

Future Tandridge Programme

Councillor Briefing

19th January 2022

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Introduction David Ford

Agenda

1. Introduction

- Purpose of briefing
- Context
- What should we be aspiring to?
- Programme Principles

2. Overview of Programme approach

- Critical Success Factors
- Programme Structure
- Governance
- Workstreams
- Overall Roadmap

3. Resources

4. Next Steps

5. Questions

Purpose of this briefing

- To provide a detailed briefing on the Future Tandrige Programme to Councillors in advance of Strategy & Resources Committee on 1 February
- To provide Councillors with the context and critical success factors key to delivering the Future Tandrige Programme
- To set out the proposed approach and governance arrangements for the Future Tandrige Programme
- To provide all Councillors with an opportunity to ask questions regarding the Programme

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Context

- Impacts of Customer First
- Challenging Financial backdrop
 - 15% reduction in net budget over next 18 months
 - £1.1m savings across Council
- Lack of senior management leadership
- Low staff morale – retention and recruitment of staff an issue
- Lack of clear sense of purpose and accountability
- Challenges & new demands resulting from Pandemic
- Changing Local Government context – new White Paper soon - Levelling Up, Unitaries, Shared Services?

What should we be aspiring to?

An improved Operating Model for Tandridge

A smaller more strategic, agile and responsive organisation with resources targeted at the Council priorities. A more business-like approach to the way the Council operates

Delivered by developing:

- A new corporate vision and strategic plan
- New Target Operating Model to transform the way services are delivered
- Culture Change
 - Focus on the needs of customers
 - Resources targeted to where the need is the greatest
 - Strong performance management culture
 - Clear management accountability
 - Behaviour change

Programme Principles

- Led by Tandridge with programme and specialist support from Surrey County Council and external subject matter expertise
- Councillor oversight and decision making
- Staff engagement in the programme – need for effective communications and engagement plan
- Robust approach to challenging the way we do things
- Realistic approach to prioritisation
- Open to new ways of delivering priority services
- Outward looking in seeking to work with partners to deliver Council priorities

Programme Approach

Ricky Fuller

Critical Success Factors



Financial

An overall reduction in net budget of 15% by 23-24 over 18 months

An overall reduction in expenditure on 'Back Office' functions of 15-20% by 23-24

A higher proportion of the budget is spent on 'front-line' services and on the Councils stated priorities



Customer

Customers are involved in the redesign of services

Customer feedback and insight is used to drive service improvement

Customers are encouraged to use the least cost channel to access Council services



Services

A mixed economy of service delivery with services undertaken by the most appropriate means

Service performance is measured and benchmarked

Service performance is demonstrably improving



Staff

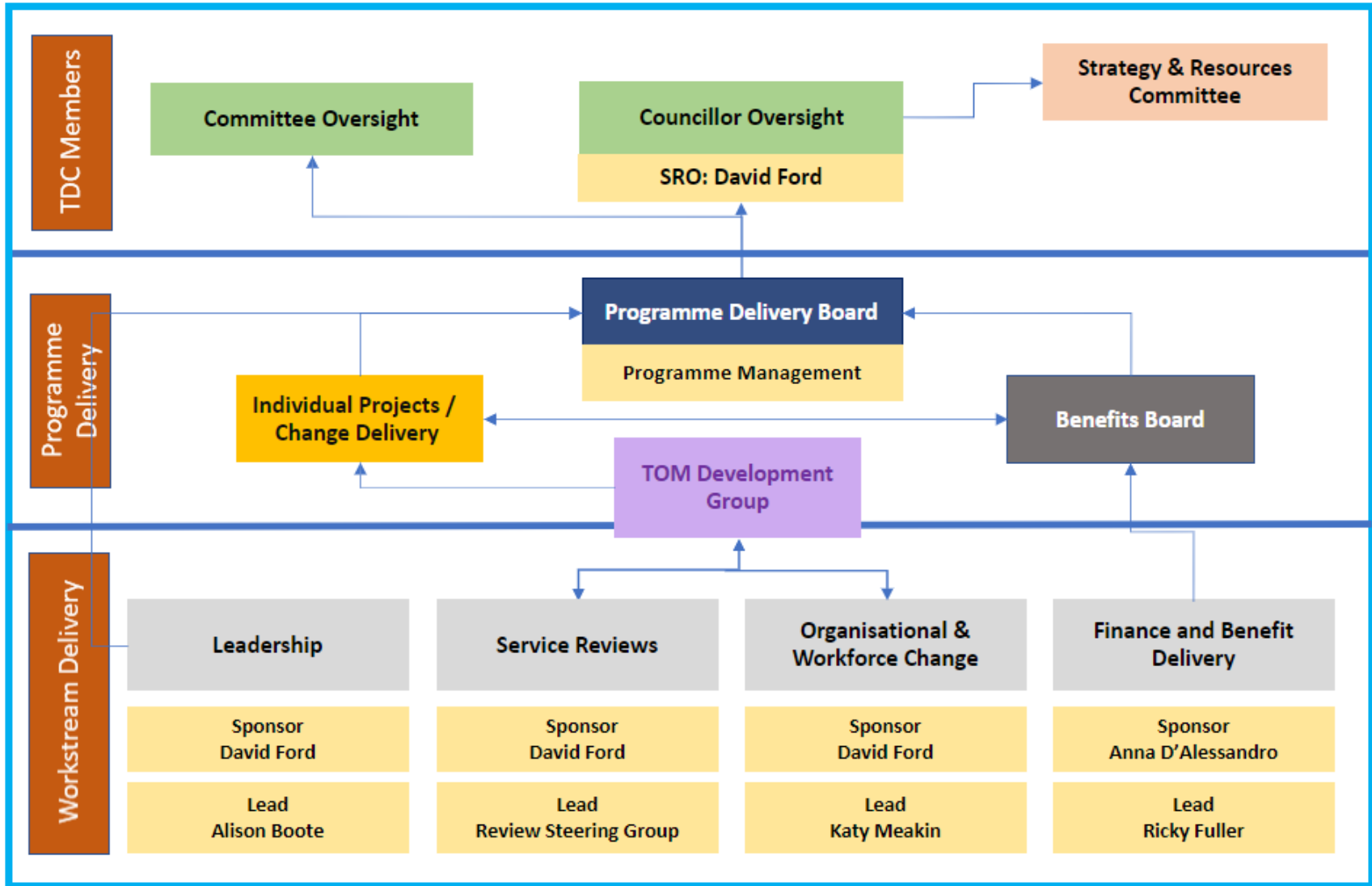
The Council has a smaller directly employed workforce

Managers and staff are engaged and accountable for their performance

Staff feel valued and motivated and understand the values and behaviours we expect of them



