

# Agenda

## Cabinet

**Thursday, 19 November 2015, 10.00 am**  
**County Hall, Worcester**

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اردو۔ اگر آپ اس دستاویز کی مشمولات کو سمجھنے سے قاصر ہیں اور کسی ایسے شخص تک آپ کی رسائی نہیں ہے جو آپ کے لئے اس کا ترجمہ کر سکے تو، براہ کرم مدد کے لئے 01905 765765 پر رابطہ کریں۔ (Urdu)

کوردی سۆزانی، ننگیر ناتوانی تێبگدی له ناوهرۆکی نهم بێلگهیه و دهستت به هیچ کس ناگات که و هههنگهه یهتوه بۆت، تکلیه تملظون بکه بۆ ژماره 01905 765765 و داوا ی پێنوونی بکه. (Kurdish)

ਪੰਜਾਬੀ। ਜੇ ਤੁਸੀਂ ਇਸ ਦਸਤਾਵੇਜ਼ ਦਾ ਮਸ਼ਹੂਰ ਸਮਝ ਨਹੀਂ ਸਕਦੇ ਅਤੇ ਕਿਸੇ ਅਜਿਹੇ ਵਿਅਕਤੀ ਤੱਕ ਪਹੁੰਚ ਨਹੀਂ ਹੈ, ਜੋ ਇਸਦਾ ਤਰਜਮਾ ਲਈ ਅਨੁਭਵ ਕਰ ਸਕੇ, ਤਾਂ ਕਿਰਪਾ ਕਰਕੇ ਮਦਦ ਲਈ 01905 765765 'ਤੇ ਫ਼ੋਨ ਕਰੋ। (Punjabi)

## DISCLOSING INTERESTS

There are now 2 types of interests:  
**'Disclosable pecuniary interests'** and **'other disclosable interests'**

### WHAT IS A 'DISCLOSABLE PECUNIARY INTEREST' (DPI)?

- Any **employment**, office, trade or vocation carried on for profit or gain
- **Sponsorship** by a 3<sup>rd</sup> party of your member or election expenses
- Any **contract** for goods, services or works between the Council and you, a firm where you are a partner/director, or company in which you hold shares
- Interests in **land** in Worcestershire (including licence to occupy for a month or longer)
- **Shares** etc (with either a total nominal value above £25,000 or 1% of the total issued share capital) in companies with a place of business or land in Worcestershire.

**NB Your DPIs include the interests of your spouse/partner as well as you**

### WHAT MUST I DO WITH A DPI?

- **Register** it within 28 days and
- **Declare** it where you have a DPI in a matter at a particular meeting
  - you must **not participate** and you **must withdraw**.

**NB It is a criminal offence to participate in matters in which you have a DPI**

### WHAT ABOUT 'OTHER DISCLOSABLE INTERESTS'?

- No need to register them but
- You must **declare** them at a particular meeting where:  
You/your family/person or body with whom you are associated have a **pecuniary interest** in or **close connection** with the matter under discussion.

### WHAT ABOUT MEMBERSHIP OF ANOTHER AUTHORITY OR PUBLIC BODY?

You will not normally even need to declare this as an interest. The only exception is where the conflict of interest is so significant it is seen as likely to prejudice your judgement of the public interest.

### DO I HAVE TO WITHDRAW IF I HAVE A DISCLOSABLE INTEREST WHICH ISN'T A DPI?

Not normally. You must withdraw only if it:

- affects your **pecuniary interests OR** relates to a **planning or regulatory** matter
- **AND** it is seen as likely to **prejudice your judgement** of the public interest.

### DON'T FORGET

- If you have a disclosable interest at a meeting you must **disclose both its existence and nature** – 'as noted/recorded' is insufficient
- **Declarations must relate to specific business** on the agenda
  - General scattergun declarations are not needed and achieve little
- Breaches of most of the **DPI provisions** are now **criminal offences** which may be referred to the police which can on conviction by a court lead to fines up to £5,000 and disqualification up to 5 years
- Formal **dispensation** in respect of interests can be sought in appropriate cases.

## Cabinet

**Thursday, 19 November 2015, 10.00 am, County Hall, Worcester**

**Membership:** Mr A I Hardman (Chairman), Mr M L Bayliss, Mr A N Blagg,  
Mrs S L Blagg, Mr J P Campion, Mr S E Geraghty, Mr M J Hart,  
Mrs L C Hodgson and Mr J H Smith

### Agenda

Item No	Subject	Page No
4	<b>Delivering the Corporate Plan - FutureFit Update – Corporate Strategy Planning – Programme Proposals (Part 3)</b>	247 - 354

#### NOTES

- **Webcasting**

Members of the Cabinet are reminded that meetings of the Cabinet are Webcast on the Internet and will be stored electronically and accessible through the Council's Website. Members of the public are informed that if they attend this meeting their images and speech may be captured by the recording equipment used for the Webcast and may also be stored electronically and accessible through the Council's Website.

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All the above reports and supporting information can be accessed via the Council's website.

Date of Issue: Tuesday, 10 November 2015

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**This paper is at concept stage and is work in progress. It should be noted it has not been approved through any formal governance at this stage**

<b><i>Future Fit Project Title: Special Education Needs and Disabilities Contract Efficiency</i></b>	
<b>Type of Saving:</b>	<b>Please tick one box</b>
<b>FURTHER</b>	✓
<b>FASTER</b>	
<b>NEW</b>	
<b>CROSS CUTTING</b>	

<b><i>Corporate Plan Area:</i></b>	
	<b>Please tick one box</b>
<b>Children and Families</b>	✓
<b>Environment</b>	
<b>Open for Business</b>	
<b>Health &amp; Wellbeing</b>	
<b>Cross Council Priorities</b>	

**CMR Lead:** John Campion

**SLT Lead:** Simon White

**Head of Service Lead:** John Edwards

**CMR Challenge:** Lucy Hodgson and Sheila Blagg

**Brief Project Description:**

They may be scope for a reduction in spend on SEN following the implementation of the SEND reforms. This service may be transferred into the Babcock contract which would be an opportune time to make the change.

**Purpose:**

There are significant savings required over the next three years in Education & Skills. A review has been undertaken to determine how the service can continue to meet required outcomes and Local Authority statutory duties within a significantly reduced budget. The 2013/14 controllable budget was £8.9 million (excluding Home to School Transport, and Dedicated Schools Grant (DSG) funding).

Savings of £1.8 million were allocated to the 2014/15 financial year and fully delivered in line with the savings plan.

Savings of £2.455m for Education & Skills are already included in the MTFP over the period 2015 – 2018 with the corresponding split during this period between savings from commissioned services and from retained core services being as follows:

Retained Service savings - £0.768m

Commissioned Service savings - £1.687m

Babcock was endorsed as the preferred provider of Education Services by Cabinet in June 2015. The contract start date was 01 October 2015. Cabinet agreed that the transfer of SEND services would happen at a later date – to be agreed by both parties – once the Council is confident that the new provider is in a position to effectively deliver these services.

**Outcomes of the project:**

The decision whether to transfer SEND services and the nature of the services to transfer (should that be agreed) will be determined through an early review with Babcock shortly after implementation of the contract.

There is considerable risk in reducing the capacity at this time given the pressure of statutory assessment and the need to comply with the SEND transition plan timescale. We will need to retain the conversion workforce funded through SEN reform and New Burdens grant in order to ensure compliance with the 2018 transfer date. This workforce could be part of a transfer to Babcock or could remain in house but the 3000 or so statements and Learning Disability Assessments must be converted by April 2018.

The case for a reduction of the substantive SEN assessment and Inclusion workforce is not strong based on need as assessment requests are increasing and there is significant pressure and challenge within existing resources to meet statutory timelines given the volume of demand. The number of caseworkers cannot be reduced without impacting statutory compliance unless in a transfer situation the plan writing element was to be commissioned out. Given this the following presumes that the only posts liable for reduction are those that are not directly associated with casework.

**Timescales:**

<b>Milestone</b>	<b>Completed By Date:</b>
Education Services in-scope transfer to Babcock	1 October 2015
Review of future SEND contract with provider	Nov 2015
SEND services transfer to Babcock (pending agreement)	2016 TBC
Further milestones on savings will be established with the provider post transfer of services	

**Risks/Impacts (E.g. risks to delivery of project – financial, political, reputational, legal, equality)**

<b>Risk description</b>	<b>Mitigation</b>
Contracted provider does not agree to take a reduced service	Early conversation with the provider will take place to ensure enough lead in time to develop robust plans for the efficiency to be made.
Any reduction in the SEND conversion workforce would jeopardise statutory timescales to convert current statements to Education, Health & Care plans	Could transfer this workforce to the provider and include the conversions required as part of the contract outcomes A full review of implications of reducing the workforce will be undertaken prior to contract efficiencies being made
Any reduction in the SEN assessment and Inclusion workforce could impact on assessment completion within statutory timescales.	The plan writing element of the assessment is included in the transfer to the provider and completion within statutory timescales is included in the contract outcomes A full review of implications of reducing the workforce will be undertaken prior to contract efficiencies being made.
Reduction in management or amalgamation of existing posts within the current structure would reduce and or delay the work delivered by the service and likely mean some output ceases.	A full review of implications of reducing the workforce would be undertaken prior to contract efficiencies being made

**Budget and Proposed Project Savings**

<b>2015-16 Base Budget excluding Recharges &amp; Management Restructure (£000)</b>		<b>£5.9m for Education &amp; Skills of which £1.083m is for SEND Services</b>			
<b>Current Savings Programme – applicable to Education &amp; Skills excluding SEND (£000) &amp; RAG 2015-17</b>		<b>2015/16</b>	<b>2016/17</b>	<b>2017/18</b>	<b>Total</b>
	<b>Green Delivered</b>	584	318		
	<b>Green On Target</b>		1,025	344	
	<b>Amber</b>		152	32	
	<b>Red</b>				
	<b>Total</b>	584	1,495	376	<b>2,455</b>

<b>PROPOSED SAVINGS – SEND element of contract</b>			<b>2016/17</b>	<b>2017/18</b>	<b>2018/19</b>	<b>2019/20</b>	<b>Total</b>
<b>New Savings (Further and New)</b>	<b>£000's</b>	<b>Green Delivered</b>					
		<b>Green On Target</b>					
		<b>Amber</b>					
		<b>Red</b>		<b>100</b>			<b>100</b>
		<b>Total</b>		<b>100</b>			<b>100</b>
<b>Existing Savings (Faster)</b>	<b>£000's</b>	<b>Green Delivered</b>					
		<b>Green On Target</b>					
		<b>Amber</b>					
		<b>Red</b>					
		<b>Total</b>					
<b>TOTAL SAVINGS</b>	<b>£000's</b>		<b>100</b>				<b>100</b>

Agreed By:

<b>Job Title and Name</b>	<b>Date</b>
Head of Service: John Edwards	27.08.2015
Director: Simon White	27.08.2015
Head of Finance: Steph Simcox	27.08.2015

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# **FutureFit 2020 – Self Sufficient Council**

## **Day Four – 23 Sept 2015**

## Contents

- Vision for a self-sufficient council
- Indicative Savings - April 2015, August 2015
- How the savings are presented in the MTFP
- Progress to date
- Strategic Asset Strategy and Self-sufficiency
- Holistic Housing Model

## Vision

By 2020 we will have increased the Council's ability to be self-sufficient, **moving further away from reliance on Central Government funding**. Self-sufficiency is not about being free from Central Government Grant, but to be more in control of our funding and influence in a greater way those monies that continue to be received through Central Government Grant. This will include a range of outcomes:

- Optimising Council Tax and Business Rate Income
- Optimising Sales, Fees and Charges
- Introducing a Revolving Door Capital Fund
- Maximising Value from Investment and the Council's Asset Base

The self-sufficient Council will seek to optimise co-operation with partners to achieve improved outcomes on services and maximise our ability to support growth in the local economy.

# Self-Sufficient Council

## Self Sufficiency – Potential Savings at August 2015

Workstream / Project		Year					Indicative Total
Ref	Description	2015/16	2016/17	2017/18	2018/19	2019/20	
1a	Optimise Council Tax	-	2.150	2.250	1.950	2.100	8.450
1b	Business Rates	-	-1.331	0.250	-	-	-1.081
2	Sales, Fees & Charges	-	0.050	-	-	-	0.050
3	Revolving Door	-	-	-	0.500	-	0.500
4	Estate / Balance Sheet	-	1.650	-	0.200	0.400	2.250
4	Commercial Income – West Mercia Energy	-	0.100	0.050	0.050	-	0.200
	<b>Total</b>	<b>0</b>	<b>2.619</b>	<b>2.550</b>	<b>2.700</b>	<b>2.500</b>	<b>10.369</b>

# Self-Sufficient Council

## Self Sufficiency – Savings at August 2015

How the savings are presented in the MTFP

Workstream / Project		Year					Indicative Total
		2015/16	2016/17	2017/18	2018/19	2019/20	
	Description						
	<b><u>MTFP Presentation:-</u></b>						
	Council Tax	-	2.150	2.250	1.950	2.100	8.450
	Business Rates	-	-1.331	0.250	-	-	-1.081
	<b>New Savings</b>	<b>-</b>	<b>1.800</b>	<b>0.050</b>	<b>0.750</b>	<b>0.400</b>	<b>3.000</b>
	<b>Total</b>	<b>-</b>	<b>2.619</b>	<b>2.550</b>	<b>2.700</b>	<b>2.500</b>	<b>10.369</b>

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**Worcestershire County Council**  
**2020 Vision Concept Paper - Self-Sufficient Council**

**Theme and Overview: Self-Sufficient Council**

**Support Requirements**

In addition to internal resources, the workstreams will require the following support:

Workstream 1 – Self Sufficiency by 2019/20  
 Estimated one-off at £50k for development of existing processes or the investment required to link existing databases across the Worcestershire Public Sector to identify fraud and error. In addition, recurrent support of £0.1 million estimated from further development of local (District Council) Council Tax Support schemes. This will be worked up by Treasurers across Worcestershire during the early part of 2016.

Workstream 2 - Optimising sales, fees and charges  
 No further support required at this stage

Workstream 3 Establishing a revolving door fund  
 Estimated one-off start-up costs of for expertise scoped at £0.25 million around developing the structures and scope of the fund as well as developing our Business Finance offer. The revolving door is due to be implemented for 2017/18 and therefore investment will be considered in 2016.

Workstream 4 - Maximising value of estate  
 One-off support from external consultancy with expertise in development and strategic asset management of £0.85 million. Funding for this has already been approved from the Council's Transformation Fund and work is underway

Further work required on development of an 'Integrated Housing Model' should CSP support the concept, including any additional resource required. The plan for potential implementation is for 2017 and therefore any investment will be clarified in 2016.

**Vision:** By 2020 we will have increased the Council's ability to be self-sufficient, **moving further away from reliance on Central Government funding**. Self-sufficiency may not be about being free from Central Government Grant, but to be more in control of our funding and influence in a greater way those monies that continue to be received through Central Government Grant. This will include a range of outcomes, from optimising the Council's ability to generate revenue and utilising income streams to establish a revolving door capital investment fund that releases the burden on the revenue account to fund new Capital expenditure. The self-sufficient Council will build upon the commissioning cycle and complement the work delivered to date and will seek to optimise co-operation with partners to achieve improved outcomes on services and maximise our ability to support growth in the local economy.

We will target all significant areas of income, confirming full cost recovery where we are working for others, and will ensure all our citizens and businesses contribute fairly to the valuable services they receive.

Whilst continuing to influence Central Government's financial policy for supporting local authorities through lobbying, consultation responses and promoting joint working and transformational successes, we will take greater control of how we can influence economic growth and create innovative business models through use of our assets or the strength of our balance sheet to pump prime change in sectors or projects needing stimulus. We will do this by:-

- Optimising Self Sufficiency by 2019/20 through influencing Central Government on Business Rates, Business Rates Pooling and Council Tax Banding and developing through local partnerships ways in which all income that is due through these streams is collected by local partners;
- Optimising sales, fees and charges on our statutory and discretionary service from those services where income, or the control of income is retained by the Council following the commissioning process;
- Establishing a revolving door fund to support capital investment delivering economic development opportunities as well as supporting the Council's revenue budget through growing our offer of loan finance to local businesses where there is a gap in the lending market;
- Following the successful delivery of the Better Use of Property Programme, optimising the value derived from the Estate (including all Land, Buildings and Equipment with a net book value of £809 million as at 31/3/15), considering how the Council's balance sheet can be best leveraged to deliver service outcomes in addition to the more traditional approach of realising value through asset sales
- Aligning the County Council's average capital asset life with internal and external capital financing to ensure the financing transactions reflect our actual consumption of assets

The four work-streams will need to be developed at different speeds. There will be a mix of early or quick wins where transformation and early savings may be generated. Following those early wins will be a programme of work, largely focused on 2017/18 to 2018/19 where embedded long term change will challenge how self-sufficient the Council can be by 2019/20.

### **How will we judge success?**

Further work will be undertaken in this area to make these outcomes specific and measurable. The emerging outcomes at this stage are drafted as:

- Increasing the ability of the County Council to optimise Council Tax income above that currently forecast across the Medium Term Financial Plan;
- Increasing the ability of the County Council to optimise Business Rate income from local growth in Business Rates and retained levies through the Worcestershire Business Rates Pool across the Medium Term Financial Plan (MTFP);
- Understanding the starting position and then the County Council's ability to optimise miscellaneous income in 2017/18 and 2018/19 following the commissioning process that will identify those services that may remain in-house for the short or medium term;
- Following the successful delivery of the Better use of Property Programme, assessing the extent of the County Council's balance sheet that can be used to deliver better service outcomes through retaining those assets and generate increased revenue for the County Council to support services. This will ensure



that the County Council derives the most benefit from the assets that we hold, not just the assets that we sell;

- More local businesses supported to grow locally;
- The capital programme will be self-financing by 2020 and that there will be no new borrowing to support new investment with a revenue account impact. Instead, any new investment, not funded by 3<sup>rd</sup> parties, grants or asset sales will be supported by borrowing that in turn is financed by revenue generated off existing programmes of capital works.

