

City of York Council Task and Finish Group Proposal

Corporate Scrutiny Committee

7 July 2025

Budget setting process and Medium-Term Financial Strategy

Members: To be confirmed

1. Summary and Rationale

At the June meeting of Corporate Scrutiny, it was resolved to establish a Task and Finish Group to provide financial scrutiny of the budget setting process and the MTFS, to add value to the process by reviewing and challenging the assumptions and choices behind the figures.

2. Aims and Objectives

It is proposed that the Task & Finish Group seeks to scrutinise the Council's finances from budget development and planning to the delivery and oversight of that budget in year to:

- Ensure there are clear links between budget setting and strategic plans
- Challenge how resources are allocated, used and their impact.
- Identify evidence-based options for reducing costs, generating income or introducing new models of delivery.
- Evaluate how the budget is allocated to achieve strategic and operational objectives and service planning.
- Ensure targets on performance are aligned within the budget available to deliver them.
- Provide additional and transparent challenge to the Executive's management of Council's finances.

3. Methods

- Desk-based research to ensure that members of the Task & Finish Group are familiar with financial scrutiny best practice.
- Interviews with officers / Executive Members.
- Resident engagement.

4. Impact on Resources

- Member time and commitment

- Director of Finance, Assistant Director of Finance and related officer time required
- Executive Member(s) time.
- Scrutiny Officer / Democracy Officer time

5. Proposed Timescale

- Review the MTFS and the budget process by 30 September 2025.
- Review budget proposals prior to public consultation.
- Following the public consultation, review the outcomes and make suggestions to Executive about how to proceed, for the Corporate Scrutiny meeting 17 January 2026.