Programme Structure & Governance



Member oversight and engagement

David Ford

Strategy and Resources

Overall ownership of the programme deliverables
Impact on the financial position of the Council

Service Committees

Consider proposals resulting from the Service review and redesign work

Wider Member engagement

On specific topics – eg Review of the Strategic Plan
Regular progress updates

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TOM Development Group

Membership

Sponsor: David Ford (CX) / Alison Boote (Ops) / Anna D'Alessandro (s151)

Mel Thompson (IT) / Katy Meakin (HR) / Ricky Fuller (Prog Mgr) / Mike Butler (Ext)

1. Owns the overall design of the new Operating Model
2. Agrees the Design Principles that will drive Organisational changes
3. Agrees the prioritisation and sequencing of the Service Reviews
4. Sets the direction for the Service Reviews (expected outcomes, financial envelope)
5. Consider results of the Service Reviews and the business case for change
6. Identifies the organisational implications of decisions made (HR / Technology etc)
7. Considers project resources required to deliver the change
8. Makes decisions on next steps (incl recommendations for approval by Members)
9. 'Holds the ring' on the overall impact of changes in the context of Member priorities

Benefits Board

Membership

Sponsor = Anna D'Alessandro (s151) / Ricky Fuller / Rona Leitch / PMO / Finance support
Nic Martlew / John McGeown / Katy Meakin / James Devonshire

1. Works alongside Programme Delivery Board and the TOM Development Group to oversee benefits identification and realisation (Financial and other)
2. Works with PMO to identify project specific needs to support delivery of benefits.
3. Manages FT programme budget and resources to support delivery of projects.
4. Identifies cross-project dependencies / where benefits are owned and realised.
5. Monitors and tracks delivery of benefits, to ensure realisation.
6. Signs off final benefits as part of programme closure process

Programme Workstreams

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Leadership - Workstream 1 – David Ford

Senior Management restructure - 3 key factors driving the need for the restructure:

- Leadership capacity and focus – currently under resourced and stretched at the senior management level
- Leadership capacity is impacted by a number of current and emerging vacancies and interim management arrangements which need addressing
- The new senior management team will need to be equipped to deliver the Future Tandridge Programme and its outcomes

Consultation to end of March – implementing new structure onwards

Political leadership and Governance

- Understanding impact of the Boundary Review to be in place for May 2024 (at the earliest).
 - Member briefing at end of January
- Consideration of improvements to the Committee system.

Strategic Plan - Workstream 1 – Alison Boote

- First we need an **Interim Strategic Plan** - this will refresh and review the current plan looking at what has been delivered, is still relevant and can be delivered in 22/23.
- This will inform service planning and the performance management of managers and staff over the next year.
- This interim plan will be focus on the Council's actual current priorities and recovery.

Vision for the Council

- Reviewing where we are will also look at whether the Council's Vision is in line - Are we recognisable from this vision? Does it feel appropriate and inclusive?
- This leads into developing a new, costed Strategic Plan for 23/24.

Strategic Plan - Workstream 1 – Alison Boote

- A New Strategic Plan will be developed which will:
 - Be Costed , tangible and able to be resourced – showing value for money
 - Be Measurable – with focused outcomes and KPIs
 - Be developed with consultation with stakeholders - Members, Officers, the public and based on research findings
 - Define the Council’s role in delivery, partnership, enabling and lobbying
 - Developed to align with the work to review what services we can carry on and how they will be delivered. This work will fully engage with the other workstreams to make sure the plan we arrive at will have priorities that the public and residents can identify with and that Officers can clearly see how they fit in to the overall picture and how they will be fulfilled.

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Service Review, redesign & delivery - Workstream 2 – Mel Thompson

A prioritised, consistent and rigorous review of all services which fundamentally challenges how and why we provide services including the demand for these services, the most appropriate delivery model, performance, cost and value for money.

This will incorporate a review of cross-cutting themes including Commercialisation, Asset Strategy, Customer Services and Digital.

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Service Review Stages

Stage 1: Scoping

Confirming scope and potential outcomes:

1. Service Outline
2. TOM DG Sign off

Mobilisation Meeting

Stage 2: Review

Data Requests Confirmed

Data Collation & Analysis

Work through service review template and methodology

Engagement with Staff and Relevant Stakeholders

Assess Customer Experience and Opportunities

Develop Options for Consideration

Assessment of Outcomes – Financial, Service and Social; FTP Critical Success Factors

