/24 balanced budget.
- Strengthen in-year forecasting of future demand and cost for services where there are particular pressures i.e. social care, technical services and homelessness.

Theme: Risk Management

Risk management and internal control are important and integral parts of a performance management system and crucial to the achievement of outcomes. Risk should be considered and addressed as part of all decision making activities.^[1]

We evaluate and monitor risk management and our risk management arrangements on a regular basis and report on these regularly.

- Our risk management arrangements are formally reviewed every 5 years (the current Risk Management Policy (2020-25). An annual and ongoing review is undertaken via the governance framework review work which informs the Annual Governance Statement, and by the Head of Internal Audit via the Annual Opinion.
- The governance review confirms that our risk management arrangements operated as intended during the year and the Head of Internal Audit Opinion for 2022-23 provided assurance that in the areas examined, the council's framework of governance, risk management and control is generally adequate and effective in achieving the council's objectives.
- Continued progress made in reviewing all policies and strategies identified as mitigation for corporate risks or listed in the governance framework, to ensure they are up to date, and / or that reviews would be undertaken in agreed timescales.
- We report comprehensively on our risks – risk registers are updated at least quarterly and reported to Senior Leadership Team, Lead Members and Governance and Audit Committee twice a year. Additional reporting in relation to identified areas of risk is also undertaken in-year: Health & Safety Governance Framework is reported to Senior Leadership Team and Lead Members, health and safety as a corporate risk is reported to Senior Leadership Team, Lead Members and Governance & Audit Committee twice, and there is additional reporting to Executive Board as required.

We have a robust and integrated risk management system, which includes clear accountability for risks.

- Corporate Risks are assigned to a responsible Chief Officer; Chief Officers are responsible for the management of their service area risks. Our processes require risks to be discussed with appropriate officers and within departmental management teams.
- We undertake an annual Chief Officer peer review challenge of our risk registers.
- Emergency planning and service continuity plans have been tested and continue to be updated with lessons learned from events.
- Procurement team manage and co-ordinate shared risk registers when we work in partnership to procure goods and services.

- Counter-fraud Policy and Strategy reviewed and approved in July 2022. We report annually on Anti-corruption and Fraud to Governance and Audit Committee and updates included in interim internal audit reports show little evidence that fraud and corruption are currently major problems.
- A risk-based approach is used within internal audit service to develop the Internal Audit Plan - taking account of the council's governance framework, risk and control registers and Internal Audit's own assessment of the council's financial and governance risks. The Head of Internal Audit's annual opinion is that in most of the areas examined, the Council's framework of governance, risk management and control is generally adequate and effective in achieving the Council's objectives.
- There are current regulatory policies, procedures and guidance available to manage risks around Information Governance and managing data, including an Information Governance Handbook on the intranet.

We consider and address risk as part of all decision-making activities and we ensure risks to the achievement of our priorities are identified.

- Annual Governance Statement (AGS) significant issues identified in AGS 22/23 have been aligned with corporate risks and reflected in the risk registers and the Self-Assessment.
- Corporate Governance and Risk Management included in Member Induction programme, and scheduled for a repeat session in early 23/24.
- The identification and management of risk is embedded in the project management process and the partnership approval process, and is included in the established reporting processes supporting these.
- Our equality impact assessments identify and assess potential risks of inequality arising from our decisions and require mitigation to be put in place.
- Departmental risks which relate to the achievement of the council's priorities are compiled into a council priority risk register, and are reviewed by Priority Boards as part of the standard Terms of Reference.
- High risk areas are acknowledged and mitigation and improvement plans are in place where necessary – such as the council's focus on the resilience of its ICT networks through the ICT & Digital Strategy.

In our self-assessment 2021-22, we rated this theme as yellow which meant that we demonstrated good performance and our strengths outweigh our areas for development. We identified the following areas for development.

- Improve efficiency and quality of risk management reporting.
- Strengthen the management of risks related to equality protected characteristics and the socio-economic duty.

- Fully embed service leads' responsibilities around proactive identification and management of health and safety risk.

Progress made against areas for development 2021-22

- Contract awarded for new Performance and Risk Management System in 2023, with development and implementation due in 23-24, will improve efficiency and quality of our risk reporting.
- Equality Impact Assessment Guidance and Tool improved to require that risks identified through the equality impact process are reflected appropriately in departmental risk registers. Also included in the draft Integrated Impact Assessment tool currently under development.
- Annual peer review of Health & Safety Risk Register in place.

Our assessment 2021-22: Yellow (sustained)

We have reached this conclusion because we can demonstrate good performance and our strengths outweigh our areas for development.

Strengths

- Detailed and robust risk management arrangements which now include real time discussion and planning for risk identification and mitigation.
- Use expertise well across the council to identify and mitigate against risks.
- Contract awarded for a new Performance and Risk Management System, with implementation expected in 2023/24.
- Reporting to Governance and Audit Committee shows that, whilst high risk, there is little evidence that fraud and corruption are currently major problems.

Areas for development

Carried Forward

- Implement the new Performance and Risk Management System to improve efficiency and quality of risk management reporting.

