

## **Agenda Item No. 7b – for information only**

### **West Midlands Regional Assembly Board of Directors – 9 March 2007**

#### **Scrutiny Review of Advantage West Midlands: Access to Finance**

#### **Report of the Regional Scrutiny Support Officer**

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1. **Purpose**  
To advise the Board of the forthcoming scrutiny review of Advantage West Midlands: Access to Finance.
2. **Recommendation**  
To note the report.
3. **Background**  
As set out in the work plan, the next scrutiny review of Advantage West Midlands activity would examine Access to Finance.
4. **Aims and Objectives**  
The Strategic Review Group agreed the broad aim for the review. Following initial Panel discussions, the draft terms of reference were developed and are appended to the report.
5. **Review Panel Membership**
  - 5.1 Panel members are self-selected with no requirement to ensure formal sectoral or political balance. The Panel is made up of Assembly Members or Alternates. The Panel may also co-opt non-Assembly members in order to bring additional knowledge or expertise.
  - 5.2 It is important to note that when participating in the review process, Panel members represent the Assembly as a whole rather than their individual sector or organisation.
  - 5.3 The Review Panel consists of:  
Frances Beatty  
Prof. Gerald Bennett – (Panel Deputy Chair)  
Mike Cherry  
Dr Sarindar Singh Sahota  
Parminder Singh  
Roger Trotman - (Panel Chair)  
Bruce Undy
6. **Progress to date**
  - 6.1 Their first meeting in February 2007 was a closed Panel briefing session to introduce the scrutiny review process and allowed a broad

discussion of issues. The Panel received a presentation from Patrick Palmer, Head of Access to Finance at Advantage West Midlands in order to provide context and background information.

- 6.2 In addition, Roger Trotman and Professor Gerald Bennett were elected as Chair and Deputy Chair of the Panel respectively.
- 6.3 Evidence sessions will commence in early March and conclude in May 2007 with a draft report available for consultation from early June. The Assembly will receive the final report for endorsement at the Annual General Meeting on 18 July 2007.

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# Scrutiny Review of Advantage West Midlands: Access to Finance

## Draft Terms of Reference

### 1. Aim

The aim of this review is to examine Advantage West Midlands' broad approach to financial support for businesses, an assessment of gaps in the market, take up and impact of financial support packages.

It is intended that this review will inform and influence the revision of the West Midlands Economic Strategy (WMES).

### 2. Objectives

Evidence will allow the Panel to assess activity in three areas:

- **Engagement**
  - Degree of understanding of provision across Region
  - Effectiveness of the Regional Finance Forum including links with other advisory bodies e.g. Enterprise Board
- **Delivery**
  - Responsiveness to the needs of the Region
  - Role and provision of financial support of other providers, including local authorities
  - Issues that inhibit or facilitate progress including National factors
- **Monitoring and Evaluation arrangements**
  - Informing future activity
  - linkages to WMES delivery mechanisms

Panel Members will develop issues to be considered during the review process. Additional areas may be identified as a result of preparatory work and input from partners and stakeholders.

### 3. Method

The review will be carried out by a Review Panel made up of Assembly Members (with the option of co-opting additional members bringing expertise and experience in this area). The process will be supported by the Regional Scrutiny Support Officer.

This will be achieved by a series of Panel Hearings taking evidence from regional partners culminating in a formal hearing with Advantage West Midlands. The Panel will also be informed by independent research and written evidence submitted to it.

Evidence will be submitted to the review either in writing or by the review activities. These are likely to include a briefing session, discussion events and hearings.

### 4. Cross Cutting Themes

All reviews are required to consider how the cross cutting themes of Sustainable Development and Equalities and Diversity will be addressed within the review process.

5. **Timescales**

The review will commence in late February 2007. It is expected that the final report will be presented to the Regional Assembly on 18 July 2007.

6. **Outputs**

A final report will be produced by the Panel and circulated widely. The final report is made on behalf of the Assembly and will not require further approval but will be reported to the full Assembly.

7. **Role of Chair**

The Panel Chair will be selected by Panel Members and will be required to act as spokesperson for Panel, with Assembly support, as required.

8. **Role of Review Panel**

The Panel has been delegated responsibility for this review by the Strategic Review Group, the Assembly's scrutiny co-ordinating body. The Panel is required to report progress to the Strategic Review Group through officers.

9. **Code of Conduct**

All Panel Members should abide by the Assembly Code of Conduct and are required to declare any possible conflict of interests.

10. **Quorum**

Panel meetings will be considered quorate if three Assembly Panel Members are present.

Drafted 19 February 2007