

**SUPPLEMENT TO THE AGENDA FOR**

# **General Overview & Scrutiny Committee**

**Monday 8 April 2013**

**10.00 am**

**The Council Chamber, Brockington, 35 Hafod Road, Hereford**

**8. RISING TO THE CHALLENGE & ROOT AND BRANCH PROGRAMMES**

**Pages**

**3 - 56**



<b>MEETING:</b>	<b>CABINET</b>
<b>DATE:</b>	<b>18<sup>TH</sup> APRIL 2013</b>
<b>TITLE OF REPORT:</b>	<b>RISING TO THE CHALLENGE &amp; ROOT AND BRANCH REVIEW PROGRAMMES</b>
<b>REPORT BY:</b>	<b>DEPUTY CHIEF EXECUTIVE</b>
<b>CABINET MEMBER(S) ONLY</b>	<b>SCRUTINY COMMITTEE FINAL CALL IN DATE: INSERT DATE (AT LEAST 3 CLEAR WORKING DAYS AFTER DECISION TAKEN)</b>
	<b>DATE DECISION MAY BE IMPLEMENTED: INSERT DATE (DAY AFTER SCRUTINY CALL IN EXPIRY DATE, IF NOT CALLED IN)</b>

## 1. Classification

Open

## 2. Key Decision

This is a Key Decision because it is likely to result in the Council incurring expenditure which is, or the making of savings which are, significant having regard to the Council's budget for the service or function to which the decision relates. It is likely to be significant in terms of its effect on communities living or working in an area comprising one or more wards in the County.

Notice has been served in accordance with Part3, Section 9 (Publicity in connection with key decisions) of the Local Authorities (Executive Arrangements) (Meetings and Access to Information) (England) Regulations 2012

## 3. Wards Affected

County-wide

## 4. Purpose

The purpose of this report is for Cabinet to consider the:

- Closure of the Rising to the Challenge Programme
- Progress on the implementation of the Root and Branch Reviews
- Outstanding actions from the Root and Branch Reviews and proposals for the Herefordshire 2020 Review

## 5. Recommendation(s)

### THAT Cabinet:

- (a) Notes the achievements and lessons learned from the Rising to the Challenge Programme as set out in Appendix One.
- (b) Notes progress with the implementation of the Root and Branch Reviews as set out in Appendix Two.
- (c) Authorises the relevant Directors to jointly produce and implement Delivery Plans for the Phase 2 and 3 Reviews and report to Cabinet or Cabinet members as appropriate.
- (d) Agrees that the scope of the Herefordshire 2020 Review be extended to include all remaining work from the Review Programme as set out in paragraphs 10.8 to 10.14

## 6. Key Points Summary

- The Rising to the Challenge Programme was launched in July 2010, it brought together a wide range of existing projects and some new initiatives to deliver the aims of greater integration, increased efficiency and productivity, managing with less funding and better outcomes for residents
- The Programme delivered savings of £21.1m, helping to protect frontline services as well as implementing partnership wide improvements in culture, working practices and processes
- A formal project closure review has been undertaken and the key learning points from this are contained within Appendix One
- The Root and Branch Review Programme was developed as part of the *Better Services* strand of Rising to the Challenge Programme. Its aims are to redefine the role of Herefordshire Council and other public services, set out the priorities for the next decade and to rebuild budgets, with clear links between spend and results
- Proposals from the 12 Reviews amounting to £20.903m over three years were approved by council as part of the Medium Term Financial Strategy. Since this time further savings have been identified and the revised total is now £ 22.047m. Delivery of these savings represents an unprecedented challenge for the Council
- Following an accelerated process for the Phase 2 and 3 Reviews it is proposed that the scope of the Herefordshire 2020 Review is extended to include all remaining work from the Review Programme. In addition to delivering savings, Herefordshire 2020 will set out our core purpose and define the *Future Council*

## 7. Alternative Options

- 7.1 The proposals from the Root and Branch Reviews will change to reflect other priorities and/or different approaches as necessary. However, Council has already agreed the savings associated with these as part of the Medium Term Financial Strategy. Completion of the programme is essential to set out the future direction of the Council and to address the financial challenges ahead.

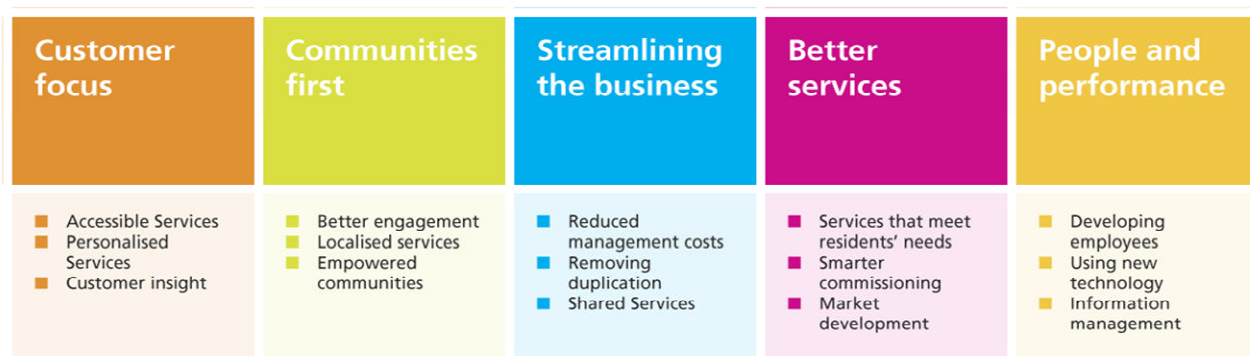
## 8. Reasons for Recommendations

- 8.1 The recommendations are made to ensure an effective close down of the Rising to the Challenge Programme and to seek Cabinet approval of the outputs and further work from the Root and Branch Review Programme.

## 9. Introduction and Background

### Rising to the Challenge

- 9.1 In 2008, Herefordshire Council and NHS Herefordshire agreed to work together as one organisation, Herefordshire Public Services (HPS) to deliver the innovative joint working between health and social care. Following the creation of HPS, it was recognised that there were a number of change initiatives underway which were not being co-ordinated or not necessarily supporting the new joint strategic objectives.
- 9.2 It was decided, therefore, to bring together the key transformation projects and initiatives under a formal programme management structure. The Rising to the Challenge (RTTC) programme was launched in July 2010.
- 9.3 The scope of the programme is shown in the diagram below:



Greater Integration  
 Increasing efficiency and productivity  
 Managing with less funding  
 Better outcomes for Herefordshire residents



Working in partnership for the people of Herefordshire



### Root and Branch Review Programme

- 9.4 The Root and Branch Review Programme was developed as part of the *Better Services* strand of Rising to the Challenge Programme. The scope and mandate was approved by

Cabinet on 5<sup>th</sup> April 2012. The programme includes all services provided by the Council, with strong links to other agencies and sectors as appropriate.

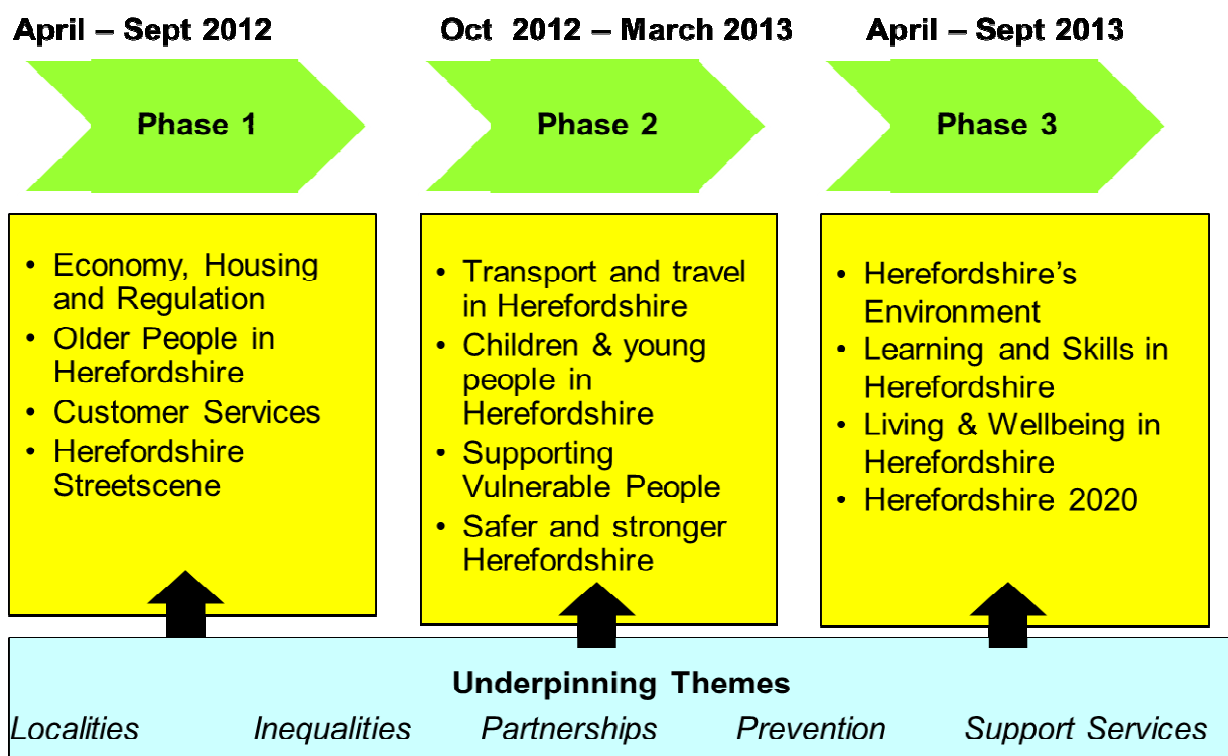
9.5 In addition to continuing to deliver the Rising to the Challenge Outcomes, the Root and Branch Review Programme has three additional outcomes, reflecting the fundamental purpose of the Reviews:

- *Redefine the role of Herefordshire Council and other public services*
- *Set out the priorities for the next decade*
- *Rebuild budgets, with clear links between spend and results*

9.6 Five key principles were adopted for undertaking the Reviews:

- *Challenge everything*
- *Think differently*
- *Focus on outcomes*
- *Evidence based solutions*
- *Engage and involve*