**What additional savings/income is targeted and when is this expected to be delivered?**

Workstream / Project		Year					Indicative Total
Ref	Description	2015/16	2016/17	2017/18	2018/19	2019/20	
1a	Optimise Council Tax	-	2.150	2.250	1.950	2.100	8.450
1b	Business Rates	-	-1.331	0.250	-	-	-1.081
2	Sales, Fees & Charges	-	0.050	-	-	-	0.050
3	Revolving Door	-	-	-	0.500	-	0.500
4	Estate / Balance Sheet	-	1.650	-	0.200	0.400	2.250
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	<b>Total</b>	<b>0</b>	<b>2.619</b>	<b>2.550</b>	<b>2.700</b>	<b>2.500</b>	<b>10.369</b>

**What will be key work streams that will enable the delivery of this theme and who will lead their ongoing development?**

**Progress so far:-**

A cross Council team has been established to deliver this theme under the leadership of Sean Pearce, Chief Financial Officer working with John Hobbs, Director of Business, Environment and Community. The Core Team is:

- Sean Pearce
- John Hobbs
- Nigel Hudson
- Peter Bishop
- Sue Alexander
- Mark Sanders

This programme concept has been developed and for each workstream an action plan has been produced. The intention is for each workstream to be aligned to each other over the 2016-2020 periods to determine the priority for development of each

workstream, the interdependencies, more detailed resource requirements and establishing a risk/issues register. The 'Big Four' management consultancies have all been contacted to seek support in developing and potentially delivering work-streams. Meetings have been held with KPMG, Deloitte and PwC. In each case, there has been a good mix of professional services support as well as a cohort of previous high profile Chief Executives who have sense checked the plans in this theme and provided constructive support and advice. All are keenly feeding back ideas, contacts and previous work. Visits to known areas of good practice were undertaken during 2015 which included

- 1) Coventry City Council (Investment Fund)
- 2) Essex County Council (Council Tax, Business Rates and utilising the estate)
- 3) Warwickshire County Council (Investment Fund)
- 4) Cheshire East Council (Securing Business Rates)
- 5) Cambridgeshire County Council (Securing Business Rates)
- 6) Chelmsford City Council (Economic Development Investment and Council Tax Support schemes)
- 7) Eastleigh District Council (Investing for a return)
- 8) Leeds City Council (Revolving Door Fund)
- 9) Birmingham City Council (aligning Capital and Debt)

A number of other meetings were held around the Municipal Journal Forum at the end of March 2015 with other organisations sharing their good practice.

**1. Workstream – Self Sufficiency by 2019**

The intention is to optimise self-sufficiency by 2019 through three areas of development: influencing Central Government on Business Rates, Business Rates Pooling and Council Tax:

- a) Reviewing assumptions in the MTFP and working with billing authorities to determine the validity of current forecasts and actions that could be taken to increase income from Council Tax and Business Rates based on local initiatives within existing regulations. This will include a review of the various Council Tax support schemes now in operation and opportunities to optimise income or minimise expenditure in this area alongside District Council partners and targeting of initiatives around fraud and error

Resources Estimate: The intention is to undertake the modelling and development of this work-stream in-house. Additionally work will be undertaken with District Councils concerning a unified cross Worcestershire fraud and error approach to increase revenue.

Timing Estimate: Development through 2015/16 for implementation from 2016/17 to 2018/19

- b) Reviewing the impact of current Single Person Discount reviews to determine whether further investment can be made in existing partnerships or development can be made in ours and partners systems to increase the identification of fraud and error to ensure that more of the current income that is due to the Council is identified and collected locally.

Timing Estimate: Agreement with Hereford and Worcester Treasurers

	<p>Association (HWTA) through to Spring 2016 with an offer being taken through Chief Executives and Leaders Board for implementation in 2016</p> <p>c) Seeking to lobby Central Government as an organisation (see the success of Cheshire East and Cambridgeshire), as a County Network (with the Society of County Treasurers), as Worcestershire (with HWTA) and as a Sector (Local Government Association and CIPFA) to increase the Council's ability for self-determination on Council Tax (Capping and Banding) and Business Rates. This includes making the most of local contacts with Central Government.</p> <p>Resources Estimate: The intention is to undertake the modelling and development of this work-stream in-house. The models previously developed by external accountancy firms will be used to scenario plan and facilitate a conversation with Central Government. Discussions need to take place with those areas that appear to have been successful in retaining a greater proportion of business rates in Budget 2015. We will need work through MPs and the Worcester Local Enterprise Partnership to influence DCLG and HM Treasury.</p> <p>Timing Estimate: Development in the later part of 2015/16 with realisation potentially in 2018/19 onwards.</p>
Lead Head of Service:	Mark Sanders
2.	<p><b>Workstream – Optimising sales, fees and charges</b></p> <p>Cabinet report produced outlining updated sales, fees and charges policy.</p> <p>Over the longer term, the work in this area will take the results of the commissioning cycle across all of the County Council services and not seek to alter this approach. It will examine those services where income is still received by the Council and/or the control of income is still within the gift of the Council. The intention is to critically analyse the entirety of miscellaneous income received by all the County Council services during the 2014/15 financial year and overlay onto the primary analysis those areas of income that will still be received or influenced by the Council following the commissioning cycle to achieve full cost recovery.</p> <p>For those identified services, go through each in detail and work with colleagues in Legal Services to determine revenue generation opportunities to achieve full cost recovery. From this a work plan will be established to optimise income streams in phases across the entire timeline of the MTFP. We will benchmark ourselves in detail against Council comparators and look to incorporate best practice from others into the Council.</p> <p>Timing Estimate: Proposal to Cabinet in Sept 2015 for approval for initial introduction of a Council-wide policy with further work planned in 2016 to identify the potential to develop new revenue streams in support of full cost recovery.</p> <p>To go live with a phased implementation of new revenue generation strategies from 2016/17 onwards with the aim of recovering only the full costs of delivery.</p>
Lead Head of Service:	Sue Alexander
3.	<p><b>Workstream – Establishing a revolving door fund</b></p> <p>The intention is to follow two areas of development:</p> <p>a) Establishing a revolving door fund to support capital investment delivering</p>

economic development opportunities as well as the County Council's net revenue budget. This type of activity is most relevant in meeting particular issues confronting the wider market in Worcestershire, particularly:

- I. The need to meet demand to be ready to occupy industrial and commercial buildings from existing and new companies seeking to expand in the County.
- II. The potential to work with others to improve the supply of social care facilities within the County
- III. The lack of upfront funding to deliver the level of strategic infrastructure required in the County given the limited level delivered from development and the increasingly limited Central Government investment in infrastructure

Central to the development of the thinking is the true value of the investment and corresponding risk. The investment decision needs to consider the increased business rates, reductions in the wider corporate budgets and wider economic benefits construction and increased employment in the County in addition to the financial return.

Examples of the type of activity involve include:

- I. The construction of a series of speculative industrial units on the key sites across the County. Taking on the construction and selling the completed investment once successfully let, or retaining the completed investment and developing a portfolio for future disposal.
- II. Joint investment with utility companies and or other infrastructure providers in strategic infrastructure such as new primary sub-stations and new technology within the water treatment industry based on a base return and share in ultimate gain.
- III. Direct development of housing units, including affordable units that can be tied directly into strategic commissioners of adult care. Financial returns of market based units potentially further subsidising core budgets over and above a return to the revolving fund.

This needs a significant amount of work to develop and is more longer term. The intention is that by 2018/19 there is no new borrowing which impacts on the Council Tax requirement to support Capital Investment. The intention is for any such borrowing to be financed from surpluses developed across existing schemes. If we can get this right, all new capital investment should yield a return that not only repays borrowing but also generates additional surpluses for reinvestment – thus the revolving door fund.

Resource Requirements: As this is more innovative, it is likely that the Council will need experienced and expert support to develop the outcomes and models to deliver such an aspiration.

Timing: This is likely to relate more to the longer term and it is estimated that we could realise benefits in late 2017/18, maybe 2018/19.

- b) Expanding our Business Finance offer that has been successful so far through arrangements with Impetus to achieve three outcomes; growing economic development in Worcestershire and therefore Business Rate Income: meeting a local business need, where there is a gap in the current business lending market, and making a financial return to reflect the risk capital that would be put up by the Council through an existing or new 3<sup>rd</sup> party partnership. Access

	<p>to finance for certain segments of the commercial market remains difficult.</p> <p>Existing schemes are being reviewed across the Country including the Cambridgeshire Bank and Finance Birmingham. In addition the wider regional work on a Fund of Funds that seeks to draw in European funding in a more structured way also needs to be considered.</p> <p>Timing Estimate: Following investigation and research work during Summer 2015/16 with the potential offer that could be taken to businesses launched in the 2016/17 financial year.</p>		
	<table border="1"> <tr> <td data-bbox="261 510 655 577">Lead Head of Service:</td> <td data-bbox="655 510 1417 577">Nigel Hudson</td> </tr> </table>	Lead Head of Service:	Nigel Hudson
Lead Head of Service:	Nigel Hudson		
4.	<p><b>Workstream – Maximising value of estate</b></p> <p>The intention to follow three areas of development:</p> <p>a) Firstly the Council needs to understand the extent to which capital assets have been financed by debt and the impact this has had on the revenue budget. The aim is then to consider whether the annual debt financing charge can be reduced by aligning asset life with the period over which the debt that financed the asset is repaid. PWC have been commissioned to review this work during August – September with a view to assessing the potential for policy change in the Winter/Spring of 2015/16.</p> <p>b) Once the Council understands the correlation between asset lives and debt financing, for those assets where there is a clear intention to retain those assets, on a case by case basis (taking the methodology applied within Property Services) undertake a buy/sell/lease analysis. Then across all of the estate consider revenue generation opportunities from those areas of the estate that will be retained by the Council. Including advertising, or and electricity production, the aim is to optimise income and reduce costs and may include the creation of a framework to assess the value for money of lending or gifting assets to achieve better service outcomes. This includes consideration of how to partner and provide incentives to create leverage off of the estate, models to be considered include Place Partnerships, Public Sector Partners and partnering with more traditional developers</p> <p>Consideration has also been given for maximising income from advertising from our highways estates e.g. roundabouts. However, we already do this on a case by case basis and to achieve the full effect across the county would mean discounting existing arrangements with District partners for a marginal income which has the potential to alienate and disadvantage partners.</p> <p>Resource Estimate: c£250k for enhanced locality review capability (This may be made available via the Cabinet Office)</p> <p>c) Introduce an 'Integrated Housing Model' across Worcestershire with partners. This model would take advantage of the existing work in Worcestershire to map all public sector land, identify a small number of opportunities where land or buildings can be developed, planning permission gained and construction of mixed use sites is undertaken by a partnership of public sector bodies to:</p> <p>i) Achieve a capital gain on the sale of a portion of the site for private residential use realising a planning gain;</p> <p>ii) Achieve an increase in Council tax from all units within a site;</p>		

	<p>iii) Achieve an increase in business rates for any local business created in the development (see iv);</p> <p>iv) Supporting District Council partners in achieving their objectives that may include housing and service delivery;</p> <p>v) Sell part of the site for scaled extra care, supported living, EBD units or other accommodation to a range of providers to meet commissioning objectives of the Council where currently that provision does not exist. This will result in outcomes being achieved and cost savings where service users can be moved from more expensive provision; and</p> <p>vi) Support District Councils in achieving their Housing Development objectives</p> <p>This does mean consideration needs to be given to taking on construction risk and not displacing a market for house-building that is returning across the County. Investment may be significant here either to grow capacity to do this ourselves or buy in to capability already developed in the private or public sector</p> <p>Resource Estimate: Estimates for investment may be in excess of £250k.</p> <p>Timing Estimate:</p> <p>1) Work through 2015/16 with implementation in 2016/17,</p> <p>2) More longer term, with a staged implementation across the MTFP period.</p> <p>3) Estimated for go-live in 2017 as there is a significant amount of work to engage with partners, identify sites and establish business cases.</p>				
	<p>Lead Head of Service: Peter Bishop</p>				
7	<p><b>What risks/issues are foreseen and how can these be mitigated?</b></p>				
	<table border="1"> <tr> <td data-bbox="272 1207 837 1632"> <p>The County Council (both individually and through work with District Councils) has the ability to indirectly influence control over a number of risks:</p> <p>Pace of planning consents / house-building</p> <p>Pace of net Business Growth</p> <p>Joint working / alignment of policies with partners (e.g. Districts)</p> </td> <td data-bbox="837 1207 1406 1632"> <p>Continue to work closely with District Council's and other partners to influence growth and economic prosperity</p> </td> </tr> <tr> <td data-bbox="272 1632 837 2022"> <p>MRP Policy – Legal / External Audit challenge for 'Prudent Provision'</p> <p>Ensure there are fair financial support arrangements in place to avoid bad debts</p> <p>Any re-profiling of debt repayments leaves the Council paying more over a 50 year lifespan</p> </td> <td data-bbox="837 1632 1406 2022"> <p>Ensure appropriate financial and legal advice is obtained</p> <p>Appropriate Discounted Cash Flow techniques will be undertaken and long term views on inflation will be considered as part of the business case</p> </td> </tr> </table>	<p>The County Council (both individually and through work with District Councils) has the ability to indirectly influence control over a number of risks:</p> <p>Pace of planning consents / house-building</p> <p>Pace of net Business Growth</p> <p>Joint working / alignment of policies with partners (e.g. Districts)</p>	<p>Continue to work closely with District Council's and other partners to influence growth and economic prosperity</p>	<p>MRP Policy – Legal / External Audit challenge for 'Prudent Provision'</p> <p>Ensure there are fair financial support arrangements in place to avoid bad debts</p> <p>Any re-profiling of debt repayments leaves the Council paying more over a 50 year lifespan</p>	<p>Ensure appropriate financial and legal advice is obtained</p> <p>Appropriate Discounted Cash Flow techniques will be undertaken and long term views on inflation will be considered as part of the business case</p>
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	<p>Identifying Revolving Door Capital Investment opportunities</p>	<p>Develop a wide ranging portfolio of revolving door investment schemes – recognising that some projects will be more successful than others</p>
	<p>Income areas could change as we commission services, some income governed by statute</p> <p>Development and market opportunity risk</p>	<p>close liaison with commissioners and service leads to understand Operating Model</p> <p>Establish a decision making governance model that appraises all value added aspects of potential project</p>
	<p>Difficult consultations likely if we ask our service users / customers to pay increased charges</p>	<p>Present clear rationale for any proposed increases.</p>

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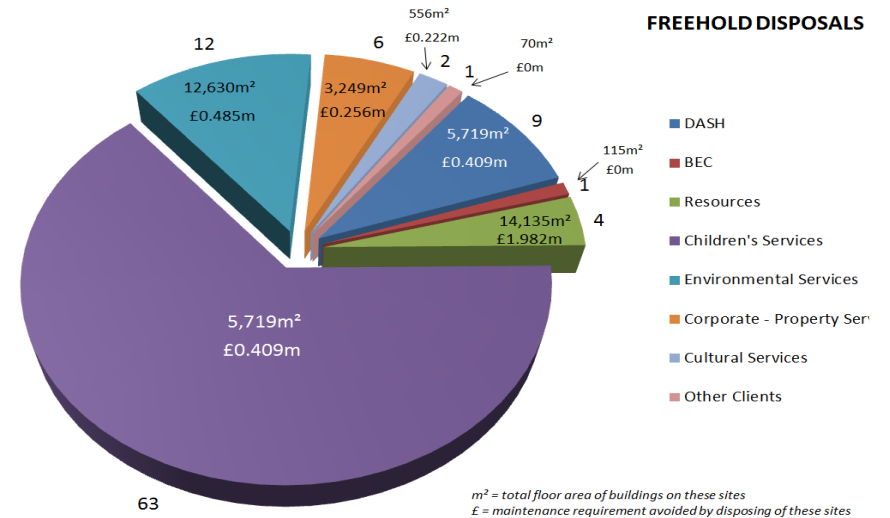
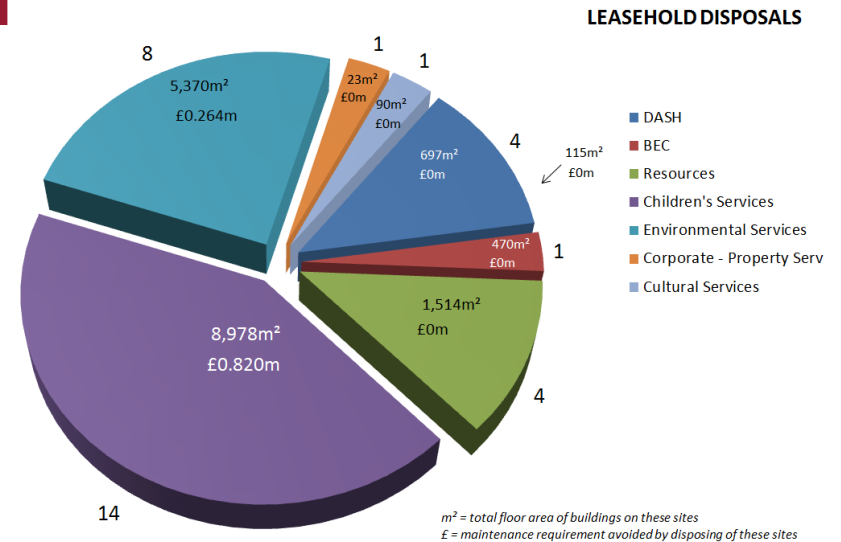


# WCC Property Asset Strategy Executive Summary

# What we have achieved

- Capital receipts approaching (£33M)
- Revenue savings >£2.5M
- Sold 99 freehold properties
- Disposed of 33 leases
- Avoided maintenance expenditure of nearly £5 million
- Reduced office buildings down from 17 to 4.
- Released 60,000 m2 of accommodation for sale or alternative use
- Reduced energy consumption/m2 by 22% and a reduction in carbon emissions of 24%.
- ***Our existing approach: by focusing primarily on rationalizing, consolidating and disposing of surplus assets***

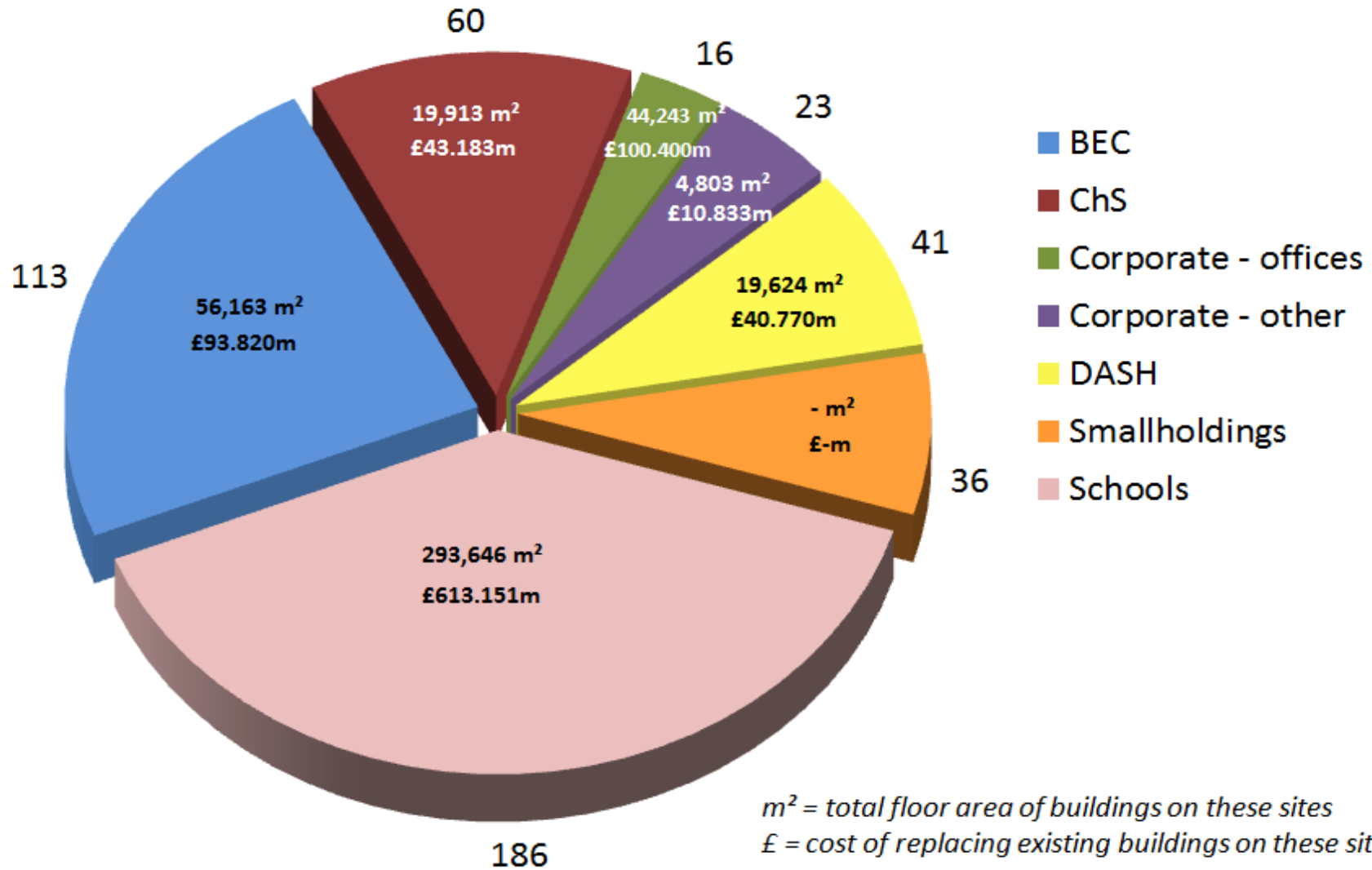
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# Example Case Studies

