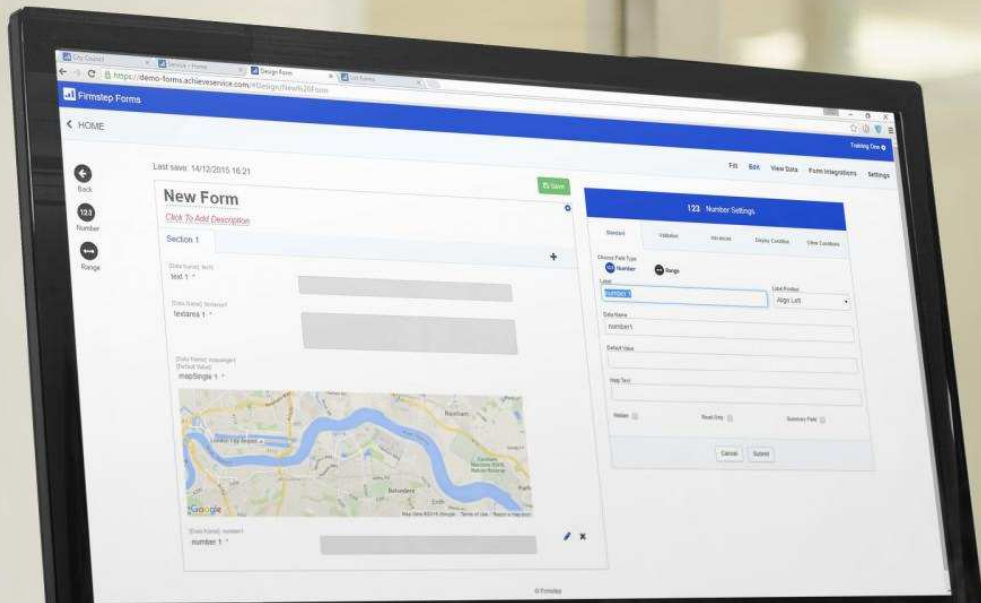




Somerset West  
and Taunton

Taunton Deane and West Somerset Councils  
working together



# Transformation Programme Highlight Report

14<sup>th</sup> January 2019



# Executive Summary

## Programme Status Report

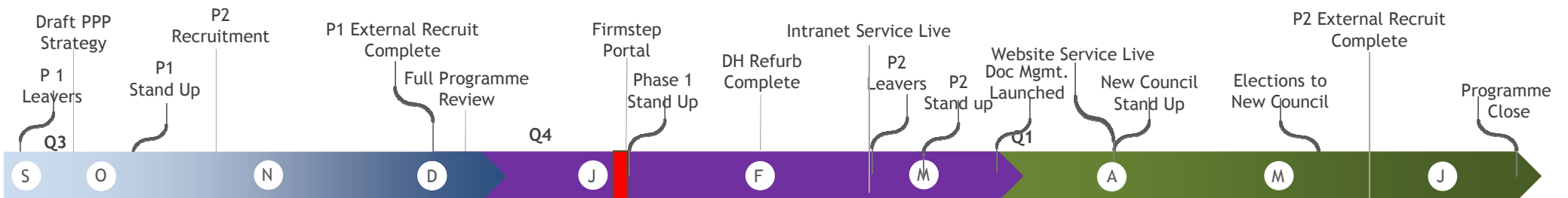
Programme Name	One Council Transformation
Senior Responsible Owner	James Barrgh
Programme Manager	Christopher Gage
Target Programme Completion	30/06/2019

Programme Cost	
Baseline Cost (NEW) Transformation (Accom) £9.5m	(£7.5m)
Forecast Cost Transformation (Accom) £9.5m	(£7.5m)
% Spent To Date 49%	(76%)
Transformation ROI (NEW) 2.7 Years	

Programme Status		
	Current Report	Previous Report
Benefit Delivery		
Saving >£3m/yr.	On Target	On Target
ROI <3 years	On Target	On Target
HL Business Case	On Target	On Target
Programme Delivery		
Resource	At Risk	At Risk
Time	On Target	Overspent
Cost	On Target	On Target
Quality	On Target	On Target