Develop Supporting Improvement Plans including Financial impact profile

Develop Draft Business Case

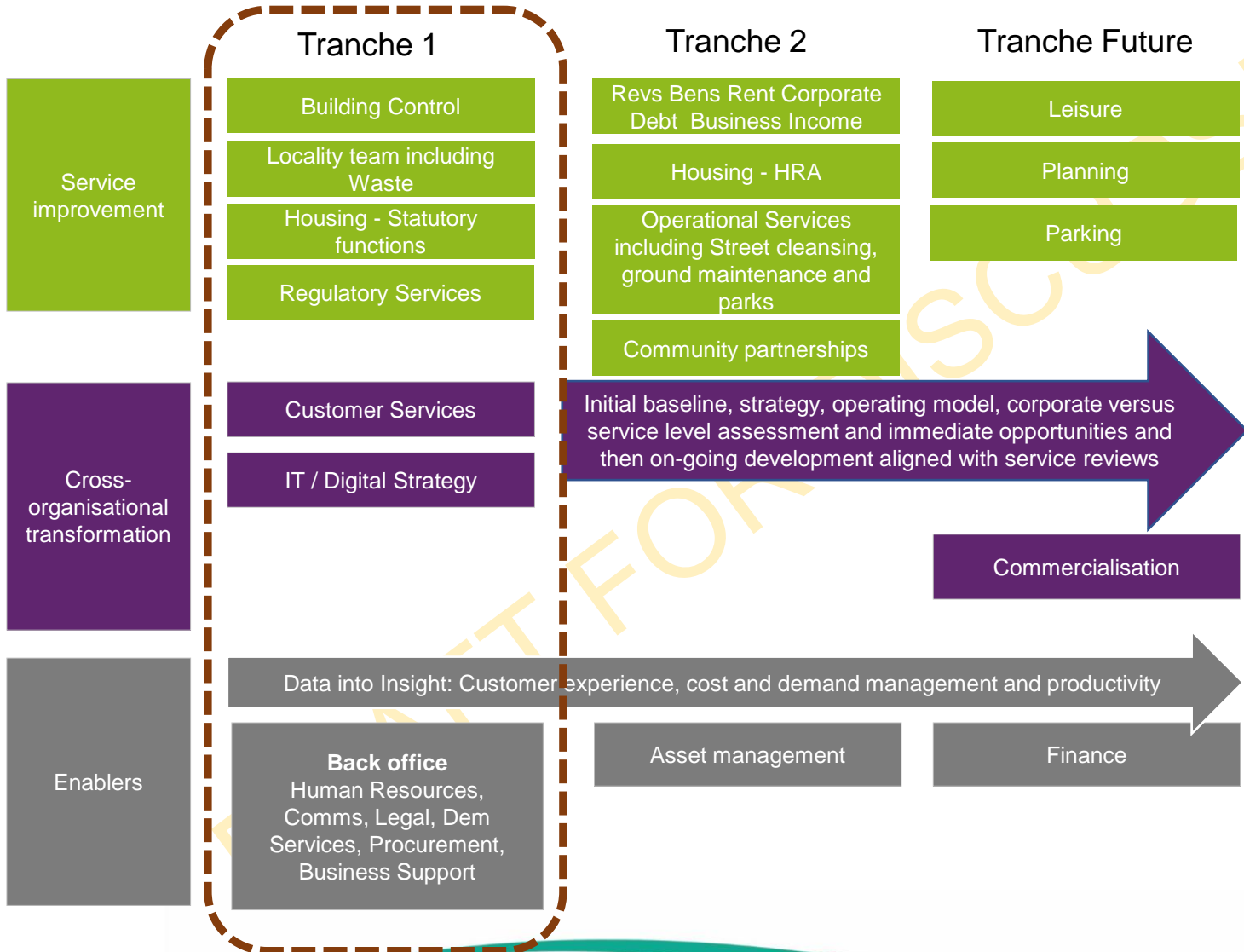
Feedback and Amendments

Produce & Present Final Business Case

This will be tailored to services depending on nature and scale of service.

Governance points to be added including TOM Development Group, Membership Oversight Group and Benefits Board.

Draft Service Review Prioritisation model – Mike Butler



Criteria:

- Scale and complexity of service
- Current service context
- Would it create a good Pilot Example
- Size of potential transformation opportunity
- Alignment with Corporate Priorities
- Impact on service and wider resources

Organisational & Workforce change- Workstream 3

Katy Meakin

We will implement leaner management and service structures to deliver to the new operating model. The service reviews and redesign will also result in a reduction in staffing levels.

Within this context we will review how we recruit and retain staff who will fit the 'Future Tandridge model', and ensure that managers and staff feeling valued and motivated, with performance managed and talent nurtured.

- Budget proposals - savings in 22/23
- Staff survey – actions arising from / linked to the (baseline) Staff Survey
- Service reviews – actions arising from / linked to service review outcomes
- People plan – building to a consolidated plan

Organisational & Workforce change- Workstream 3

Katy Meakin

Budget proposals 2022/2023	Staff Survey actions 2022	Service Review workstream	People Plan 2022/2023
Savings on employee benefits	Vision/Values review	People & Behaviour Change Plan	Recruitment and retention
Recruitment savings	Senior Management restructure	HR Policy adjustments	Skills training
Review staff increments, T&C's, reward	Service Plans (linked to appraisals)	Recruitment process	Career development
Review staff expenses & training budgets	Appraisals (linked to service redesign)	Consultation & change management	Self service HR
		Managing poor performance	Data led HR

Finance and Benefit delivery – Workstream 4

Ricky Fuller

Strong financial management is embedded across the Council along with a culture of budget accountability and financial decision making based on evidence and insight.

Robust Medium Term Financial Strategy	Good financial systems and support in place for Service Managers	Service Managers accountable for budgets	Culture of effective budget setting, monitoring and review	Budget focussed on delivering Council priorities	Value for money underpinning budget decision making
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These objectives will be delivered through:

Delivery of the **Tandridge Finance Transformation (TFT)** programme

A **Benefits Board** to oversee benefit delivery through the Future Tandridge programme

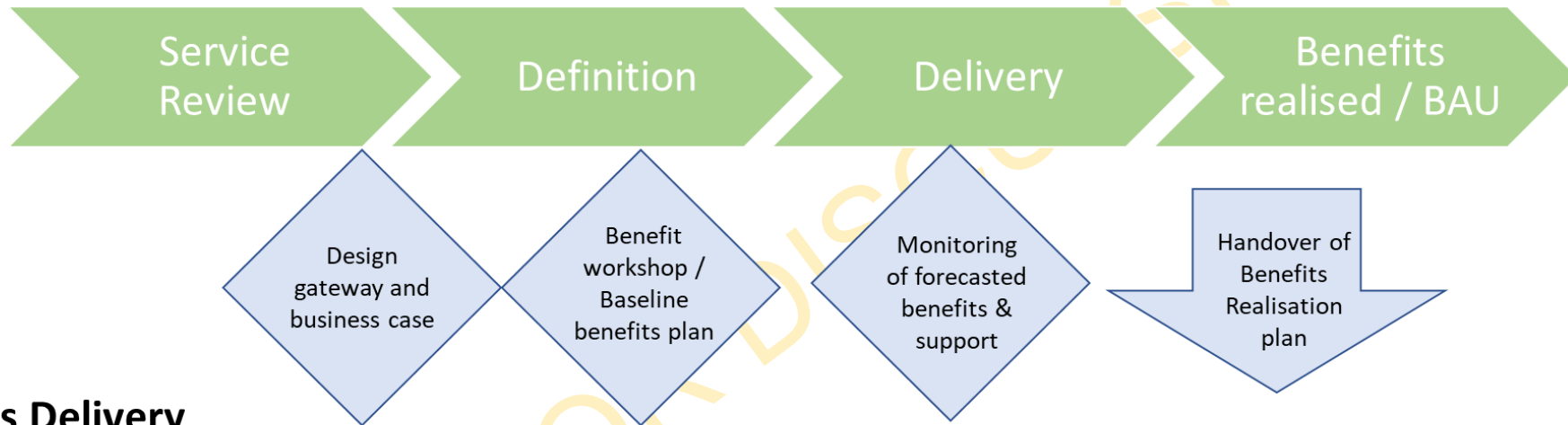
Benefits Board - Ricky Fuller

	22/23	23/24
Starting position	£11,295k	£11,351k
Service	£256k	£250k
Corporate Items	£545k	£1,030k
Funding	£367k	
Pressures	£1,167k	£1,280k
Tranche 1 - directly related to services	(£461k)	(£513k)
Tranche 2 - distributed in March	(£200k)	
Tranche 3 - distributed by Benefits Board	(£450k)	(£200k)
Savings	(£1,111k)	(£713k)
Movement	£56k	£567k
Budget	£11,351k	£11,918k
Funding	(£11,351k)	(£11,044k)
Gap¹	£0k	£874k