9.7 The programme consists of 12 Reviews based on cross cutting themes as set out below



## 10. Key Considerations

### Rising to the Challenge Programme Closure - Summary

10.1 The closure report for the Rising to the Challenge Programme is attached at **Appendix One**.

10.2 A summary of the programme's achievements is as follows:

- Rising to the Challenge ambitions were right, giving the organisation and staff a sense of pride at the innovation and forward thinking nature of the joint working initiative
- Without the Rising to the Challenge programme and its focus on integrating services and increasing productivity and efficiency front line services would not have been protected for as long
- The Rising to the Challenge programme delivered over £21m of savings, including reduced staff costs
- Many areas delivered what they set out to and benefitted from the structured programme approach and the opportunity to work in a more integrated way, such as the Better Ways of Working programme
- The Rising to the Challenge programme board provided a good oversight of plans, supporting an organisation wide approach rather than traditional silo working
- The Change Champions programme has proved extremely valuable and continues to have full coverage and sponsorship across the organisation

### **Progress on the Root and Branch Review Programme**

- 10.3 Progress against each of the Root and Branch reviews, including savings, is set out in **Appendix Two**. Cabinet is asked to authorise the relevant Directors to jointly produce and implement Delivery Plans for the Phase 2 and 3 Reviews and report to Cabinet or Cabinet members as appropriate.
- 10.4 Lessons Learned from the programme will be built into future council programme delivery and Root and Branch implementation.
- 10.5 A summary of the Programme's achievements to date is as follows:

#### **Headline Achievements**

- Cabinet approval of Phase 1 reviews in October 2012
- Completion of Phase 2 reviews through to Discovery and then accelerated through Options and Proposals
- Commenced Challenge and Options for Phase 3
- Council approval of savings totalling £20.903m (revised to £22.047m) over three years

(The accelerated process was designed to facilitate early decision making for the budget process, but it was recognised that further work would be required on phases 2/3)

#### **Deliverables**

Through the programme activities, we have delivered the following:

##### **Phase 1**

- Implementation has commenced in all areas, Delivery Plans have been signed off for Making Every Contact Count, HERS and Herefordshire Streetscene
- Common themes from Phase 1 for our future service delivery strategy have been built into the new Corporate Plan e.g. prevention, engagement
- Public Consultation exercise - *Your community, your say*:
  - Quality of life survey results published

- Report from the 21 community events published
- Over 1,400 people engaged
- Further budget options consultation exercise

**Phases 2 & 3**

- Rapid engagement across services
- Clarity about the whole council picture and a view on the core purpose
- Discussion on stopping provision versus doing less
- A growing understanding of the prevention, demand management & behaviour change agenda
- Savings for the budget process for 2013/14 and some indicative savings for 2014/15
- Estimated Full Time Equivalent reductions: 100 to 120 (2013/14 only)

10.6 The Root and Branch Programme now covers over 100 lines of activity, which vary significantly in terms of scale and benefits (cashable and non - cashable). This information is monitored for the Delivery Board using the Programme Status report and Performance Plus (P+) reports.

10.7 Savings identified through the programme were approved by Council on 18<sup>th</sup> February 2013 as part of the Medium Term Financial Strategy. The current savings position is as follows:

Review Area	Review savings total (000)	Profiled Savings (000)		
		2013/14	2014/15	2015/16
Older People	2692	1792	900	0
HERS	1340	1154	186	0
Customer Service	609	609	0	0
Street Scene	2417	1000	1417	0
CYP	2159	2159	0	0
Vulnerable People	6719	6219	500	0
Safer And Stronger	281	178	97	6
Travel & Transport	1760	340	894	526
Learning & Skills	30	30	0	0
Environment	1000	500	250	250
Living & Wellbeing	1500	500	500	500
Herefordshire 2020	1540	1540	0	0
<b>Total Root and Branch</b>	<b>22047</b>	<b>16021</b>	<b>4744</b>	<b>1282</b>



## Proposals for the Next Phase – Herefordshire 2020

- 10.8 The Root and Branch Programme has delivered some positive learning about services, customers and managing change in Herefordshire, along with significant savings for 2013/14 and beyond and the opportunity to do things differently.
- 10.9 What has not been completed to date, in part because of the accelerated process and focus on budget pressures, is completion of the programme aims, in particular, the Council's future core purpose.
- 10.10 At this stage in the programme it is appropriate to review the original scoping and phasing of the work streams in light of the current circumstances. This programme review suggests a revised approach to Root & Branch that will support:
- *Delivery of the budget requirements to date and in the future*
  - *Improvement and efficiency benefits for the customer, council and partners*
  - *Development of the future Council core purpose statement and outcomes*
  - *Transformation of the council to meet the Herefordshire 2020 aims*
- 10.11 The Delivery Board recommends to Cabinet that the scope of the Herefordshire 2020 Review be extended to become the strategic vehicle by which the Root and Branch programme and all remaining work from the reviews are completed. This re-scoping will offer the opportunity to consider any areas of work undertaken by the Root and Branch programme to date that could benefit from further challenge against the H2020 purpose. Core Purpose Statements from all the Root and Branch reviews are shown at **Appendix Four** of this report. The re-scoping also extends the programme beyond the original timescales to recognise the likely scale of some of the transformational change.
- 10.12 The two key themes of Herefordshire 2020 will be:



- 10.13 Cabinet will be kept updated on progress with the revised overall programme as part of budget and corporate performance monitoring. Relevant Cabinet Members will also be briefed on matters within their portfolios on a regular basis. The Delivery Board meets monthly to monitor progress and support efficient and effective implementation of the programme alongside service delivery planning and budget monitoring.

10.14 Members of the council will be fully engaged in the development of the Future Council (2020) Core Purpose

## 11. Community Impact

11.1 The Root and Branch review programme outputs and outcomes have a significant impact on Herefordshire residents and public services. There will be changes to the delivery of services, which will have an impact on all or parts of the community.

## 12. Equality and Human Rights

12.1 As public sector service providers we must protect and respect equality and human rights in all that we do, and we have a responsibility to promote and implement equality when we:

- provide services
- purchase services
- employ staff
- work in partnership
- engage with our communities.

12.2 Equality Impact Assessments are being undertaken as part of the implementation of each Review to ensure a clear understanding of the potential impact on equality and inclusion. Equality duty considerations will therefore be noted as part of any individual review proposal as appropriate.

## 13. Financial Implications

13.1 The Rising to the Challenge Programme delivered savings of £21.1m in 2011/12 and 2012/13.

13.2 The financial implications of the Root and Branch Programme to date were agreed by Full Council on 18<sup>th</sup> February 2013 via the Council Medium Term Financial Strategy Report. The current savings target position for Root and Branch is shown in the table below:

Review Area	Review savings total (000)	Profiled Savings (000)		
		2013/14	2014/15	2015/16
<b>Total Root and Branch</b>	22047	16021	4744	1282

A Transformation Fund of £1.16m was established to ensure that the Root and Branch Review Programme and other transformational change can be delivered. A breakdown of the spend to date is shown at **Appendix Three**.

## 14. Legal Implications

14.1 Legal advice has been taken in relation to each Review proposal. This has covered, in particular, UK and EU procurement rules.

## 15. Risk Management

- 15.1 Risks have been identified and are monitored as part of programme governance and are reviewed at the Delivery Board. The key Programme risks relate to the delivery of savings:
- **Delivery of Savings:** there is a risk of slippage in the delivery of savings. Directorates' plans for delivery of savings will have robust management and action plans. Contingency plans will form part of the process with regular monitoring by Directors and the Delivery Board and Cabinet Members.
  - **Capacity and Capability:** the Reviews contain a wide range of proposals that will change the nature and scope of Council services, many involving transformational change. This will require sufficient resources with the right skills and knowledge. Delivery Plans contain resourcing plans and capacity is being shared across Directorates.
  - **Stakeholder Engagement:** many of the changes to services require the co-operation of our partners and, in some cases, a change in behaviour amongst the population. Delivery Plans contain actions for partners and engagement is taking place as necessary. Work on prevention, early intervention and demand management is core to our future strategy.

## 16. Consultees

- 16.1 Cabinet agreed a comprehensive programme of community engagement, *Your Community, Your Say*, as part of the review process to ensure that decisions were informed by residents' views and that the impact of change is understood and is acceptable. The *Your Community, Your Say* initiative included a Quality of Life survey, 21 community events and involved over 1,400 residents. The outcome was reported to all Members and to Council as part of the budget setting process, together with the results from a further survey about particular proposals to reduce service delivery. Views from *Your Community, Your Say* and other consultation exercises will be considered in the delivery planning and implementation of Root and Branch decisions.
- 16.2 In addition, involvement and consultation included employees, Members, parish councils and key partners through the Herefordshire Partnership.
- 16.3 The General Overview and Scrutiny Committee considered this report at its meeting on 8 April 2013 and made the following recommendations to Cabinet (*to be inserted*)..

## 17. Appendices

- 17.1 Appendix One – Rising to the Challenge Programme Closure  
Appendix Two – Root and Branch Reviews Progress Reports  
Appendix Three – Transformation Fund Breakdown of Spend  
Appendix Four – Root and Branch Core Purpose Statements

## 18. Background Papers

- 18.1 Root and Branch Review Programme Cabinet 5<sup>th</sup> April 2012  
Root and Branch Reviews Phase 1 Cabinet 11<sup>th</sup> October 2012

Council Medium Term Financial Strategy 18<sup>th</sup> February 2013

## **Rising to the Challenge Programme Closure Report**

### **Cabinet 18 April 2013**

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This is a summary of the closure report written following interviews with those associated with the programme.

The purpose of the Programme Closure report is to document the programme's achievements and to capture lessons learnt for future programmes.

## Rising to the Challenge Programme Closure

In 2008, Herefordshire Council and NHS Herefordshire agreed to work together as one organisation, Herefordshire Public Services (HPS) to deliver the innovative joint working between health and social care. Following the creation of HPS, it was recognised that there were a number of change initiatives underway which were not being co-ordinated or not necessarily supporting the new joint strategic objectives.

It was decided, therefore, to bring together the key transformation projects and initiatives under a formal programme management structure. The Rising to the Challenge (RTTC) programme was launched in July 2010.

The programme was divided into five delivery workstreams, each led by an executive sponsor(s) from the Joint Management Team and with outcomes identified for each workstream.

The governance arrangements for the programme involved each workstream having a Board chaired by the sponsor and reporting into the overall RTTC programme board. The Corporate Transformation team provided the programme support including a dedicated overall programme manager and a project manager to support each workstream.

