

## **Corporate Report Template Guidance**

When writing reports to go to Full Council and Committees, authors should always use the Council's Corporate Report Template. When a report is submitted to a Committee Officer or Monitoring Solicitor, if the report does not accord with the template, then the report will be returned to the author for amendment.

Authors are encouraged to use plain English, avoid jargon and explain acronyms and initialisations either at first use or in a glossary. Please always check spelling and grammar thoroughly before submitting the report for to the Committee Officer or for monitoring.

The Corporate Report Template has the header and title, four sections and a footer.

### **Header and Title**

Double click into the header with the Aberdeenshire Council logo at the top of the page, where the template says "Service Name" and fill in the name of your service.

Insert Full Council or the committee name and add the date.

Insert the report title. Report titles are an early indicator of the content of the report and will appear on the agenda. The report title should be very clear and concise.

### **Section 1**

This is the section of the report where authors list all the **recommendations** they are making to the Committee.

These recommendations should be typed in **bold** and follow the agreed numbering format. All of the recommendations must be set out in full in this section.

It is not good practice to ask the Committee to approve the recommendations contained in Section 2.7 of the report, which then requires the reader to go to that section and sort through to find what the recommendations actually are.

What can the Committee do?

The starting place for this is List of Committee Powers in Part 2A of the Scheme of Governance. If you are asking a committee to use a power in the List then the recommendations should reflect the wording used in the Scheme.

If you are asking committee to make recommendations to a policy committee or Full Council then be clear about this.

The committee can also note, consider, instruct...

If any of the recommendations are asking for authority to be delegated to an officer it has to be clear that the delegation is only to that officer. There are no joint delegations allowed. Only one officer can ever bear the responsibility of a delegated power.

There must always be a clear separation between the officer first consulting with others and then the officer making the decision. If the officer has to consult with a Project Board or Working Group, then the officer making the decision cannot be a member of that Board or Group. For that reason using “in conjunction with” and “in consultation with” are not advised, as they both can be taken to imply some kind of communal decision-making process.

The correct wording is

“To delegate authority to [position of officer] **following consultation with [ ]**.”

If there are different aspects to the delegation (e.g. legal, financial, procurement) then the specific delegations to the appropriate officers for each should be separated out in the recommendations.

There is a separate Legal and Governance Guidance Note for officers who are exercising delegated powers setting out what they are required to do:-

- before the power is delegated
- when exercising the delegation
- when they should refuse to exercise the delegation and
- after exercising the delegation.

## **Section 2**

This section of the report can be called either Background or Discussion or Background/Discussion, whichever is more appropriate. The main content of the report goes in this section.

Although there is no official page limit for reports, authors are encouraged to be concise. Please use appendices to include relevant information. Do not add sections to the report.

Other matters to refer to in Section 2 are

- Any consultation that has taken place
- Area related issues
- Council Policy
- Sustainability
- Or any other issues which have been taken into account and the author needs to highlight.

It is mandatory that authors must include a specific reference to consultation with the finance and legal Monitoring Officers and this the final paragraph of Section 2.

It will not always be possible to complete this sentence at the draft report stage, but authors must ensure that they complete the sentence before submitting the final report.

It is not sufficient to say the Monitoring Officers have been consulted, full stop. Authors have to say what the outcome of the monitoring procedure which is “and have no comments” or “and their comments have been included in the report.” The report template indicates in red where you have to add the required text.

### **Section 3**

This is called Scheme of Governance. In order to meet the requirements of governance at Aberdeenshire Council it is important to ensure that there is clarity about why a report has been submitted to that particular committee. Full Council has the ultimate power to make decisions unless it has delegated that power to a committee or an officer. Every report going to Full Council or a committee must make the delegation clear. The template contains examples and the required wording. Report authors will find the delegations in the List of Committee Powers in Part 2A of the Scheme of Governance.

### **Section 4**

This section is where authors should identify any Equalities, Staffing and Financial implications.

#### Equalities

Authors should all be aware of the importance of considering equalities implications when writing their reports and must be familiar with the Equality Impact Assessment (EIA) form which should be appended to the report if there is a need for an EIA. The Equalities team have Guidance available. [Insert link?](#)

The report template gives the form of words to be used when an EIA is attached, and also when authors consider that it is not required. In the latter case authors must give a justification for why an EIA is not required. For every committee report there must be either an EIA attached or a clear reason why not.