Open Risks	
1 High	9 Med
10 Low	75 Complete
Overall Progress	
62%	
Process Redesign	58%
People & Change	70%
Accommodation	80%
New Council	50%
Technology	50%

### Milestones





# Programme Commentary

Programme Manager	Commentary
	<p>Key progress milestone from the workstreams in December:</p> <p><b>Accommodation</b></p> <ul style="list-style-type: none"><li>• Police are now in occupation of the building and are present in the main reception area</li><li>• Project on budget and schedule for completion February 15<sup>th</sup>.</li><li>• Next Steps - Project close out &amp; building opening ceremony (JMR ready for member meeting on project closure, AV equipment fully installed 6<sup>th</sup> May)</li><li>• Ongoing - Marketing of the vacant space and agree commercial terms with potential occupiers. Finalising terms with potential Tennent</li></ul> <p><b>Process Redesign &amp; Technology</b></p> <ul style="list-style-type: none"><li>• Process Redesign and Technology workstreams have completed on schedule 140+ processes and connected the technology to make these work in the live environment. The 240+ processes have been broken down into 3 release phases from the 1<sup>st</sup> April and will be going live throughout April. The 1<sup>st</sup> Phase of released processes delivers the bulk of the benefits from the technology &amp; process redesign workstream to allow the new organisation to work effectively. The latter 2 &amp; 3 phases are released with 4-6 week lead times to ensure each phase can be embedded in the organisation effectively and is stable.</li><li>• Next Steps - Redesign remaining 104 processes (scheduled completion 25<sup>th</sup> January). The remaining processes to be redesigned are static/generic processes which have been grouped into 6-8 firm step processes. Although high volume in terms of remainder to the total it accounts for significantly reduced work for the team as they do not required detailed firm step process design or technology integration work which provides confidence delivery will be met for target date.</li><li>• 7 Processes in User Acceptance Testing</li></ul> <p><b>People and Change</b></p> <ul style="list-style-type: none"><li>• External recruitment for specialist posts commenced in December (20 specialist post to fill)</li><li>• Case Manager &amp; Customer Leads were recruited (fully resourced in organisation)</li><li>• Next Steps - 7<sup>th</sup> January recruiting Case Managers and Customer Service Champions (108 interviews to be completed by the end of January)</li></ul> <p><b>Programme Finances</b></p> <ul style="list-style-type: none"><li>• Following the November report the programme budget has increased to £9.5m. The forecast is in line to deliver to the re-baselined budget and the ROI for the programme remains at 2.7 years maintaining a robust business case.</li></ul>



# Business As Usual Commentary

Director of Operations	Commentary
	<p>My commentary in November focussed on the work that was underway to support areas in our organisation where staff were choosing to leave or were leaving to take up new roles.</p> <p>As we enter deeper into the transition phase (the bit between old ways of doing things and having the new structure in place) I need to remind Councillors again, that there will be an impact on service delivery during the coming months. Capacity will be stretched and we will be re-phasing work, stopping non-essential activity to ensure we focus on priority work. We expect there to be a temporary dip in performance.</p> <p>Since the last update, the priority tasks have been:-</p> <ul style="list-style-type: none"> <li>• <b>Phase 2 Recruitment.</b> The recruitment to the second section of phase 2 (Case Management Leads &amp; Customer Service Leads) has now largely completed, with 17 staff securing roles in this area. We now need to plan the handover of their existing work as they move to take on their new responsibilities in the new year. The third section of phase 2 (Case Managers and Customer Champions) involves 177 staff going through recruitment. The impact on the organisation during this will be significant.</li> <li>• <b>Member Case Management</b> - Members are reminded that Dianne Blackmore is their key contact and can help navigate the organisation to ensure queries are resolved.</li> <li>• <b>Extensions &amp; Risk Areas.</b> There are some services that need additional capacity - on a temporary basis - beyond the end of February (e.g. there will still be 2 sets of Statements of Accounts to produce and support through external audit). We have put arrangements in place to ensure these areas have sufficient capacity (on a temporary basis) to fulfil their essential tasks.</li> </ul> <p>We continue to monitor high priority areas on a regular basis (collection of income, planning performance, support to vulnerable) and are managing any key vacancies by using agency resource. This continues to be a challenge in some areas as there is a national difficulty in sourcing some key specialist skill areas (e.g. Planning / Housing Options).</p> <p>Staff are working extremely hard to keep services operating, in challenging circumstances. I am sure Councillors recognise this and continue to offer their support as we move into the largest phase of change in our programme.</p>



## Programme Finances (£'000's)

The table below shows the revised budgets and current forecast spend for the transformation programme following the increases to budget being approved at both WSC and TDBC Full Council's in December.