New

- Ensure that risk is considered as part of the budget mitigation measures undertaken to enable a 23/24 balanced budget.

Theme: Workforce Planning

A local government organisation must ensure that it has both the capacity to fulfil its functions and to make certain that there are policies in place to guarantee that its management has the operational capacity for the organisation as a whole. Because both individuals and the environment in which an authority operates will change over time, there will be a continuous need to develop its capacity as well as the skills and experience of the leadership of individual staff members.^[1]

We have an effective workforce plan that is reviewed regularly and that is focussed on ensuring we have the necessary capacity and skills.

- We understand the challenges around the recruitment of staff and the potential impact on service delivery. Planning for the new People Strategy (to replace the current Organisation Development and Workforce Strategy) is underway and includes the implementation of work streams to mitigate against these challenges.
- We have taken action to address recruitment and retention challenges including 'Grow Your Own' approach and the review of pay and reward benefits.
- Additional support provided to services experiencing recruitment difficulties such as Social Care, through a customised Social Care Recruitment and Retention Strategy.
- We use employee monitoring information and our workforce planning process to review the effectiveness and fairness of our employment policies and practices, to help us identify key equality issues with services and to review whether our workforce reflects the local community. We are taking steps to improve our equality monitoring to better target actions to promote workforce diversity.
- The results of our annual Employee Survey (2022) were reported to the Senior Leadership Team and services for consideration and action, for inclusion in their workforce planning processes.

We recognise the need to 'do more with less' and we are changing our working arrangements to support this.

- Our 'Ensuring a Modern & Resilient Council' priority ensures we retain our focus on our commitment to our 'Modern Ways of Working,' this has also been retained as a proposed priority for the Council Plan 2023-28 which is under development
- We continue to embed our Modern Ways of Working programme and implement our ICT and Digital Strategy – these aim to transform working practices by providing improved working environments, adopting new technology and digital solutions and making our work more sustainable in the long term.
- The Employee Survey 2022, reported that 67% of the workforce agreed or strongly agreed that working in a modern way supports them to be more productive.
- Modern Ways of Working Champions are in place across departments.

We have a framework in place to ensure that we have the people with the right skills, appropriate qualifications and mind set and we ensure the workforce has a strong awareness of and commitment to good governance and the rule of law.

- Organisational Development and Workforce Strategy (OD&WS) in place to support us in developing a culture where employees and elected members feel involved, valued and empowered and have the right skills to enable them to deliver efficient services.
- A framework of policies exists to support our expectations of our workforce – this includes induction, Performance Review and Development (PRD) arrangements which include values and behavioural competencies.
- Our induction arrangements were comprehensively reviewed and updated in 2019-20, and include a probationary period to ensure any early concerns are addressed, and the requirement to complete mandatory training modules which focus on compliance with key legislation and policies. Work continues to support awareness of policies and procedures for employees who do not have ready access to e-learning modules.
- We recognise that we need to continue with work to ensure that inductions, PRDs and training are used effectively, and to improve reporting on these.
- Our training offer includes development opportunities from entry level to degree level.
- We have identified a programme of core training and key governance e-learning modules but recognise the need to improve monitoring arrangements to ensure that all mandatory training has been completed satisfactorily across the workforce,
- Workforce policies for recruitment and selection promote equality and diversity and encourage candidates from all communities, and promoting equality and diversity is an integral part of our workforce development programme.

We are committed to the health and well-being of our workforce.

- Awarded Gold Corporate Health Assessment in 2023 (12 month extension to previous Gold status) through continued ongoing support for workforce health and well-being, regular staff communications, guidance for managers, promotion of our Employee Assistance Programme - Care First and Mental Health Champions embedded in services.
- We are committed to being an 'Employer of Choice' and our commitment to workforce health and well-being and our 2022/23 recruitment campaigns support this approach.
- Our 2022 Employee Survey reported that 72% of the workforce feel satisfied with their job.
- Sickness absence is monitored by our Senior Leadership Team and our scrutiny committee through Workforce Monitoring Reports. Departmental sickness absence rates are reviewed and underlying issues identified and addressed.

- Sickness absence rates disrupted for two years by Covid-19 have now stabilised, and data collected for 2022/23 will create a baseline for future years.

In our self-assessment 2021-22, we rated this theme as yellow which meant that we demonstrated good performance and our strengths outweigh our areas for development. We identified the following areas for development.

- Work towards ensuring the workforce is sustainable, working in a modern and resilient way, working as one council, having honest and enabling conversations.
- Timely interventions and appropriate pay structures are in place for services where necessary to improve recruitment and retention.
- Continue to improve training and development opportunities to ensure a highly skilled and motivated workforce including a robust induction process. Effective PRDs support the development of a skilled and highly motivated workforce.
- Integrated workforce planning, modern ways of working and office accommodation reviews that work more efficiently and support the Modern Ways of Working programme and 'Ensuring a Modern and Resilient Council' priority.