- Parkside Bromsgrove
- Stourport Civic
- DEFRA/ HMRC into County Hall
- Job Centre Plus
- Kidderminster Library
- Community led library service
- Hartlebury Castle

# Where does this leave us?



# What next – Drivers for change

- Service transformation
  - Customer demand (and how we influence that)
  - Further service re-design e.g. mobile working
  - Commissioning e.g. Adult/CHS Provider Services
  - Co-location and Integration
- Economic factors
  - Continued base cost reductions
  - Locality based economic regeneration
- Property factors
  - Condition vs Suitability
  - Efficiency & Effectiveness
  - Balance opportunity costs and future liabilities
  - Carbon Emissions

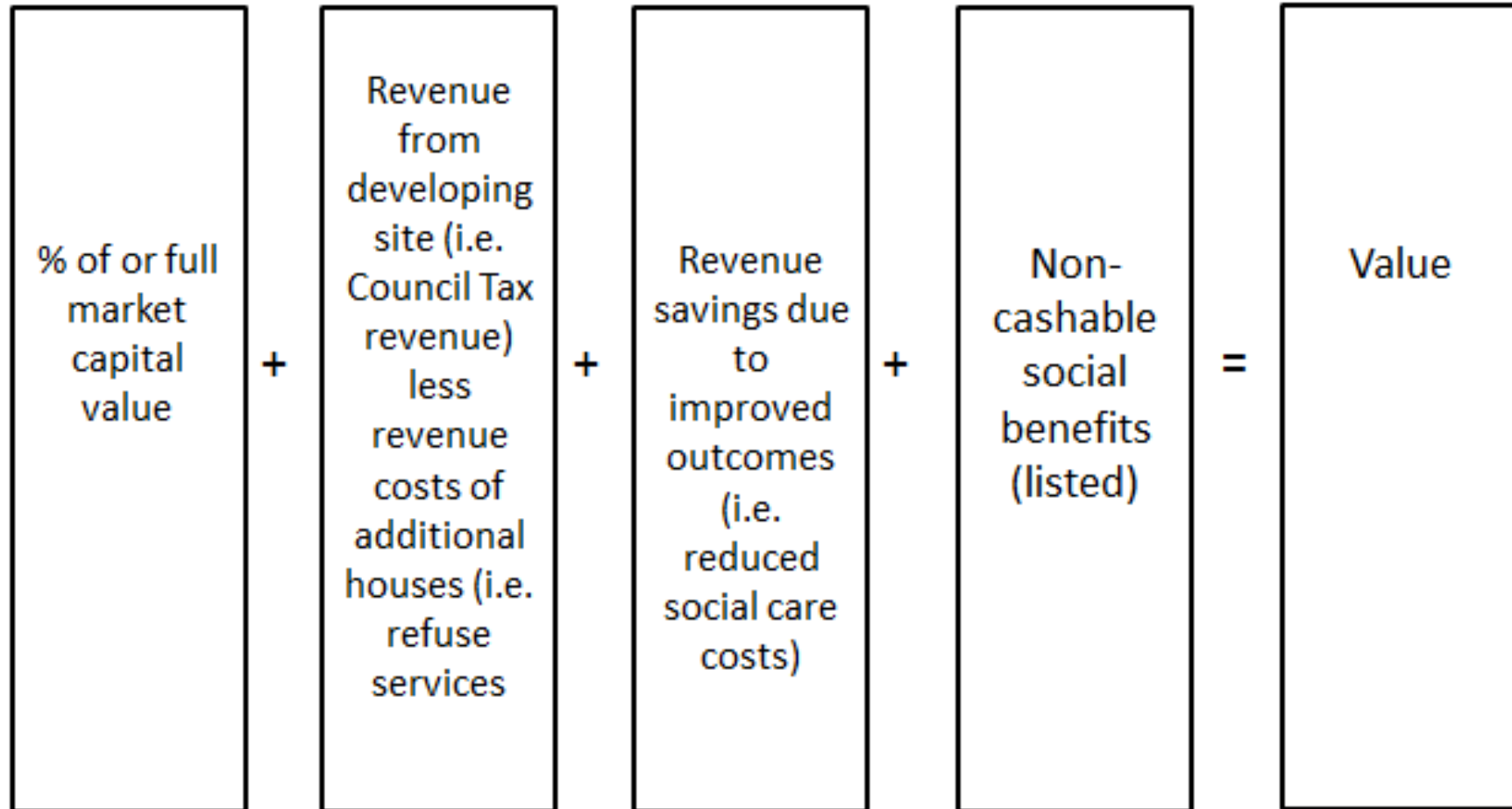
# Opportunities

- WCC as Developer
  - Influencing demand and long term service outcomes
- Income Generation
- Place Partnership
- One Public Estate
- Growth funds and working with LEP
- Innovation
- Driving change and ways of working

# Opportunities

- Locality Reviews (Redditch, Wyre Forest etc.)
- Kidderminster
- Children's Centres
- Library Re-modelling
- Older People's services
- County Hall Campus

# Developing an alternative approach to value



Taking a broader approach to investment and site appraisal could mean WCC invests in various types of Housing provision influencing long term outcomes



# What are our options 2016-2020?

- Stop; keep as is
- Continue our current disposal strategy
  - All
  - Parts
- WCC as “developer”
  - Housing
- Recommendation: Disposal combined with selective developer option

# County Hall Campus

- What are our Options long term (10 years +)?
- Recommendation: Develop for sustainable occupancy with multiple tenants

# Innovative Spaces



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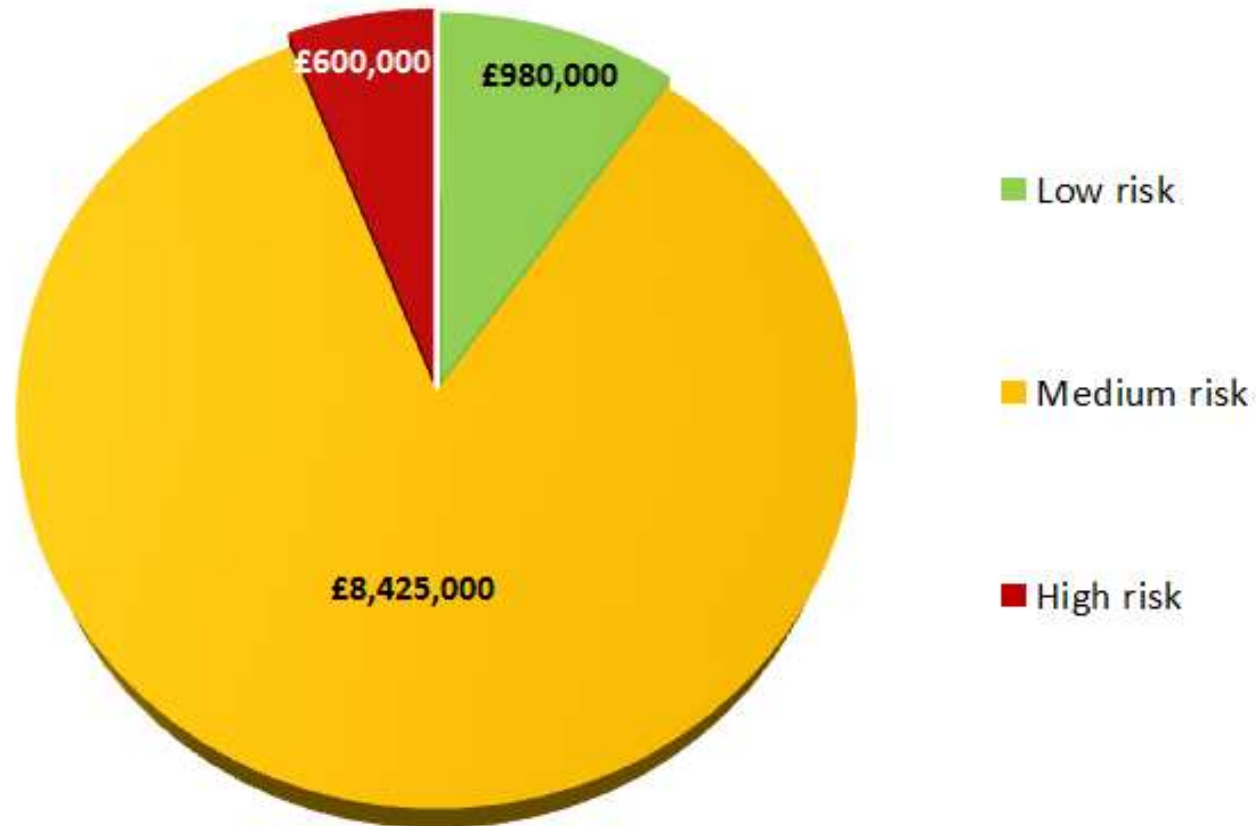


## Where do we want to get to? New Strategic Goals for our asset strategy

- To manage the Property Assets to ensure optimal efficiency and effectiveness
- To pursue the maximisation of value by seeking opportunities for residential, commercial or other economic development
- To influence service re-design and integration through effective challenge and design
- To exploit opportunities for income generation

# Target Capital Receipts – 2016-20

Better Use of Property - phase 2  
Capital Receipts 1st April 2016 - 31st March 2020



# How do we get there?

- Place Partnership
- Locality reviews
- Changing our approach:
  - For specific sites take more risk (“Developer”)
  - Develop further County Hall Campus Innovative Spaces
- New Governance and new leadership

# Next Steps

- Finalise Draft with CSP
- Develop locality reviews and for appropriate candidate sites (where “developer” option is appropriate) – decision at Cabinet
- Final version to be informed by other partners

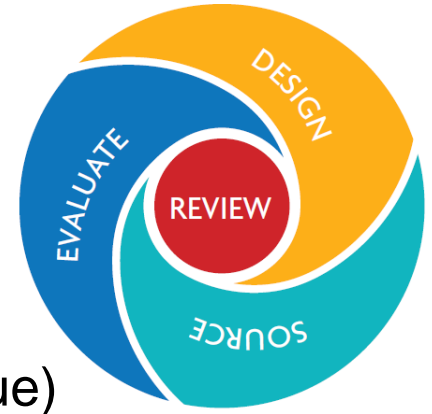
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# FutureFit 2020 - Commissioning

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# Commissioning



- Maximise commercial value of contracts
- Increase services commissioned to 80%-90% (value)
- Increase jointly commissioned services to > 30% (value)
- Take advantage of buoyant market from which to commission
- Develop the local market (through effective business intelligence)
- Learn and build on successes to develop innovative delivery models
- Develop Individual Commissioning – use of personal budgets

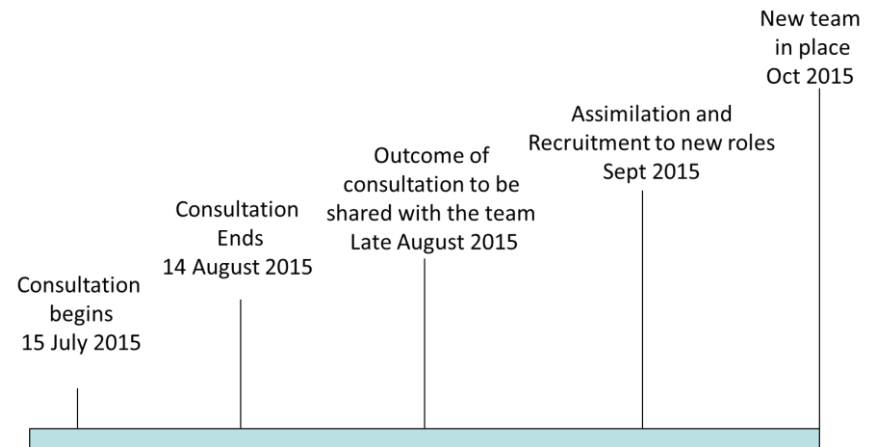
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# Commissioning Support

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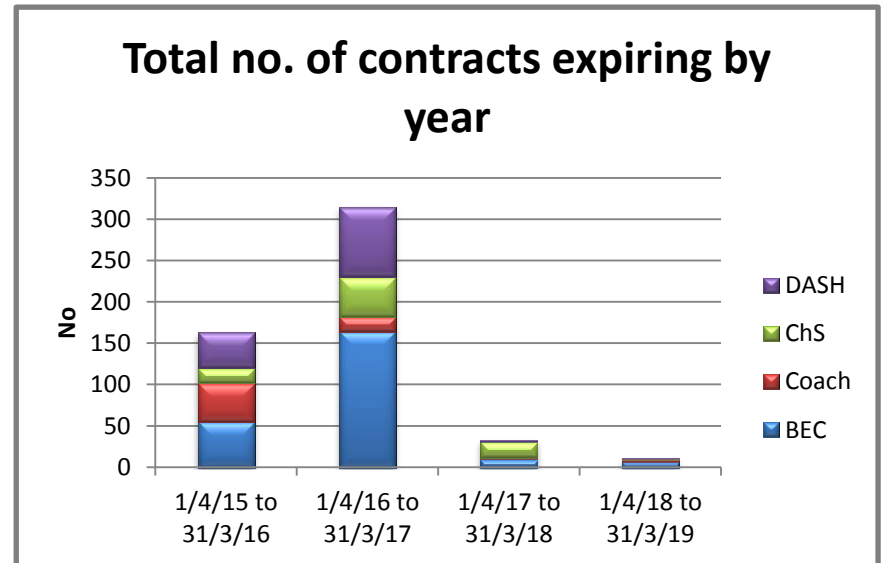
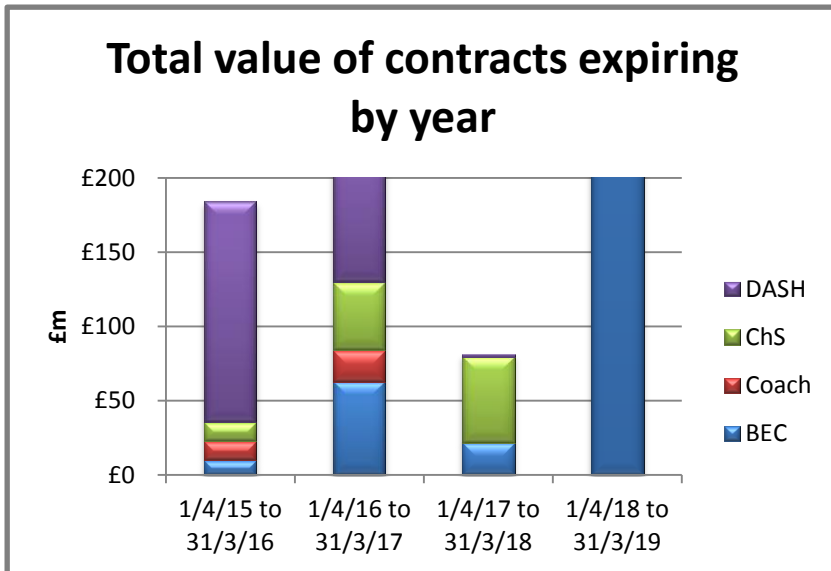
- Centralising commercial skills
- Currently consulting with staff
- Completed Oct 2015



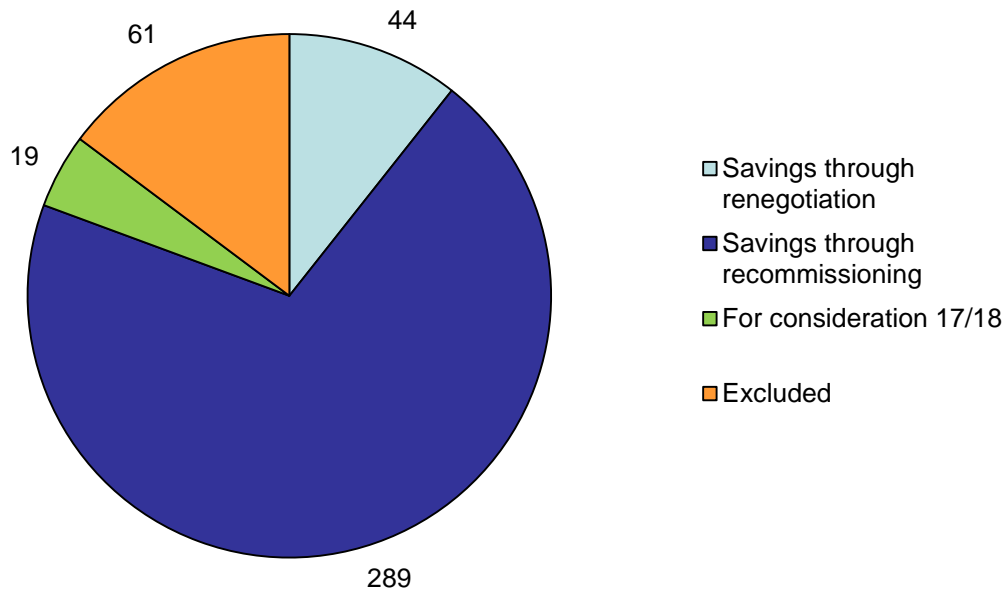
# Key Contract Data – snapshot at Sept 2015

- WCC has a total of 413 strategic contracts (above £50k total value)
- Which consists of over 800 individual contracts
- Annual contract value of £305m
- Total contract value of £1.9bn

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# Contracts over £50k



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- £147m worth of contracts excluded for instance framework contracts or recently renegotiated
- £17m worth of contracts directly renegotiated
- Further analysis to check for double counting
- Procure consultancy for large complex contracts

Commissioning - £m	2016/17	2017/18	2018/19	2019/20	2020/21+	Total
CSP Position	0.5m	0.5m	0.5m	0.5m	0.65m	2.65m

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## Worcestershire County Council 2020 Vision Concept Paper

**Theme and Overview:** Commissioning

**Support Requirements:**

- Commercial training
- Institute of Public Care
- Market Shaping (third party)
- External awareness raising and workshops

**Vision:**

1. We will **commission** 80% - 90% of all our services, 30% of which we will commission **with other partners** in areas where it makes financial sense and improves outcomes (e.g. end-to-end services to residents).
2. There will be a **mature market** to commission from throughout Worcestershire with a variety of **innovative** providers including **models** such as mutuals and social enterprises which will often be owned by (ex-) staff, service users and/or carers.
3. The majority of services to individuals will be **commissioned by those individuals** where that's appropriate, with the role of the council being limited to the **quality** assurance of high risk services and ensure the right people are provided with the **personal budgets** that they are entitled to. Quality assurance for low risk services will be self-managing through customer feedback.
4. We will have a robust operating model that focusses on value and **outcomes** and ensures that all decisions have a robust **commercial** basis. Where we have supported the shaping of the market we will often get a financial return if that market grows. We will always encourage the use of the **local supply chain** and consider the impact of our decisions on our Open for Business outcomes and the local economy.
5. We will ensure that our **contracts are managed** throughout their lifecycle, providers are held to account and we deliver and over achieve the projected **commercial benefits**. Our role will no longer be to procure or manage contracts and frameworks for services that are not directly provided to the council.