Financials (£'000's)				
Work Stream	Re-baselined Budget	Actual to date	Forecast Total Spend	Variance to Revised Budget
Programme Management	1,185	966	1,185	0
People and Change	716	527	716	0
Customer Focus and Process Redesign	569	239	569	0
Technology	1,397	627	1,397	0
Redundancy	4,482	1,271	4,482	0
Redundancy - DLO workforce	798	44	798	0
<b>Transformation Sub-Total</b>	<b>9,147</b>	<b>3,674</b>	<b>9,147</b>	<b>0</b>
New Council	381	209	381	0
<b>Total (inc. New Council)</b>	<b>9,528</b>	<b>3,808</b>	<b>9,528</b>	<b>0</b>
<b>Accommodation</b>	<b>7,517</b>	<b>6,227</b>	<b>7,517</b>	<b>0</b>

## Programme - Top Risks

The below table shows the top RED (R) and Amber (A) risks extracted from the programme risk register. All risk are assigned an owner and actionee who will ensure the risk have an appropriate mitigation plan.

Title	Description	RAG	Path to Green/Closure	Strat/ Prog
Programme Resources Migrating into New World	More Staff are taking VR and we have more vacancies for case manager/customer/locality roles in the new organisation than expected. There is a risk that we will not have enough staff to populate the organisation in its new form on the 1st April.	R	Forecast workload on worst case scenario and contingency plan based on resource demand to ensure we have staff ready, inducted and trained for the 1st April.	S
MyAccounts - Accessing OpenRevenue Data	There is a risk that the Civica OpenRevenues data required to populate MyAccounts for Benefits, Council Tax and NNDR may not be delivered in time to build into MyAccounts and complete full testing for go live mid-April 2019. Plans in place so far are: 1. Checking cost, scope and delivery timetable of data extract with Civica. 2. Checking overnight update timescale with Civica (reluctant to commit to a time). 3. Reviewing available update windows and order of jobs with Revs & Bens system administrator. 4. Exploring a Plan B of using APIs instead of a data extract and tactical database with Firmstep.	A	Purchase order for a data extract raised with Civica. Delivery requested by December 2018, supplier unable to commit to 1st December. Need to explore how updates will be scheduled.	S
SharePoint Platform	Escalated from Workstream RAID to Programme RAID:  Our planned approach of building an on-premise SharePoint DMS is looking incorrect - our external SharePoint consultant has advised that we would waste significant time and money building an on-premise version based on already out-of-date technology. He advised that we should adopt SharePoint online (as part of a move to Office 365). There is therefore a risk that the timing of the SharePoint DMS build will need to be moved to later in 2019.	A	The DMS plan incorporates a 'Transition Drive' as an interim solution prior to migrating data to SharePoint. To enable the move to Office 365 this stage will be lengthened.	P
Completion of Phase Two Recruitment is delayed	The final sub phase of the recruitment process seeks to appoint Locality Champions during February 2019. It has been agreed that the current content of the Discovery Day is not appropriate for these roles and that a more 'practical' assessment approach is required. The format of these new 'Discovery Days' is not yet developed. A team is being constructed of People Managers, a Unison Rep and Two Bald Blokes, led by Alison North to devise what the new process will involve. this is due to be worked upon during December and January. Potential applicants will then require an opportunity to have a 'practice session' to understand what the day will involve, then the actual Discovery Days are delivered (approx 120 applicants) and then the interview process can commence. It is therefore likely that the interviews will not start until mid February and potentially not complete until mid March.	A	Risk doesn't impact transformation as DLO is outside the main benefit drop dependencies. 1) Construct Team by 1 <sup>st</sup> December (completed) 2) Scope format for discovery days by 21 <sup>st</sup> December 3) Communicated process to DLO workforce 4) Schedule sequence for discovery days and interview 5) Highlight indicative completion date (est. mid March)	P

# Somerset West and Taunton

New Council  
Highlight Report

7<sup>th</sup> January 2019

### Commentary

The plan is progressing with no significant issues.