Progress made against areas for development 2021-22

- Good progress made in delivery of our Modern and Resilient council priority actions to achieve our agreed outcomes, with the priority rated as 'yellow' at the end of the current Council Plan 2020-23, meaning that good progress has been made, with evidence of improvement observed across several key performance measures..
- A review of pay and reward benefits completed, with phased implementation underway to ensure appropriate pay structures are in place.
- Continued successful delivery of the 'Grow Your Own' scheme, with a high calibre of interest for 2023/24.
- Implementation of a bespoke Social Care Recruitment and Retention Strategy to mitigate against ongoing challenges within social care recruitment.

Our assessment 2022-23 - Yellow (sustained)

We have reached this conclusion because we can demonstrate good performance and our strengths outweigh our areas for development.

Strengths

- Workplace health and well-being support is good, as evidenced across external reviews and our Gold Corporate Health Standard Award.
- Our 'Modern Ways of Working' programme is being embedded throughout the council and is transforming our working practices. There are good levels of agreement from workforce that modern ways of working supports both good work life balance and good levels of productivity in work.
- The council has good resources, policies and processes in place to support high standards of behaviour.
- Health and Safety is given a high priority and is being embedded across the organisation as everyone's responsibility.
- No significant issues have been identified in the employee survey.
- We have good working relationships with our trade unions.
- Pay structure - timely interventions and appropriate pay structures are in place for services where necessary to improve recruitment and retention
- Organisation and Workforce Development Strategy includes work streams to mitigate against recruitment and retention issues in some services including Grow Your Own, apprenticeships and academies.
- Bespoke recruitment and retention support plans for services facing recruitment challenges.

Areas for development

New

- Improve recruitment and retention – specifically in those services experiencing recruitment and retention issues. (*AGS)
- Work with our Public Services Board partners to identify where organisations can use their recruitment practices to enable diverse and thriving workplaces. (PSB Well-being Plan).
- Improve the monitoring and reporting arrangements for the completion of mandatory training across the workforce.
- Improve our workforce equality monitoring data and the timeliness of our reporting.

Theme: Assets

Local government ensures good asset management to ensure effective service provision and achieve value for money. Asset management is central to local government priorities with assets reviewed regularly and recommendations for improvement made. Current and future service needs of the local population are considered as part of an appropriate asset management strategy.^[1]

The value of the council's Assets as at 31 March 2022 is £517 million as per 2021/22 Audited Statement of Accounts (Note 20 and 22). This figure relates to Council Fund assets and includes Land & Buildings, Community Assets, Surplus Assets, Assets Under Construction, Assets Held for Sale and Infrastructure Assets. It excludes Council Dwellings, Heritage Assets, and Vehicles, Plant & Equipment.

The Value of the Council Dwellings as at 31 March 2022 is £440 million as per 2021/22 Audited Statement of Accounts (Note 20).

Latest available audited figures.

For further explanation as to how these values are calculated, please see Appendix 2 – Glossary of Terms.

Corporate assets

We support service delivery by ensuring asset management strategies are driven by service need and future service requirements.

- Our current Corporate Land & Buildings Strategy (CLABS) (although time expired due to the impact of Covid-19) emphasised the importance and significance that the council's property portfolio plays in the activities it undertakes in delivering its services. The Strategy is being reviewed (supported by CIPFA), will reflect changes following the Covid-19 pandemic and the requirements of the decarbonisation agenda, and is due for approval in 2023-24.
- As part of the review of our CLABS, a new structure has been proposed; an Asset Management Policy, underpinned by an Asset Management Strategy and Action Plan. Agreement and implementation is expected to begin autumn 2023/24.
- The new Asset Management Policy, Strategy and Action Plan will be aligned with the Place Making Strategy and new Council Plan 2023-28.
- Our approach to corporate asset management supports our 'Ensuring a Modern & Resilient' well-being priority and as such the council has been undertaking a rationalisation of its assets for several years. The impact of Covid-19, the council's Modern Ways of Working principles and improvements in digital technology have influenced the way we view our assets. We remain mindful of the impact of our office accommodation review on Wrexham town centre and our recent refurbishment of Crown Buildings has provided a modern facility capable of accommodating approximately 625 staff.

- We work in collaboration with national consortiums and regularly explore options around working in collaboration with our partners and/or sharing assets. This is considered from a service improvement as well as a financial perspective – for example North Wales Police now occupy part of Wrexham Library and the 'Well-being Hub' in the recently refurbished Crown Buildings provides an opportunity for us to offer integrated services with our partners.

We are taking steps to improve the quality of our asset information and our support for departments in reviewing their asset management plans.

- The council's bespoke Asset Management database contains comprehensive details of all land and property assets held and managed by the council and enables the council to manage the performance of the Assets portfolio, detect trends and identify any underperforming property.
- Each department produces a service asset management plan, which identifies the service need for its assets and is the result of internal challenge and review of alternative options for asset use and service delivery within our stringent budgetary framework.
- New asset management software is in place, which provides an integrated and proactive approach which supports set processes for acquisitions and disposals and provide better reporting functionality.
- New governance arrangements within the new Asset Management Policy and Strategy will ensure we regularly review and report on operations, performance and use of assets to ensure their continued effectiveness, including supporting a consistent approach across departments.