#### Staffing

The report must confirm whether or not there are any staffing implications.

#### Finance

The report must confirm whether or not there are any financial implications and if there are then use the final paragraph of section 4 to explain.

### **Private and Exempt Footer**

The report template includes an automatic footer with the standard wording to be completed when authors believe the report contains exempt information and therefore should be considered in private. They should refer to the paragraphs in Schedule 7A to the Local Government (Scotland) Act 1973 to see which paragraph number will be relevant. The

paragraphs are at the end of this guidance. If in doubt, the first point of contact for report authors would be their Governance Service Champion, but they can also seek advice from the Monitoring Officer for the Committee. When an exempt footer is applied, this means that, if the Committee agree, your report will be considered with the press and public excluded.

However, the Council's ultimate aim is transparency of business and should only conduct business in private where it is absolutely necessary.

Please consider the following questions before deciding whether or not to apply the footer

- What is the reason you wish your report to be determined with the press and public excluded?
- Is it appropriate to allow the public to have full access to all details?
- What would be the effect if this report was taken in public?
- Is there any way that your concerns could be allayed by removing some of the sensitive issues from the report?
- Could the report be written with less information or with different emphasis so that the Committee can still have a full discussion of the issues without having to exclude the press and public?

A reminder of the categories of business that can be transacted in private is below but you should bear in mind that these are discretionary grounds. The Committee is not obliged to hold items that fall into this category in private but rather it is a choice based on officer recommendations. The Committee takes a decision at the beginning of every meeting as to whether to support the officers recommendation as to whether or not the report be held in private - the members, despite your applying an exempt footer, may opt to bring it into the public session.

If a report is to be taken in public, authors should delete the automatic footer from the report before sending it on, so as to avoid any confusion for Committee Officers and Monitoring Solicitors.

### **Signing off the Report**

At the end of the report template authors should insert the name and directorate of the officer presenting the report at the Committee. This will be Director of the Service. Underneath they put their own name as author of the report, their job title and the date of the report.

Authors don't always remember to put in a date, and it can be helpful for inclusion in minutes to be able to track back to individual reports, particularly when there may be a series of them on the same topic. The date must be the full date not just the month and year.

## **Descriptions of Exempt Information**

- 1 Information relating to a particular employee, former employee or applicant to become an employee of, or a particular office holder, former office-holder or applicant to become an office-holder under, the authority.
- 2 Information relating to any particular occupier or former occupier of, or applicant for, accommodation provided by or at the expense of the authority.
- 3 Information relating to any particular applicant for, or recipient or former recipient of, any service provided by the authority.
- 4 Information relating to any particular applicant for, or recipient or former recipient of, any financial assistance provided by the authority.
- 5 Information relating to the adoption, care, fostering or education of any particular child or relating to the supervision or residence of any particular child in accordance with a supervision requirement made in respect of that child under the Social Work (Scotland) Act 1968.
- 6 Information relating to the financial or business affairs of any particular person (other than the authority).
- 7 Information relating to anything done or to be done in respect of any particular person for the purposes of any of the matters referred to in section 27(1) of the Social Work (Scotland) Act 1968 (providing reports on and supervision of certain persons).
- 8 The amount of any expenditure proposed to be incurred by the authority under any particular contract for the acquisition of property or the supply of goods or services.
- 9 Any terms proposed or to be proposed by or to the authority in the course of negotiations for a contract for the acquisition or disposal of property or the supply of goods or services.
- 10 The identity of the authority (as well as of any other person, by virtue of paragraph 6 above) as the person offering any particular tender for a contract for the supply of goods or services.
- 11 Information relating to any consultations or negotiations, or contemplated consultations or negotiations, in connection with any labour relations matter arising between the authority or a Minister of the Crown and employees of, or office-holders under, the authority.
- 12 Any instructions to counsel and any opinion of counsel (whether or not in connection with any proceedings) and any advice received, information obtained or action to be taken in connection with—
  - (a) any legal proceedings by or against the authority, or
  - (b) the determination of any matter affecting the authority,



(whether, in either case, proceedings have been commenced or are in contemplation).

- 13 Information which, if disclosed to the public, would reveal that the authority proposes—
  - (a) to give under any enactment a notice under or by virtue of which requirements are imposed on a person; or
  - (b) to make an order or direction under any enactment.
- 14 Any action taken or to be taken in connection with the prevention, investigation or prosecution of crime.
- 15 The identity of a protected informant