**How will we judge success?** *(What will be the key outcomes)?*

- Percentage of commissioned services in value 80% - 90% (*Currently 65%*)
- Percentage of joint commissioned services in value over 30%
- Visualisation of the market place showing there is a buoyant market
- Visualisation of local supply chain for each contract
- 5-10% reduction in contract spend showing that all significant contracts are reviewed at least annually.

<b>What will be key work streams that will enable the delivery of this theme and who will lead their ongoing development?</b>			
1.	<p><b>Commercialism</b> – which will include the creation of the resources that will support the organisation to become more commercially focussed and the re-negotiation and/or re-commissioning of all our contracts over time, achieving best value, to deliver the right outcomes for service users, residents and businesses.</p> <p>a. Operating model: includes; skills and workforce development – <i>links to Op Model theme</i>, corporate set of contract and market intelligence, including market risk management.</p> <p>b. Commissioning Programme - Have a robust plan to deliver the Commissioning project to get to the target of between 80% and 90% of all services commissioned (current baseline 65%) - <b>Appendix 1</b></p> <p>c. Culture – changing to Directorates focusing on service delivery through third parties with the central function providing the commercial expertise and to realise effective contract and process management</p> <p>d. Contract Management – Effective Contract management to realise efficiencies and improve outcomes, Category management and consolidation of contracts</p>		
	<table border="1"> <tr> <td>Lead Service Manager:</td> <td>Jo Charles</td> </tr> </table>	Lead Service Manager:	Jo Charles
Lead Service Manager:	Jo Charles		
2.	<p><b>Market Shaping</b> – The modelling of the market place in Worcestershire over time particularly projecting forward and having strong plans in place for bridging any gaps. Reducing market risk associated with direct relationships between services user and providers. This will include more focus on capacity building in communities and the Voluntary sector.</p> <p><b>Options for Delivery Models</b> – Design and deliver different innovative provider (and commissioning) models. This will include creating the culture where staff, carers and service users will consider their own options for creating models such as mutuals and social enterprises. Forging strong links with market shaping to ensure market risks are effectively managed to provide a robust provider base. Includes identifying pros and cons of various delivery models and suitability and will be added to the commissioning toolkit as part of the evaluate and design phases.</p>		
	<table border="1"> <tr> <td>Lead Head of Service:</td> <td>Simon Mallinson (with support from the Commercial Team)</td> </tr> </table>	Lead Head of Service:	Simon Mallinson (with support from the Commercial Team)
Lead Head of Service:	Simon Mallinson (with support from the Commercial Team)		
<b>What are the key milestones for delivery and when do these need to be achieved?</b>			
<ul style="list-style-type: none"> <li>• Identification of Contracts by Year expiring that could have savings targets – Completed average 5% initial savings target identified: <ul style="list-style-type: none"> <li>○ Year 1 £0.5m</li> <li>○ Year 2 £0.5m</li> <li>○ Year 3 £0.5m</li> <li>○ Year 4 £0.5m</li> <li>○ Year 5 £0.65m</li> </ul> </li> </ul>			
<b><u>Outstanding Milestones</u></b>			
<u>November</u>			
<ul style="list-style-type: none"> <li>• Use external organisation to deliver savings of &lt;£50k contracts - Prepare draft</li> </ul>			



tender pack for Contract Tail Spend Management service - Nov 2015

- Analysis of over £50k contracts - develop plan for category management approach and identify quick wins Nov 2015 onwards

RAG rate non-commissioned services against the criteria to work out the commissioning programme moving forward – Nov 2015

- Comprehensive Review of the Care Market Analysis: to understand the market, demand pressures – now and future, current supply, actions to stimulate the market – November 2015 (with interim updates)
- Investigate options for forensic review of 15 high value contracts – Run a pilot and spec developed - Nov

### Ongoing

- Market Risk Shaping Analysis underway to inform commissioning programme – Initial analysis complete further analysis ongoing in line with roadmap
- Analysis of currently non-commissioned services against criteria set and apply criteria such as whether it is market ready, whether there is a developed market etc. Ref roadmap – ongoing
- Progress potential use of Social Impact Bonds – third party advice on potential opportunities – ongoing
- Plan of commissioning linked to Market risk being developed to include new commissioning, re-commissioning and de-commissioning of services - autumn onward ref roadmap
- Develop phased plan for market risk analysis – ongoing (non-commissioned services and programme for commissioning)

### Completed Milestones

- Identification of risks and double counting in savings identified above
- Tender evaluation of Comprehensive Review of the Care Market analysis proposals
- Third Party engagement for Market Shaping decided by 17 April
- Breakdown of services currently commissioned
- Looking at contract values under £50k looking at Category Management and also - consolidation of contract with multiple providers – Workshop 07/05/15
- Proposal for implementation of savings including ROI Business Case for progression – for contracts under £50k (per annum spend)
- Compile a fully comprehensive list of all contracts held within WCC, and key data for these such as value, end dates etc.). Contract register for > £50k contracts completed
- Pilot ongoing with JDP procurement to analysing the contracts register to identify savings opportunities
- Comprehensive Review of the Care Market Analysis awarded to IPC
- Delivery Models identified and with Bevan Brittan for validation
- Secure sector specific input on delivery models and add to commissioning toolkit

### **What risks/issues are foreseen and how can these be mitigated?**

#	Risk	Mitigation
1	Implementing within timescale and at desired pace	<ul style="list-style-type: none"> <li>• Commissioning plan in place</li> <li>• Stakeholder communications</li> <li>• Prioritisation of skills and capacity</li> </ul>

		within commercial team
2	Lack of capacity in commissioning, procurement and commercial management	<ul style="list-style-type: none"> <li>• Prioritisation of skills and capacity within commercial team</li> <li>• External input</li> <li>• Use of Transformation Fund</li> </ul>
3	Savings cannot be achieved or double counting	<ul style="list-style-type: none"> <li>• Ongoing analysis required</li> <li>• Work with WLT / Services</li> </ul>
4	Existing practice and policy may not support innovative commissioning solutions	<ul style="list-style-type: none"> <li>• Development of delivery models</li> <li>• Visibility and understanding</li> </ul>
5	Political support for some of the commissioning work	<ul style="list-style-type: none"> <li>• Early political buy-in</li> <li>• Continued commissioning member briefings aligned commissioning plan</li> </ul>
6	Unable to stimulate the market in key areas	<ul style="list-style-type: none"> <li>• Investing in Market Intelligence</li> <li>• Planning and early engagement with providers</li> </ul>

## COMMISSIONING PLANS BY SERVICE

COMMISSIONED SERVICES & COMMISSIONING PLANS – BUDGET SUMMARY (2017/18)										
	DASH £'000	DASH %	ChS £'000	ChS %	BEC £'000	BEC %	CoaCh/ Fin/ CE £'000	CoaCh/ Fin/ CE %	Total £'000	Total %
Already commissioned	148,800	71%	40,500	56%	71,800	69%	10,800	33%	271,900	65%
Planned to commission by 17/18	40,300	19%	3,600	5%	10,300	10%	900	3%	55,100	13%
Currently internal provision	23,400	11%	27,000	38%	22,700	21%	13,600	41%	86,700	20%
Not applicable - unallocated savings, pension liabilities etc.	-2,500	-1%	1,000	1%	300	0%	7,500	23%	6,300	2%
<b>Total expenditure 17/18</b>	<b>210,000</b>	<b>100%</b>	<b>72,100</b>	<b>100%</b>	<b>105,100</b>	<b>100%</b>	<b>32,800</b>	<b>100%</b>	<b>420,000</b>	<b>100%</b>
Total income 17/18	(90,600)		(8,000)		(42,500)		(6,400)		(147,500)	
<b>Net budget 17/18</b>	<b>119,400</b>		<b>64,100</b>		<b>62,600</b>		<b>26,400</b>		<b>272,500</b>	

\*Figures based on Bottom-Up Budgeting finance spreadsheets prepared June-August 2015 – budgets projected to 17/18

ALREADY COMMISSIONED	Quarter 3 15/16	Quarter 4 15/16	Quarter 1 16/17	Quarter 2 16/17 onwards
<b>DASH</b>				
Community Health & Social Care Services				
Step Down Beds				
Commissioned Dementia Training				
Residential and Nursing Provision				
Home Care Services				
Day Care Services (External)				
Extra Care and Sheltered Housing				
Transport Services				
Prevention – Adults – Information & Advice				
Prevention - Adults – Sexual Health				
Prevention - Adults (Other Targeted and Universal)				
Healthwatch				
<b>CHILDREN'S SERVICES</b>				
Placements – Externally Commissioned				
Early Help Services				
Housing Support				
Children's Services 0-19 Public Health contracts				
Positive Activities				
WCC Contribution to West Mercia Youth Offending Service				
<b>BEC</b>				
Waste Services				
Regulatory Services				
Bus Subsidy				
Concessionary Fares				
Book Fund				
Bridges & Structures				
Winter Maintenance				
Highways Maintenance				
Street Lighting				
<b>COACH/ FINANCE/ CHIEF EXECUTIVE</b>				
Property Services				
Facilities Management				
Maintenance & Minor Works				
Systems & Customer Access ICT - externally commissioned				
Customer Services				
Employee Services & Central Recruitment				
Internal Audit				



## COMMISSIONING PLANS BY SERVICE

COMMISSIONING PLAN IN PLACE	Quarter 3 15/16	Quarter 4 15/16	Quarter 1 16/17	Quarter 2 16/17
<b>DASH</b>				
Timberdine				
Urgent homecare				
Promoting Independence Service				
Resource Centres				
Integrated Community Equipment Service (ICES)				
Transport - Older People				
Assistive Technology				
Internal Homecare Provider Services				
Residential & Nursing Provision (Internal)				
Day Services (Internal)				
Supported Living				
Shared Lives				
<b>CHILDREN'S SERVICES</b>				
Care Leavers team				
L&A Commissioned Service				
L&A - SEN (Special Educational Needs)	TBC - following commissioning of L&A Services			
0-19 Services				
<b>BEC</b>				
Transportation Services				
Bishop's Wood Visitor Centre				
Music Service				
<b>COACH/ FINANCE/ CHIEF EXECUTIVE</b>				
HR & Finance Systems & Transactional Processes				
Legal Services	TBC - awaiting Cabinet decision			

CURRENTLY INTERNAL PROVISION - SERVICE REVIEW				
DASH	CHILDREN'S SERVICES	BEC		COACH/ FINANCE/ CHIEF EXECUTIVE
Adult Social Care and Case Management	Children with Disabilities	Archive and Archaeology Service	Registration and Coroner Services	Business Support Unit
Carers' Services	Placements – internal provision	Scientific Services	Libraries – internal provision	S&CA ICT – internal provision
LD Integrated Teams	Adoption Service	Corporate Information Management Unit	Lifelong Learning	Corporate Programme Management
MH Integrated Teams	Fostering and Kinship Teams	The Hive	Joint Museums Service	HR Advisory – Directorate and Policy
Public Health Staffing	Children & Family Support Team	Network Control	Countryside	DBS – Vetting Team
Voluntary and Community Services	Outreach Support Service	Open Road – Customer and Community	Sustainability	Pensions Function
Business Support	Business Development & Administration	Gypsy Service	PROW / Access	Health & Safety
Emergency Planning	Home to School and College Transport	General Transport	Highways Maintenance – internal provision	Learning & Development
	Early Help – internal provision		Street Works / Inspections	Commercial, Performance and Research Functions
	Children's Social Care Teams		Business Administration & Systems	Marketing & Communications
	L&A – Provision Planning, Accommodation & Fair Access		Waste Management Services – Pollution Control	Consumer Relations Unit
	Family Front Door			Corporate Diversity
	Placements & Resources Team			

CURRENTLY INTERNAL PROVISION – NO CURRENT PLANS TO COMMISSION			
DASH	CHILDREN'S SERVICES	BEC	COACH/ FINANCE/ CHIEF EXECUTIVE
Adults' Safeguarding	Safeguarding & Quality Assurance	Investment & Growth	Chief Executive
DASH Central Management	L&A – Education Intelligent Client Unit	Strategic Planning & Environmental Policy	Finance – Strategic/statutory functions
Integrated Commissioning Unit	Early Help Intelligent Client Unit	Highways Contracts and Programme ICU	Coach Central Management
	ChS Central Management	BEC Central Management	Democratic Services
		Transport Planning	
		Planning Development and Control	
		Minerals and Waste Policy	

### Key



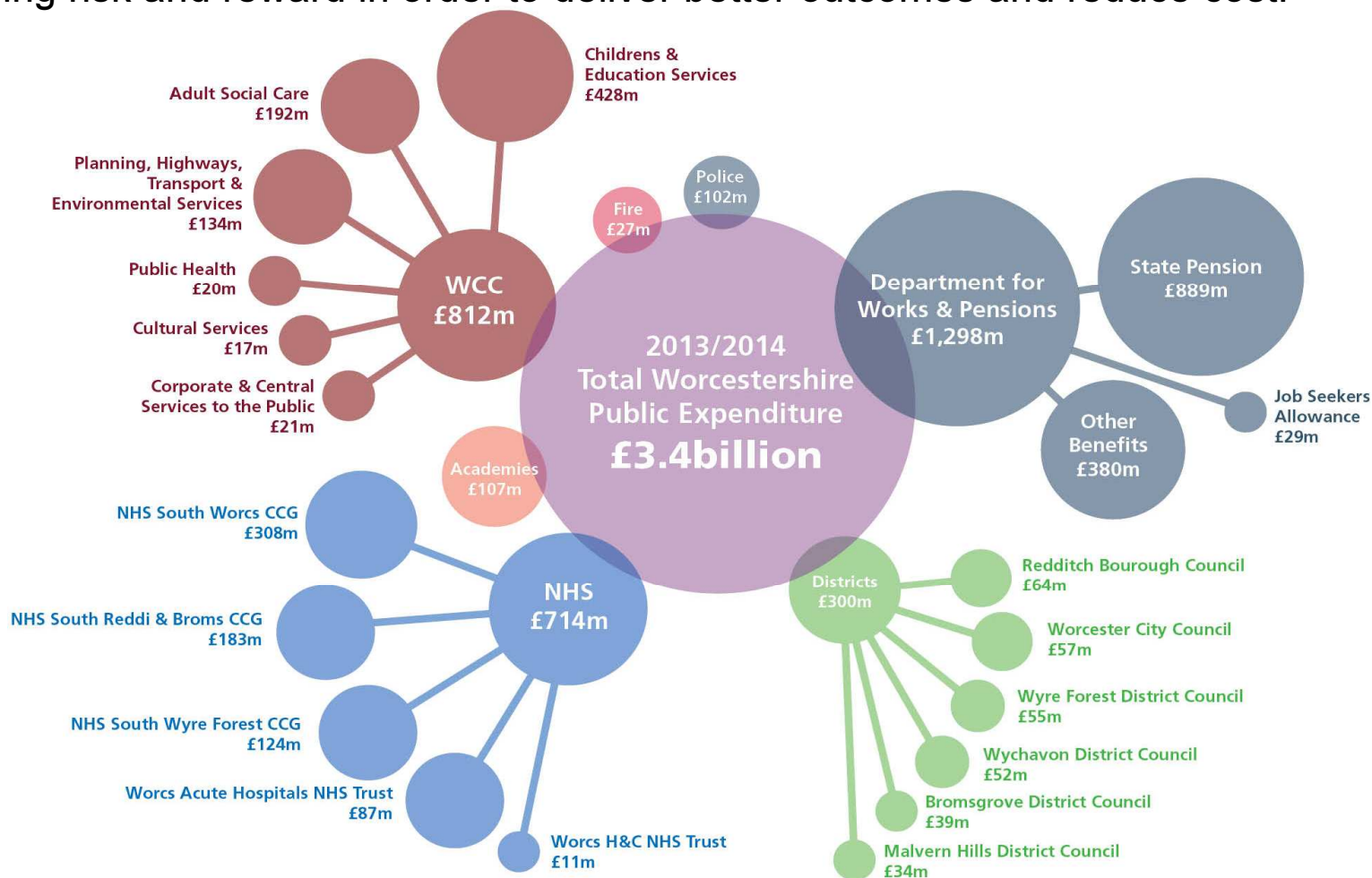
# Worcestershire County Council

## CSP 2015

### Active Alliances

# Active Alliances – Programme Summary

- Diminishing budgets in most individual organisations
- 2015–2020 opportunity to focus 'partnership' working on small number of active alliances
- Sharing risk and reward in order to deliver better outcomes and reduce cost.



# Active Alliances – Programme Summary Continued

## 3 Workstreams:

- Shared Management and Leadership
- Further exploration of Shared Services and Systems
- Strategic Alliances – Public Sector Reform and Devolution

**Money:** £400K across the first two workstreams, profiled as follows

2016/17	2017/18	2018/19	2019/20	2020/21+	Total
£0.050m	£0.100m	£0.100m	£0.150m	£0	£0.400m

**Investment Required:** One off: Estimated £50k total across all workstreams

## Risks:

- Identified within individual workstreams
- 'Readiness' of potential partners within alliances
- Focus on priority 'alliances'
- Managing organisational relationships inside/outside of specific alliances
- Recognition of need to share the benefits proportionately

# Active Alliances – Workstream 1 & 2

## Workstream 1 – Shared Management & Leadership

Identification of Senior management posts that could be shared with other partners. Not necessarily on a 50:50 ratio, also possibility to spread less 'effort' over more posts.