Once the programme had been defined, scoped and moved into delivery, support to the programme was reduced with the programme manager role being absorbed into the transformation team management with a smaller support function reporting to the RTTC programme board.

### Rising to the Challenge programme



Greater integration  
 Increasing efficiency and productivity  
 Managing with less funding  
 Better outcomes for Herefordshire residents

The timeline below identifies the major step changes undertaken in the transformation journey to date:

Date	Change
2008	Herefordshire Council and Herefordshire PCT join forces to become Herefordshire Public Service
Jun 2010	<b>Organisation Design – Phase 1</b> <ul style="list-style-type: none"> <li>• Organisation Design principles established</li> <li>• Reduction in management layers and increased spans of control (ratio of staff: manager)</li> </ul>
Jul 2010	<b>Launch of Rising to the Challenge programme</b>
2011	Total asset review undertaken within Herefordshire localities
Mar 2011	<b>Locality Strategy for Herefordshire</b> published
May 2011	<b>Organisation Design – Phase 2</b> <ul style="list-style-type: none"> <li>• New operating model places existing structures within three directorates under the theme of People, Place and Infrastructure/Corporate</li> <li>• Senior managers appointed to new roles within the three directorates</li> </ul>
Apr 2011	<b>New organisations established</b> to deliver key services: <ul style="list-style-type: none"> <li>• Herefordshire health and social care providers join forces to form <b>Wye Valley NHS Trust</b> – the first integrated provider of acute, community and social care in England</li> <li>• <b>Shared Services Partnership Ltd</b> (now <b>Hoople</b>) is established to share back office functions across Herefordshire Council, PCT and the Acute Trust</li> <li>• <b>2gether NHS Foundation</b> provides mental health, substance misuse and learning disability services across Herefordshire</li> </ul>
Nov 2011	<b>Organisation Design – Phase 3</b> <ul style="list-style-type: none"> <li>• Organisation wide team restructures to implement the organisation design principles</li> </ul>
2012	<ul style="list-style-type: none"> <li>• Implementation of new <b>Customer Relationship Management (CRM)</b> system(Microsoft Dynamics) goes live</li> </ul>
2012	National reforms of the NHS lead to <b>GPs taking over from managers in the PCT</b> as the people who buy health services for patients <ul style="list-style-type: none"> <li>• Herefordshire Council and Herefordshire PCT undertake disestablishment process with staff moving to other organisations (e.g. Clinical Commissioning Group, Commissioning Support organisation) or leaving the organisation</li> </ul>
2012	<ul style="list-style-type: none"> <li>• <b>Better Ways of Working</b> programme rolls out across the organisation reducing the staff to desk ratio to 10:6 and improving how we work</li> </ul>
May 2012	<ul style="list-style-type: none"> <li>• Three organisations merge to provide joined up support services to front line community and voluntary sector organisations. <b>Herefordshire Voluntary Organisations' Support Service</b> (HVOSS) is created</li> </ul>
Jan 2013	<ul style="list-style-type: none"> <li>• Refurbishment of Plough Lane starts</li> </ul>
2014	<ul style="list-style-type: none"> <li>• Refurbishment of Plough lane completes</li> </ul>

## Overall Assessment of Delivery

The programme ambitions were right, giving the organisation and staff a sense of pride at the innovation and forward thinking nature of the joint working initiative.

Due to the huge scale and diversity of the programme, it proved difficult to maintain the boundaries of the programme and consequently programmes such as the QIPP (Quality, Innovation, Productivity and Prevention) programme came in and out of scope many times, causing ambiguity around the “edge” in terms of what was in scope.

Without the Rising to the Challenge programme and its focus on integrating services and increasing productivity and efficiency valuable front line services would not have been protected for as long.

- The RTTC programme has delivered over £21m of savings (detail below)
- Reduced staff costs (per quarter) from £14.5m (2010) to £9.6m (2012)

The programme developed a strong brand which, at times, was felt to take precedence over the substance and quality of delivery and we struggled to get underneath the programme and get the required level of assurance around project delivery. That said, however, a key objective of the programme was to promote the service philosophy across the Partnership about the importance of Customers, Communities, Streamlining the Business, Better Services and People and Performance as part of the day job.

Many areas did deliver well and benefitted from the structured programme approach and the opportunity to work in a more integrated way, such as the Better Ways of Working programme. The RTTC programme board enabled a greater oversight of plans in other areas supporting a more organisation wide approach rather than traditional silo working.

There have also been some notable improvements in key organisational areas including:

- **IM&T (Information Management and Technology)** – improved governance of ICT projects through the IM&T Board and the alignment of the IM&T strategy with business objectives has progressed well
- **Accommodation Programme** – good progress made over the past 2 years and now integrated with other key areas such as IM&T and BWOW. Total Asset Review has allowed us to understand our physical assets better and options for the future to ensure public buildings have a strong, sustainable future whilst reducing costs to the council
- **Employee Engagement** –
  - Change Champions programme (aligned to the Programme in May 2011) has proved extremely valuable and continues to have full coverage and sponsorship across the organisation.
  - Employee Opinion - There has been an increase in the participation in the employee opinion survey since the focus on improvements and acting on outcomes
  - Communications – redesigned corporate communication briefs to enable information to be more timely, relevant and easier to read

However, once some of the projects were delivered, the new business processes and behavioural changes required didn't get the traction needed to drive service improvement. This is an area of focus for the future to ensure the business owner makes the necessary commitment to deliver the outcomes and benefits following project closure.

A total of £21.1m was taken out of the budget in 2011/12 and 2012/13. Additional savings targets were also set in both years with the aim of bringing the Adult Social Care budget into balance. In 2011/12 a target of £1.8m was set for procurement savings to be delivered by the corporate procurement team, of which £1.5m was carried forward into 2012/13.



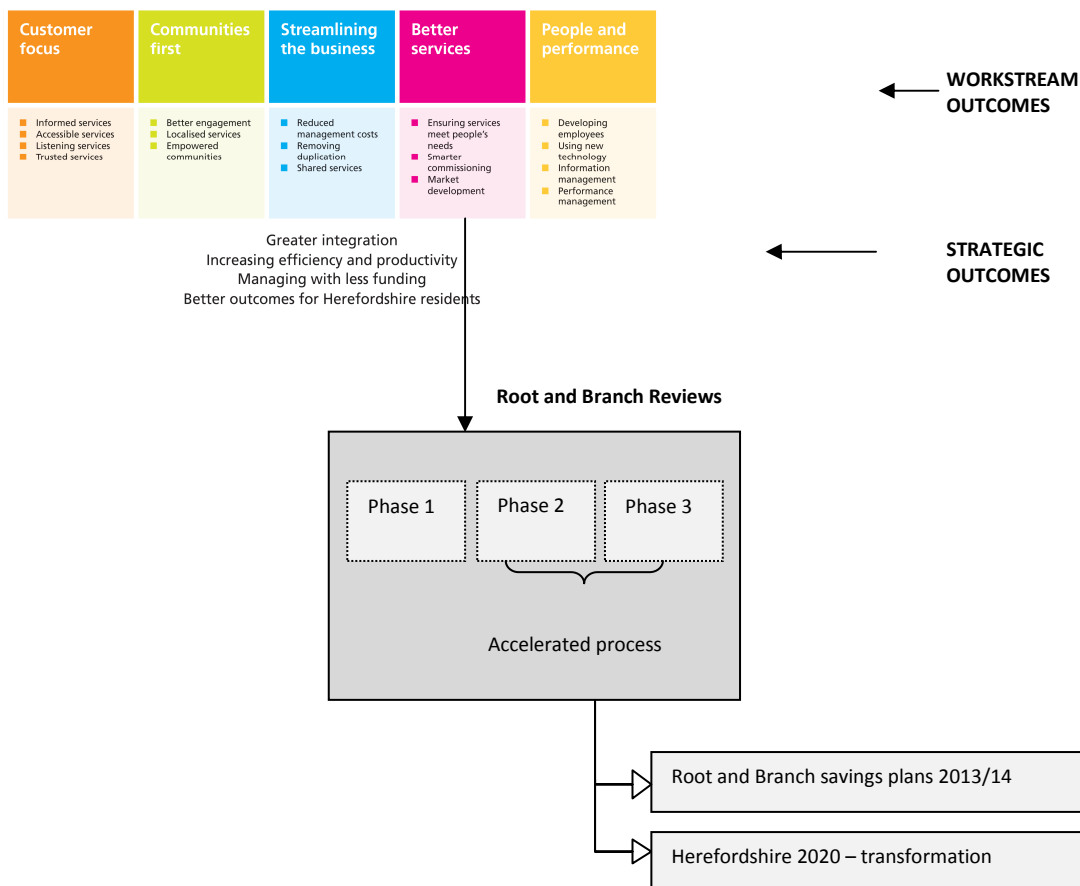
	2011/12 £m	2012/13 £m
Budget reductions	10.3	10.8
ASC recovery	0.9	5.1
Procurement slippage		1.5
<b>Total Savings Plan</b>	<b>11.2</b>	<b>17.4</b>

The table below analyses the programmes into themes and shows delivery against targets;

	2011/12 Target £m	2011/12 Out-turn £m	2012/13 Target £m	2012/13 Projected £m
Contracts and commissioning arrangements	4.8	1.5	5.1	3.2
Staffing and restructures	2.6	2.7	2.0	1.8
Business and service redesign	1.3	1.0	3.1	1.2
Hoople SLA	0.5	0.5	0.4	0.4
Increasing Income	0.7	0.6	1.7	1.1
Other	1.3	1.8	5.1	4.5
<b>Total</b>	<b>11.2</b>	<b>8.1</b>	<b>17.4</b>	<b>12.2</b>

The diagram below aims to illustrate the transformation to date and how it will continue to be taken forward once the RTTC programme has closed down.

**Rising to the Challenge programme**





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## 1. Herefordshire Streetscene

The aim is to deliver Public Realm, Property and Ancillary Services at the best possible value for money whilst meeting customer expectations through a greater emphasis on locality working for delivery that meets local needs.

The delivery plan is progressing well and is currently on track. The main focus is the re-procurement of the wide range of services within scope of the review. A number of related procurements are underway to put in place new contractual arrangements from September 2013. These segment the services into appropriate lots to ensure appropriate interest from the market and reflect the aims of the review. Key elements are:

**Public Realm Services** – This is the largest procurement package and focuses upon Highways and related services. There is currently strong competition in the market and this seems set to remain throughout the coming months. The procurement is following a competitive dialogue approach and detailed discussions are underway with potential providers.