We recognise the need to obtain best value for money and to work towards improving long term sustainability and reducing energy use.

- Best value and use of resources is supported by new procurement rules and management systems, including rental management and rent arrears actions.
- We have embraced sustainability for new build developments with the refurbishment of Crown Buildings in the city centre which was announced winner of the Welsh Government 'Ystadau Cymru' award specifically for environmental sustainability, as well as being awarded 'Overall Winner.'
- We have contract frameworks in place which include mechanisms to review prices using nationally recognised indices – however the recent sharp rise in building materials has meant that some contractors have left the frameworks. Price adjustments are now considered on a shorter frequency to help mitigate these risks to the supply chain.
- We recognise the need to consider not only financial and physical resources in terms of value for money and best use of resources: the council's commitment to contributing to the national de-carbonisation agenda (Buildings is one of the four Key Themes in the council's Decarbonisation Plan) must be taken into account in all decisions and strategies and is incorporated into the draft Asset Management Policy and Strategy.

Our governance controls are good, but we recognise there are opportunities to improve on clarity around our decision-making.

- Decisions about assets are often contentious and there is a reputational risk to the council if our processes are not clear and understandable to elected members, the public and our stakeholders. The draft Policy and Strategy includes a section on decision making and consultation processes, and new governance arrangements will ensure we regularly review and report on operations, performance and use of assets to ensure their continued effectiveness, including supporting a consistent approach across departments. Our annual report to our Executive Board will be aligned to the new Strategy.

Housing Stock

We support service delivery by ensuring asset management strategies are driven by service need and future service requirements.

- Effective management of our housing stock supports the council's 'Ensuring Everyone is Safe' well-being priority to ensure that people, particularly the most vulnerable, have access to the right housing.
- We are working with partners to increase our housing stock with on-going build and buy programmes.
- The Local Housing Strategy 2018-23 establishes the priorities and actions for our housing services and is informed by the Local Housing Market Assessment (LHMA) which identifies local housing need. The Strategy is currently under review and will reflect changes in legislation, housing need, support for services and the council's priorities.
- Our Housing Allocations Policy ensures that accommodation is provided to meet the housing needs of all groups in local communities and we gather equality monitoring data in support of this.
- The Housing Revenue Account (HRA) Business Plan acknowledges that Wrexham's contract holders are key stakeholders and play a prominent role in informing and shaping key elements of the capital investment programme, and we actively support contract holders' participation to facilitate this.
- We have achieved compliance with the Welsh Housing Quality Standard (WHQS) 1 and maintenance of this standard is now embedded.
- We are awaiting the final version of WHQS2 from Welsh Government which will inform future service requirements and govern future investment. Decarbonisation will be the focus going forward, with work likely to commence in April 2023.

We are taking steps to improve the quality of our asset information and planning processes.

- The restructure of our housing service is underway, to adopt a more integrated strategic approach across the investment and maintenance teams for the future. The alignment of our capital investment and housing repairs will support the development and delivery of a wide range of programmes, including carbon reduction and energy, repairs, planned works, voids and property and investment services. The senior management team structure has been established and recruitment is ongoing.
- Our asset management software supports delivery of future programmes, and plans for our ongoing investment programme. Offering an integrated, flexible and user friendly approach for our officers and our contract holders, it is used for business planning, the production of future programmes of work and the calculation of associated costs.

We recognise the need to obtain best value for money and to work towards improving long term sustainability and reducing energy use.

- We manage the HRA effectively to ensure we maximise the income available to improve our stock.
- We aim to make best use of housing stock by allocating general needs properties to applicants whose household size is the best match for the size of the property.
- Regular procurement exercises are undertaken. Officers within Housing work closely with corporate procurement on tendering and updating contracts to ensure best value. The contractual documentation is reviewed and updated accordingly to strive for best value as well as making service improvements.
- The WHQS programme has been used to support social value / community benefits and our contracts are used to promote social, economic and environmental well-being in communities.
- Our De-carbonisation Plan includes actions for the Housing Service in relation to the housing stock and our future Housing Business Plan will need to reflect WHQS2.
- Positive progress made in reducing energy use, with a number of pilot properties completed as part of Welsh Government's Optimised Retrofit Programme have an Energy Performance Certificate (EPC) A rating, indicating a SAP (Standard Assessment Procedure) energy score between 92 and 100. Positive progress continues to be made to date. Our housing stock has an average SAP energy score of 72.

We report regularly on how well we manage our housing stock and the associated finances.

- Our approach to our stock condition survey is under review, this will ensure asset information that informs our reporting is up to date and complete.
- Inflation and increased costs have impacted on our HRA and we recognise the need to sustain quality service provision through this period of budget challenge.

