

Cabinet

Dorset County Council



Date of Meeting	5 April 2017
<p>Cabinet Member CLLR ROBERT GOULD – Leader Lead Director DEBBIE WARD – Chief Executive</p>	
Subject of Report	Forward Together Review
Executive Summary	<p>In December 2013 Forward Together was established as a council-wide initiative to lead the transformation of the way the County Council delivered its services, and the way it works in partnership with stakeholders and other public services within Dorset. By the development of a new cultural approach for the organisation and employees, its aim was to put customers first, offering the best value for money, and ensure what we do spend is spent well. It aimed to build on our strengths and allow staff to work more efficiently. All staff were encouraged by the Cabinet, Chief Executive, their Directors, Service Directors and Managers to challenge how they can deliver the best possible services to the people we serve, with a reduced budget. Regular reports were provided to Cabinet and all Members by Member Briefings and reference to County Council.</p> <p>The Cabinet, Chief Executive and Corporate Leadership Team have been mindful of the expectations that have been, and will continue to be, placed on us all, through the Forward Together Programme, to deliver transformation through to the current austerity in the public sector, and agreed the need to review the current Programme and support arrangements. Using the commissioning cycle methodology (understand - plan – do – review), there was a review undertaken by a core team of the Forward Together story so far. This has enabled us to learn from our experiences so far, to share the successes and support the development of a strong plan for what the Programme and future change machinery needs to be for the future.</p>

	<p>Previous reports provided to the Cabinet have reported both the background and progress being made through the Forward Together Programme across the council.</p>
<p>Impact Assessment:</p> <p><i>Please refer to the protocol for writing reports.</i></p>	<p>Equalities Impact Assessment:</p> <p>EQIAs will be required to be undertaken for each work stream by the Forward Together gateway process.</p> <p>Health and Wellbeing Assessment:</p> <p>The Forward Together programme is securing the services that we need and making sure our efforts to secure the outcomes for residents are successful, particularly for those who are more vulnerable. The actions of the Forward Together Programme as a whole will impact on the achievement of the health and well-being strategy. Any Local Government Reorganisation (LGR) will be based on the positive impact on resident's outcomes.</p> <p>Use of Evidence:</p> <p>The Forward Together Programme is continually appraised for its delivery against the county council's aims and objectives and information such as that provided by Ask Dorset.</p> <p>Budget:</p> <p>The Forward Together programme is the transformation programme for the county council and includes the delivery of its Medium Term Financial Plan (MTFP).</p> <p>Risk Assessment:</p> <p>Having considered the risks associated with this decision using the county council's approved risk management methodology, the level of risk has been identified as:</p> <p>Current Risk: HIGH Residual Risk: HIGH</p> <p>The largest risk to the programme currently is that even with the identified major transformation programmes there remains a need to deliver a substantial savings target in the years 2017/18 and beyond.</p> <p>There is a requirement to identify the source of the savings required, and whilst a variety of approaches are in hand to do this the residual risk has been rated as HIGH in accordance with the risk assessment guidance</p> <p>Other Implications:</p> <p>None</p>

Recommendation	The recommendation is that Cabinet notes the finding of the review and proposals for strengthening the work of the Forward Together Board.
Reason for Recommendation	To ensure the Forward Together programme is fully implemented to secure both the organisational benefits and financial savings necessary to deliver a balanced budget, up to and beyond 2017/18.
Appendices	None
Background Papers	None
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1. Background

- 1.1 In December 2013 Forward Together was established as a council-wide initiative, which would transform the way the County Council delivered its services, and the way it works in partnership with stakeholders and other public services within Dorset. It puts customers first, offering the best value for money, and ensures what we do spend is spent well.
- 1.2 Forward Together also sought to introduce a new culture for the organisation's employees. It builds on our strengths and allows staff to work more efficiently. All staff were encouraged by the Cabinet, Chief Executive, their Directors, Service Directors and Managers to challenge how they can deliver the best possible services to the people we serve, with a reduced budget.
- 1.3 By challenging each of the 4,500 employees to think individually about their role in Dorset, they were encouraged to share their thoughts on how they can innovate, inspire and include others in their daily work. This applied equally to all staff, regardless of hierarchy and geography. This would result in a more streamlined management structure, allowing staff to be empowered to make decisions quickly to respond better to customer's needs. The Forward Together ethos expected all staff to actively demonstrate agility, personal accountability and innovation in their working practices. This was encapsulated in the Dorset Leader model.