**Building Services** – A separate procurement is underway for building maintenance services. As a smaller package this is likely to be of potential interest to both smaller as well as larger organisations. This is on track and the OJEU notice and PQQ have been published in line with the required timeline.

**Building Cleaning** – A separate procurement is underway for building cleaning. Again, as a smaller package this is likely to be of potential interest to both smaller as well as larger organisations. The OJEU notice has been published in line with the established timeline.

- **Ancillary services** – smaller procurement exercises are also being considered to meet any further requirements in relation to more ancillary services such as printing and courier services.

**Property Services** - Further activity is on-going looking at the provision of professional services support for the Council with support from DTZ Property Services Consultants. The current situation and way forward is understood. Immediate savings are in hand and a longer term solution is being developed

**Public Conveniences** – The aim is to implement improvements to the public convenience services provision to deliver higher quality, sustainable, accessible toilet provision that meet the needs of local people and visitors to Herefordshire. A new Community Toilets scheme has now been launched and initial savings have been delivered.

Savings identified are:

	£ k	2013/14	2014/15	2015/16
Street Scene	2417	1000	1417	0

## 2. Customer Services Review

This review developed the **Making Every Contact Count Strategy** (MECC). This new Customer Contact Strategy for Herefordshire will deliver the following outcomes:

- **‘Digital by default’** provision of services i.e. Customers find that online transactions work so well for them that they prefer it to the phone and face to face option and we design our services recognising that 82% of adults use the internet.
- Clear Customer Contact standards for internal and external providers
- The ability to manage and divert demand for services through self- service channels
- Clear and quick points of access to services
- First time resolution for enquiries
- The ability to predict and prevent the need for council services
- Achieve Value for money for residents
- Support and enable people to be independent and self- reliant
- Continuous customer led service improvements
- Changed behaviour and expectations of staff and customers

The project deliverables are to:

- Enable cashable savings during 2013/14 to address corporate cost saving imperatives
- Redesign end-to-end services through the Root & Branch process
- Redesign customer contact functions to *Digital by Default* and virtual contact centre models
- Explore and deliver options for how and who is best placed to fulfil the first point of contact for customers
- Deliver ‘quick wins’ through enabling *Making Every Contact Count* ways of working in priority areas, such as services for Older & Vulnerable People and the Business Hub
- A further roll out of making every contact principles and tools to all areas of the council’s business
- Deliver the technical infrastructure to support self-service, and customer focussed cross-service and organisational working.

Actions to date are as follows:

- Delivery of budget savings via discrete reductions to opening hours based on customer demand levels and redirection of customers to automated payment channels. Savings to be realised in July 2013;
- Development of the *Making Every Contact Count* and *Digital by Default* communications plan with a wide range of stakeholders being engaged through workshops, meetings and presentations;
- Digital by Default; transition plan in draft to enable channel and resource shift;
- Public Realm procurement; *Making Every Contact Count* and *Digital by Default* principles are within the procurement pack and options for appropriate delivery are being considered and discussed with the potential public realm providers;
- *Making Every Contact Count* Business Hub; the draft target operating model had been developed utilising existing council technologies;
- *Making Every Contact Count* for Older & Vulnerable People; the principles of *Making*

*Every Contact Count* and *Digital by Default* are firmly embedded within the ASC Business Change Programme. Working together the current web content will be updated to enable customers to self-serve and gain the information that they need, in many cases removing the need to access council services. Local Access Points for customers are under consideration for consolidation into a (virtual) contact centre provision.

Savings identified are:

	£K	2013/14	2014/15	2015/16
Customer Service (MECC)	609	609	0	0

### 3. Housing, Economy and Regulatory (HERS)

The aim of this review was to ensure our Regulatory Services continue to meet the demands and needs of the County in a cost effective manner and to ensure the Council works effectively with local businesses to develop and grow the economic well-being of the County.

The review encompasses services with a total gross revenue budget of £14.4 million including an income of £9 million and approximately £5.4 million of net expenditure.

There are some 300 staff employed in the delivery of the services in scope of the review.

The core services included in the review are:

- Economic Development;
- Planning/Building Control;
- Housing;
- Environmental Health and Trading Standards

The Core Purpose of the services is to deliver a range of housing, regulatory and economic services that minimise red tape and support the delivery of the Council's strategic objectives around vulnerable people and creating a thriving local economy.

The HERS project delivery plan includes nine key work streams which cover the following themes;

- Redesigning our Regulatory Services to move to full cost recovery wherever possible, actions included in this re-design include:
  - reducing staff for regulatory based activities
  - Increasing fee generating services
  - Reducing unnecessary regulation
  - Manage expectations in terms of services provided and enabling self -help for customers where appropriate
- Reshaping the Economic Development Service to facilitate economic growth through the Local Enterprise Partnership including the Hereford Enterprise Zone:
  - Work has commenced on realigning staff and reducing overall staff numbers to take out costs and also provide additional focus to the Local enterprise Partnership
  - Establishing a one stop shop for business advice and support with council services
- The re-procurement of housing related support services to deliver value for money savings and service improvement:
  - Work has been completed on the re-procurement of a number of housing related support contracts which will deliver significant savings during the 2013-2014 financial year

The overall savings target associated with the HERS review is £1.34 million spread over two financial years.

Detailed delivery plans are in place to ensure the delivery of the savings.

Savings identified are:

	£k	2013/14	2014/15	2015/16
HERS	1340	1154	186	0



## 4. Transport and Travel in Herefordshire

A cross directorate review that encompasses the following passenger transport services that total a budget of £8.7 million.

- Local bus and community transport
- Home to school travel
- 16-19 travel
- Special education needs travel
- Adult social care transport

The Core Purpose of the services as defined within the Local Transport Plan is:

- *To deliver a cleaner, healthier more prosperous county  
(Create and maintain a successful economy)*
- *To maintain connectivity for all and to reduce social isolation of the elderly and those without access to a car  
(Enable residents to be independent and lead fulfilling lives)*

There are four key areas of work within the project based around:

- Integration of the commissioning of all passenger transport services within the Places Directorate with the Transport Strategy function in order to both coordinate policy and deliver savings, target date October 2013
- Undertaking a full Network Review and Service Re –design, target date September 2014
- Identifying and implementing Public Transport contract efficiencies in advance of the full network review, target date September 2013
- Reviewing the current level of Discretionary Provision for School Transport Target date June 2013

A detailed delivery plan has been developed and work is underway to begin implementation. Actions to date are as follows:

**Team Integration** - A high level specification and terms of reference have been developed setting out the remit for the new team. A detailed structure and new job descriptions/person specifications will be drafted in April/May. Consultation on the structure will be carried out with staff June 2013 with recruitment and mobilisation July to September 2013.

### Network Review and Service Redesign

Aspect	Evidence
Review Policy & strategy	Policy drivers paper Advice on commissioning models / practice elsewhere Engagement with commissioners Establishing a new commissioning model Potential policy / eligibility changes identified to contribute to savings
Organisation &	As above, plus:

approach to commissioning	Technical paper on integration Change programme established Discussions with commissioners
Service integration	Key options for change, identifying opportunities Paper on transport integration and assessment of possible efficiencies Term of reference for Integrated Transport Team Implementation underway – change programme set out in Board Report Engagement with community transport sector
User needs	Review of previous surveys / consultations / research Policy drivers identified and future needs / trends highlighted
Savings	Identification of appropriate measures to achieve these Integration and change programme established Plans to work with the market / partner organisations Policy / eligibility changes to achieve savings

The Project Delivery Plan for the Network Review identifies two points for cabinet decision – agreement to options for public consultation (Nov 2013) and preferred option to implement (May 2014).

**Public Transport Contract Efficiencies in Advance of the Network Review** - Contract discussions have been held with the bus operators who are responsible for the services that are due for renewal September 2013. The discussions have focused on opportunities to reduce contract costs through the re packaging of existing contracts enabling more efficient use of vehicles and marginal service reduction in areas of low usage.

Public transport savings for 2013/14 are being progressed through contract negotiation.

**Discretionary Provision of School Transport-** The following proposals have been developed and are being progressed through the normal project and directorate governance processes.

1. **Increase in parental contributions towards post 16 transport.**
2. **Increase in parental contributions towards denominational transport**
3. **Increase in parental contributions towards Vacant Seat Payment Scheme**
4. **Introduce a parental contribution towards Special Educational Needs (SEN) Post 16 transport provision**
5. **Provide free transport to nearest school only**

Savings identified are:

	£k	2013/14	2014/15	2015/16
Travel & Transport	1760	340	894	526

## 5. Safer and Stronger in Herefordshire

This review set out the following aims:

**Prevention and preparedness** – assigning resources early can mean avoiding the need for higher levels of public sector intervention and associated scale of cost before situations become critical.

**Localised decision making and delivery** – for service design to reflect distinctive local needs, and delivery as close to neighbourhoods as economically possible.

**Enable and Empowerment** – build social capital within organisations, communities and individuals to be self-reliant, proactive and resilient.

**Choices** – Make available options and choices for decisions to be made on allocating resources.

The review developed 7 key areas of work:

**Involvement Strategy** – produce a framework document outlining the local authority’s method of involving communities in decision making and service delivery.

**Partnership funding** – review relationship with the voluntary sector and other partners in the re-design of grants and Service Level Agreements to ensure a proactive response to the findings of the Root and Branch Reviews e.g. local schemes to support people at risk of being vulnerable.

**Local delivery of services** – use opportunities of contracts, grants, service level agreement and partnerships to maximise the delivery of services at the most localised level possible.

**Locality working** – for a new approach to working with communities to be reflective of a “second phase” of locality working, increasing local co-ordination and collaboration to deliver the key objectives of the locality strategy.

**Parish Councils** – instigate new ways of working with parish councils as part of the “local government family”, collaborating on joint schemes that affect local areas.

**Advice Strategy** - create a sustainable advice provision in the county, co-ordinated across organisations that addresses needs of individuals before they reach crisis point.

**Right first time policy** – that the services in the review influence wider council policy specifically:

- Understanding of diversity and respect integrated into HR and management practices to counter negative attitude and practice in the workplace that would have an effect on staff morale, grievance or tribunal.
- Integrate equality objectives into procurement and commissioning practice and policy.
- Co-ordinated approach across the local authority, agencies and local communities to avert disaster and progress recovery from emergency.