Although there has been some slippage with regard to completion of some of the Implementation Plan actions, all tasks that were time critical have been delivered as anticipated.

On 6 December branding for the new council was approved by the Shadow Executive.

Key matters progressed through Shadow Council 17 December include:

- Interim Report of the Joint Independent Remuneration Panel on preparation of a Draft Members' Allowances Scheme for Somerset West and Taunton Council
- Anti -Fraud and Corruption Policy and Strategy
- Income and Arrears Management Policy
- Fees and Charges 2019/20
- Council Tax Support Scheme for 2019/20
- Discretionary Reduction in Council Tax Liability Policy and
- Discretionary Housing Payment Policy
- Council Tax Charges - Empty Properties and Second Homes

14 Jan - New Council Member working Group considering Times and venues for SWT meetings, Financial Regulations (inc delegation levels) and Stage 2 papers on the constitution.

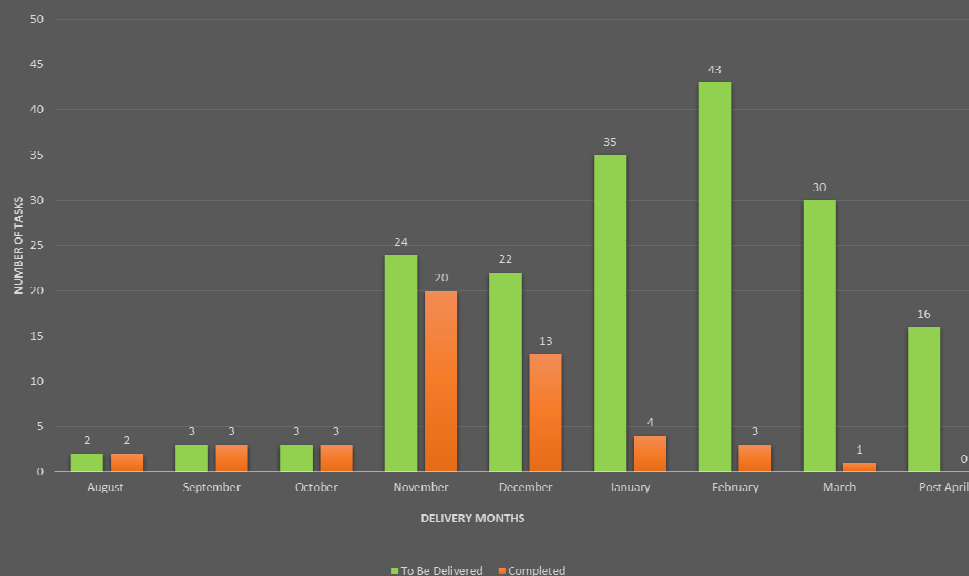
28 Jan - The Shadow Corporate Governance and Standards Committee will be reviewing Stage 2 of the draft Constitution for Somerset West and Taunton Council (drawing on the thoughts of the new council member working group).



## Implementation Plan Actions @ 17 Dec

Not Started	In Progress	Completed	Total
59	71	49	<b>179</b>
33%	40%	27%	100%

Task Delivery Profile



## Highlights this period

1. Branding approved by the Shadow Executive 6 December;
2. Bank account confirmed;
3. Slight slippage from November (4 of 24 actions) - no concerns;
4. Corporate Governance and Standards Committee - development of the constitution (stage 2).

## Risks and Issues

### Risks

- A** Dependencies on third parties (e.g. technology providers, HMRC), causes delay beyond our control.

### Issues

- A** Movement of staff within, and exiting, the council and their current capacity.

## New Council Cost

Total Budget  
£ 381k

Forecast Cost  
£381k

Currently on budget target

# Somerset West and Taunton

## New Council Implementation- Key Milestones

