Future Tandridge Programme

Councillor Briefing

19th January 2022
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 Tandridge 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 Tandridge Programme

• To set out the proposed approach and governance arrangements for the Future Tandridge Programme

• To provide all Councillors with an opportunity to ask questions regarding the Programme
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 Council's 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

- TDC Members
  - Committee Oversight
  - Councillor Oversight
    - SRO: David Ford
  - Strategy & Resources Committee

- Programme Delivery
  - Individual Projects / Change Delivery
  - Programme Delivery Board
    - Programme Management
  - Benefits Board
    - TOM Development Group

- Workstream Delivery
  - Leadership
    - Sponsor: David Ford
    - Lead: Alison Boote
  - Service Reviews
    - Sponsor: David Ford
    - Lead: Review Steering Group
  - Organisational & Workforce Change
    - Sponsor: David Ford
    - Lead: Katy Meakin
  - Finance and Benefit Delivery
    - Sponsor: Anna D’Alessandro
    - Lead: Ricky Fuller

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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
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
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.
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.
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.
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.
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
- 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
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

<table>
<thead>
<tr>
<th>Budget proposals 2022/2023</th>
<th>Staff Survey actions 2022</th>
<th>Service Review workstream</th>
<th>People Plan 2022/2023</th>
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<td>People &amp; Behaviour Change Plan</td>
<td>Recruitment and retention</td>
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<td>Recruitment savings</td>
<td>Senior Management restructure</td>
<td>HR Policy adjustments</td>
<td>Skills training</td>
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<td>Review staff increments, T&amp;C’s, reward</td>
<td>Service Plans (linked to appraisals)</td>
<td>Recruitment process</td>
<td>Career development</td>
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<td>Review staff expenses &amp; training budgets</td>
<td>Appraisals (linked to service redesign)</td>
<td>Consultation &amp; change management</td>
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<td></td>
<td></td>
<td>Managing poor performance</td>
<td>Data led HR</td>
</tr>
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</table>
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

<table>
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<tr>
<th></th>
<th>22/23</th>
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<td><strong>Starting position</strong></td>
<td>£11,295k</td>
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<td>£256k</td>
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<td>Corporate Items</td>
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<td>Funding</td>
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<td>Pressures</td>
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<tr>
<td><strong>Tranche 1</strong> - directly related to services</td>
<td>(£461k)</td>
<td>(£513k)</td>
</tr>
<tr>
<td><strong>Tranche 2</strong> - distributed in March</td>
<td>(£200k)</td>
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</tr>
<tr>
<td><strong>Tranche 3</strong> - distributed by Benefits Board</td>
<td>(£450k)</td>
<td>(£200k)</td>
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<td>Savings</td>
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<td>(£713k)</td>
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<tr>
<td><strong>Funding</strong></td>
<td>(£11,351k)</td>
<td>(£11,044k)</td>
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<tr>
<td><strong>Gap</strong></td>
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<td>£874k</td>
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- 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

1. Service Review
   - Design gateway and business case
2. Definition
   - Benefit workshop / Baseline benefits plan
3. Delivery
   - Monitoring of forecasted benefits & support

Benefits realised / BAU
   - Handover of Benefits Realisation plan

Benefits Delivery

1. Benefit board created, owners identified
2. Benefit management strategy
3. Benefit identification
4. Benefit modelling
5. Benefit profiling
6. Benefit realisation

- Operational owners, key stakeholders identified and terms of reference agreed
- Define the stakeholders involved and the principles for managing benefits
- Define benefit owners, outcomes and benefits
- Map out benefit enablers, intermediate and end benefits
- Measure, agree ownership, responsibilities, dependencies and timings
- Prioritised benefits plan containing milestones to measure benefits

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Roadmap and Resources
Ricky Fuller
Future Tandridge programme – Phase 1 Roadmap

### Workstreams

#### Communications
- Jan: Comms Strategy and Planning
- Feb: Comms Strategy and Planning
- March: Monthly updates to Councillors and Staff
- April: Monthly updates to Councillors and Staff
- May: Dates tbc
- June: Dates tbc

#### Committees
- 1st S&R
- 24th PP
- 24th Hou
- 7th S&R
- CS
- PP
- Hou
- S&R

#### Leadership & Corporate Planning
- Corporate plan review
- Identify key priorities
- Stage 1 Consultation paper
- Service Planning
- Political leadership & Governance review
- Vision, Objectives, Design Principles
- Development of Strategic plan for 23/24
- Implement