- We report to the council's Homes and Environment Scrutiny Committee as required, and submit quarterly and annual returns to Welsh Government.
- We prepare comprehensive quarterly performance reports for the Tenant Membership Partnership – rent (revenue and arrears); lettings and voids management, updates on housing stock; repairs and planned maintenance; tenancy management and sustainment; and statutory compliance with gas servicing.
- The implementation of the Renting Homes (Wales) Act 2016 in December 2022 has made significant changes to the management of the council's housing stock and housing contracts. These changes have been successfully implemented by the council's housing services.

We involve our stakeholders and tenants in designing our services and regularly seek feedback to improve our services.

- We employ a dedicated Contract Holder Participation Officer who promotes and encourages involvement across a range of initiatives – Tenant Member Partnership, Tenant Forums, Tenant and Resident Associations, Service Improvement Groups, surveys and questionnaires, annual tenant events.
- We actively consider ways of ensuring that there is representation across a fully diverse tenant demographic and consult on all proposed changes to policies which affect the management of contract holders' homes.
- We carry out bi-annual surveys of contract holders and residents as required by Welsh Government and will be re-introducing 'new contract holder' surveys.
- Considerable work has been undertaken to reduce Voids and we have worked alongside contract holders to develop a number of initiatives which contributed to reduce arrears, including revisions to the content and delivery process for communications, the introduction of pre-court interventions and pro-active work by Financial Inclusion Officers and Estate Officers.

In our self-assessment 2021-22, we rated this theme as amber which meant that we demonstrated satisfactory performance, but investment and increased capacity may have been required in a number of key areas. We identified the following areas for development:

Corporate

- Improve strategic management and reporting about how we manage our corporate assets.
- Improve consistency of approach to management of corporate assets across departments and services.
- Ensure our approach to managing our corporate assets addresses our future ways of working and service requirements and meets the requirements of our decarbonisation commitments and reflect this in our Corporate Land & Buildings Strategy.

HRA

- Ensure accurate HRA asset management informs effective business planning and financial management.
- Manage HRA effectively to maximise income and deliver value for money and improve contract management and compliance.
- Ensure the Housing Service structure supports a strategic approach across investment and maintenance teams.

Progress made against areas for development 2021-22**Corporate**

- Asset Management Policy and Strategy is being reviewed by CIPFA and will be submitted to our Executive Board (EB) for approval in Q2 2023/24. It will reflect our decarbonisation commitments and will set standards for best practice for the Asset Management Improvement Group.
- Implementation of the new Corporate Asset Management IT system is underway.
- A new Annual Report is in development to align with our new Assessment Management Strategy and will be submitted to Executive Board.

HRA

- We have begun the review of our HRA stock condition survey approach and the new survey will take account of decarbonisation and WHQS 2023.
- Contract Management and compliance training for managers and relevant officers has been scheduled for summer 2023/24.
- Working with Welsh Government and other local authorities to maximise grant funding has resulted in a provisional WG allowance for optimised retrofit funding being granted by Welsh Government for 3 years (2022/23 to 2024/25).
- We restructured our Housing Service team to support a strategic approach across investment and maintenance teams.

Our assessment 2022-23: Amber (sustained)

We have reached this conclusion because we demonstrate satisfactory performance, but investment and increased capacity may be required in a number of key areas.

Strengths

CORPORATE

- Asset Management Policy review underway supported by CIPFA.
- Management and team structure review is in progress.
- The Office Accommodation Review continues to be delivered.
- Progress is being made on capital works on schools.
- Project plans are in place for key assets.
- Facilities management work continues to meet statutory compliance.

HRA

- Our services are driven by service need and supported by business plans, allocation policies and effective management of the HRA.
- Continued investment in stock and delivery of new build (including refurbishment of sheltered housing stock) to increase housing stock capacity, whilst recognising pressures around increasing construction and contractor costs.
- Reduced void numbers and sustaining a good standard of accommodation and external works focused on reducing energy use.
- Financial inclusion work to maximise contract holders' income, and work to support sustainment of tenancies and to prevent homelessness reduces arrears. Effective working towards eradication of rough sleeping.
- Implementation of Renting Homes (Wales) Act in December 2022.
- Managing our assets according to service need – good customer service (including out of hours access) and proactive digital communications.

Areas for development

CORPORATE

Carried Forward

- Approval of new Asset Management Policy, Strategy and Action Plan.
- Establish Asset Management Implementation Group to support consistency of approach to management of assets across departments.

New

- Implementation of Asset Management Plan through efficient and effective asset decisions that are clearly linked to priorities for the council identified in the Asset Management Policy.
- Ensure asset information is up-to-date and complete by completing the update of the new asset management software (Techforge).

HRA

Carried Forward

- Ensure accurate asset management informs effective business planning and financial management through procurement of new Housing Management System and review of stock condition survey approach

New

- Improve management of contracts. *(AGS)
- Work with contract holders to support decarbonisation work.
- Improve contract holder experience (Housing Repairs) and reduce reactive repairs backlog.
- Expand Contract Holder participation.
- Prepare for procurement of new Housing Management System.
- Ensure quality service provision is sustained through period of budget challenge.