Actions to date are as follows:

- Delivery Plan agreed by Delivery Board
- Focus Groups with Town and Parish Councils to look at areas of support and delivery of

services

- Production of discussion Paper on Locality Working\*
- Review of South Wye Regeneration Partnership\*
- Paper on Collaboration with Local Councils for consideration at Leaders Briefing on 25<sup>th</sup> April 2013

Savings identified are:

	£k	2013/14	2014/15	2015/16
Safer And Stronger	281	178	97	6

## 6. Children and Young People in Herefordshire

The review aim was to answer the following questions:

- What is the function of Children and Young People Services and what do the services need to achieve?
- What are the priorities for the next decade?
- How well are the different aspects of the function achieving their objectives and evidencing value for money?
- How well do the different parts/aspects of the service understand what they need to achieve and how they could relate to each other better?
- What are the fundamental belief systems – the ones we need and those we need to change?
- What could/should we stop doing?
- How could/should we deliver this function differently?
- Is the balance between commissioned and directly provided services right? Does it need to change? How?
- What should be delivered by Herefordshire alone and what should be delivered in conjunction with other organisations – e.g. sub regional arrangements

The table below outlines the vision and aims of the key work areas within the review.

Service area and vision	Aims
<p><u>Additional Educational Needs</u></p> <p><i>Our business is about educating and developing EVERY child and young person within a cost effective and sustainable learning community. We will have the highest expectation and belief in every individual's talents and abilities - we will not turn our back on anyone.</i></p>	<p>To understand:</p> <ul style="list-style-type: none"> <li>• To what extent are we succeeding in fulfilling the Mission Statement already?</li> <li>• What is preventing us from doing this more fully?</li> <li>• How are we going to fully deliver this vision described in the mission statement?</li> </ul>
<p><u>Early Years</u></p> <p><i>Our aim: All EY children</i></p>	<p>To clarify the future of the Early Years Service with regard to:</p> <ul style="list-style-type: none"> <li>• Capacity</li> </ul>

<p><i>achieving a good level of development through access to high quality EY care and education</i></p>	<ul style="list-style-type: none"> <li>• quality</li> <li>• leadership</li> <li>• direction</li> </ul>
<p><u>Learning and Achievement</u></p> <p><i>Learning and Achievement's focus is on targeted support and challenge for Early Years settings and all schools in order to raise achievement.</i></p>	<ul style="list-style-type: none"> <li>• To identify the core services that the team provides to schools and settings</li> <li>• To identify those activities for which schools can/are charged for</li> <li>• To identify and analyse future models for delivery</li> </ul>
<p><u>Locality Services</u></p> <ul style="list-style-type: none"> <li>• <i>To safeguard children</i></li> <li>• <i>To improve the lives of children and families</i></li> <li>• <i>To achieve the best possible outcomes for children</i></li> <li>• <i>Identify needs and support</i></li> </ul>	<p>Our future core purpose:</p> <ul style="list-style-type: none"> <li>• Ensuring the best possible outcomes for our children</li> <li>• Breaking the cycle</li> <li>• Effective joined up working across family support teams, children's services and all agencies</li> <li>• Parents being receptive to our support and to change</li> </ul>
<p><u>Safeguarding</u></p> <p><i>We want every child and young person to grow up happy, healthy and safe, brought up by supportive families and carers and living in caring communities with lots to do and learn.</i></p>	<p>The Child's Journey project, which utilises a Lean Systems Thinking methodology has the following aims:</p> <ul style="list-style-type: none"> <li>• To identify and analyse demands on the system (from early help through to the Looked After Children service)</li> <li>• To analyse our capability through data and performance measures</li> <li>• To identify, and attempt to mitigate, the long standing issues around data (imputting, collection, reporting and analysis)</li> <li>• To identify the flow of current processes</li> <li>• To analyse actions and processes, focusing on the benefit to the child</li> <li>• To identify and analyse waste in the system</li> <li>• To analyse the influence management thinking has on</li> </ul>

Actions to date are as follows:

- **Additional Educational Needs** – A series of whole team workshops and multi-team, multi-disciplinary workshops have taken place. A savings target has been agreed, and restructure proposals are in place to meet these.
- **Early Years Service** – A core purpose workshop and a reaching our aim workshop have taken place. Early Years Improvement services have transferred to children’s services commissioning and a savings target has been agreed. It is proposed as part of the localities/early help proposals that Early Years parenting and family support services should be integrated into the locality new ‘Early Help@’ teams. Further restructure of the Early Years Improvement services is required to meet savings targets; Chris Baird is leading on this.
- **Learning and Achievement Service** – A series of whole team workshops and multi-team, multi-disciplinary workshops have taken place. A savings target and organisational restructure has been agreed and the service has been transferred to children’s services commissioning, Chris Baird is leading on this.
- **Locality Services** – A core purpose workshop and reaching our aim workshop have taken place. Members of the team have also participated in multi-team, multi-disciplinary workshops. It has been agreed that duplication needs to be reduced further and services streamlined and simplified. Organisational restructure proposals have been released and are being consulted on. The proposals are available on the intranet, but involve reorganising the various early support teams into four locality based early help teams, who will have a focus on parenting and family support for young families, and young people/youth. The proposals will be consulted on until mid-April. Locality services have been fundamentally reviewed and the proposals are out for consultation and the 500k savings target there will be achieved. Savings in additional needs services will also be achieved and the root and branch review has focused there on driving best value, the customer experience and ensuring savings targets can be achieved.
- **Safeguarding** – Lean Systems Thinking (LST) methodology has been utilised on the Child’s Journey project. This was a 6 week project with 12 members of staff from all teams. It has included demand analysis, process mapping of key processes, analysis of what we currently measure and waste identification. The overall findings report will be available in May 2013; and the recommendations report in June 2013.

The methodology challenges us to gain an understanding of the ‘status quo’, as well as understanding where implementation plans, pilots and actions are already underway. To achieve the changes and savings required, we need to be confident of the holistic picture, in order to improve end to end rather than tampering around the edges.

We have to improve the safeguarding services we offer children. The Child’s Journey project compliments the work already happening in the various work streams of the Improvement Board and provides the opportunity to deliver sustainable and improved services, as the focus is on targeted early help and preventative work. Working with children and families as early as possible gives us the best chance of successful outcomes and is less expensive than more serious interventions further down the line.

Significant work has taken place to ensure the root and branch work is focused on the customer experience, meeting needs early to prevent the need for customers to enter high cost services, service improvement and quality and meeting the cost savings needed.

Savings Identified are:

	£k	2013/14	2014/15	2015/16
Children & Young People	2159	2159	0	0



## 7. Herefordshire's Environment

The aim of this review is to reduce the cost of waste management services and energy whilst maximising income from renewables

The key workstreams are built on the objectives of:

- Minimising the amount of waste produced to reduce the cost of collection and disposal
- Viewing waste as a resource and maximise recovery of value including energy production
- Delivering renewable energy projects to reduce costs and maximise income; through a number of energy efficiency projects both in-house and within the communities to reduce energy costs

Actions to date are as follows:

- Scoping of the projects
- Background research on best practice opportunities
- 'Discovery' workshops with staff to establish the current position
- Potential options presented as a benefits case to the Cabinet Challenge session as part of the accelerated process
- Presentation of the final benefits case to Delivery Board
- Project Delivery Plan signed off at Delivery Board

Outputs and outcomes to date are:

- Negotiations have started with contractors to identify savings by moving to Alternate Weekly Collection (AWC) of refuse and recycling.
- Continued negotiations with Worcestershire County Council (WCC) and waste disposal contractors to realise savings in 2013-14.
- Realised the remaining savings from the black sack cessation in 2013-14.
- Negotiated savings from reducing the 'bring recycling' savings in 2013-14.
- Continued development of plans to introduce an 'Energy from Waste' plant with WCC
- The Energy & Environment Team will reduce energy costs through investment in energy efficiency measures, centralisation of budgets, maximisation of commissioning opportunities with suppliers, West Mercia Energy and the integration of existing resources.

Savings identified are:

	£k	2013/14	2014/15	2015/16
Environment	1000	500	250	250

## 8. Living and Wellbeing in Herefordshire:

The **Living & Wellbeing Review** was split into two stages as part of the accelerated process.

Stage A looked at developing a policy of full financial recovery across Arts and Leisure contracts and Stage B is the originally scoped Community Based Health and Public Health Services Review

### Stage A – Full Recovery Arts and Leisure Contract

Work has progressed well and the programmed reductions in Council funding to Halo, Visit Herefordshire and the Courtyard have now been agreed with the respective organisations. This brings assurance to the savings programmed for the next three financial years. Officers will continue to monitor the performance and financial spend of the three organisations in 2013/14 and beyond.

Savings identified are:

	£k	2013/14	2014/15	2015/16
Living and Wellbeing	1500	500	500	500

### Stage B Community Based Health and Public Health Services

This stage commences in April and will be completed in September 2013 for reporting in October 2013. The mandate is shown below.

#### Initial Scope

- Culture and leisure services
- Community base health services
- Public health

3:2 LIVING AND WELLBEING		
High-Level Scope	Services	
<ul style="list-style-type: none"> <li>• Culture and leisure services</li> <li>• Community based health services</li> <li>• Public Health</li> </ul>	Arts administration Arts and entertainment venues Arts development Theatres Culture and creativity Community health services Community hospitals Community nurses Dental access centre Dental health Dispensaries and prescription services Pharmacy GPs Exercise and training Health support groups Hygiene Smoking Healthy lifestyles Medical advice and support services Nursing Occupational therapy Ophthalmology Opticians	Physiotherapy Out of hours health services Sexual health clinics Leisure centres Swimming pools Allotments Public libraries Mobile libraries Museums Galleries Archives Genealogy Sports and recreation Sports development Sports grounds Modern records office Wedding venues Registration of births Registration of marriages Civil naming ceremonies Civil weddings Civil partnerships

#### Core purpose

To promote and improve health and wellbeing of the population:

- Physical and mental wellbeing;
- Belonging to the community;
- Involvement in activities to enhance life;
- Promoting individual and community responsibility for their health.