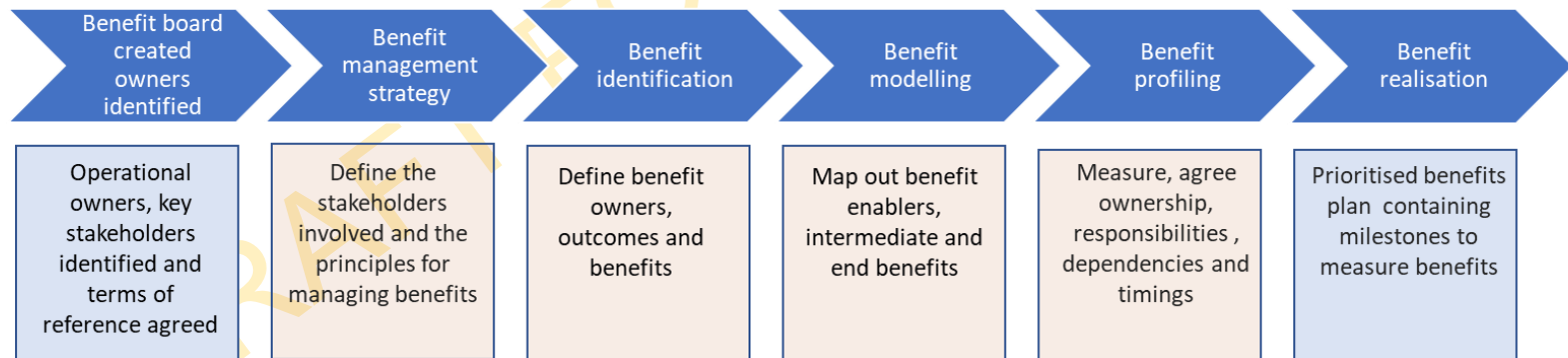
- Establish a Benefits Board to oversee the delivery of benefits (financial and other) identified through the Programme.
- Oversee delivery of savings in 2022/23.
- Work alongside Programme Delivery Board to oversee benefits identification through Service Reviews and realisation of these savings in 2023/24.

Approach to Benefit Management & Delivery – Ricky Fuller

Programme Delivery



Benefits Delivery

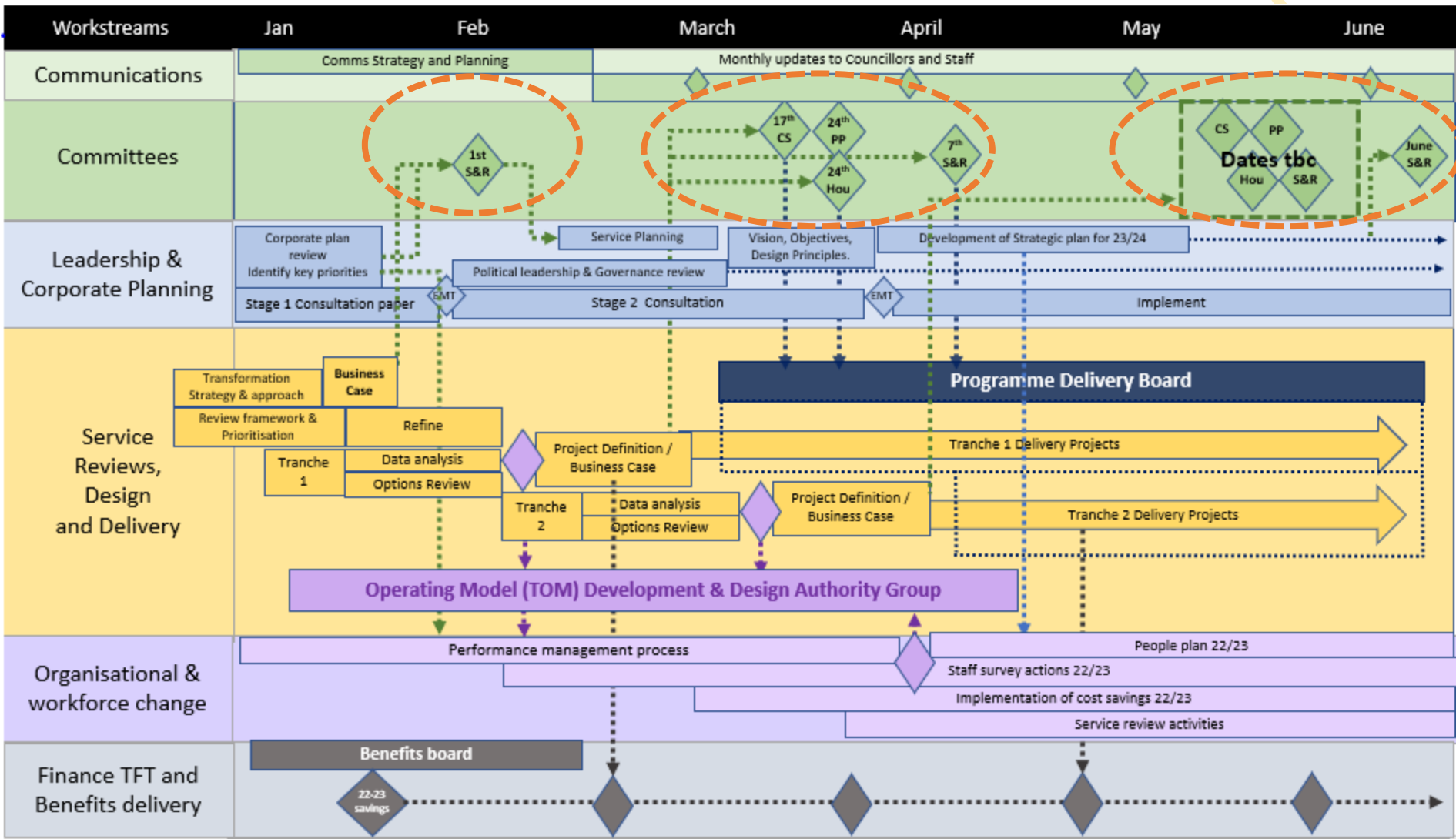


Roadmap and Resources

Ricky Fuller

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Future Tandridge programme – Phase 1 Roadmap



Resourcing – Typical roles in Programme Delivery

Type	Function	Core / Variable
Programme Management (Prog Mgr)	Overall operational oversight of the programme progress through design, options appraisal through to delivery, interface with key sponsors	Core
Programme Management Office (PMO)	Maintain overview of progress and ensure consistency in approach, documentation, reporting etc, interface with sponsors	Core
Business Analyst (BA)	Detailed data, performance and benchmarks especially during design and options appraisal stages	Core
HR advisory	Expert HR advice / support on revisions to working practices, employment terms etc in support of Org Devpt workstream	Core
Change Management	Support change management through delivery, staff and stakeholder engagement	Core
Project Administration	Provide administrative support through programme / project delivery – attached to PMO or provide by service	Core
Workstream Leads	Operational oversight of workstream progress through design, options appraisal and delivery, interface with key sponsors	Core
SRO (Senior Responsible Officer)	Lead for delivery of the change project (Director / Head of Service)	Variable
Project Managers (PM)	Manage detailed development and delivery of individual projects, reporting into Service leads	Variable
Subject Matter Experts (SME)	Support with expert knowledge through design, options appraisal, potentially also delivery depending on internal resources available	Variable

Core – core requirement for the programme

Variable - dependent on Service Reviews. Roles could be combined for smaller projects.