Theme: Procurement

Effective procurement that is underpinned by commissioning, that improves productivity and efficiency to deliver better outcomes for local people. The procurement process is sustainable in meeting the needs of local people in a way that achieves value for money and generates benefits to the local people, the local economy and the organisation whilst minimising damage to the environment.^[1]

Options appraisals and decision-making is based on analysis and advice and there is evidence of clear reasoning and decisions.

- The procurement team follow a full commissioning cycle, in accordance with the current Commissioning & Procurement Strategy and the Commissioning, Procurement & Contract Management Strategy. Good practice standards and advice is available for services and we work closely with Chief Officers and managers to support successful procurement.
- Preparation towards Procurement Reforms which will require increased transparency on procurement over £25k are underway with implementation of new processes, procedures and reporting requirements. We are considered a leading Local Authority in preparing for them by Welsh Government (WG), evidenced by current relationship and discussions with WG representatives.
- All procurement projects have a corresponding risk register, and appropriate risks are included in department risk registers.

We have a centralised, experienced team, but are facing capacity issues.

- The procurement team is a centralised unit which means we are able to work collaboratively within departments while maintaining an overview of commissioning and procurement across the authority and identify opportunities for maximising budgets and expertise.
- We work with departments to plan their procurement requirements to help ensure we have capacity to support them as required and category managers work with departments on procurement projects.
- We have recognised the opportunity to work more closely with Finance colleagues to ensure procurement developments are reflected in financial planning.
- Improved the capacity of the Procurement Team to support the council's procurement processes and projects through action to address hard to fill vacancies: almost a full complement of staff at the end of 2022-23 after a high turnover of staff – almost 70% within the last 2 years - as a result of staff turnover due to competitive market conditions. 2022-23. We work in collaboration and in partnership with colleagues and stakeholders.
- Our team has effective regional and national networking relationships which support a good understanding of markets.

- We work in partnership across North Wales and are experienced in taking the lead procurement role on partnership projects. Our standardised contract is in use across Wales.
- Training workshops to prepare for the upcoming Procurement Reforms have been held with senior leadership team and over 70 officers with more planned for autumn 2023.
- We involve the public and our stakeholders in decision-making and feedback, and this will be reinforced as part of the Procurement Reforms.
- Our current Commissioning & Procurement Strategy and Commissioning, Procurement & Contract Management Strategy include a commitment to considering equality in our commissioning and procurement decisions and this is included in our tender documents and contracts.

We have taken steps to maximise the 'social value' of our procurement.

- Our Commissioning & Procurement Strategy identifies social value as a key priority, and clearly defines that in Wrexham this means contributing to decarbonisation and providing defined community benefit. (Community benefit being the provision of something in kind for the community, a cash payment towards a community need, or products and services to help a given community within the County Borough.)

In our self-assessment 2021-22, we rated this theme as yellow which meant that we demonstrated good performance and our strengths outweigh our areas for development. We identified the following areas for development.

- Ensure compliance with and delivery of Procurement Reform and Common Framework for Public Procurement.
- Improve recruitment and retention of procurement team against backdrop of a competitive employment market.
- Prioritise carbon reduction and zero emissions through responsible and sustainable procurement to deliver our ambition for a Net Zero public sector in Wales by 2030.
- Contribute to improved financial management and budget planning with better integration between finance and procurement services.
- Embed the effective management of contracts across the organisation.

Progress made against areas for development 2021-22

- Although implementation of Procurement Reforms has been delayed, preparation and planning is ahead of schedule with the implementation of new processes and procedures.
- Improvement in recruitment and retention with the team at nearly full capacity.
- Work has continued in regard to the Net Zero 2030 agenda through the Commissioning, Procurement and Contract Management Unit supported by the procurement reforms.

Our assessment 2022-23: Yellow (sustained)

We have reached this conclusion because we can demonstrate good performance and our strengths outweigh our areas for development.

Strengths

- Strengthened approval processes around procurement decision making within last 12 months.
- Workforce changes well managed with recruitment and retention securing an almost fully staffed Team at the end of 2022-23.
- Purchase 2 Pay processes work well – ensure that potential off-contract spend is monitored and subject to procurement review where appropriate.
- Continuing to develop approach to delivery of social value with partners including Manchester University.
- Positive engagement by departments in preparing for and adopting change for the procurement reforms.

Areas for development

New

- Improve management of contracts at corporate and operational levels.
- Management of contracts (Health & Safety Governance Framework) (*AGS)
- Continue with preparation for implementation of Procurement Reforms.
- Review the structures for contract management.

APPENDIX 1:

Key sources of evidence

The review to inform the report considered a broad evidence base, guided by Welsh Government's 'Performance and Governance of Local Authorities: Statutory Guidance.' This included, but was not limited to:

- Reports produced by the council in response to statutory requirements;
- Evidence, reports and advice from a range of inspection and regulatory bodies;
- Review of various council strategies, policies and procedures;
- Reports to the council's various committees, including Council, Executive Board, scrutiny committees and Governance & Audit Committee;
- Internal audit reports and self-evaluations undertaken by the council and individual services;
- Compliments, complaints and other feedback from engagement processes with local people and stakeholders; and
- Workforce surveys and outputs from other engagement processes with the workforce and the recognised Trade Unions.