### Risk:

Assumes additional capacity at Director/Head of Service level and demand within partners. Cross over with Operating Model

### Next Steps:

- The first opportunities are being identified. The sharing of senior officer posts could enable the saving of £50k identified against 2016/2017.
- Two further posts (or equivalent) to be identified by August 2016 to deliver potential savings in 2017/2018



# Active Alliances – Workstream 1 & 2

## Workstream 2 – Further exploration of Shared Services and Systems

Identification of at least two opportunities for sharing systems and services. This might include shared service arrangements or WCC providing services on behalf of or in conjunction with other partners.

### Risk:

Appetite of partners, position in commissioning cycles, demand management.  
Cross over with Operating Model

### Next Steps:

- Future procurements will be open to other named public sector organisations where there has been interest expressed, or the likelihood of it being used by other public sector organisation is high.
- The Commercial Team is currently developing a relationship with Warwickshire & West Mercia police forces to secure additional capacity within 'Procurement'. (This is not expected to achieve savings)

# Active Alliances – Workstream 3

## Workstream 3 – Strategic Alliances – Public Sector Reform and Devolution

Public Sector Reform aims to both identify the opportunity for, and to achieve improved value from the Worcestershire Pound. The work also contributes to the potential Devolution deal within Worcestershire, presented on Day 1 of CSP, exploring the local 'ask' to Central Government as the 'County Offer' is developed.

The Worcestershire Pound Workshops, through June and July, returned a number of viable opportunities; 5 strands have been identified to take forwards, with Chief Executive / Managing Director level sponsorship.

- Data Sharing
- Connecting Families Joint Vehicle
- Frail and Elderly with a focus on resilient communities
- 5 Workforce (inc older):

### Next Steps:

- The leads of each of the 5 Strands will deliver a brief / early scoping paper – **September 15**
- Group of Key Sponsors to be identified to drive wider piece forwards – **September 15**
- Future Milestones will be agreed by the Partnership Executive Group as the detail of the strands becomes known

**Worcestershire County Council  
FutureFit 2020 Concept Paper - Active Alliances**

**Theme Overview:** with a £3.4bn spend by the public sector across Worcestershire and diminishing budgets in most individual organisations 2015 – 2020 is an opportunity to focus our 'partnership' working on a small number of active alliances within which we share risk and reward in order to better outcomes and reduce cost.

**Support Requirements  
(resource and investment)**

- Finance and or research capability to understand (Level 1) partner spend and outcomes beyond that presented in individual accounts.
- Discussions with external bodies to understand art of possible e.g. ImPower.
- External facilitation of partner workshops - secured.

**Investment: estimated £50k**

**Vision:**

**A clear and dynamic approach to alliance working, based on prioritising productive, transformational work with a select number of organisations.**

Underpinned by a rational identification of those organisations where there is a good probability of achieving high return for the County Council (and therefore its residents) in terms of either cost savings or service improvement.

A methodology was applied to all those organisations with which we currently work in partnership. A first scoping stage process considered:

- Was the partner a commissioning organisation;
- Was the partner a provider organisation with redesign capacity without prior agreement from commissioner;
- Did the partner have a user population who were also WCC social care users;
- Was there a statutory duty to cooperate with this partner.

The second stage considered current and potential investment and return:

- Could return include short or medium term demand reduction on WCC social care?
- Could return improve achievement of Open for Business ambition?
- Could return improve VFM of services in Worcestershire?
- Could return reduce reputational risk in terms of general public as we move through change?

The third stage considered organisational readiness:

- Maturity of existing relationships;
- Maturity of organisation in terms of stability and performance.

**What additional savings/income is targeted and when is this expected to be delivered?**

**£400K across the first two work streams, profiled as follows:**

2016/17	2017/18	2018/19	2019/20	2020/21+	Total
£0.050m	£0.100m	£0.100m	£0.150m	£0	£0.400m

**How will we judge success?**

- Proactive strategy around who we ally with, why and for what benefit
- Staff involved understand potential return on time spent on alliances
- Achieve potential return (outcomes and monetary) on alliances through at least 2-3 new initiatives with partners

**What additional savings/income is targeted and when is this expected to be delivered?**

1.	<p><b>Workstream – Shared Management and Leadership</b></p> <p>Identification of senior management posts that could be shared with other partners during the four year period.</p> <p>Sharing arrangements wouldn't necessarily be on a 50:50 ratio, but could include partners contributing on an hourly or weekly basis, or to undertake projects with or on behalf of partners, sharing the professional / support / operational costs of service delivery and providing specialist skills and professional support at a competitive rate to those in the private sector. This might include using strategic commissioners to commission across partners at a greater scale.</p> <p>This assumes some additional capacity or at least refocus of capacity at senior officer level.</p> <p>The first opportunities are being identified. The sharing of senior officer posts could enable the saving of £50k identified against 2016/2017.</p> <p>Further posts (or equivalent) to be identified by August 2016 to deliver potential savings in 2017/2018</p>
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Lead Head of Service:	Clare Marchant
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2.	<p><b>Workstream – Further exploration of Shared Services and Systems</b></p> <p>Identification of at least two opportunities for sharing systems and services. This would build on work done regarding the Place Partnership and Internal Audit which prove this can be done across a multitude of partners and through different models. This might include shared service arrangements or WCC providing services on behalf of or in conjunction with other partners.</p> <p>Identification of opportunities to achieve service integration (beyond front of house) across at least one frontline and one support service.</p> <p>To ensure opportunities can be recognised, future procurements will be open to other named public sector organisations where there has been interest expressed, or the likelihood of it being used by other public sector organisation is high.</p> <p>The Commercial Team is currently developing a relationship with Warwickshire &amp; West Mercia police forces to secure additional capacity within 'Procurement'. This initial example of the working practice will not deliver a saving, however it is likely to mitigate the need for expenditure , build in some resilience and the ability to share best working practices and maximise further opportunities for future joint procurement exercises.; it also represents a step forward in Shared working practices.</p> <p>Lead Head of Service:             Jo Charles</p>																		
3.	<p><b>Workstream – Strategic Alliances – Public Sector Reform and Devolution</b></p> <p>Public Sector Reform aims to both identify the opportunity for, and to achieve improved value from the Worcestershire Pound. The work also contributes to the potential Devolution deal within Worcestershire exploring the local 'ask' to Central Government as the 'County Offer' is developed.</p> <p>The below table illustrates the Worcestershire priorities out of Devolution in the county.</p> <table border="1" data-bbox="309 1272 1393 1424"> <thead> <tr> <th colspan="6">Devolution: Worcestershire Priorities</th> </tr> <tr> <th colspan="3">Public Sector Reform</th> <th colspan="3">Unlocking Growth</th> </tr> </thead> <tbody> <tr> <td>Public Estates</td> <td>Health &amp; Social Care</td> <td>Complex Dependency</td> <td>Infrastructure Investment</td> <td>Skills and Innovation</td> <td>Environment</td> </tr> </tbody> </table> <p>The Worcestershire Pound Workshops returned a number of options, 5 strands have been identified to take forwards.</p> <ul style="list-style-type: none"> <li>• Connecting Families Joint Vehicle</li> <li>• Worcestershire Data Sharing Initiative</li> <li>• Partners working better together to support Worcestershire’s diverse workforce</li> <li>• Frail and Elderly with a focus on resilient communities</li> </ul> <p>By learning from and building on the emerging work from Better Care Fund, the Place Partnership and more recently Connecting Families this workstream provides the opportunity to work with partners to deliver more in Worcestershire for less. Initially it is unlikely this workstream will deliver savings or an immediate return on investment. It should be noted that some work within the 5 strands have been identified elsewhere within the CSP 2015 process; including Connecting Families and the Cultural Trust concept.</p>	Devolution: Worcestershire Priorities						Public Sector Reform			Unlocking Growth			Public Estates	Health & Social Care	Complex Dependency	Infrastructure Investment	Skills and Innovation	Environment
Devolution: Worcestershire Priorities																			
Public Sector Reform			Unlocking Growth																
Public Estates	Health & Social Care	Complex Dependency	Infrastructure Investment	Skills and Innovation	Environment														

	<p>The first savings are most likely 2019/2020 from within this workstream and remain caveated based on the activity over the next six months.</p> <ul style="list-style-type: none"> <li>• Identify one high cost area to pool budgets and reform approach with partners beyond above; for example this could build on Worcestershire Vanguards and look at scope to our elderly communities and community and cultural offer.</li> <li>• Reinforce across organisation dual role of WCC officers re locality responsibilities alongside professional responsibilities.</li> </ul>
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Lead Head of Service:	Nigel Hudson
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**What will be key work streams/projects that will enable the delivery of this theme and who will lead their ongoing development?**

The first rounds of preliminary discussions and workshops have taken place, both within WCC and with other Public Sector partners through June and July to understand the ways in which public sector partners could work together along with the voluntary and private sectors to deliver innovative solutions.

Much of the work identified out of the Public Sector Reform workshops is at an early stage. The Shared Management and Leadership work stream is expected to deliver the 16/17 saving and the majority of 17/18 Targets. This work will be led by the Chief Executive, due to the sensitivity of the piece amongst Senior Officers.

**Preparatory Work with Public Sector Partners**

During the session 'Exploring Public Sector Reform - getting greater value out of the Worcestershire pound', the group, comprising of Chief Executive's and Lead Officers from across Worcestershire, identified the areas of highest potential (identified below) and allocated lead sponsors to scope any real potential. Subsequent workshops took place through June and July; WCC officers attended and engaged in the majority of the workshops to bring experience and challenge to the opportunities presented and steer WCC engagement.

Item
<b>Children and early intervention including CSE</b>
<b>16-24 year olds (education, skills, work)</b>
<b>Elderly (dementia, family support)</b>
<b>Workers (inc. Older)</b>
<b>Why choose Worcs (inc. county of festivals fun and culture)</b>
<b>Physically active, healthy population</b>
<b>Resilient communities</b>
<b>Connecting families</b>
<b>Mental health (young people, crisis, well-being,)</b>
<b>Sexual assault</b>
<b>Reducing overhead – pension investment</b>

**Continuing Development Work with Public Sector Partners - Stage 2:**

Following the workshops the sponsors reconvened to discuss, which priority pieces of work should be taken forward. It was agreed these pieces of work would report back into the existing Partnership Executive Group, who would support and provide strategic steer at a Chief Officer level. The initial five strands were identified as:

- Connecting Families Joint Vehicle
- Worcestershire Data Sharing Initiative
- Partners working better together to support Worcestershire's diverse workforce
- Frail and Elderly with a focus on resilient communities

**Internal Activity**

An initial matrix has been developed allowing senior officers to scope the perceived opportunities alongside the potential partners identified within the workshops; these have been rationalised by the Active Alliances work stream leads.

The indicators from this activity have identified the areas of greatest potential. Opportunities include, shared back office functions and joint vehicles for service delivery. The matrix will be reviewed moving forwards by the Lead Officers supporting the work streams within Active Alliances.

**What approach will be taken to deliver this work stream/project?**

As indicated within the vision Active Alliances requires a clear and dynamic approach to alliance working, based on prioritising productive, transformational work with a select number of organisations.

**What are the key milestones for delivery and when do these need to be achieved?**

**Workstream 3**

Public Partners 'Specific Opportunity' Workshops – Through June/July 2015

Public Partners and Public Sector Reform Sponsors to collaborate to bring together a two page summary for each of the five identified strands on how each idea can be taken forward and who needs to be involved. - September 2015.

Developments of specific concepts to be reported back to Worcestershire Partnership Executive Group on **30 September 2015**.

Future Milestones will be agreed by the Partnership Executive Group as the detail of the strands becomes known.

**What risks/issues/dependencies are foreseen and how can these be mitigated/managed?**

**Key risks/issues/dependencies**

- Shared Management / Leadership and Exploration of Shared Services and Systems work streams link with activity in Operating Model Theme, avoid duplication of efforts and double-counting.
- Work stream 3 links to Demand Management and Commissioning Themes, avoid duplication of efforts and double-counting.
- Any 'Private sector partners' within the 'matrix' that offer potential income streams may have cross-over with 'Self-Sustaining Council'
- 'Readiness' of potential partners within alliance
- Retention of focus - avoid pursuing too many initiatives presenting lower returns of investment
- Managing expectations of organisations within and outside of particular 'alliances'
- Assumption 'Active Alliances' replaces commissioning cycle, it does not, it forms part of commissioning.
- Timescales of potential 'Alliances' restricted by existing 'commissioned services'
- Recognition for need of 'Benefit Sharing' and proportionate distribution of benefits
- Assumption of Capacity at a Director or Head of Service level

**Equality Impact Assessment**

The Corporate Equality and Diversity Manager will be consulted on the development of specific projects arising out of Work stream 2 and Work stream 3. In particular the strands of 'Frail and Elderly' and 'Workforce including older' within Worskstream 3 will be viewed as they develop.

**What current programmes and projects will also support this theme's development?**

- Better Use of Property and Place Partnership
- Digital Council (Systems WMPSN)
- Act Local – Project Optimise - Volunteer Strategy
- Recovery
- Open for Business
- Modernising Projects in COaCH



# Commercial, Change and Finance – Our Goals

“We will be the main engine for delivering the authority's ambition to be an excellent commissioning council including getting the best commercial value from our current and future contracts.

We will support the council by developing a buoyant market place for relevant services including stimulating a voluntary and community sector, giving a diverse range of people the opportunity to participate in the economy.

We will support, drive and be an integral part of the change of the organisation by developing an agile workforce, effective and innovative spaces and digital tools that are fit for 2020

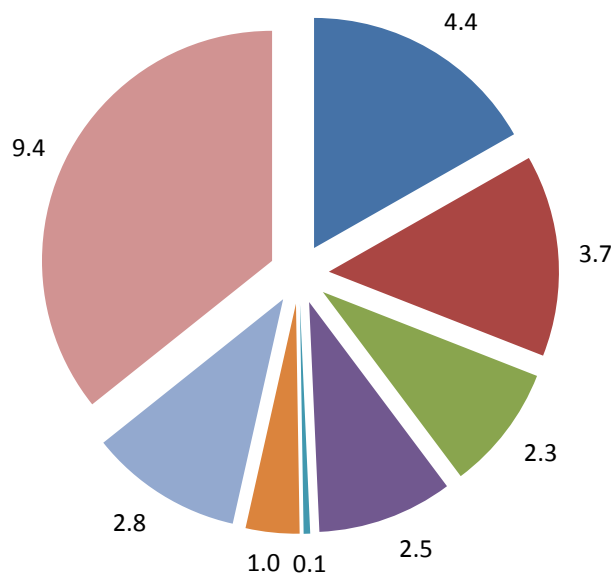
We will develop and run the processes that govern us and that that are the lifeblood of our organisation together with the finances that are required for the future.

We will develop the organisation to be increasingly self-sufficient including using our assets better and focussing on the things that really make a difference ensuring every £1 is spent as effectively as possible.

We will lead by example when it comes to looking at delivering services in an integrated way, including finding the best outcomes for the organisation, residents and businesses.

.....and we will tell people about it too! About the excellent organisation we are, the progress we have made and the great place that World Class Worcestershire is to live, work and visit”

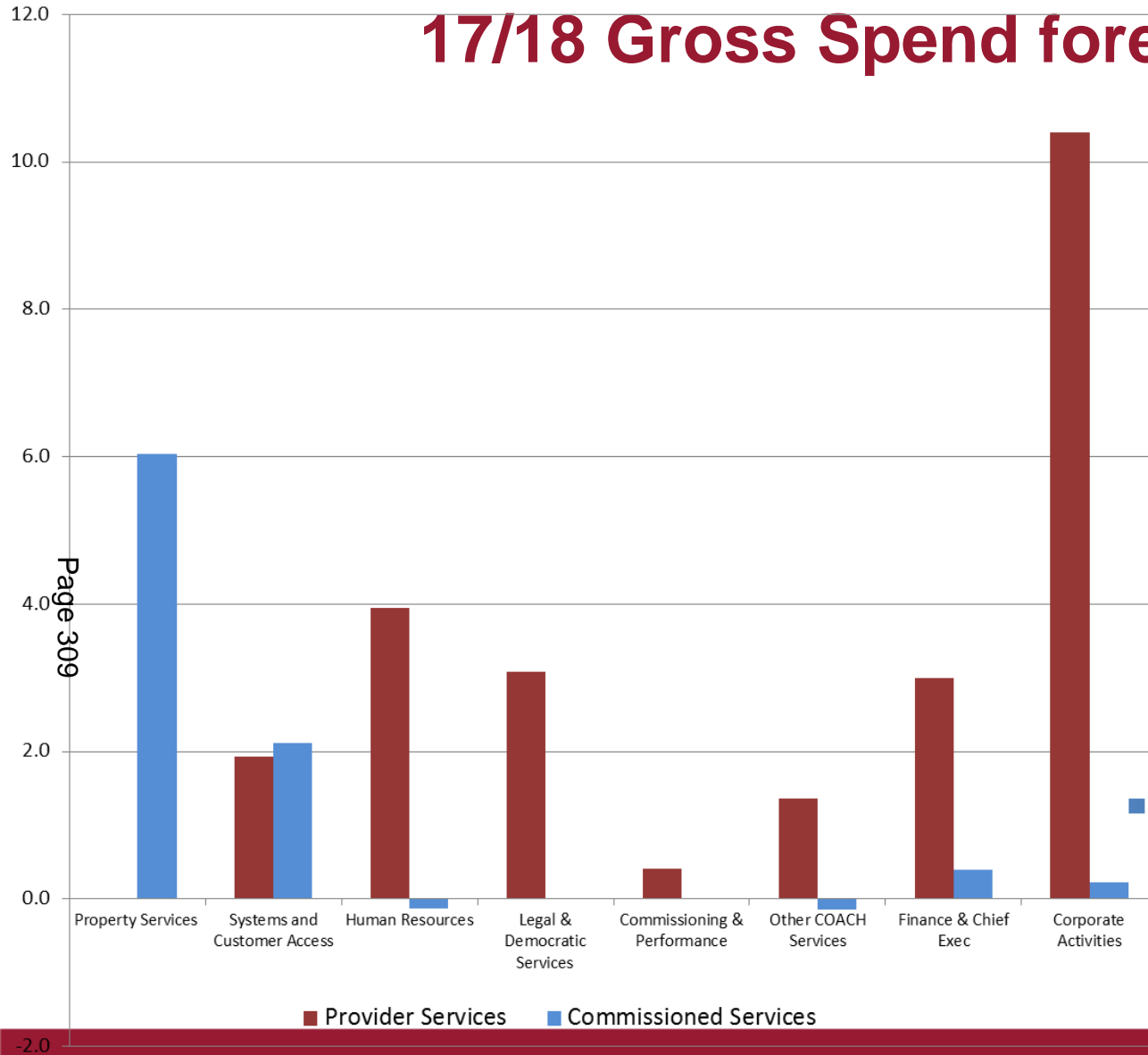
## Net Expenditure by Service 2017/18 (£26.3m)



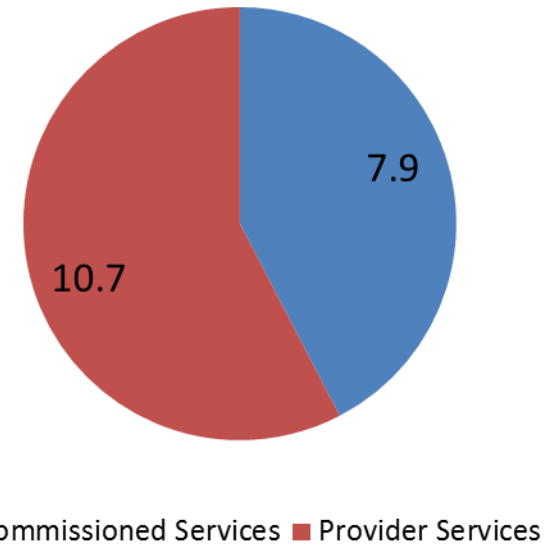
- Property Services
- Human Resources
- Commissioning & Performance
- Finance & Chief Exec
- Systems and Customer Access
- Legal & Democratic Services
- Other COACH Services
- Corporate Activities

# Provider -v- Commissioned Spend

## 17/18 Gross Spend forecast



### COACH Gross Spend 2017/18 (£18.6m)



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# Operating Model – Overview

## Vision

- Reflect the *flexibility* required in commissioning environment.
- Accommodate for more *cross public sector working*.
- Underpinning principles based on *outcomes* and *maximising commercial value*.