2. The Review

- 2.1 The Cabinet, Chief Executive and Corporate Leadership Team have been mindful of the expectations that have been, and will continue to be, placed on us all, through the Forward Together programme, to deliver transformation through to the current austerity in the public sector, and agreed the need to review the current programme and support arrangements. Using the commissioning cycle methodology (understand - plan – do – review), there was a review undertaken by a core team of the Forward Together story so far. This has enabled us to learn from our experiences so far, to share the successes and support the development of a strong plan for what the programme machinery needs to be for the future.
- 2.2 The review consisted of two main parts:
 - an assessment of the progress on a number of key action plans relating to the Forward Together Programme and Service Transformation, governance; including a review of the programme structure, Forward Together Board and Corporate Leadership Team, Forward Together Programme resourcing (including Directorate liaison), Programme reporting and oversight arrangements (including Members), and links with the Corporate Plan and Outcomes Framework; Provide an assessment of the savings made to date against planned savings identified at start of Programme, and review of the future plan of savings.
 - an assessment of our people to see if the message is out there; challenging managers to understand their role; understanding if our managers are leading change; Can our managers balance the need for change with the expectations of their service users and are they aware of and using the tools and resources available to help them?
- 2.3 The review approach was to use an internal team of officers to undertake discreet pieces of work, supported by the Councils Internal Audit Team and South West Audit Partnership.

- 2.4 This review did not include Local Government Reorganisation or the implications of this on the Forward Together Programme.

3. Findings from the review

- 3.1 A substantial level of savings has been achieved over the last three years of the Forward Together Programme. The headcount of the Authority has been reduced, as well as its property portfolio:

- Since 2013 there have been £49.8m of savings across the authority.
- A 39% reduction in staff since 2013 (FTE /headcount);
- Office rationalisation strategy to reduce from 28 to 8 is well advanced. Disposal of high maintenance properties has helped enable £3.5m underspend on R&M budget of £9m in 2016-17.

- 3.2 The Corporate Plan has been streamlined into a focussed, outcomes-based document, which is clear and accessible to members of the public.

- 3.3 New ways of working have delivered a range of benefits including increased flexible working, improved office accommodation, delivering new technology, and increased travel choices.

- 3.4 The Ask Dorset consultation exercises carried out were successful in engaging with a wide range of residents and stakeholders across the county, in order to establish their priorities and views.

- 3.5 Throughout the Forward Together Programme, there has been regular reporting to Members as well as engagement and oversight.

- 3.6 In terms of staff awareness:

- 81% of managers are clear about what needs to change and what this means for them and their team.
- 76% of staff are receiving a PDR and 88% are clear about their targets.
- Over 20% of managers are struggling to balance the need to develop and implement new approaches with the priorities of ongoing service delivery.

- 3.7 The current review of the Forward Together Programme demonstrates that the Authority is seeking to learn from the past three years, as well as re-clarifying objectives and priorities at a time of significant change, to ensure that the Programme remains relevant and achievable.

4. Risks identified moving forward

- 4.1 As part of the analysis, SWAP provided some useful learning for us to consider moving forward, both in terms of strengthening the Forward Together programme and stronger more sustainable change principles for LGR and beyond. A summary of the key learning lessons from this report is included below:

- 4.1.1 Without robust and ongoing management of key Forward Together risks, there is a risk that the Programme does not deliver its intended outcomes, resulting in a failure to achieve the objectives for the Authority as a whole.

- 4.1.2 In the absence of clearly defined, captured and reported programme savings, there is a risk that projects will not be delivered in full. This may result in savings not being achieved and/or transformation change not being implemented.
- 4.1.3 In the absence of clearly defined programme governance that is consistently adhered to, reported on, and rigorously monitored, there is a risk that control over the success of the programme will be affected. This could result in the programme deviating or failing to achieve its intended outcomes.
- 4.1.4 In the absence of regular benefits realisation, there is a risk that changes and their impact are not well understood, lessons are not learnt, and success is not celebrated. This may result in future mistakes being made, missed opportunities, and a lack of understanding in relation to the Forward Together Programme's objectives.
- 4.1.5 Given the rapid and sustained pace of change in Local Government, along with the budget challenges faced by the Authority, there is a need to reinvigorate the Forward Together Programme quickly. However, at the same time, the Council needs to look ahead to future challenges and potential changes, and build flexibility into the programme to incorporate this.