Some of the key published documents we reviewed, with hyperlinks, are set out below:

[Wrexham Council Constitution](#)

[Council Plan \(2020-23\) and Council Plan Annual Performance Report \(2022-23\)](#)

[Annual Governance Statement \(2022-23\)](#)

[Budget Monitoring – February 2023](#)

[Internal Audit Summary Report 2022/23](#)

[Summary of external inspectorates reports 2022](#)

[Public Services Ombudsman for Wales Annual Letter 2022](#)

[Future Generations Commissioner for Wales Procuring Well-being in Wales 2021](#)

[Audit Wales Annual Audit Summary 2022](#)

[Audit Wales Decarbonisation Progress Update 2023](#)

[Audit Wales Review of Public Engagement 2022](#)

[Audit Wales Arrangements for the open sharing of information through committees 2022](#)

[Audit Wales Arrangements for responding to the Local Government and Elections \(Wales\) Act 2021 - 2022](#)

[Audit Wales Driving Sustained Improvement Review 2021](#)

[Audit Wales Wrexham Council Financial Sustainability Assessment 2021](#)

[Audit Wales Springing Forward Review 2022](#)

[Audit Wales Public Engagement Review 2022](#)

[Estyn Monitoring Visit \(November 2021\)](#)

[Care Inspectorate Wales Report of performance evaluation inspection: Wrexham County Borough Council's adults and children's services 2022](#)

[Housing Business Plan 2022](#)

APPENDIX 2:

Glossary of Terms

Annual Governance Statement

The purpose of the Annual Governance Statement (AGS) is to describe the extent to which the council has complied with its Code of Governance. It describes how the effectiveness of the governance arrangements has been monitored and evaluated during the year and sets out areas for improvement in the coming year.

The AGS is required to be published as part of our Annual Statement of Accounts.

Assets Valuation – additional detail

Council Fund Assets - Assets included in the Balance Sheet at current value are revalued sufficiently regularly to ensure that their carrying amount is not materially different from their current value at the year-end, but as a minimum every five years.

Assets are carried in the Balance Sheet using the following measurement bases:

- infrastructure assets – depreciated historical cost.
- assets under construction – historical cost.
- council offices – current value, determined as the amount that would be paid for the asset in its existing use (existing use value – EUV), except for a few offices that are situated close to the council's housing properties, where there is no market for office accommodation, and that are measured at depreciated replacement cost (instant build) as an estimate of current value.
- school buildings – current value, due to their specialist nature, are measured at depreciated replacement cost which is used as an estimate of current value.
- surplus assets – the current value measurement base is fair value, estimated at highest and best use from a market participant's perspective.
- all other assets – current value, determined as the amount that would be paid for the asset in its existing use (existing use value – EUV).

The Value of the Council Dwellings as at 31 March 2021 is £457 million as per 2020/21 Audited Statement of Accounts (Notes 20 & 24).

- Council Dwellings are carried in the Balance Sheet based on current value, determined using

the basis of existing use value for social housing (EUV-SH).

Audit Wales

Audit Wales is the trademark of two legal entities: the Auditor General for Wales and the Wales Audit Office.

Each has its own particular powers and duties:

- The Auditor General audits and reports on Welsh public bodies.
- The Wales Audit Office provides staff and other resources for the Auditor General's work, and monitors and advises the Auditor General.

CIPFA/SOLACE

Chartered Institute of Public Finance and Accountancy: is a UK-based international accountancy membership and standard setting body.

Society of Local Authority Chief Executives and Senior Managers: is the leading members' network for local government and public sector professionals in the UK.

Care Inspectorate Wales (CIW)

Care Inspectorate Wales is the independent regulator of social care and childcare in Wales.

Commissioning & Procurement Strategy

The council's arrangements for how it undertakes commissioning, procurement and contract management activities.

Constitution

The Constitution sets out how the council operates, how decisions are made and the procedures it follows to make sure it is efficient, transparent and accountable to local people. It contains 22 sections, which contains sections about the rules, protocols and codes of practice that councillors and employees work under.

Corporate Land & Buildings Strategy

The council's strategy sets out the importance and significance of the council's property portfolio in the activities it undertakes, and seeks to challenge and justify why assets are being retained, while looking at alternative options for asset use and service delivery within our stringent budgetary framework.

Council

All 56 Elected Members. Approves the Council Plan and agrees the Constitution, policy and financial frameworks.

Council Plan

The [Council Plan](#) is a key document, agreed by Council, which publishes the well-being and equality objectives.

Council's Standards Committee

A council committee which promotes high standards of conduct by elected and co-opted members and monitors the operation of the Members' Code of Conduct.

Elected Member Protocol

The Protocol promotes high standards of conduct and behaviour as a means of strengthening respect and trust among members. It is contained within the [Constitution](#).

Estyn

[Estyn](#) is the education and training inspectorate for Wales.