Resourcing – Mobilisation, Design, & Business Case



Type	Core / Var	Total	Phase 1 (6 mths)	Est Cost
Prog Mgt	Core	18 mths	Buy in for up to 6 mths (SCC / External – c 0.5 FTE)	£30-£40k
PMO	Core	18 mths	Buy in for up to 6 mths (SCC / External – c 0.5 FTE)	£25-£35k
Project Administration	Core	18 mths	Provided in house. Estimate 1 x FTE additional	
Business Analyst	Core	6 mths	Buy in (External)	£25-£30k
HR advisory	Core	18 mths	HR advisory tbd	£25k
Change Management	Var	12 mths		
Project Manager(s)	Var	12-18 mths	Review internal capacity and capability. Identify during service reviews. Estimate 1 x FTE for 3 mths (from Apr 22)	£15-£20k
Subject Matter Experts (SME)	Var	12-18 mths	Strategic advisory & expertise on TOM / Service Reviews. Buy in (External)	£40-£50k
Total			Indicative range	£160k - £200k

This is the initial investment required to mobilise the programme and undertake the Service Reviews

Immediate Next Steps – David Ford

1. Take feedback from Members on the approach
2. Strategy & Resources Committee – 1st Feb
 - Set out the aims and objectives of the Future Tandridge programme
 - Seek approval to the resources necessary to mobilise the programme for the period to end June 2022
3. (Subject to above approval), mobilise the programme in line with the roadmap plan

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Appendices

- 1. Member Feedback**
- 2. Delivery Resource summary**
- 3. Delivery Governance Board & Risk management**
- 4. Service Review Process**

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Appendix 1

Feedback from member sessions held during w/c 17th January

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Member Feedback

- Resourcing
 - BAU resourcing capacity has been raised as a concern and the need for planning to take peoples 'day jobs' into consideration
 - Retaining good people is key to a successful transformation programme
- Risk Management
 - How risks will be managed during the programme has been questioned.
 - Best practice risk management will be part of the delivery phase and risks will be regularly monitored and reported on to Committees and members
- Member Oversight
 - Members have invaluable knowledge and insight which should be used by the programme.
 - Further exploration needed on how to work with members during the programme
- Change Delivery
 - Previous attempts at delivering change have not delivered desired results – how will this programme be different?
 - All of the above elements are being addressed as part of the approach to the programme to ensure that best practice is followed and there is transparency and engagement with members and staff
- TOM
 - Definition and design of the future operating model is key to the success of the programme
- Critical success factors
 - There is a need to define some overall design metrics for the programme
- Pace
 - The existing Committee cycle sets the pace of the programme which may cause delays, unless an alternative method of governance and oversight can be implemented for the programme

Appendix 2

Resourcing – Delivery Resource Summary

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Resourcing – Project Definition and Delivery

Type	Core / Var	Total
Prog Mgt	Core	18 mths
PMO	Core	18 mths
Project Administration	Core	18 mths
Business Analyst	Core	6 mths
HR advisory	Core	18 mths
Change Management	Var	12 mths
Project Manager(s)	Var	12-18 mths
Subject Matter Experts (SME)	Var	12-18 mths
Total		

This is an estimate of the potential level of investment required to oversee delivery of the changes identified in the Service Reviews.

The expected benefits, level of investment and the return on that investment will be identified in the business case

Phase 2 (12 mths)	Est Cost
Recruit during Phase 1 to oversee Delivery. Cost included in base budget.	Incl
Continue to buy in OR recruit during Phase 1. Additional cost.	£50-£70k
Provided in house. Estimate 1 x FTE additional	
Decision whether ongoing requirement during Delivery	tbd
HR advisory and Change Management	£50k
Change Management through Delivery	£50k
Review internal capacity and capability. Identify during service reviews. Estimate 1 x FTE minimum	£60-£80k
Potential to support during Delivery, dependent on Service Reviews	tbd
Indicative range	£210k - £250k

Core – core requirement for the programme

Variable - dependent on Service Reviews. Roles could be combined for smaller projects.

Resourcing – Indicative total investment

Type	Core / Var	Total	Phase 1 (6 mths)	Est Cost	Phase 2 (12 mths)	Est Cost
Prog Mgt	Core	18 mths	Buy in for up to 6 mths (SCC / External – c 0.5 FTE)	£30-£40k	Recruit during Phase 1 to oversee Delivery. Cost included in base budget.	Incl
PMO	Core	18 mths	Buy in for up to 6 mths (SCC / External – c 0.5 FTE)	£25-£35k	Continue to buy in OR recruit during Phase 1. Additional cost.	£50-£70k
Project Administration	Core	18 mths	Provided in house. Estimate 1 x FTE additional		Provided in house. Estimate 1 x FTE additional	
Business Analyst	Core	6 mths	Buy in (External)	£25-£30k	Decision whether ongoing requirement during Delivery	tbd
HR advisory	Core	18 mths	HR advisory tbd	£25k	HR advisory and Change Management	£50k
Change Management	Var	12 mths			Change Management through Delivery	£50k
Project Manager(s)	Var	12-18 mths	Review internal capacity and capability. Identify during service reviews. Estimate 1 x FTE for 3 mths (from Apr 22)	£15-£20k	Review internal capacity and capability. Identify during service reviews. Estimate 1 x FTE minimum	£60-£80k
Subject Matter Experts (SME)	Var	12-18 mths	Strategic advisory & expertise on TOM / Service Reviews. Buy in (External)	£40-£50k	Potential to support during Delivery, dependent on Service Reviews	tbd
Total			Indicative range	£160k - £200k	Indicative range	£210k - £250k

Core – core requirement for the programme

Variable - dependent on Service Reviews. Roles could be combined for smaller projects.