## Outcomes

- Up to £1.5m savings
- Measure and *maximise commercial value* of contracts.
- Robust talent management and *increase talent*
- *Flexible and fit for purpose structures*
- *Clearly defined processes and governance*
- Flexible environment *maximising mobile working*
- *Readily available and easy to interpret information*

# Operating Model - Programmes of Work

## Workforce, Grading and Structures (*Savings £1.250m*)

- Continue to review structures as the organisation changes
- Fit for Commercial/Commissioning Organisation; continual DMA review
- Consider workforce beyond 2018

## Systems, Processes and Spaces (*Savings £250K*)

- Refreshed Digital Strategy – Sept 2015
- New Draft Strategic Asset Plan – Sept 2015

## Governance and Decision Making (*marginal savings*)

- Streamline decision making

# DIGITAL STRATEGY REFRESH

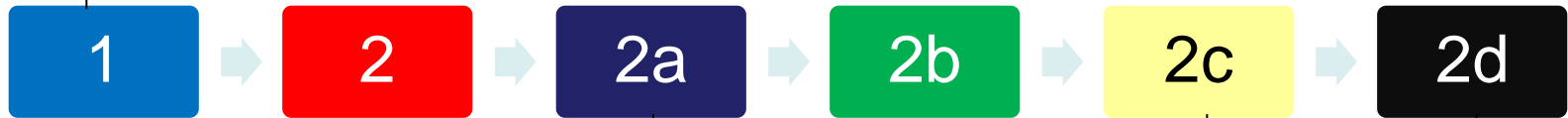
September 2015

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Customer Experience....underpinned by technology



**Executive  
Summary**



**Supporting  
Information**

**Introduction**

**New Plans**

**A review of what have we  
achieved since 2013**

**New  
Challenges  
ahead**

## Objective of the refresh:

To revisit our Digital strategy, 2 years into the 4 year plan, ensuring continued alignment and prioritisation to the Council's evolving operating model as a Strategic Commissioner

## What we have found?:

- The original digital strategy is fit for purpose and the focus areas are right
- Considerable progress has been made and the foundations for future savings and consolidation are in place. For example:
  - Experienced digital team in place
  - Innovative technology solutions available to deploy
  - Key foundations either in place or about to be (e.g. redesigned website for external customers, robust secure underlying infrastructure and other tools for internal customers)
  - Commissioned partner engaged for ICT Service Management
- We have put the technology foundations in place with minimum disruption, with savings (and Capital benefits) which is robust and ready for the future. Our Digital Team are becoming one of the UK public sector digital leaders and have the capability to deliver on our customer requirements
- Transformation requirements over the last 2 years have more than quadrupled reflecting increasing recognition and trust in the Systems and Customer Access as a partner enabling strategic change. The team have already delivered considerable savings to the Council.



# The Future for Service Users....



- Simpler to work from anywhere
- Easier to support
- Increased staff productivity
- Improving Management Information
- Improved Tools



- Integrated
- Works from anywhere
- 'One Number'
- Improved Management Information
- Video conferencing ready

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- Wide Area Network direct cost savings & property enablement
- Lower cost of delivery
- Service credits for non delivery
- Increased focus on ROI on all project activity



- Improved SLA's
- Extended service window
- Self service
- 'Amazon' style catalogue
- Projects delivered to customer requirements, on time and to budget

# The Future for our Residents....



- Access to information at any time through enhanced website 24/7
- 100% of services available online – end to end service, not just the front end
- Better service and faster resolution times
- Easy to access services anytime and anyplace

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- Multiple channels of communication to suit the individual – face-to-face, telephone, email and web chat

All these changes were mapped out over 2013-2017 (see next slide)

# Our Original Transformation Map 2013

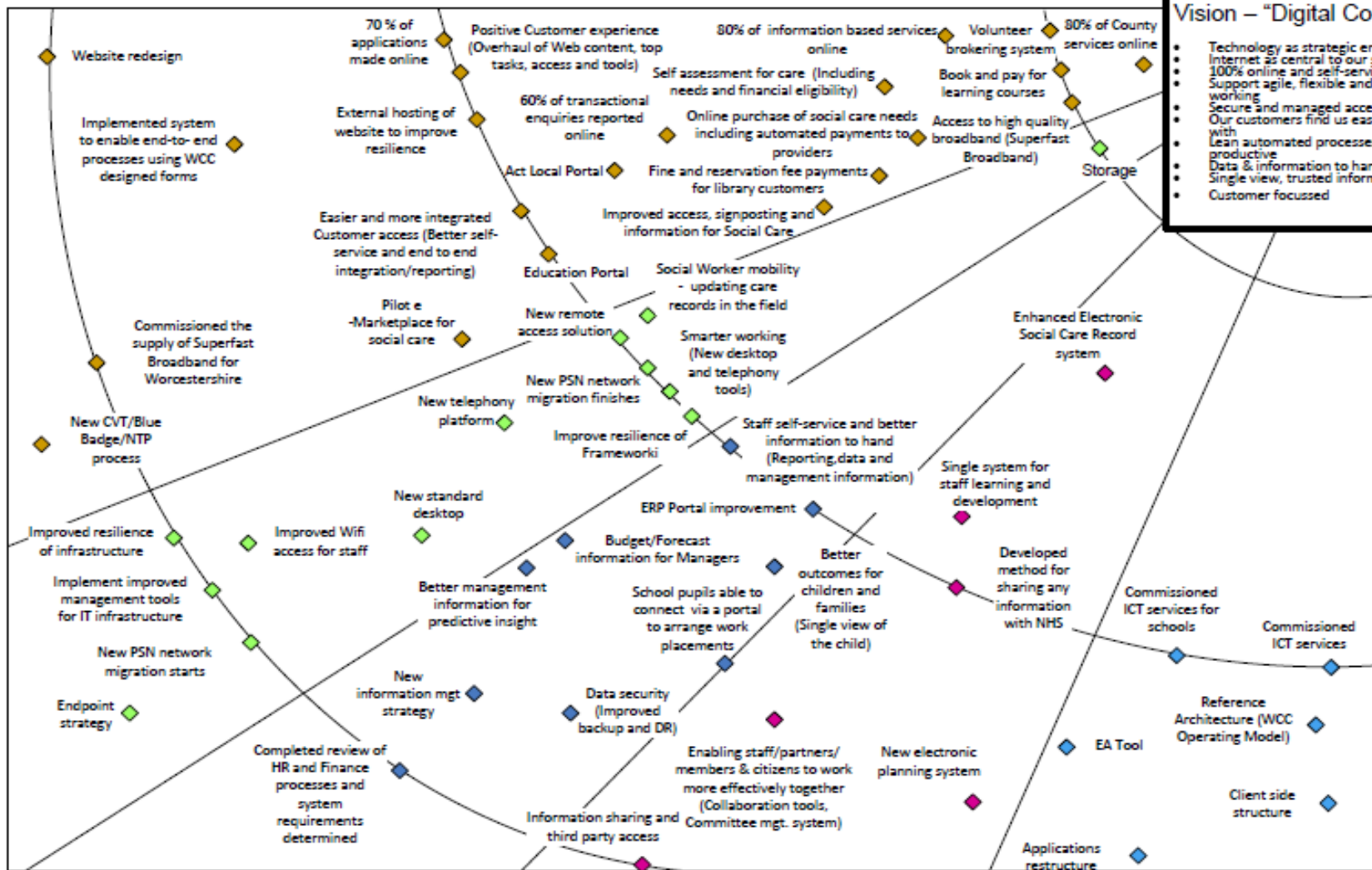
2014

2015

2016

Online Access

Flexible and Mobile



**Vision – "Digital Council"**

- Technology as strategic enabler
- Internet as central to our strategy
- 100% online and self-service enabled
- Support agile, flexible and mobile working
- Secure and managed access
- Our customers find us easy to engage with
- Lean automated processes, more productive
- Data & information to hand
- Single view, trusted information
- Customer focussed

# **Our Capability is enabling us as a World Class Digital Council**

**In 2015 we now have the capability to deliver, for all Directorates, any technological solution available on the marketplace – whether delivered using internal resources or by contracting in external resource.**

**As well as transactional services we can deliver innovative and secure solutions that delivers service redesign and transformation for any device, anywhere, and for customer.**

**Given business requirements, we will deliver effectively to your customer needs. Sometimes we will use partners to get us there more quickly. Whatever the solution, we will deliver quality at pace.**

**Our infrastructure is rapidly being improved and will allow new ways of working and collaboration that are leading edge,**

**Technology will no longer be an excuse for how we operate. It will be the backbone of how we operate. Our capability and delivery of these technology solutions will enable us to be a world class digital council.**

**See Appendix 2b for many examples of our achievements**

NEW MINDSET



NEW RESULTS



## New Financial Reality

- Invest in technology
- Innovation & Better Design
- Agile working
- Prioritisation

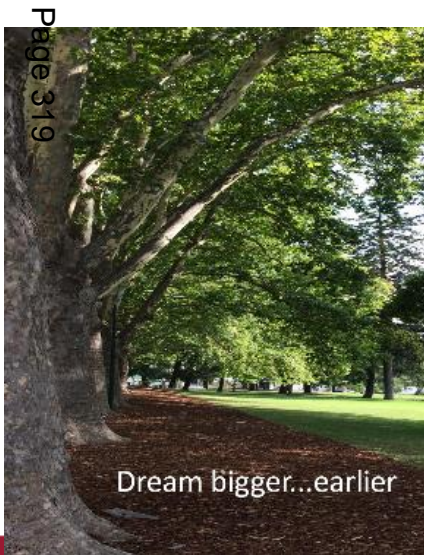
## Joined up working

- New business model – one council, one team, one digital purpose
- Reallocation of resources
- More time with customers
- Change attitudes and make all our people Digital Leaders
- Collaboration
- Enabling communities
- Partnerships



## More Expansive

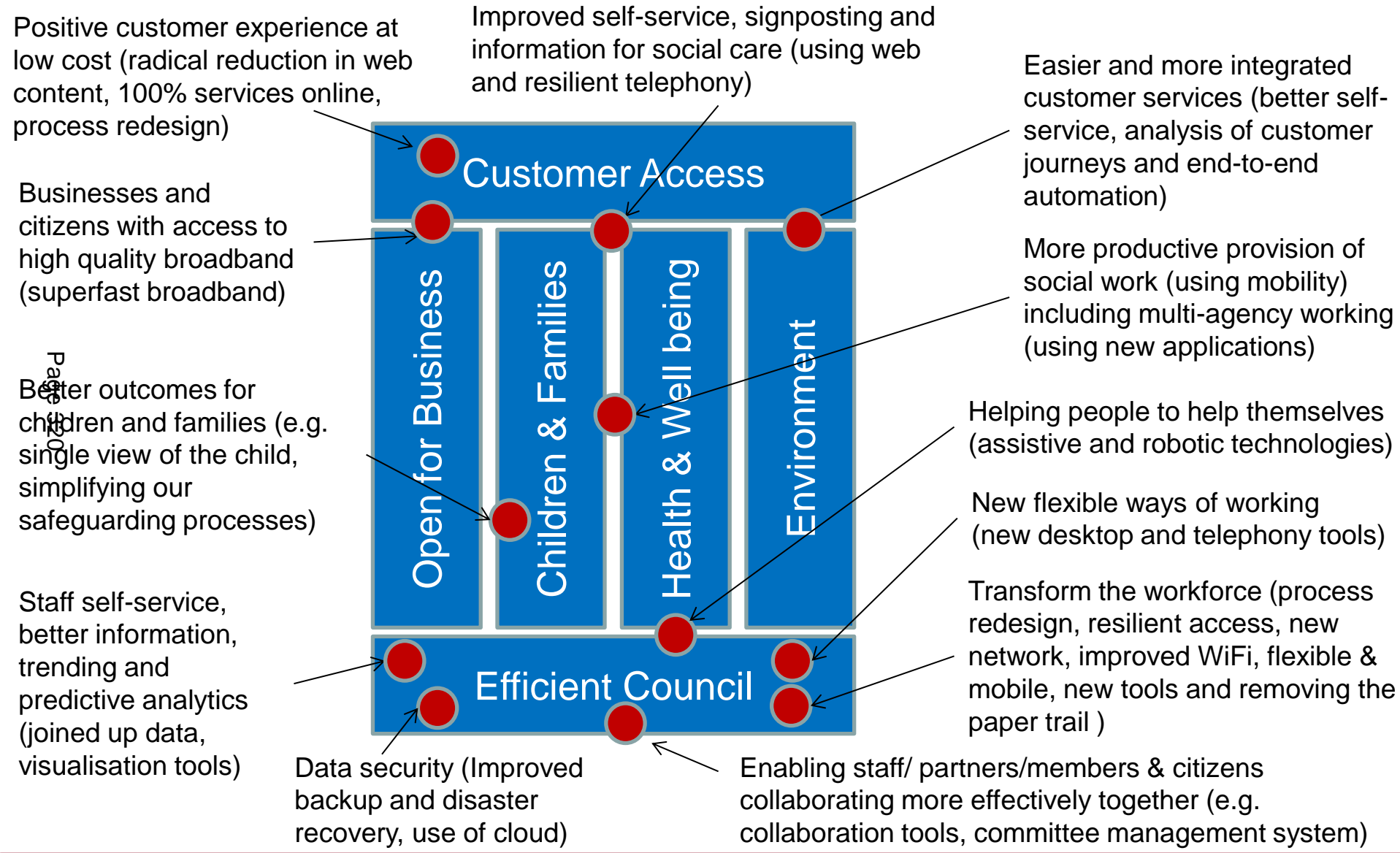
- World-class Worcestershire
- Data driven
- The Digital County
- Devolution
- Extend use of assistive technology



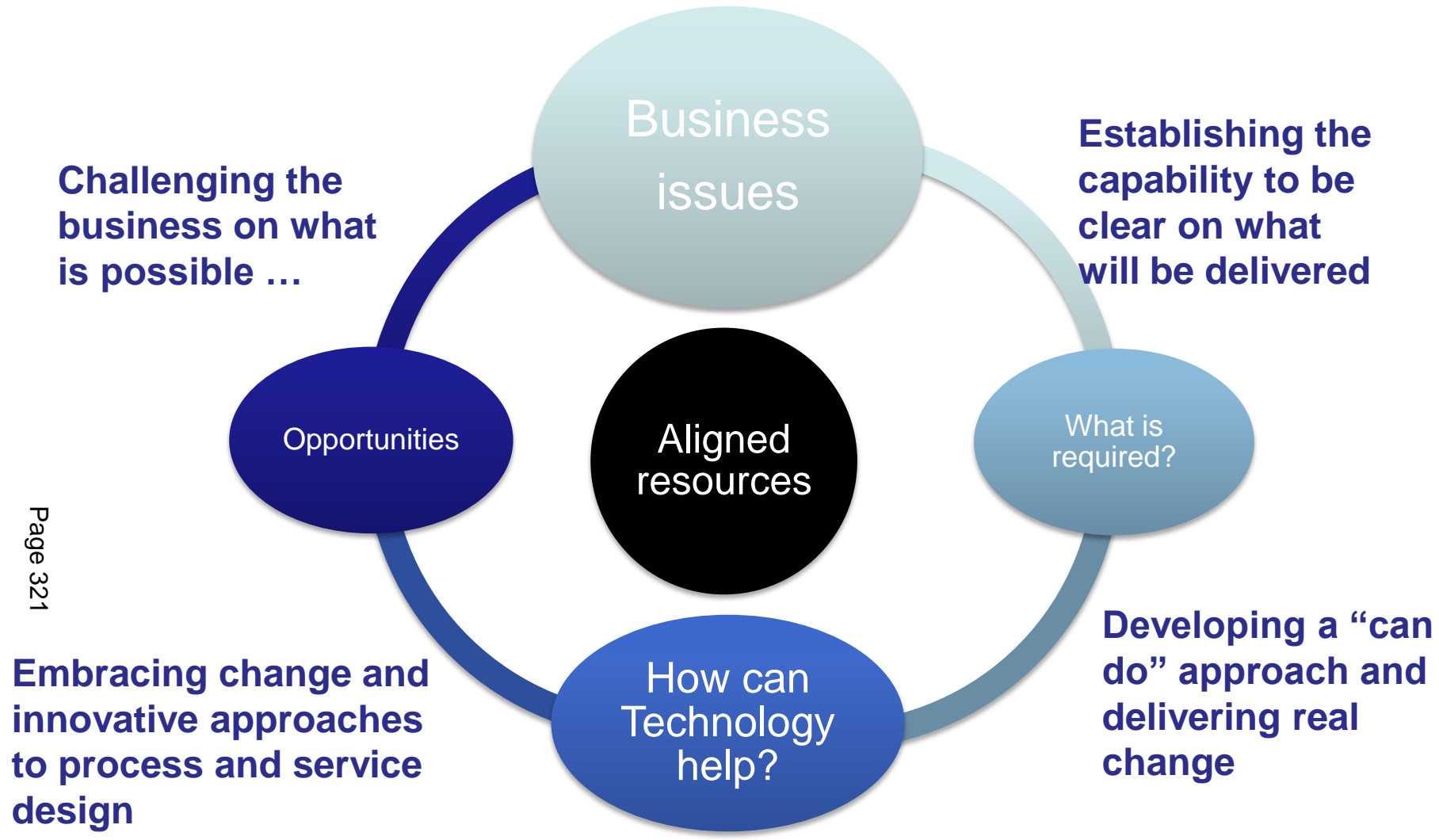
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# Our Digital Strategy still maps very well onto our corporate strategy