Executive Board

The Executive Board is appointed to carry out all of the Council's functions which are not the responsibility of any other part of the Council, whether by Law or under the Constitution. The Executive Board consists of the Leader of the Council and nine other Councillors appointed to the Executive Board by the Council.

Governance/ Governance Framework

[Governance](#) refers to the processes by which organisations such as the council are directed, controlled, led and held to account. Our governance framework is set out in our Code of Governance which sets out our commitment to good governance and the framework of controls and arrangements we have in place to ensure good governance.

Housing Revenue Account (HRA)

The HRA records expenditure and income in relation to the council's housing stock.

Internal Audit

Internal audit is an independent assurance function that undertakes work that will inform the Head of Internal Audit's (HoIA) annual opinion on the overall adequacy of the council's framework of governance, risk management and control, including all its operations, resources and services and responsibilities in relation to other bodies.

Involvement Strategy

The council's Involvement Strategy sets out the council's commitment to involving everyone in our communities in discussions about the services we design and deliver and the principles we will work to in ensuring this.

Local Government and Election (Wales) Act 2021

The Local Government and Elections (Wales) Act 2021 established a new legislative framework for local government elections, democracy, governance, and performance.

Medium Term Financial Plan

The [MTFP](#) is a strategic guide to the council's spending plans over the coming 3 years to support the council's priorities within the context of a balanced annual budget. It forecasts the future financial outlook for the council based on a number of assumptions, setting out indicative revenue and capital budgets, including projections of the likely level of council tax and council balances.

Member Development Strategy

The Local Government (Wales) Measure 2011 sets out a number of requirements in relation to Member training and development. The Member Development strategy sets out the development and training activities specifically designed to improve knowledge, skills and abilities of elected members in their varied roles.

Mersey Dee Alliance (MDA)

The [MDA](#) is a partnership supporting strategic economic growth across North East Wales, West Cheshire and Wirral, which is recognised as a single economic sub-region having a population close to 1 million.

Modern Ways of Working Programme

A programme to transform our working practices by providing improved working environments, adopting new technology and digital solutions, making our work more sustainable in the long term and challenging the culture around the way the council works.

North Wales Economic Ambition Board

The [NWEAB](#) is a partnership between the six local authorities in North Wales and other local partners in the region. It is the sponsoring group and decision-making body for the North Wales Growth Deal, funded by UK and Welsh Governments as well as other private and public partners aims to build a more vibrant, sustainable and resilient economy for North Wales.

Office Accommodation Review

A programme of work to review our office accommodation requirements, ensuring our assets are fit for purpose and provide modern and flexible office accommodation which meets the requirements of a modern organisation.

Performance Management Framework

A performance management framework ensures that individuals, teams and the overall organisation know what they should be doing, when they should be doing it, and how they should be doing it. It is part of an ongoing cycle of 'Plan, Do, Review', involving robust self-assessment, service planning and performance management. It is focussed on ensuring that we deliver our objectives and achieve our corporate and partnership priorities as set out in the Council Plan.

Personal Review and Development (PRD)

The council's arrangements for performance review of the workforce, to appraise the employees' performance over the previous year, to set objectives, to identify training and development needs and to provide constructive feedback to enable good performance.

Priority Boards

Each council priority is supported by a Priority Board responsible for delivering the outcomes set out in the plan and reporting on these to elected members and the public.

Public Services Boards

[Public Services Boards](#) were established by the Well-being of Future Generations (Wales) Act 2015, consisting a number of statutory members (including local authorities) to improve joint working across all public services in each local authority area in Wales.

Purchase to Pay

The council's e-Procurement process.

Strategic Equality Objectives

[The Equality Act 2010](#) requires public authorities to consider how they can positively contribute to a fairer society through advancing equality and good relation with and between 8 'protected characteristics'. It requires that local authorities prepare and publish its strategic equality objectives at least every 4 years. Our strategic equality objectives are published as part of our Council Plan.

Sustainable Development Principle

[The Well-being of Future Generations \(Wales\) Act 2015](#) introduced the sustainable development principle: the importance of balancing short term needs with the needs to safeguard the ability to also meet long term needs. It sets out 'five ways of working' to support this approach – long term, integration, involvement, collaboration and prevention.

Wales' Well-being Goals

Seven interdependent well-being goals for Wales, established by the [Well-being of Future Generations \(Wales\) Act 2015](#).

Well-being Objectives/ Council Priorities

Local Authorities are required to agree and publish their own well-being objectives, which contribute to Wales' well-being goals. In Wrexham Council, these are published in our [Council Plan](#) and also serve as our Council Priorities.

Welsh Housing Quality Standards 1 (WHQS1)

The Welsh Housing Quality Standard is the Welsh Government standard of social housing quality, first introduced in 2002.

Welsh Housing Quality Standards 2 (WHQS2)

The Welsh Housing Quality Standard 2, is a new set of standards due to start in 2023. The Standard lays out the standards for what all homes should have, to name a few: a good state of repair, safety and security, proper insulation and be well managed.

Endnotes

[1] Good governance statement – underpinned by CIPFA/SOLACE's 'Delivering Good Governance in Local Government' principle.