Appendix 3

Delivery Governance Programme Board – Terms of Reference Risk Management approach

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Programme Delivery Board

The programme delivery board will be initiated after the Business Case has been approved

1. Oversees project and programme delivery following approval of the business case
2. Oversees key risks and issues and takes corrective action where needed
3. Point of escalation and decision making group
4. Identification and monitoring of dependencies across the programme

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Risk Management

Key Risk (R) / Issue (I)	Own	Imp.	Prob.	Rating	Mitigation Measures	Post Mit. Rating
I Impact of finance staff leaving the Council may cause: <ul style="list-style-type: none"> a loss of knowledge existing resources to be overstretched and put key activities at risk a need to prioritise BAU at the expense of improvement activity a draw on SCC resources (which may not be funded by TDC) 	MHS	4	5	20	<ul style="list-style-type: none"> Replanning and reprioritisation of BAU / improvement tasks. Review of existing finance budget to determine available 'headroom' to fund interim support from SCC or externally Identification of available SCC resources to support the transition (through secondment agreements) Delay ambition for significant improvements until transition is complete 	12
R Recruitment to fill vacant roles: There is a risk that there will be significant lag before we are able to fill the vacant roles within the finance team.	AD / RF	4	5	20	<ul style="list-style-type: none"> s151 role now filled Two roles to fill: New Exchequer Manager and Corporate Business partner role Interim support being provided from SCC (Verity & Glenn) 	12
I New requirements emerging from ongoing discovery work , combined with a movement in priorities and a blurring of distinction between BAU and programme activities. Taken together, this is impacting on the programme delivery plan resources and timescales.	AD / RF	4	4	16	<ul style="list-style-type: none"> Baseline scope Establish and embed new governance to allow for consistent capture, review and prioritisation of all change requests. Manage key stakeholder expectations. 	9
R There is a risk that the budget gap will not be closed without having to make a significant call on reserves or taking emergency measures to balance the budget.	AD / RF	5	4	20	<ul style="list-style-type: none"> Continuing to focus on all areas in the Budget dashboard that will impact on the size of the gap Identify further savings opportunities Set up benefits board to drive savings forward 	9
I Lack of engagement from key stakeholders which impacts on our ability to co-produce organisational improvements and to move forward at pace with some improvement activities. Some feedback from TDC colleagues indicates that there is an 'us and them' undercurrent which needs to be tackled in order for change to embed.	RF / CE	3	4	12	<ul style="list-style-type: none"> Acknowledge risk and re-plan to focus on the importance of organisational engagement at the expense of pace. Ensure sequencing fits with other priorities of the overall programme and the wider CX led change programme. Strengthen communications and engagement with key stakeholders. Reinforce the message that this needs TDC ownership. 	6

Above is the Risk register that is currently being used on the Tandridge Finance Transformation. The same approach to management of risks would be taken on the Future Tandridge programme.

During the delivery phase, Risks will be identified, mitigated and scored and are managed and monitored throughout the programme delivery process.

Appendix 4

Service Review Process

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Service Review Approach

- ✓ Fundamental review of services over a 4 year period with focus on outcomes – Critical Success Factors and Corporate Priorities
- ✓ Service Review Methodology as guidance and to ensure consistency and outcomes achieved
- ✓ Prioritisation and Sequencing of Service Reviews – criteria to be agreed and tranches
- ✓ Typical team to undertake reviews – **Service led and owned:**
 - Director as oversight
 - Head of Service as Lead
 - Other dependent service reps
 - Key managers/staff within as appropriate
 - Cross-cutting services: Customer Services and Digital/IT
 - Enabling services: Finance, HR, Legal and Procurement
 - *[Ricky Fuller/Peopletoo rep to be decided – to ensure consistency and coverage]*
- ✓ Ensure strong links to other workstreams within TOM Development Group
- ✓ Governance through TOM Development Group, Member Oversight Board and Benefits Board
- ✓ Agree output format with delivery implementation plans and measurable and profiled financial, performance and social outcomes – forms the basis of the implementation phase and handover to Benefits Board for benefits realisation.

Overview of Service Review approach

The Council needs to fundamentally change the way in which it works. It needs to become a smaller more strategic, agile and responsive organisation with resources targeted at the Council priorities, with a more business-like approach to the way the Council operates.

The Service Review and redesign process will facilitate this change through a prioritised, consistent and rigorous review of all services which fundamentally challenges how and why we provide services including the demand for these services, the most appropriate delivery model, performance, cost and value for money. This will incorporate a review of cross-cutting themes including Commercialisation, Asset Strategy, Customer Services and Digital.

Key Objectives:

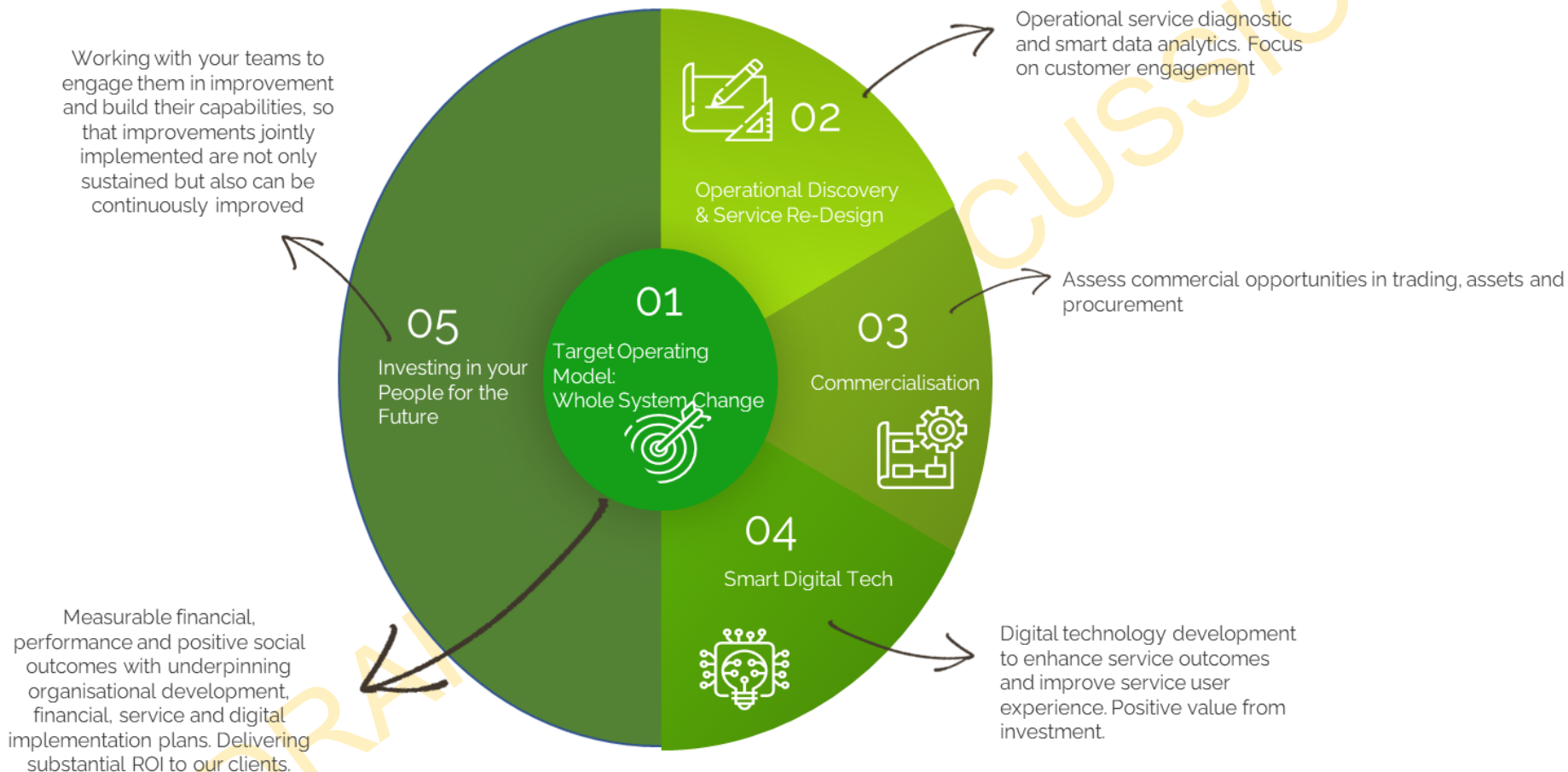
- Meet customer needs
- Support Future Tandridge Critical Success Factors / Outcomes
- Align with (interim) corporate plan
- Utilise technology to deliver improved customer experience and employee experience
- Eliminate processes that are no longer required
- Simplify by removing duplication and re-keying
- Automate where it will deliver the most value
- Support by clearly defined and measurable performance standards
- Align with the Future Tandridge Programme (FTP) design principles
- Optimise the delivery of services using the most appropriate model
- Develop the Council's own in-house capability to sustain performance following the end of the programme