**See Appendix 2c. For refreshed Plans for ICT enabled change**

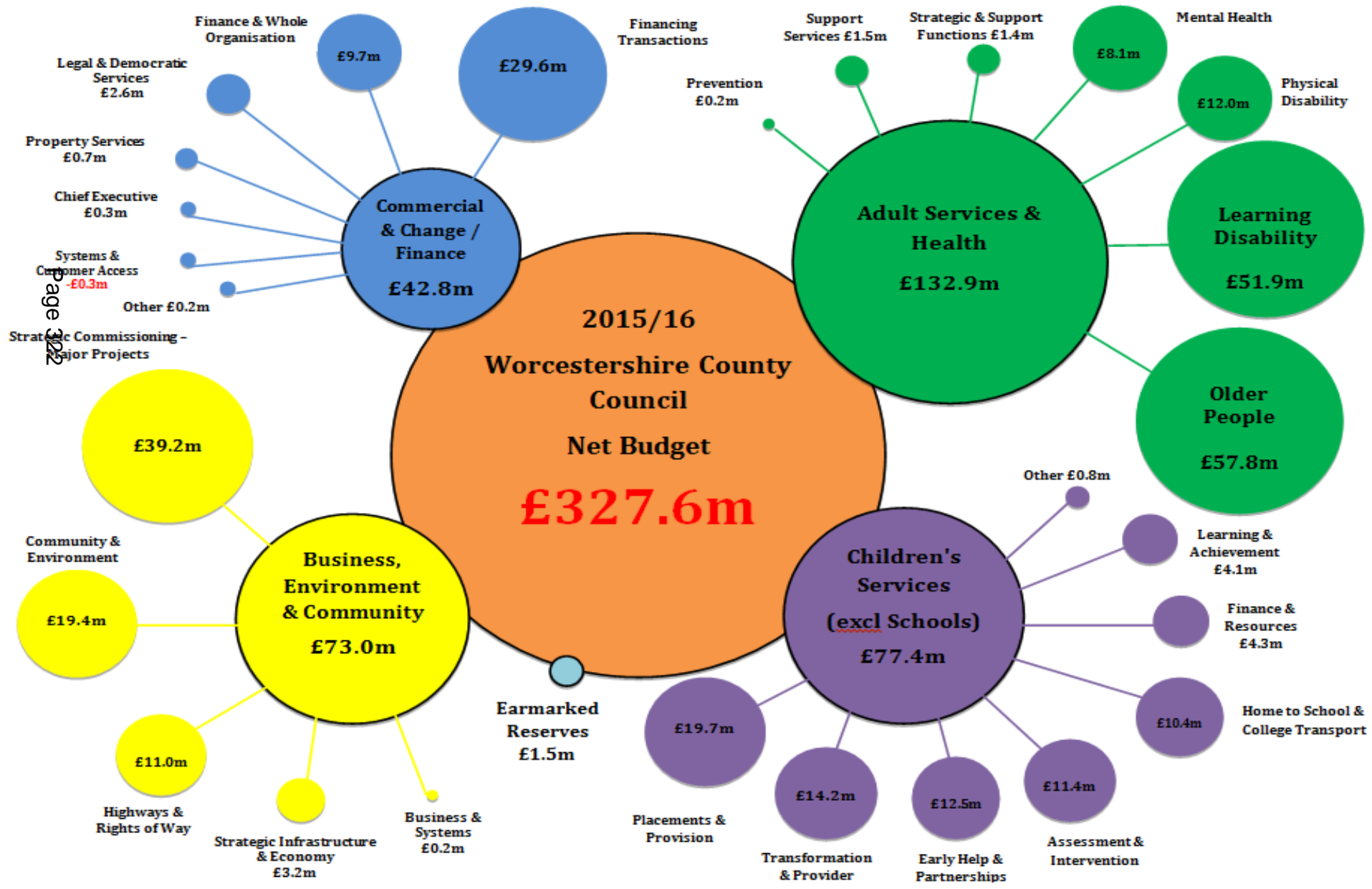


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# **But can we go further.....?**

# Is the allocation of resources appropriate for a Digital Council?

Worcestershire CC Spend v WCC technology budget (£327m v c.£6m = c.1.8%)





# Executive Summary

## The need for digital leadership is more visible...

- Worsening financial picture
- We still have many time consuming end to end manual processes
- Making best use of our data to inform commissioning, whilst improving, is still a significant weakness
- Significant risk remains in our adoption of digital technologies to enable service re-design and adopt new ways of working at pace
- The need for a flexible and agile response to changing demands is increasing

## We want to accelerate...

- To deliver on new ways of working such as multi-agency working
- To be agile in our design and delivery of services to citizens, partners and businesses
- To be world-class and drive further pace and ambition into the Council via service re-design enabled by technology
- We are implementing digital leadership in the organisation e.g. Leadership Exchange, training on social media etc. and it is embedded in the new talent management framework, and it will be extended to people thinking "Digital by default" themselves."

## Our Recommendation...

- We need to reallocate resources in a sustainable way to deliver and enable that change combined with a new approach to the way technology funding is managed.
- We need to further improve governance and integration of teams to ensure exploitation of our capability

- Finance Management savings in current plan include £160k from review of management structure to be delivered in 2016/17
- Other savings currently on track circa £347k through to 2019/20
- All further savings captured under Self Sustaining Council Initiative

# Modernising HR and Organisational Development

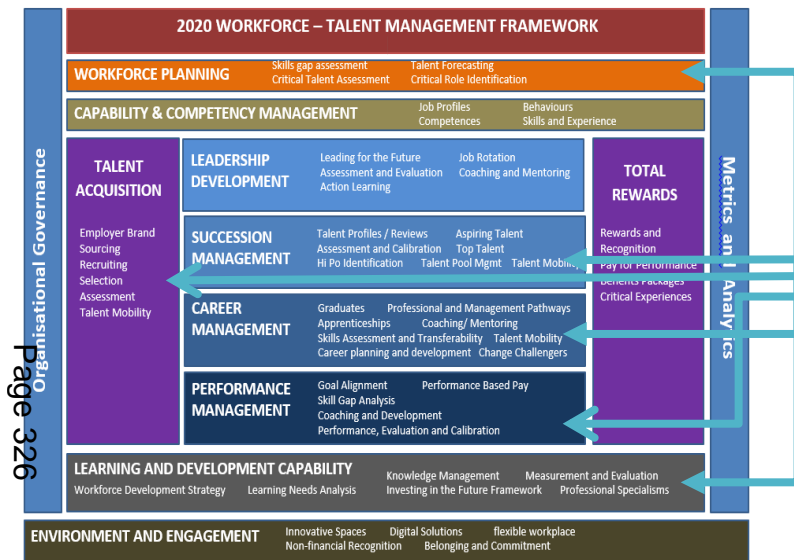
## Outcomes :

- HR self service is increased
- HR & OD services are smaller, with defined centralised functions and a business partnering/challenge model
- HR is recognised for its 'value added' approach
- More business focused approach with a clear unit cost and measured demand metrics
- Vocational Team aligned with service requirements and DASH future service delivery model
- £100K savings (**£30K 2015/16** **£70K 2016/17**)

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Milestones	Completed By Date:
HR functional identification and operating model analysis	Completed July
Demand analysis activity with HR teams	Completed July
Collation, analysis and outputs from activities	July / August 2015
Options developed for future HR & OD functions / structures	September/October 2015
Evaluation and organisation engagement on preferred option	October/November 2015
Plan and start implementation of chosen option	December 2015

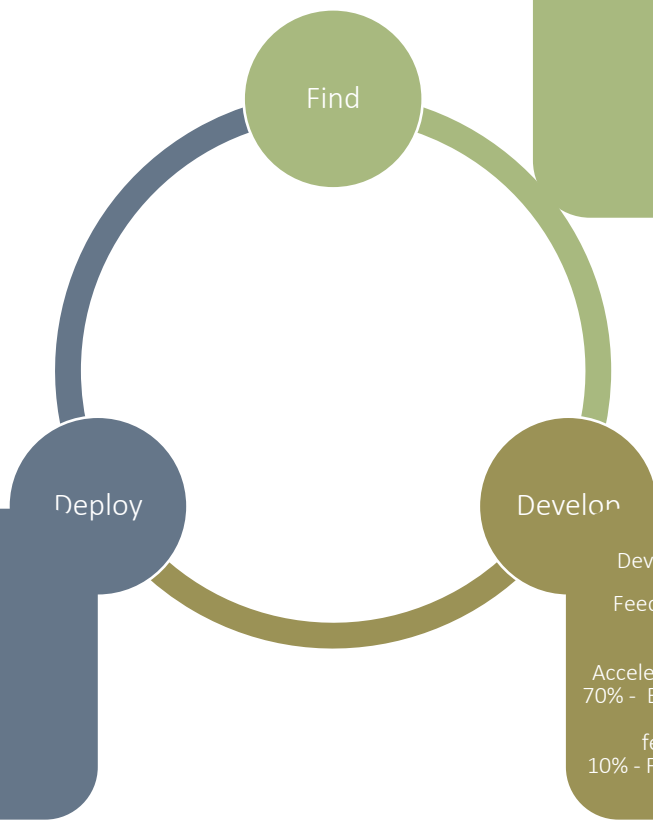
# Talent Management - Workforce 2020



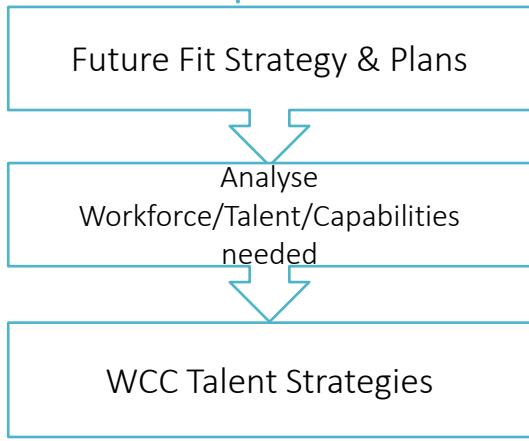
Talent Management System

Graduates

Work Placements



## Building a Future Fit Talent Pipeline



- ✓ 4 future Heads of Service
- ✓ 16 future Senior Managers/Key Professionals
- ✓ 24 future Level 1 Managers
- ✓ 6 Graduates

- Development Assessment Centres
- Feedback & Personal Development Planning
- Accelerated Development Programmes
  - 70% - Experiential real world experience
  - 20% - Social feedback/coaching/networks
  - 10% - Formal training, courses, seminars

## Worcestershire County Council 2020 Vision Concept Paper

**Theme and Overview:** Operating Model

### Support Requirements (resource and investment)

- Investing time to visit others to experience innovative ways of using spaces
- Visits to Local Government Chronical/Municipal Journal award winners in relation to proposals
- Human resource to support pace
- Specialist human resource
- Investment in Technology/People -£1000K
- Investment in Innovative Spaces - £ 500K
- Investment in talented workforce - £ 600K

### 1. Vision:

This theme builds on our current operating model but steps up the pace and has 3 priorities of focus and savings. They are:

- **Workforce, grading and structures;**
- **Governance and decision making**
- **Systems, processes and spaces**

We will have a significantly smaller and more flexible workforce of senior generalist and specialist commissioners. The right people will be recruited and retained in the organisation, with simplified employment contracts and grading and re-numeration that reflects the complexity of the commissioner role.

A refreshed digital strategy will ensure extensive use of digital tools to connect, collaborate, allocate and deliver work, with the information that we need, to make decisions readily available and easy to interpret.

Our Property Asset Strategy for the County Council will develop further our approach to integrated working and collaboration.

Streamlined decision making will reduce time take to make political decisions and ensure officer governance is efficient with reduced administration and grind and support member led consideration of potential savings in allowances in September 2015.

### How will we judge success?

- We will save money
- We will have stronger and sustained commercial outcomes by having the right people in the right roles
- Flexible and fit for purpose structures
- Clear, defined and efficient processes and governance
- Flexible environment that maximises mobile working
- Readily available and easy to interpret information

**What additional savings/income is targeted and when is this expected to be delivered?**

Workforce and Grading - £1250K (split equally across 2018/19 & 2019/20)  
Systems, Processes and Spaces - £250K (split equally across 2018/19 & 2019/20)  
Governance and Decision-Making - (marginal)

**What will be key work streams that will enable the delivery of this theme and who will lead their ongoing development?**

**1. Workforce, Grading and Structures**

We will have a significantly smaller and more flexible workforce of senior generalist and specialist commissioners and highly skilled professional specialists who will draw on appropriate expertise and take responsibility for delivering outcomes for Worcestershire. In order to achieve the savings indicated above we would anticipate that further FTE reductions would need to be made over the two years from 2018/19 on top of existing directorate savings across the whole Council.

The success of our organisation depends upon attracting, developing and retaining talent within the organisation and identifying and securing support from specialists, outside of the organisation as required. To be effective commissioners, we must invest in commercially focussed individuals with a strong business acumen who will ensure the best outcomes from our contracts.

To secure this new workforce our pay, conditions and cultural environment have to be attractive for current and prospective talent.

West Midlands Employers, the Regional Employers Organisation, who offer a range of services to local councils and the wider public sector, have highlighted Worcestershire's success in delivering savings through changes made in terms and conditions. However, they also highlighted the importance of us retaining a balance in our employee offering to ensure Worcestershire's terms and conditions are perceived to be competitive by people in the labour market.

A robust programme will be in place to ensure we recruit, retain and develop talent and will include succession planning and development opportunities. Mobile and flexible working will be maximised. Matrix working will be common place. Many staff will have dual roles and might be funded or matrix managed through multiple commissioning organisations to deliver the outcomes that are required.

All staff with decision making responsibility will understand the cost of the decisions that they make and will consider the right balance between the outcome they need to achieve and the commercial impact on the public purse.

With the operating model in its second year, it is timely to understand how it will evolve between now and 2020. With commissioning well underway there is further potential for parts of the commissioning function to be centralised under Commercial & Change.

	<p>We will simplify employment contracts and have an approach to grading and remuneration that reflects the operating environment and recognises the complexity of the Commissioner role. We will increasingly measure and manage staff's contribution to the outcomes for the people of Worcestershire. , We will recognise good performance and be robust in how we deal with underperformance. We will be innovative in how we reward and/or recognise people who perform beyond expectations.</p> <p>We will:</p> <ul style="list-style-type: none"> <li>• Understand the savings attached to planned structural changes that are included in the medium term financial plan (Completed)</li> <li>• Run focus groups with a cross section of the workforce to establish the baseline to build upon (Ongoing throughout August)</li> <li>• Understand the workforce factors that underpin a positive cultural environment (August 2015)</li> <li>• Work with West Midlands Employers to develop the principles associated with our 'human capital' that will support us in fulfilling our vision. Identify HR and/or management interventions that will drive our performance and are aligned to these principles. (August/September 2015)</li> <li>• Understand capacity and target additional savings (Completed)</li> <li>• Undertake regular Decision Making Accountability (DMA) reviews and by 2016/17, we will have implemented an organisational structure fit for a commissioning organisation. Further staff reductions will be identified. (Ongoing)</li> <li>• Articulate the 2017 and 2020 organisational structure blueprint (First Draft November/December 2015)</li> <li>• Develop Workforce Strategy and Plan (January 2016)</li> </ul>
	<p>Leads: Elaine Chandler</p>
2.	<p><b>Governance &amp; Decision-making</b> – As a political organisation it is crucial to consider how the decision-making process is affected by being a commissioning organisation. The commissioner/ provider split will inevitably reduce the council's influence on <i>how</i> services are delivered and will focus more on the <b>outcomes</b> that we achieve. Particularly for those services that will be <b>commissioned jointly</b>, due consideration will need to be given from the start. The role of <b>scrutiny</b> should be considered to be a consistent part of the process and there will be good <b>political awareness</b> within the organisation as well as those partners that we work closely with. Our decision-making will be based on <b>evidence</b>, facts and figures and will be substantially <b>commercial</b> in its thinking to maximise value for the tax payer and our Quality Assurance will need to be strengthened.</p> <p>Achieved –</p> <ul style="list-style-type: none"> <li>• The role of Scrutiny and Quality Assurance has been reviewed, facilitated by the Centre for Public Scrutiny.</li> <li>• Proposals were approved by Council in May 2015, together with a revised Scrutiny structure better matched to the new Operating Model and a Commissioning Council..</li> <li>• The review formed part of case study presented to LGA national conference fringe event by Centre For Public Scrutiny (CfPS) in July 2015 with Suzanne O'Leary also presenting</li> <li>• Council's revised scrutiny restructure has already been implemented and Overview and Scrutiny Performance Board (OSPB) is developing the detail of approach to quality assure across Scrutiny.</li> </ul>

We will streamline decision-making by:

- **Reducing the time taken to make political decisions:**

Publish rapid web-based notices of decisions for Cabinet Members with Responsibility (CMR) and Cabinet by June 2015, allowing quicker implementation – Achieved. (From June 2015 Notices of all Cabinet decisions are being published and circulated to all members - normally on the day of decision itself the 'call-in cool-off' delay before the political decision can be implemented has now almost halved (5 working days for Cabinet rather than 8).

- **Identical Decision Notices with rapid implementation are published in relation to all CMR decisions.**

Specific delegations are being sought from the Leader as appropriate to allow a political decision to be taken rapidly by a CMR rather than await a Cabinet cycle, with due governance followed.

- We will also review other governance processes at officer (or mixed officer/member level) with a view to streamlining and reducing 'grind' getting in the way whilst still ensuring good governance:
  - Roll out Modern.Gov Committee Management System deeper into the organisation by March 2016. - Achieved. New system now available for drafting, reviewing and submitting Cabinet agenda reports using Modern.Gov to manage the workflow and promote version control. Available for September 2015 Cabinet E-Learning module in support of new system.
  - New Word template for Cabinet, Council and Committee reports created to facilitate report drafting and reduce grind of re-formatting. Template likely to reduce report length by 5-10% with marginal reduction on print costs. To be launched for September round of meetings and onwards.
  - Format of minutes revised to remove lengthy regurgitation of reports. Replaced by an increase in noting comments made at meeting to provide a wider record of discussion, but not verbatim.
- Governance 'map' of informal bodies created.
- There is potential for some minor further savings from reduced print spend if more members/officers adopt more of an electronic approach to meeting and agenda papers.

