

APPENDIX C

THE TIMETABLE FOR PREPARING PLANS AND BUDGETS FOR 2007/10

* Most services have monthly team meetings and 121s but some services with staff who are geographically dispersed hold team meetings and 121s on a quarterly basis.

The quarterly monitoring of Service Plan improvements and PIs takes place for the first (April-June), second (July-September) and third (October-December) quarters as soon as possible after the end of each quarter. Details for the fourth quarter (January-March) are incorporated in a review of the end-of-year performance of Service Plan improvements and PIs during the summer.

Month	Members	Strategic Management Team (SMT)	Heads	Staff
Every month	Executive Board monitors selected PIs	Each director leads monthly Directorate Management Team (DMT) meetings and has monthly 121s with their Heads SMT monitors selected PIs	Lead monthly service team meetings and have monthly 121s with their direct reports * Where relevant, prepare figures for PIs selected for monthly monitoring	Attend monthly team meetings and have monthly 121s with their manager *
Every quarter	Executive Board monitors Corporate Strategy measures and PIs Scrutiny Committee and Corporate Overview Committee monitor Service Plan improvements and PIs #	Each director prepares a report on progress against the measures and PIs for their Priority in the Corporate Strategy SMT monitors Service Plan improvements and PIs #	Prepare monitoring forms for Service Plan improvements and PIs	

Month	Members	Strategic Management Team (SMT)	Heads	Staff
April 2006		SMT refines the Corporate Strategy and consults on the priorities		
June 2006		SMT reviews the Medium Term Financial Plan (MTFP), service plan template and service planning day format	Work with directors to outline future service priorities and meet budget targets	
July 2006	Executive Board considers the MTFP in relation to the Corporate Strategy priorities and outcomes	SMT propose priority services and budget targets	Work with accountants to predict budget needs/meet budget targets	
September 2006	Scrutiny and Overview consider the Corporate Strategy, MTFP and future service/budget targets and make recommendations to the Executive Board			
October/November 2006	Council approves Corporate Strategy/MTFP	Directors attend Service Planning Days	Lead their Service Planning Day which informs the parallel development of Service Plans and detailed revenue and capital budgets	Some staff participate in Service Planning Days
December 2006		SMT ensures draft Service Plans and draft budgets tie up with expectations and Government Grant Settlement	Revise their Service Plan and revenue and capital budgets and present to CMT	

Month	Members	Strategic Management Team (SMT)	Heads	Staff
January 2007	Executive Board, Scrutiny and Overview consider Service Plans and Budgets			
February 2007	Executive Board approves Service Plans and Budgets and Council sets Council Tax			
March 2007	Joint Performance Information and Council Tax Booklet delivered to every household with Council Tax bills Interim audit of some PIs conducted by the Audit Commission			
April 2007		Each director appraises their Heads	Appraise their direct reports	Appraisals - all staff review performance in 2005/06 and set objectives for 2006/07 with their manager
May 2007		SMT review end-of-year performance of Service Plan improvements and PIs #	Prepare end-of-year forms for Service Plan improvements and PIs and, in light of these results, review PI figures and targets for next 3 years Review PIs	
June 2007	Executive Board and Scrutiny Committee review end-of-year performance of Service Plan improvements and PIs #			
	Web-based Annual Performance Plan published by 30 th June			
Summer 2007	Audit of some PIs conducted by Internal Audit			
Autumn 2007	Audit of the Annual Performance Plan, including PIs, conducted by the Audit Commission			
December 2007	Report on the audit of the Annual Performance Plan, including PIs, produced by the Audit Commission			