Service Design Principles

Services are designed to meet customer needs, evidence-based and with clearly defined and measurable performance standards:

- a. Customers and staff involved in design / redesign of services
- b. Principle of channel shift (digital by default) to make it as easy as possible for customers to access council information and services 24/7
- c. Customer and data insight used to inform and drive service improvements
- d. Build on the investment in technology by integration of systems and automation of processes
- e. Being commercial in how the service operates, use of assets and trading or charging for services where applicable
- f. Environment of innovation and learning from across the sector and internal
- g. Enhance or remove internal processes
- h. Develop whole system target operating model through detailed assessment and define financial, service performance and social outcomes
- i. Develop the capability of staff and focus on retention
- j. Develop robust performance management using relevant measures (through technology where possible) and embed into the service
- k. Projects are commissioned with clear objectives and consideration of resourcing implications.

Delivering Exceptional Results in Transformation



** This is generic and can be tailored by services depending on nature and scale of service.*

Target Operating Model



Working with your team to assess the current operating model and identify opportunities to redesign the model based on best practice and to meet your future outcomes.

Delivering greater measurable outcomes - financial, performance and service user experience, climate change and positive social outcomes. This approach ensures benefits are realised as it drives implementation following the diagnostic.

All aspects are considered including service user needs, people, systems and processes, operations, cost and demand, commercialisation and digital and external factors including partners and government policy with underpinning organisational development, financial, service and digital implementation plans.

Critical to success and sustainability is the investment in and development of people and active engagement across all phases of the change process from diagnostic to implementation.

Operations and Analytics



Operational service diagnostic using smart data analytics and bringing innovation and best practice from across the sector. Identify opportunities for improvement and delivering better outcomes underpinned by robust implementation plans.

Engagement of your people to ensure outputs are deliverable and meet your requirements.

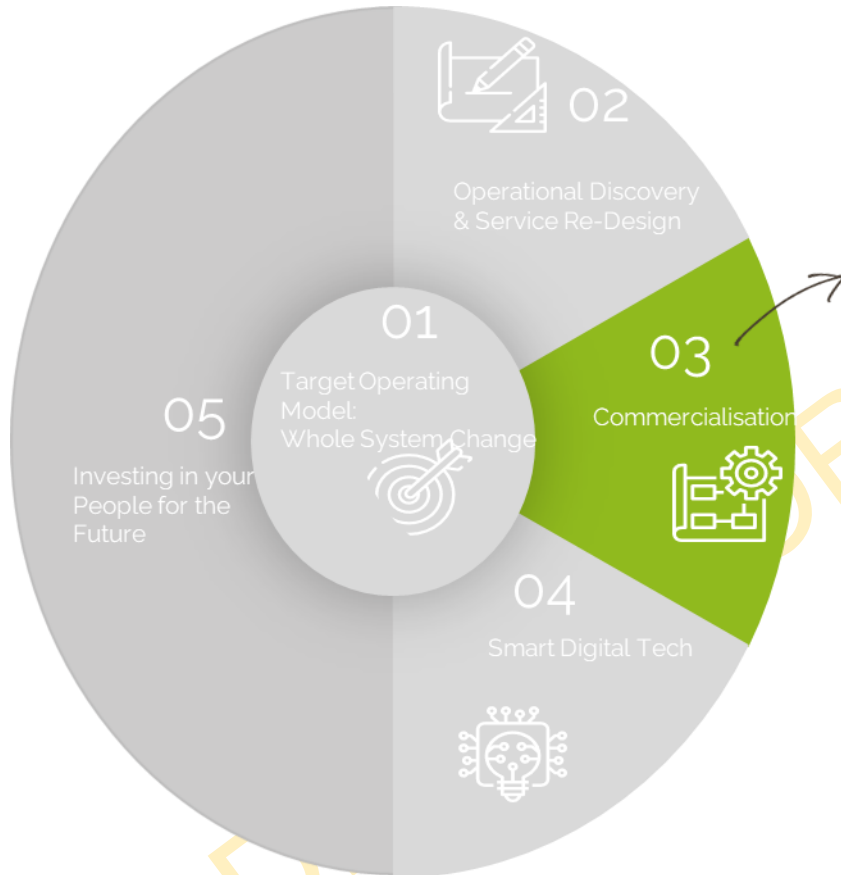
Focus on customer demand and requirements and how these can best be met.

Increased measurable and deliverable outcomes are identified across financial, performance, climate change and social outcomes in particular from cost and demand management and operational redesign. Outcomes are profiled and evidenced in detail and underpinned by implementation plans that your people sign off and hence have ownership of.

The core of the operational diagnostic is delivered through:

- ✓ Assessment of strategy, operations, cost/demand/income analysis, people, external factors, digital, systems and processes
- ✓ Focus on service user experience including engagement and digital design UX considerations
- ✓ Intelligent Data Analytics creates Insight
- ✓ Asset implications assessed – realising value from assets and reducing recurring revenue costs including FM and Energy.

Commercialisation



Assess commercial opportunities in procurement, trading/JVs and assets both from an income and cost perspective. Work with your people to create and implement delivery plans aligned with target outcomes.