5. Next steps

- 5.1 To address the learning and risks identified from the review, including the focus of SWAP, further detailed work is being undertaken to address these areas and develop the programme to align with the Corporate Plan and wider Dorset Partner priorities.
- 5.2 The further work has been developed from the themes that have been identified in the finding of the initial review. This work will be complete by mid-April and will provide recommendations in respect of adopting and/or strengthening areas of work in the following areas:
 - 5.2.1 Governance: As the Forward Together Programme is now understandably focused on savings and efficiency, it is timely to review the routes, relationship and effectiveness of moderation and assurance from Directorates, to CLT, and thereafter Cabinet. This will involve reviewing the content of the Forward Together Programme over the next 2 years and ensuring there is proportionate governance in place to manage this work. An outcome from this work will be the development of a Forward Together business schedule that shows line of sight between performance, financial and risk management from directorates to Cabinet. Finally, there needs to be clear convergence in respect of how the new and emerging LGR governance arrangements (which will be shared governance amongst the County and District Councils) will eventually adopt responsibility for the Forward Together Programme and of course the outstanding areas for other change programmes for District Councils.
 - 5.2.2 Risk Management: We are currently reviewing our approach to risk management in the organisation and how we ensure there is priority and transparency on existing and emerging risks. This will require some immediate actions to strengthen our approach, and a longer term piece of work to align our methodologies.
 - 5.2.3 Financial Management: The Forward Together programme will now embed the work of the Budget Task and Finish Group in respect of key decisions and the work programme to achieve a balanced budget in 2017/18 and 2018/19. Members have previously requested that financial reporting is strengthened in respect of aligning the monitoring of the budget, both spend and forecast, with the projection of savings from Forward Together. This, of course, also needs to be consistent across the organisation. This work has now commenced. Associated to this, and moving

forwards towards LGR, we also need to develop (with our partners) an approach to benefits realisation.

- 5.2.4 Programme and Project Methodologies: The previous 3-4 years of Forward Together has provided a useful proving period in respect of what works and what is required for successful programme and project management. We are looking to ensure there is a consistent approach across the organisation and where possible look to encourage a common approach with key partners such as Dorset Councils Partnership and Health. This will be particularly important as many of the change programmes will have interdependencies in respect of the emerging LGR programme and of course the Sustainability and Transformation Plan.
- 5.2.5 Communications and Engagement: The emerging collective work on LGR will require us to have a shared and stronger approach to communications and engagement. Officers are currently liaising with partners as to the possibilities and requirements for this.
- 5.2.6 Resourcing: Currently there is a blend of business support resources within Directorates, supplemented with further support from some central business support teams. The current roles, responsibilities and relationships of these support arrangements are an iterative product of time. The review of the Forward Together programme and determination of resource requirements to support LGR will require us to examine the priority, balance, availability and suitability of resources across our organisation and of course in respect of our wider work on LGR.

6. Summary

- 6.1 There is little doubt that our Forward Together Programme has been successful on many fronts. It has galvanised Member-Officer working around a common and shared vision of priorities and ways of working. It has changed, and continues to change, the way we work, both in terms of our internal service relationships and, more importantly, in terms of the services we deliver, whether solely or in partnership to our communities. Finally, it has also ensured that the organisation has continued to provide key services whilst addressing the congoing challenges of austerity.
- 6.2 We are a different Council and organisation since the inception of Forward Together and it is now timely to consider the learning together with the challenges ahead to ensure, as we move forward, our approach, both individually and over the coming months and years collectively, is strong and sustainable. Our analysis has provided some excellent foundations about what needs to stay and what needs to change and work is well in hand to develop a comprehensive action plan to ensure we continue to remain fit for the future.

Debbie Ward
Chief Executive
April 2017