Lead Head of Service:

Simon Mallinson



3.	<p><b>Systems, Processes and Spaces</b> - We will extensively use digital tools to connect, collaborate, allocate and deliver work and will have the information that we need to make decisions readily available and easy to interpret.</p> <p>All processes and systems will look at the whole system across partners and providers regardless of who delivers those services. Our spaces and systems reflect the diverse range of partners that we work with, support us working closer with communities, reflect a mobile and flexible workforce and stimulate innovation and creativity.</p> <p>We will provide a more innovative, efficient and dynamic office layout for Council staff and visitors, further encouraging flexible and collaborative working, further promoting the behavioural and ways of working more representative of a strategic County Council projecting a more 21st Century purpose to public service delivery.</p> <p>We have refreshed our Digital Strategy (<i>Appendix E</i>) and we have:</p> <ul style="list-style-type: none"> <li>• Re-profiled existing and new opportunities brought through transformation</li> <li>• Understand where further investment in technology and/or people can bring further savings and/or de-risk the scale of ambition</li> </ul> <p>We have a new Draft Property Asset Strategy (<i>Appendix F</i>) for the County Council which :</p> <ul style="list-style-type: none"> <li>• Develops further options for County Hall and Admin Buildings including further integrated working and collaboration through innovative approaches, flexibility and creativity – enabled by property co-location.</li> <li>• A final Property Asset Strategy which will contribute to the overall Business Plan of Place Partnership by April 2016.</li> </ul> <p>The approach we will take is outlined below:</p> <p>An initial analysis to produce a draft Asset strategy for the time period 2016-2020. Components from this initial draft will consider:</p> <ul style="list-style-type: none"> <li>• Does the Farms estate offer any further opportunities? Does the current management plan need to be adjusted?</li> <li>• Future of Admin Buildings e.g. County Hall - A range of radical options as an illustration of what could be done with the Admin Buildings</li> <li>• What Opportunities for driving up rental income from existing buildings through co-location and/or consolidation?</li> <li>• What opportunities for retail, industrial and/or housing development on sites the Council owns or could leverage with others?</li> <li>• The analysis will also be matched with Service Needs and how these may change over time informing the overall strategy</li> <li>• Advice, learning and guidance will be sought from other organisations to shape our thinking</li> <li>• The analysis will also be matched with Service needs and how these may change over time to inform the overall strategy</li> </ul>
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	<ul style="list-style-type: none"> <li>For our approach to office accommodation, a key element of this work will be to take a step back and fully understand the profile and detailed activities of the proposed users. These early analytical exercises will be based around interviews of key stakeholders, which will formulate a better understanding of the functional requirements and generate a pertinent brief for a stage 2 concept design study to take place. In parallel to this exercise a review of the Architectural effectiveness of the buildings themselves should be done. Once we have developed a view of people, process and place, only then will we be able to understand the future potential of the workplace environment and how people might be able to use it. To achieve this will require an investment of approximately (£500k working out at £461 per sqm.) but there is expected to be a 30% improvement in overall occupancy thereby allowing the opportunity to let more space to other users creating an income for the Authority.</li> </ul> <p>A final analysis producing a Final Property Asset Strategy based on the assets and partner intentions associated with the formation of Place Partnership (a joint venture with Worcester City, Redditch Borough Council, Hereford/Worcester Fire &amp; Rescue and Warwickshire and West Mercia Police Forces). This will leverage the wider public sector assets in line with the overall strategic purpose behind the new joint venture using the "One Town" review methodology pioneered by Property Services.</p>		
	<table border="1"> <tr> <td data-bbox="261 898 655 936">Lead Head of Service:</td> <td data-bbox="655 898 1414 936">Peter Bishop</td> </tr> </table>	Lead Head of Service:	Peter Bishop
Lead Head of Service:	Peter Bishop		
<p>What are the key milestones for delivery and when do these need to be achieved?</p>			
<p>The key milestones for delivery are articulated within each work stream.</p>			
<p>What risks/issues/dependencies are foreseen and how can these be mitigated/managed?</p>			
<p>The following risks are foreseen at this stage:</p> <p><b>Workforce, Grading and Structures:</b></p> <p>There are risks that:</p> <ul style="list-style-type: none"> <li>We lose the ability to recruit and retain business critical talent. Sufficient time and resources will need to be given to establish the principles and evaluate the options.</li> <li>There is a lack of understanding, support and appropriate decision making which will be mitigated through effective political engagement.</li> <li>Proposals lead to employee relations issues both collective (with trade unions) and in the relationship with individual employees. This could be mitigated by effective and prompt communication and engagement with both the trade unions and the workforce.</li> <li>Potential changes impact negatively on employee engagement and their commitment to delivering the objectives of the Council. This may be mitigated by ensuring an effective mechanism/strategy exists for two-way communication.</li> <li>We will need to invest in the right workforce with the right conditions which will be quantified through the development of a robust business case.</li> </ul>			

- That savings may be double counted e.g. where workforce reductions have already been factored into the MTFP. This will be mitigated by coordinated management and tracking of resource savings ensuring that they are appropriately accounted for.

**Systems Processes and Spaces:**

There are risks that:

- Staff do not adopt new working practices enabled by technology and property that could be mitigated through proactive change management.
- The Place Partnership is delayed in start-up and/or access to skilled and knowledgeable resources which could be managed through effective and robust governance and activity.
- The most financially beneficial asset strategy is not matched by service area change in business processes that make full and effective use of any changes which may delay the realisation of benefits. This could be managed on a case by case basis where alternatives in either service area delivery and/or alternatives assets will be considered that could make up the gap.

**Governance and Decision-Making:**

There are risks that:

- The business does not engage/accept self-service approaches which could be mitigated by proactive change management initiatives
- Members are not supportive of approaches to deliver savings which could be mitigated through continued and sustained engagement.

**The following dependencies are understood at this stage:**

Self-Sufficient Council – "One Town" approach for wider economic development; developing options for farm estates and developing an approach to get best reward from other assets e.g. street furniture.

Active Alliances – Shared Management and Leadership and Exploration of Shared Services and Systems

Commissioning – Ensuring functions, people, processes and systems moved to alternative provision take appropriate account of the Council's change programme and business and information needs.

Current FutureFit Programmes – including Better Use of Property, Modernising HR, Modernising Legal and Democratic Services, Digital Strategy and Customer Access Strategy will be embedded within the one council approach for its future operating model.

Equality Impact Assessment

TBD

What current programmes and projects will also support this theme's development?

Modernising Projects in COaCH – Modernising HR, ICT, Legal and Democratic Services, Systems and Customer Access will support the development of this programme.

Better Use of Property Programme – this already has a plan that extends beyond 2016. This programme will be delivered by Place Partnership.

Customer Access Programme – this will assist in any reconfiguration of business processes to support digital access to council services thus allowing the re-use of council assets used to support access to council services.

Demand Management as this could impact which assets are impacted by changes in demand and/or how the council operates.

Other Digital Strategy projects, including the Worcestershire Information Network will support the delivery of this programme.

**This paper is at concept stage and is work in progress. It should be noted it has not been approved through any formal governance at this stage**

<b><i>Future Fit Project Title: Modernising Human Resources and Organisational Development</i></b>	
<b>Type of Saving:</b>	<b>Please tick one box</b>
<b>FURTHER</b>	✓
<b>FASTER</b>	
<b>NEW</b>	
<b>CROSS CUTTING</b>	

<b><i>Corporate Plan Area:</i></b>	
	<b>Please tick one box</b>
<b>Children and Families</b>	
<b>Environment</b>	
<b>Open for Business</b>	
<b>Health &amp; Wellbeing</b>	
<b>Cross Council Priorities</b>	✓

**CMR Lead:** Marc Bayliss  
**SLT Lead:** Sander Kristel  
**Head of Service Lead:** Elaine Chandler  
**CMR Challenge:** Simon Geraghty

**Brief Project Description:**

A conscious decision was made at the beginning of the efficiency drive to protect the frontline HR Advisory Service to ensure we can effectively manage the continued increasing demand from the organisation as we downsize and re-shape. As we move to becoming a strategic commissioner we have also seen an increase in some specific service demands (both in terms of employee relations, case work, re-structuring and TUPE). However, as the organisation downsizes HR advisory will also need to downsize and therefore £206k of the future planned savings will be delivered from reducing HR Directorate Teams and a further £50k from a reduced Corporate Learning and Development function

A piece of work is being completed to completely re-shape HR in line with the Council's future operating model. This will ensure we understand what services will be required in the short, medium and long term, and also systematically assess the demand we are currently facing and from what services. We will therefore ensure that the downsize of the service is based on the actual work demands reduction, rather than on an employee number reduction and ensure the resultant structure is more aligned with matrix working.

*HR and OD has made 1.5 million savings from its delivery and staffing budgets over the last 4 years with a further £ 346k over the next two years. The majority of the £ 1.5 million has come from the L&D function (including the Adult Social Care training functions), re-shaping its service provision and centralising functions, therefore streamlining staffing. A significant amount has also been made from the central HR services, including Health and Safety. This plan will enable future savings to be taken from the HR and OD services in a planned way, rather than straight downsizing cuts*

**Purpose:** To re-shape and realign the HR and OD service provision with the future operating model.

**Outcomes of the project:**

- HR Self-service is increased with managers seeing this as part of their normal routine
- HR & OD services are smaller, with defined centralised functions, allowing for Directorate focus to be through a business partnering/challenge type role.

- HR is recognised for its 'value added' approach
- A more business focused approach throughout HR services, with a clear understanding of unit cost and demand metrics
- The Vocational Team is aligned with service requirements and the DASH future service delivery model

**Timescales:**

<b>Milestone</b>	<b>Completed By Date:</b>
HR functional identification and operating model analysis	Completed
Demand analysis activity with HR teams	Completed
Collation, analysis and outputs from activities	July / August 2015
Options developed for future HR & OD functions / structures	September/October 15
Evaluation and organisation engagement on preferred option	Oct/Nov 15
Plan and start implementation of chosen option	Dec 2015

**Risks/Impacts (E.g. risks to delivery of project – financial, political, reputational, legal, equality)**

<b>Risk description</b>	<b>Mitigation</b>
Failure of organisation to downsize in appropriate time/ level	Firm plans for downsizing will be in place to go live in line with planned service directorate downsizing. Directorate reserves may be required in the short term to bridge the gap between service area downsizing completion and HR downsizing completion
Demand for HR services continuing to rise at the pace it has over the last two years	Push the self-service agenda / ensure WIN captures HR requirements / ensure HR structure is set up to match the results from the demand management activity
Service re-design in DASH does not allow for changes to the delivery of Vocational Qualifications	DASH will identify alternative solutions to deliver savings

## Budget and Proposed Project Savings

<b>2014-15 Base Budget excluding Recharges &amp; Management Restructure (£000)</b>					
<b>Current Savings Programme (£000) &amp; RAG 2015-17</b>		<b>2015/16</b>	<b>2016/17</b>	<b>2017/18</b>	<b>Total</b>
	<b>Green Delivered</b>	332			<b>332</b>
	<b>Green On Target</b>				
	<b>Amber</b>	40	156		<b>256</b>
	<b>Red</b>			190 (inc. 90 ASC delivery budget savings)	<b>190</b>
<b>Total</b>	<b>372</b>	<b>156</b>	<b>190</b>		<b>718</b>
<b>Current FTE</b>					
<b>FTE Impact</b>					

<b>PROPOSED SAVINGS</b>			<b>2016/17</b>	<b>2017/18</b>	<b>2018/19</b>	<b>2019/20</b>	<b>Total</b>
<b>New Savings (Further and New)</b>	<b>£000's</b>	<b>Green Delivered</b>					
		<b>Green On Target</b>					
		<b>Amber</b>	30	70			100
		<b>Red</b>					
		<b>Total</b>					
<b>Existing Savings (Faster)</b>	<b>£000's</b>	<b>Green Delivered</b>					
		<b>Green On Target</b>					
		<b>Amber</b>					
		<b>Red</b>					
		<b>Total</b>					
<b>TOTAL SAVINGS</b>	<b>£000's</b>		30	70			100
<b>ANY INVESTMENT REQUIRED?</b>	<b>£000's</b>						
<b>Is investment recurrent?</b>	<b>Y/N</b>						
<b>RAG Ratings Key</b>		<b>Green Delivered</b>					
		<b>Green On Target</b>					
		<b>Amber</b>					
		<b>Red</b>					
<b>Comments on RAG Ratings</b>		Savings are subject to organisational support for chosen model					

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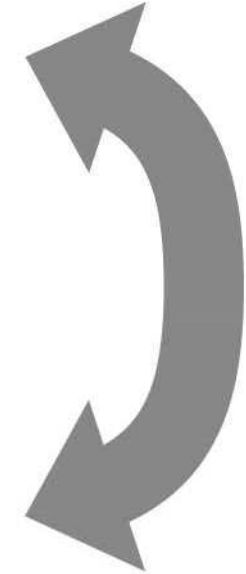
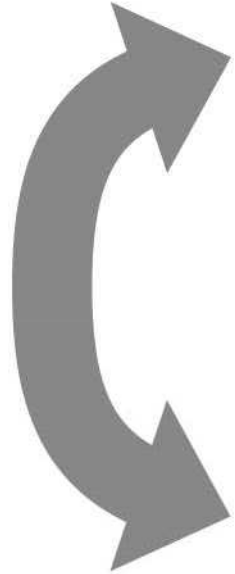


WORLD CLASS WORCESTERSHIRE  
— A World of Opportunity —



**WORLD CLASS  
WORCESTERSHIRE**

—— A World of Opportunity ——



## Mutual benefits

### Worcestershire County Council

- Inspire greater pride in the county
- Showcase achievements
- Improve morale
- Positive PR

### Business Community

- Attract more inward investment
- Create new jobs
- Fill the skills gaps
- Expansion of networks

A passionate rallying call for colleagues, businesses, residents and visitors

## Showcasing the Council success story



- Worcestershire has the third fastest growing economy in the country
- Nine out of ten schools in Worcestershire are rated as good or outstanding by OFSTED
- More money is being invested in highways and improvement projects in Worcestershire now than at any time in the last three decades



## WORLD CLASS WORCESTERSHIRE

— A World of Opportunity —

- A compelling message for World Class Worcestershire
- Focus on skills base for WCW
- Focus on connectivity for WCW



WORLD CLASS WORCESTERSHIRE

# World Class businesses





# World Class events





# World Class opportunities



## Why bother?

- 8 out of 10 people say that they want Worcestershire to have a more positive brand inside and outside of the county
- **#worldclassworcs** is already associated with positive sentiment
- People want to feel good about where they live and where they work
- If we don't share what is great about our county then who will?



## The best kept secrets

What are the achievements that we are most proud of?



- Schools
- Investment in our Infrastructure
- Innovative Partnerships
- The Hive
- Business Growth
- Skills
- Connectivity
- Malvern Cyber Centre

These are an essential part of our rallying call

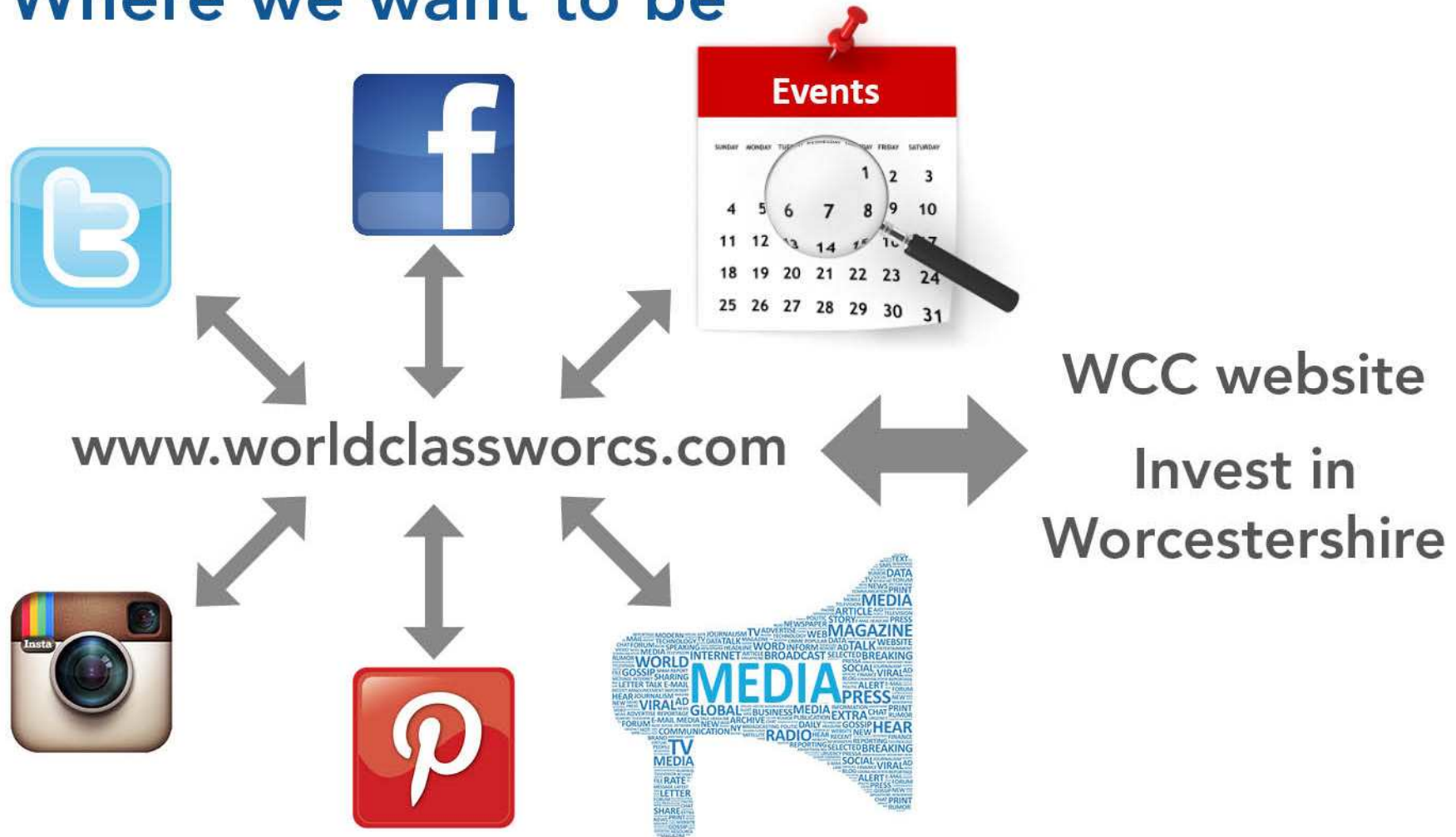
# Where are we now?



## Digital audit

- **'World Class Worcestershire'** is hard to find on Google UK, the top place goes to the .pdf guide
- **#worldclassworcs** hashtag has not spread beyond Worcestershire
- There appears to be only a limited awareness of it among social media users in Worcestershire
- Very few media organisations are using the hashtag
- Worcestershire messaging is not appear to be coordinated among accounts

# Where we want to be





# The customer journey

## World Class Worcestershire

### INVEST

Driven by LEP

Content to move investors between worldclassworcs.com and

— Invest in Worcestershire —

### LIVE

Driven by WCC

Content to move residents between worldclassworcs.com and



### VISIT

Driven by the Chamber

Content to move visitors between worldclassworcs.com and



All underpinned by the World Class Worcestershire content hub

## Next steps

- **What's the Story?** Creation of and buy into key messages supported by robust evidence
- **How can we find it?** Develop the World Class Worcestershire website
- **Who are our audiences?** Audience analysis on how people receive information, when, where and on which platforms
- **How do achieve brand clarity?** Production of clear guidelines for which brand is used when

## Next steps

- **Why does it matter to me?** Creation of compelling content that is relevant to audience groups and inspires interaction
- **How do we spread the word?** Stakeholder engagement to identify and grow networks with compelling, shareable content
- **Are we collaborating effectively?** A marketing forum to bring together partners to move forward

# Next steps

#WORLDCLASSWORCS

MITCHELL

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