Maximise opportunities to drive income and/or reduce cost and create a commercial culture across the organisation. Commercialisation also focuses on wider opportunities to create further positive social impact and support climate change initiatives.

Bringing best practice from across the public and private sector:

- ✓ Commercial value from 3rd Party Spend – services expertise and commercial analysis of third party costs and options on alternative service delivery models. Assessment of Procurement and Contract management to sustain value.
- ✓ Strategic Commercial Opportunities developed and implemented
- ✓ Operational Trading opportunities considered
- ✓ Realising value of commercial assets
- ✓ Being commercial in how services are managed and operated linked to Operational Diagnostic approach.

Digital



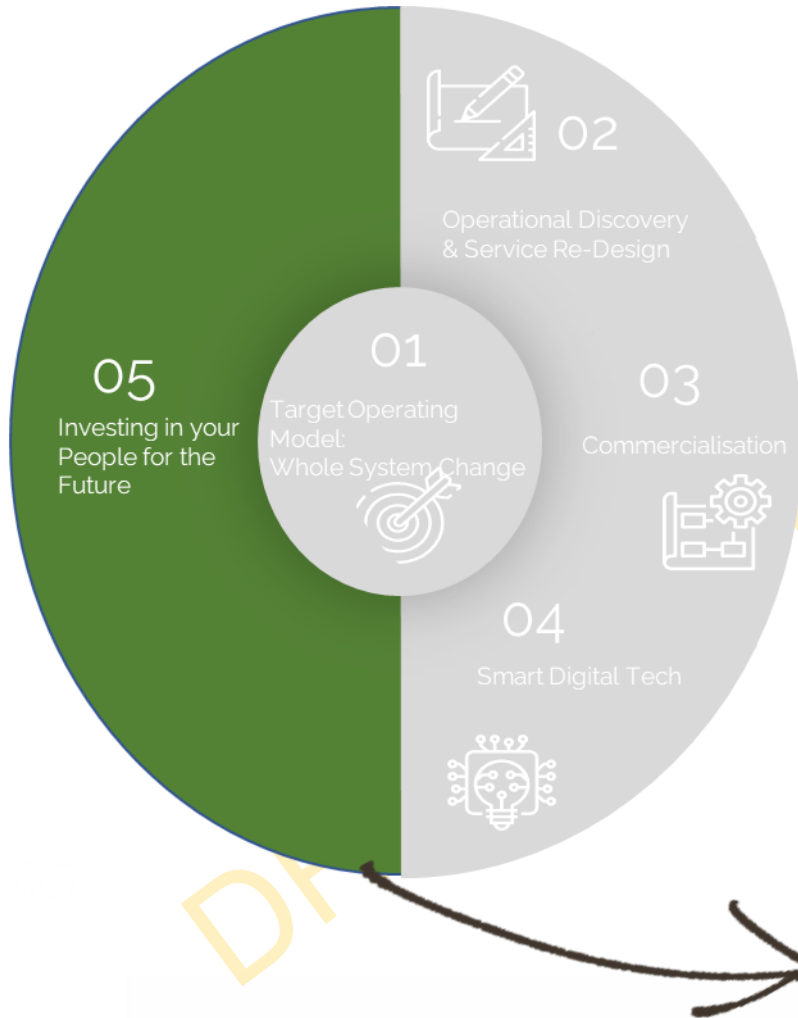
Digital transformation at a corporate and service level including digital design UX to enhance outcomes and improve the service user experience. Digital as enabler for the organisation and ensures a robust ROI on investment.

Delivers substantial ROI on investment through enabling change at a corporate and service level to deliver efficiencies and support social and climate change outcomes.

Digital transformation incorporates:

- ✓ Best practice and innovation from the public and private sector
- ✓ Digital Maturity Assessment
- ✓ Corporate digital transformation assessment, strategy and delivery plan
- ✓ Service level digital transformation assessment and roadmap linked to the target operating model
- ✓ User needs and customer journey discovery mapping and insight
- ✓ Digital supporting efficiency in operations and systems
- ✓ Digital UX building on service user and journey insight. Design and Prototyping and Implementation of digital solutions
- ✓ Creating and turning data into insight to support transformation.

Investing in your People



Working with your teams to engage them in improvement and build their capabilities, so that improvements jointly implemented are not only sustained... but can also be continuously improved by your people.

Outcomes include embedded expertise and developing capability of your people who will feel more motivated from delivering positive change and achieving substantial outcomes. Creating a positive culture and ensuring sustainability.

Delivering change with your people:

- ✓ Organisational change readiness assessment
- ✓ Organisational development and culture change plan
- ✓ Focus on coaching and mentoring of management team
- ✓ Engagement and motivation of staff. Support professional development
- ✓ Measuring change in your people – building a positive future.

Key Questions – Heads of Service

Operational Considerations	Commercial Considerations	Digital/IT systems Considerations	TOM Considerations
<ul style="list-style-type: none">• Detailed budget information• Staff Establishment• What services are provided?• Statutory/Non-Statutory?• Who are the customers – interdependencies?• Current customer experience• Review key processes and focus on largest by volume or cost• Data – task lists, benchmarking, KPIs, Annual Plan, surveys, complaints	<ul style="list-style-type: none">• List any contracts with end and cancellation dates• Different delivery models – in-house, shared services, outsource, arms length company, Parish Councils• Assets – what do we own, value, sale or rent?	<ul style="list-style-type: none">• Cost of systems• Systems used - fit for purpose?• Integration with other systems• Move to Salesforce	<ul style="list-style-type: none">• What will we need to consider in making changes and improving – staff, members, budget, data, performance management, IT?• Invest to save opportunities to be identified• Impact of different service specifications

Governance and Quality Assurance to be developed

Diagnostic Phase



Setting up for success

- Kick off meeting and mobilisation
- Confirm scope and outcomes
- People Engagement
- Stakeholder engagement
- Communication planning



Analysis and contextualising

- Initial assessment current position
- Identification of key opportunities and areas for more in-depth analysis



Solution Development

- Development of draft solutions and indicative outcomes with your people
- Finalise solutions and outcomes with sign off.
- Implementation plans signed off

Implementation Phase



Mobilisation

- Implementation mobilisation
- Co-produced transformation programme
- Outcomes agreed
- People Engagement
- Stakeholder engagement
- Communication planning



Implementation

- Transformation programme reviewed monthly
- Outcomes achieved and signed off
- People programme on track
- Innovation on-going



Sustain and Improve

- Sustainability criteria incl people achieved
- Continuous improvement plans and outcomes set
- Transfer to business as usual
- Lessons learnt review

Robust Governance, Quality Assurance, Milestone Reviews, Deliverables and Outcomes Signed Off →

* Summary template that needs to be developed in line with wider governance