How to create a Forward Plan Entry

To avoid duplication and ensure that forward plan entries are linked to reports and Officer Decision Notices on the website for transparency, forward plan entries should now be uploaded via mod.gov. This is the same form that is filled in to upload a report, but the stage at which you complete the form is now sooner.

You can access the form here: direct link here

Select either Key Decision Committee Report, or Officer Decision Notice Key Decision, and you will be presented with this form:

Title:	Title of Item
Decorintion	The purpose of this item is to ask the Committee to
Description:	The purpose of this item is to ask the committee to
	/
Lead Officer:	Sharples - Dan Sharples ×
_	
Lead	Director of Law and Governance (Monitoring × Officer
Director:	
* Provide	Owner will be automatically copied from Lead
details of	officer (Author)
Report writer	Deadline Date: 5 working days before Committee
using the	Coordination and Oversight Group
arop aown list If this is	
Nourcolf	
nlease	
specify	
* • •	
Coordination	Committee Coordination and Oversight
and Oversight	Meeting date: 16/05/2023 14:00 ¥
Group	Meeting date: 10/05/2025 14:00 *
* Committee	Policy and Posources Committee
committee	
	Meeting date: 14/06/2023 18:00 ∨
Open /	Part exempt 🛛 🗙 👻
exempt:	
Exempt	
report	■ Para: 1:U 2:U 3:■ 4:U 5:U 6a:U 6b:U 7:U
Paragraph	
Explanation	The appendix to the report will include financially sensitive information
for	
exemption:	
* Reason for	
key decison	
0	Expenditure impact > £500,000
View guidance	

1. Include the title of the item

2. Include a brief description of what the Committee or Officer will be asked to do

3. Lead Officer is who will write the report

4. Lead Director is the Director who's name the report will be in

5.The system will generate report deadline dates based on the dates you give it

6. Select the relevant CCOG meeting, you can find the committee deadline dates on the report writing intranet page

7. Select the relevant Committee and meeting date

7a. For ODNs,

8. Select whether the report will be open or exempt, if exempt, include the relevant reason for exemption (hovering over the numbers provides the wording)

9. Select the reason for the item being key, either due to income/expenditure being £500k or due to its significant impact on 2+ wards

Select Next

The system will then give you the deadline for when you need to write the report by in advance of CCOG. Check this date to make sure it accords with the report deadlines you were provided by Committee Services.

Action dates		
Title of Item		
Actions		
Title	Туре	Due Date Fix Date
Write Report for Title of Item Dan Sharples	On	♥ 09/05/2023 14:00
Committee Coordination and Oversight Group	On	♥ 16/05/2023 14♥
Committee Policy and Resources Committee	On	▶ 14/06/2023 18♥
Recalculate Finish		

Action dates for Title of Item

Once completed, the system will have created a report for you to produce in your 'Work to Do', with the relevant deadline date

Meetings and Minutes	Work to do - Dan Sha	rple	S			
Meetings, agenda, minutes	Work to do					
Calendar	Work owner: Dan Sharples	~				
Committees	Date range: 12/04/2023 - 19/04/20	23				
Decisions	□ Show other people's actions I ca	n edit				
Officer Decisions						
Forward plans	Find					
Constitution	To do Dono Ortiono					
Library	To do Done Options					
Meetings	Due date 🔹 Item type	•	Description -			
Outside bodies	Enter date to Write report	~	Enter text to match	Ī		
Search documents			Title of Item,			
Statistics	00/05/0000 NV/I		Committee			
Subscribe to updates	09/05/2023 Write report		Oversight Committee			
What's new			16/05/23 14:00			
Work to do			Test, zzTestCommittee (do not delete - for			

Amending a Forward Plan Entry

If you need to amend the date when the report is due to be considered, go to your 'Done' section and click on the title of the item

Work to do - Dan Sharples

Work to do				
Work owner:	Dan Sha	arples	~	
Date range:	12/04/2	023 - 19/04/	2023	
Find				
To do	Done	Options		
Due date	φ	Item type	Φ	Description +
Enter date t	o matc	Select an ite	m type 🗸	Enter text to match
12/04/2023	08:13	Add issue		Title of Item

You can then select 'edit issue', and the submit plan item form will appear again, allowing you to make the necessary changes. You can also add a note as an explanation for the changes.

Display Action
Add Issue Description: Title of Item
Owner: Dan Sharples
Status: Completed
Start date: 12/04/2023
Deadline: 12/04/2023
Date completed: 12/04/2023
Possible actions:
Edit issue
Add note
Continue

If the report has not yet been to CCOG, be sure to change the date at which the report is due to be considered by CCOG as well as the Committee.

For Officer Decision Notices, the date you select is indicative and as long as 28 calendar days' notice has been given, the date of expected decision should only change if the timeline has changed significantly.