## **Aims and Objectives of Stage B**

*The transition of the public health function into the Council from the NHS offers an opportunity to review how the services within it can best collaborate and integrate with other Council services. In order to do this, we will:*

- Review scope and core purpose.
- Investigate opportunities for collaborative working supporting the preventative agenda.
- Conduct re-procurement of Public Health contracts as appropriate – Current contracts will be maintained in the first instance for 2013/14, to minimise the risk of any break in service or destabilisation of providers following the Public Health transition. These contracts will be re-procured thereafter on the basis of opportunities for savings and contract value, risk of challenge, and the effectiveness and impact on the NHS, Adult Social Care and Public Health Outcomes. A timeline for review and re-procurement of all contracts, including considering decommissioning and re-commissioning has been developed to support this.
- Explore interfaces and opportunities with partners- e.g. Adult Social Care, Children and Young People, voluntary agencies, health services.

## **What are we proposing to stop or cut?**

- Stage B - At this early stage, no other proposals to stop or cut have been recommended.

## **Stage B Organisation**

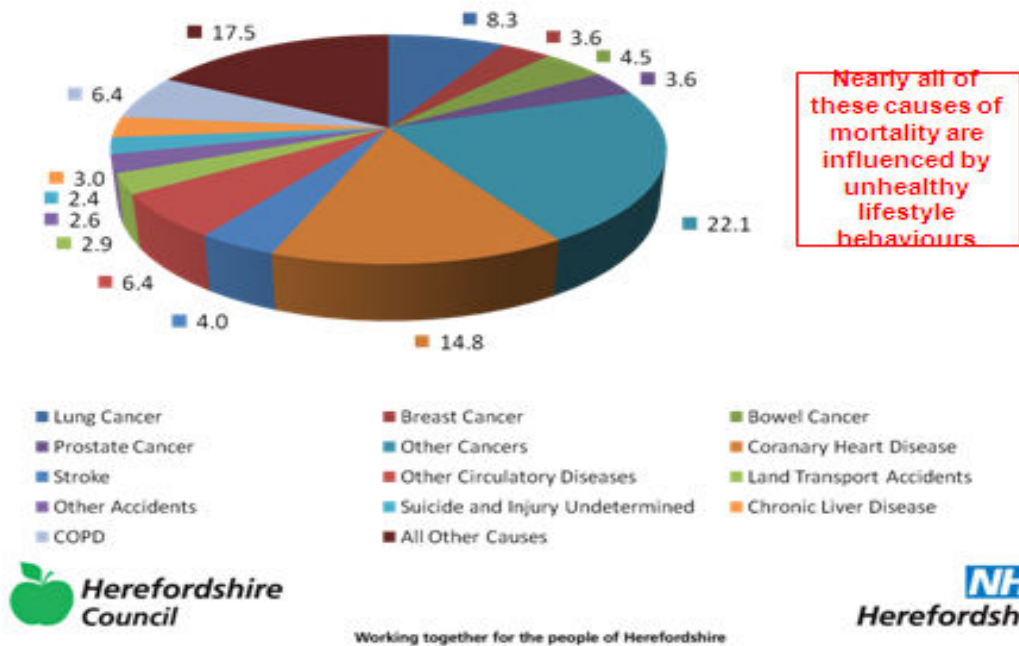
- Programme Lead – Elizabeth Shassere;
- Programme Manager – Alan Holmes;
- Business Analyst(s) – Pauline Heaps/Natalie Richards;
- Finance – Sam Powels;
- Procurement – Wayne Welsby plus additional support
- Business – Public Health representatives plus additional support from other areas.

## **Constraints**

- Initial proposed scope is very wide and includes services which naturally don't fit together
- Community health is commissioned and paid for by NHS CB and CCG
- Lack of clarity over 2020 vision

## **Current Performance**

# Percentage Mortality by Cause



## Target Performance

- Health and Wellbeing Target Performance Measures (**Refer to Background Papers: Corporate Plan, Public Health Outcomes**)
- Adult Social Care Outcomes
- NHS Outcomes

## Impact and Risks

- Lack of procurement capacity within the Council to support the rapid turnaround of inherited contracts as necessary in order to utilise resources better, control quality and value for money for outcomes that meet identified need- at best will require at least 12 months to turn around.
- Potential to destabilise NHS and other providers resulting in loss of service provision
- Failure to address key health and social care issues in Herefordshire

## Health Related Challenges in Herefordshire

- A higher than average ratio of older people within the local population with a higher prevalence of long term conditions, such as dementia and diabetes;
- Increased public expectations of public services resulting in growth demand for services;
- Inequalities in access to services and the health and social outcomes achieved for different social groups within Herefordshire
- Serving a dispersed rural community at a local level;
- A reduction in public sector resources;

- Smoking remains the single most important cause of premature death, ill-health and hospital admission in Herefordshire;
- Rapidly rising rates of alcohol related hospital admissions;
- Obesity is a major contributing factor to poor health, disability and premature death.

### **Understanding Herefordshire – The 2012 integrated needs assessment – Key Recommendations**

- Be proactive about our changing demographics, identifying the predicted rise in need for services and ways to address it.
- Develop the infrastructure, services and support networks needed to enable people to live independently. As well as direct service provision this will include housing and accommodation that facilitates independence, the economy, spatial planning, transport, engagement with the third sector and communities, and support for carers.
- Continue to build on a community based approach, developing our assets of volunteers, carers, third sector organisations, active communities and statutory services.
- Adopt this community based approach to provide comprehensive and integrated services and support for people living with Dementia.
- Ensure that the environment and infra-structure enables people to make healthy choices such as cycling and walking, as well as supporting economic growth and improved connectivity.
- Target preventative activities at the major causes of morbidity and premature mortality, in particular smoking, alcohol and falls.
- Make childhood obesity a priority for all stakeholders, tackling the underlying causes as part of a joined up strategy.
- Ensure continued improvement for Early Years and Foundation Programme, primary and secondary school children to achieve top quartile performance.
- Ensure the various strategies targeting families living in poverty are joined up to provide an integrated response.
- Address social inequalities through a comprehensive approach, encompassing opportunities such as employment as well as lifestyle behaviours, access to services and community engagement.

## 9. Learning and Skills in Herefordshire

The aim of this review is to enable effective partnerships between businesses, education/training providers and communities, and maximise external funding in order to:

- Help all residents, including the most vulnerable, to find out what education, training and volunteering support/information is available to them and what they need to do to gain employment or start a business.
- Help businesses to find out how to develop their workforce and find new employees with the general and specialist skills which they require.
- Work towards realising the full potential of Herefordshire residents and businesses, enabling them to grow, compete and prosper in a global economy.

Unlike the other Root and Branch reviews, Learning and Skills has not gone through the accelerated process, and so remains aligned to its original timeframe (March-October 2013). The review is currently in the initial 'Discovery' phase, so has not yet identified workstreams.

Actions to date are as follows:

- Scoping of the Project
- Background research on current and best practice opportunities
- Discovery workshops with staff and key stakeholders

Outputs and outcomes to date are

- A quick win savings opportunity was identified prior to the initiation of the review with a deliverable of £30k. This represents a 62.5% saving on the small in-scope budget of £48k. This is a reduction in base budget revenue funding supporting the management of the programme of Adult & Community Learning. Work is underway to identify an appropriate future model for the hosting/management of Adult & Community Learning. This area of work receives significant external funding; maximising this funding, both in terms of how much we are able to secure, and how it is utilised, is therefore a key priority for the review.
- Mapping and group discussion workshops have been held looking at in-scope areas of work, functions and context in order to:
  - Categorise key stakeholder groups and identify who the in-scope areas work with directly, via other teams, or links which have potential for development;
  - Identify the points of entry for residents and businesses;
  - Build a representation of the framework which shapes, informs and supports the in-scope areas of work, incorporating Herefordshire Council's organisational priorities, the various stakeholder groups, policy/legislation, funding sources and research/data.

Relationships between the teams who participated in the workshop sessions are highly collaborative; an in-built strength and value in this area. There is an understanding of the commonalities between them and a shared commitment and contribution to prioritising the local economy and enabling vulnerable people. Many of the in-scope areas of work are key enablers with the potential to prevent and alleviate vulnerability, break multi-generational cycles of social and economic marginalisation, and also contribute to the resilience and sustainability of the local economy.

Therefore, whilst this is an area which draws on minimal internal funding, if these links are not sufficiently augmented into the councils strategic planning, there is a risk of overlooking a fundamental opportunity to build economic sustainability within the county and region.

Savings identified are:

	£k	2013/14	2014/15	2015/16
Learning & Skills	30	30	0	0

## 10. Herefordshire 2020 Review

The Herefordshire 2020 Review was planned as the last review. The conclusions from all the other Reviews need to feed into H2020 so that we can describe the Council's purpose, functions and structure.

The Delivery Board recommends that the Herefordshire 2020 scope be extended to become the strategic vehicle by which the R&B programme and all remaining work from the reviews are completed. This re-scoping will offer the opportunity to consider any areas of work undertaken by the R&B programme to date that could benefit from further challenge against the H2020 purpose. It will also extend the programme beyond the original timescales to recognise the likely scale of some of the transformational change.

The two strands of Herefordshire 2020 are:

- Future Council
- Savings

### Future Council

The high level outcomes anticipated from the Future Council element of the revised programme are:

- Clarity of the Council's future core purpose and community leadership role
- Agreement on the services that we provide and stop providing, and as a result the Core Functions and models of delivery for that business (outsource, third sector, partnership, social enterprise, staff mutual, in house etc)
- Provision of services, information and processes that will deliver our core purpose:
  - helping people to be independent and to thrive
  - safeguarding vulnerable children and adults
  - supporting the positive and sustainable development of the Herefordshire economy
  - demonstrating positive outcomes, good performance and value for money to residents

Engagement, consultation and organisational development work streams will be developed.

### Savings

The budgets covered by Herefordshire 2020 total £18.661m. The budget for 2013/14 includes a savings requirement of £1.540m. Approximately £994k of savings has already been delivered. In addition, further savings need to be identified for 2014/15 and 2015/16. Further savings will be sought from the following project areas:

- 1 Management Costs
- 2 Support Services
- 3 Corporate Services
- 4 Hoople
- 5 Corporate Budgets

Savings identified are:

	£k	2013/14	2014/15	2015/16
Herefordshire 2020	1540	1540	0	0



## 11. Adults Social Care (ASC) Business Change Programme

The original Supporting Vulnerable People Review scope and activities have been merged with the Phase 1 Older Peoples Services Review within the scope of the Adult Social Care (ASC) Business Change Programme.