#### Service Reviews, Design and Delivery
- Transformation Strategy & approach
- Review framework & Prioritisation
- Business Case
- Refine
- Data analysis
- Options Review
- Tranche 1
- Project Definition / Business Case
- Operating Model (TOM) Development & Design Authority Group
- Tranche 2
- Performance management process
- People plan 22/23
- Staff survey actions 22/23
- Implementation of cost savings 22/23
- Service review activities

#### Organisational & workforce change

#### Finance TFT and Benefits delivery
- Benefits board
- 22-23 savings

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## Resourcing – Typical roles in Programme Delivery

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

**Core** – core requirement for the programme  
**Variable** - dependent on Service Reviews. Roles could be combined for smaller projects.
### Resourcing – Mobilisation, Design, & Business Case

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

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

Feedback from member sessions held during w/c 17th January
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
Resourcing – Project Definition and Delivery

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.

<table>
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<td>Business Analyst</td>
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<tr>
<td>Total</td>
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<table>
<thead>
<tr>
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<td>Recruit during Phase 1 to oversee Delivery. Cost included in base budget.</td>
<td>Incl</td>
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<tr>
<td>Continue to buy in OR recruit during Phase 1. Additional cost.</td>
<td>£50-£70k</td>
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<td>Provided in house. Estimate 1 x FTE additional</td>
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<td>Decision whether ongoing requirement during Delivery</td>
<td>tbd</td>
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<tr>
<td>HR advisory and Change Management</td>
<td>£50k</td>
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<td>Change Management through Delivery</td>
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<tr>
<td>Review internal capacity and capability. Identify during service reviews. Estimate 1 x FTE minimum</td>
<td>£60-£80k</td>
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<tr>
<td>Potential to support during Delivery, dependent on Service Reviews</td>
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<tr>
<td>Indicative range</td>
<td>£210k - £250k</td>
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Core – core requirement for the programme
Variable - dependent on Service Reviews. Roles could be combined for smaller projects.
## Resourcing – Indicative total investment

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<th>Type</th>
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<th>Est Cost</th>
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<tr>
<td>Prog Mgt</td>
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<td>Business Analyst</td>
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<td>HR advisory</td>
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<td>HR advisory and Change Management</td>
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<td>£160k-£200k</td>
<td>Indicative range</td>
<td>£210k-£250k</td>
</tr>
</tbody>
</table>

**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
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
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
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

01 Target Operating Model: Whole System Change
02 Operational Discovery & Service Re-Design
03 Commercialisation
04 Smart Digital Tech
05 Investing in your People for the Future

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

Operational service diagnostic and smart data analytics. Focus on customer engagement.

Assess commercial opportunities in trading, assets and procurement.

Digital technology development to enhance service outcomes and improve service user experience. Positive value from investment.

Measurable financial, performance and positive social outcomes with underpinning organisational development, financial, service and digital implementation plans. Delivering substantial ROI to our clients.

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

Aspirational for our people, our place and ourselves
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.
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 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

<table>
<thead>
<tr>
<th>Operational Considerations</th>
<th>Commercial Considerations</th>
<th>Digital/IT systems Considerations</th>
<th>TOM Considerations</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Detailed budget information</td>
<td>• List any contracts with end and cancellation dates</td>
<td>• Cost of systems</td>
<td>• What will we need to consider in making changes and improving – staff, members, budget, data, performance management, IT?</td>
</tr>
<tr>
<td>• Staff Establishment</td>
<td>• Different delivery models – in-house, shared services, outsource, arms length company, Parish Councils</td>
<td>• Systems used - fit for purpose?</td>
<td>• Invest to save opportunities to be identified</td>
</tr>
<tr>
<td>• What services are provided?</td>
<td>• Assets – what do we own, value, sale or rent?</td>
<td>• Integration with other systems</td>
<td>• Impact of different service specifications</td>
</tr>
<tr>
<td>• Statutory/Non-Statutory?</td>
<td>• Review key processes and focus on largest by volume or cost</td>
<td>• Move to Salesforce</td>
<td></td>
</tr>
<tr>
<td>• Who are the customers – interdependencies?</td>
<td>• Data – task lists, benchmarking, KPIs, Annual Plan, surveys, complaints</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Current customer experience</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Review key processes and focus on largest by volume or cost</td>
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</tbody>
</table>
Governance and Quality Assurance to be developed

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