Herefordshire has a significant transformation and savings agenda to deliver in the short and medium term and requires a structured programme management methodology to ensure that change is managed effectively, benefits are realised and timescales and resources are aligned. The ASC 'Plan on a Page' for 2013/14 shown below is focused on projects that will deliver cashable savings in year. Change management and project management control, with a specific focus on deliverables for 13/14 as set out in the Service Delivery Plan, will be achieved through the Business Change Programme (BCP) and will go live at the beginning of April. This will ensure a robust governance structure for projects agreed by the Directorate Leadership Team. The outcomes will be: change that benefits service users, carers and the wider community; service improvements and savings.

The savings plans for 2013/14 have been developed in a high level of detail with costed models of savings to be derived from demand management activities and cost reduction plans. Savings plans have been developed with four key themes and will be monitored and reported through the Financial Sustainability Group. Every savings target is allocated to a cost centre and will have an owner responsible for delivery.

The 'Plan on a Page' 2013/16, shown below places much greater emphasis on communities; preventative interventions; promoting and maintaining well-being and consequently deferring and preventing the need for more expensive, acute and intensive health and social care interventions

Commissioning for Health & Well Being will take forward the Transformation Programme through a whole system review of services in the sector. The Transformation will promote health and well-being through effective development of universal services, ensuring that we enable 'something for everyone' through provision of clear information about facilities and activities in their community.

Priority in future service delivery will focus on helping people recover, recuperate, and rehabilitate so they are able to live as independently as possible. Within Adult Social Care the Choice and Independence/Rapid Improvement Programme will ensure that professionals work with service users in ways that promote their independence, ensure their safety and support their recovery.

The challenge of achieving further budget reductions will necessitate a truly collaborative approach across the sector.

- Demographic pressures are creating additional financial pressures for statutory ASC services although partly offset by the fact that more people are paying or partly paying for their services;
- Some traditional methods have been used to deliver a large part of recent cash releasing savings e.g. fees paid to independent providers of both residential and domiciliary care have been suppressed. There are likely to be diminishing returns from this approach over the next few years;
- More fundamental change is required from now on through a redoubling of effort to manage the demand for formal social care intervention: help people who may be at risk of needing formal health and social care intervention to remain independent for as long as possible;

build the capacity of communities to support people in new ways; prioritise the development of services that support people’s recovery after an accident or episode of ill-health (including re-ablement, intermediate care, crisis response and telecare); ensure that personalisation works for those with on-going needs so they are able to plan and direct their own support and have a choice of cost effective solutions.

- These approaches need to be underpinned by rigorous examination of the effectiveness of existing ASC services through an outcome based approach to assessment, commissioning and measurement of success;
- A pre-requisite for delivering further budget reductions is partnership working, particularly with the NHS; integrated service models and joint commissioning plans will make the best use of resources and improve outcomes for communities;
- Co-production of solutions with service providers, community groups and people who use services is essential;
- Fundamental change to behaviours and new ways of working are required are even more important than changing structures, systems and processes. The energy, commitment and professional skills of staff employed across the sector needs to be harnessed to find new and better ways of meeting individuals’ needs.
- The development of more appropriate performance indicators, bench-marking and a more robust evidence base to achieve a better sector-wide understanding of what works is a pressing need.

Savings identified are:

	£k	2013/14	2014/15	2015/16
Older People	2692	1792	900	0
Vulnerable People	6719	6219	500	0



# HEREFORDSHIRE'S ADULT SOCIAL CARE BUSINESS CHANGE PROGRAMME – 1 YEAR PLAN ON A PAGE 2013/14

Context	181000 population	13/14 ££48.641 net budget 13/14	High and rising population aged >65	Financially challenged CCG/ acute providers	High and rising prevalence of LTC	Geographically dispersed population
Vision	<i>Herefordshire is a place where adults live independently, and are active participatory citizens with a sense of well being and good quality of life</i>					
Objectives	* Building social capital within local communities * Making a strategic shift to prevention and early intervention * Improving health & well being through preventative services * Facilitating access to universal services * Integrated working across the health and social care system * Commissioning support for critical points and transitions to maintain people in their own homes * Improve quality and safety of care * Empower service users and carers to control the support they need * Improve sustainability of health and social care system					
Work Programmes	Modernising Safeguarding Adults Programme ( MS )	Shaping the Market, a Sector led Approach Programme ( MS )	Prevention & Early Intervention Programme ( MS )		One Herefordshire Approach to Transformation Programme ( MS )	
	Wye Valley NHS Trust Next Stage Integration Programme ( HC )	2gether Foundation Trust Next Stage Integration Programme ( HC )	Financial Sustainability ( Delivering Savings and Medium Term Financial Strategy Planning Programme ) ( HC )		ASC Developing the Right Workforce for Herefordshire Programme ( HC )	
	ASC Systems, Business Process and Infrastructure re engineering ( IIC )	Implementing Strategic Business Change Governance Structure and Board Programme ( HC )			ASC Specific Commissioning and Procurement 13/14 Implementation Programme ( MS )	
Outcomes Framework	Adult Social Care Outcomes Framework 2013/14					
Outcomes 2013/14	<b>Communities</b> Extended use of community support networks and resources  People exercise maximum control over their lives	<b>Health &amp; Well Being</b> Better health and well being achieved through preventative, practical and self help services	<b>Diversion</b> Interventions to avoid inappropriate admissions to hospital or residential care	<b>Live Independently</b> Stay healthy and recover quickly from illness	<b>Access Community Opportunities</b> Have best quality of life through access to leisure, appropriate housing and social activities	<b>System Transformation</b> Service users experience a seamless health and social care system Financial sustainability
Aspirations 2015/16	* Implemented health & wellbeing transformation programme * Implementation of Personalisation and the Care and Support Bill * Developed market offering greater choice and control to individuals * Shift from over reliance on residential and nursing care through effective commissioning of help to live at home alternatives* Financially balanced health and social care economy					
Cross Cutting Themes	* Service user, Carer & Stakeholder Involvement * Quality & Safeguarding * Prevention * Partnership Working * Workforce * Governance & Assurance					
Strategic Performance Measures	Reduction in admissions to residential and nursing homes - % of people supported to achieve and maintain independence - % of people completing a period of reablement with reduction or ending of care - % contacts sign posted to other agencies- delivery against national Outcomes Frameworks- Market development is evidence based and informed by service user analysis- delivery of financial savings					

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HEREFORDSHIRE'S APPROACH TO THE ADULT TRANSFORMATION PROGRAMME – 3 YEAR PLAN ON A PAGE 2013/16

Context	<p>181000 population      13/14 ££48.641 net budget 13/14      High and rising population aged &gt;65      Financially challenged CCG/ acute providers      High and rising prevalence of LTC      Geographically dispersed population</p>					
Vision	<p><i>Herefordshire is a place where adults live independently, and are active participatory citizens with a sense of well being and good quality of life</i></p>					
Objectives	<p>* Building social capital within local communities * Making a strategic shift to prevention and early intervention * Improving health &amp; well being through preventative services * Facilitating access to universal services * Integrated working across the health and social care system * Commissioning support for critical points and transitions to maintain people in their own homes * Improve quality and safety of care * Empower service users and carers to control the support they need * Improve sustainability of health and social care system</p>					
Work Programmes	<p><b>Community/Sustainable Systems</b></p> <p>Community strategy and Capacity Building</p> <p>Building social support networks</p> <p>Housing Options</p>	<p><b>Demand Management</b></p> <p>Universal Offer</p> <p>Customer Contact</p> <p>Information &amp; Advice</p> <p>Market Shaping</p> <p>Carers Support</p>	<p><b>Prevention &amp; Early Intervention</b></p> <p>Partnership on implementation of community teams with virtual wards and neighbourhood teams as a service continuum</p>	<p><b>Integrated Commissioning</b></p> <p>Integrated care pathways</p> <p>Help to live at Home: re-ablement; Telecare/Assistive Technology/Home Care</p>	<p><b>Service Developments</b></p> <p>Day Opportunities</p> <p>Supported Living Options</p>	<p><b>System reconfiguration</b></p> <p>Next Stage Integration</p> <p>Self Directed Support</p> <p>Care &amp; Support Bill</p>
Outcomes Framework	<p>ASC / Public Health and Health Outcomes Framework</p>					
Outcomes 2013/14	<p><b>Communities</b></p> <p>Extended use of community support networks and resources</p> <p>People exercise maximum control over their lives</p>	<p><b>Health &amp; Well Being</b></p> <p>Better health and well being achieved through preventative, practical and self help services</p>	<p><b>Diversion</b></p> <p>Interventions to avoid inappropriate admissions to hospital or residential care</p>	<p><b>Live Independently</b></p> <p>Stay healthy and recover quickly from illness</p>	<p><b>Access Community Opportunities</b></p> <p>Have best quality of life through access to leisure, appropriate housing and social activities</p>	<p><b>System Transformation</b></p> <p>Service users experience a seamless health and social care system</p> <p>Financial sustainability</p>
Aspirations 2015/16	<p>* Implemented health &amp; wellbeing transformation programme</p> <p>* Implementation of Personalisation and the Care and Support Bill * Developed market offering greater choice and control to individuals * Shift from over reliance on residential and nursing care through effective commissioning of help to live at home alternatives* Financially balanced health and social care economy</p>					
Cross Cutting Themes	<p>* Service user, Carer &amp; Stakeholder Involvement * Quality &amp; Safeguarding * Prevention * Partnership Working * Workforce * Governance &amp; Assurance</p>					
Strategic Performance Measures	<p>Reduction in admissions to residential and nursing homes - % of people supported to achieve and maintain independence - % of people completing a period of re-ablement with reduction or ending of care - % contacts sign posted to other agencies- delivery against national Outcomes Frameworks- Market development is evidence based and informed by service user analysis- delivery of financial savings</p>					

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**Transformation Fund: Breakdown of Spend**  
**Cabinet 18 April 2013**

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## Transformation Fund - Progress report

### 1. Introduction

1.1 The Transformation Fund was approved by Council in February 2012 at £1.164m as part of the one off funding arising from the council tax freeze grant. An initial allocation of £325k was agreed to fund staff in the Corporate Transformation team, with the balance to be approved by the RTTC Board following the submission of a bid.

### 2. Current balance

2.1. The position of the fund to date is set out below;

#### Transformation Fund

	£
<b>Opening balance</b>	<b>1,164,000</b>
 <i>Allocated</i>	
Corporate Transformation Team	325,000
Resourcing – Root and Branch	191,036
Introducing Lean Systems Thinking	100,000
Broadband	140,000
Transport consultant	25,000
Quality of Life survey	10,000
Re-ablement – expand capacity	197,302
Older Person's Accommodation & Support	100,000
 <b>Total</b>	 <b><u>1,088,338</u></b>
 <b>Balance uncommitted</b>	 <b>75,662</b>

2.2 The following paragraphs provide a brief progress report on the use of the funds from the project leads. Use of the Fund is monitored by the Delivery Board.

### 3. Transformation Team

3.1 The funding allocation for the transformation team, now part of Hoople (project and programme managers, business analysts), has supported the following programmes and projects which have been identified as priorities for the Council:

- Better ways of working (project manager/implementation officers/business analysts)
- Public health transition (project manager)
- Business support review (project manager)
- Agresso self-service (project manager)
- Homecare procurement (project manager)
- S75 agreement with CCG (project manager)



- Information management programme (business analyst)
- Customer organisation programme (programme manager)
- Frameworks improvement (project manager)
- ICT Infrastructure projects (project managers/business analysts)

#### **4. Root and Branch Resourcing**

- 4.1 Following an innovative recruitment process to identify skills and experience for the Root and Branch programme, a team of 4/5 people were recruited via the Hoople Agency. The fund was also used to backfill vacancies where internal employees were used for the reviews.
- 4.2 The resources have been used to support delivery of Root and Branch to date and have identified significant savings for delivery in 2013/14 and 2014/15. The fund also additional project management support to the Child's Journey, Ofsted improvement plan and Multi Agency Safeguarding Hub (MASH).

#### **5. Lean Systems Thinking**

- 5.1 In May 2012 the Council introduced Lean Systems Thinking into the organisation. In conjunction with Hoople (via the new Lean Academy), it was agreed that resource would be recruited to the Academy to specifically support this aim. The Rising to the Challenge (RttC) programme board agreed to utilise £100k from the transformation fund to support this.
- 5.2 This fund was used to provide external consultancy support and the appointment of a full time LST specialist to support the Root and Branch reviews.

#### **5.3 Lean Redesign - Case Study - Major Adaptations (Disability Facilities Grant)**

- 5.3.1 The Home Improvements Agency (HIA) is part of the Private Sector Housing team within the Places & Communities Directorate. Private sector housing has overall responsibility for the management of the Disabled Facilities Grants (DFG) and implements major adaptations to properties occupied by disabled people. The department cannot function without Occupational Therapist (O/T) support and referral as it is a fundamental part of the process; however in this county they are employed by Herefordshire Primary Care Trust (PCT).
- 5.3.2 The objective of the review was to use Lean & Systems Thinking methods to understand the work 'end to end' and from a resident's perspective. This included several organisations and departments:
- 5.3.3 The redesign was undertaken working in partnership with both workforces (Occupational Therapy and Housing Improvement Agency). The staff are confident that the outcomes are achievable and these are supported by the management of both organisations. Work has already started on the implementation planning.
- 5.3.4 This is a **Spend to Save Area**, savings will not be found directly within this team or directorate, but the impact of earlier and quicker responses in terms of adaptations will prevent rising costs in the adult social care budget associated with complex care packages, residential and nursing placements. Significant savings due to this review appear in the Root & Branch financial analysis.
- 5.3.5 The customer experience will also improve significantly. Capability data collated during the review evidenced that the journey from the resident's perspective (initial enquiry to completion) on average took 296 days but it could typically take up to 822 days to complete. This will be a key measure of improvement during the implementation.

**6. Broadband**

- 6.1 The Transformation Fund is to be used to make the most of the improved Broadband infrastructure in Herefordshire by encouraging more services to be delivered electronically, whilst simultaneously encouraging residents to use the internet to access services. A contract for the infrastructure was signed with BT in December 2012. The commercial roll out in Hereford City is near completion and Ledbury and Leominster have been confirmed to have fibre infrastructure this year.
- 6.2 The **Go-On HERE**fordshire is linked to a national campaign to drive internet use in order to address issues of social isolation, supporting people with household finance, aid learning and a tool to assist health and wellbeing. Also whilst public services become digital by default, the Go-On programme is concerned with ensuring the public is ready to maximise the use of digital services.
- 6.3 The project will be run by a co-ordinator, under the title of Digital Inclusion Officer. This post will run for two year working through the deployment to support more people to use the internet. The focus will be on older people to be more familiar with the technology and maximise its use when more dependent.
- 6.4 There has been minimum spend and outcome to date due to the timing of the recruitment of the lead officer who will now work towards an action plan.

**7. Transport and Travel Review**

- 7.1 Funding has been used to provide the Council with technical advice and support for the review of transport and travel. This was to provide external expertise, awareness of best practice and approaches which have been successful in other locations and also to add capacity to the officers leading the review.
- 7.2 The advice and support received has been used to support project management, engagement with providers, workshops with commissioners. This informed the review options (56 in total) for change leading to final recommendations. The external consultant is now supporting implementation of the agreed recommendations to achieve the savings target of £1.76m.

**8. Quality of Life Survey**

- 8.1 This is a large scale residents' survey to provide a statistically robust understanding of the views on aspects of quality of life in Herefordshire and to provide some insight regarding how these vary across the localities.
- 8.2. The survey covered a wide range of topics primarily concerned with experiences of living in the area and (mostly council-provided) services. For example: what things are important and what needs improvement; volunteering, participation and involvement; respect, consideration, anti-social behaviour and community safety; satisfaction with a range of services (e.g. doorstep, recycling, bus services etc), the council overall and other public services.
- 8.3 The Herefordshire Quality of Life survey was a postal survey, sent to around 4,000 randomly selected households across the county and stratified to reduce cost whilst at the same time providing information on views for each of the 9 localities and plus the sub localities Hereford North, South and rural. Outcomes were:
  - Response rate of 33% with 1,346 responses with fieldwork completed by July 2012.
  - Reports produced: headline, localities, full (including analysis of views by rurality and age) reports produced and published.
  - Headlines presented at senior management team, leadership team, health and well-being board and other groups. Thematic analysis done for root and branch review areas to inform priorities and savings proposals. Information used to inform 'your community, your say' qualitative research in the autumn, including conversations with communities and parish councillors.

## **9. Re-ablement**

- 9.1 The re-ablement project is an invest to save project. Currently a high proportion of patients are being placed into long-term care services without the support of a personalised re-ablement approach that promotes independent living.
- 9.3 The additional investment funding is to be used to further develop the re-ablement function within Neighbourhood Teams. At present efficiencies and associated benefits are not being effectively realised due to lack of resource and co-ordination of the customer journey this is contributing to unnecessary or higher cost care packages for service users.
- 9.4 This will also enhance Case Co-ordination and re-ablement capacity in the Teams, supporting a more efficient process by enabling team managers to provide a re-ablement service that can be monitored and measured by Care Co-ordinators and administrators aimed at enabling service users to gain independence.
- 9.5 Implementation of this proposal will also deliver benefits to service users including increased access to re-ablement programmes, improved independence and well-being and increased service user satisfaction.
- 9.6 The re-ablement project was granted £197,302, in the main for additional staffing to support the re-ablement process. To date the recruitment process has proved to be difficult and has caused delays to the project. This funding was pass-ported to Wye Valley Trust under a section 75 agreement, to provide this additional resource. Under this agreement £102,231 of this £197,302 funding has been underspent due to the slippage in recruitment as at the end of March.

A request will be made to place the final underspend into a reserve fund during the closedown of 2012/13 accounts. This money can then be utilised so that the project delivers the required outcomes and savings in the next financial year.

## **10 Older Person's Accommodation and Support**

- 10.1 Funding has been agreed for a project manager to implement changes to older person's accommodation and support. Key tasks are to:
- Launch the action plan with Peter Fletcher through seminar/workshops (draft format of the event has been established)
  - Take forward workshops with existing Registered Social Landlords and providers of sheltered housing to discuss remodelling etc. (draft format of the event has been established)
  - Finalise the draft action plan with the existing steering group members and co-ordinate the establishment of task and finish groups for the various projects, whilst ensuring that the actions correlate with The Strategic Delivery Plan for Transforming Adult Services.
- 10.2 Extra care provision has already been identified and work has commenced to take forward potential sites across Hereford city. Initial discussions have taken place between directorates to ensure that resources are focussed when needed in terms of initial assessments for households moving from residential care and appropriate attendance on steering groups to maximise the benefits to be realised.
- 10.3 Very little of the £100k has been spent so far.



**Root and Branch Core Purpose Statements**  
**April 2013**

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**ROOT AND BRANCH REVIEW PROGRAMME - Appendix A**

**HERS Review - Core Purpose**

To deliver a range of housing, regulatory and economic services that minimise red tape and support the delivery of the Council's strategic objectives around vulnerable people and creating a thriving local economy.

**Safer and Stronger - Core Purpose**

"Get it right first time":

- Prevention and preparedness – assign resources to avoid the need for higher levels of intervention.
- Localised decision making and delivery – service design to reflect distinctive local needs.
- Enable and empowerment – build self-reliance, proactive and resilient communities.
- Choices - options and choices for decisions to be made on allocating resources.

**Streetscene - Core Purpose**

To deliver Public Realm, Property and ancillary services at the best possible value for money whilst meeting customer expectations through a greater emphasis on locality working to tailor the delivery and implementation of services to meet local needs.

**Customer Services (MECC) - Core Purpose**

To improve outcomes for our residents and Herefordshire by making every contact count, so that the following outcomes:

- Predict and prevent the need for services
- Support people to be independent and self-reliant
- Manage and divert demand for services to self-service channels
- Customer led service improvements
- Clear points of access
- Achieve Value for money for residents

**Children and Young People - Core Purpose**

To ensure positive and sustainable outcomes for all children and young people in Herefordshire, by ensuring that those who are unlikely to thrive are supported.

**Environment - Core Purpose**

- Promote HC as an environmental exemplar
- Draw together environmental resources to;
  - Deliver renewable energy projects to reduce costs and maximise income
  - Develop energy efficiency projects both in-house and in the community to reduce energy costs
  - Minimise the amount of waste produced to reduce the cost of collection and disposal
  - To view waste as a resource and maximise recovery of value including energy production
  - Protect and enhance Herefordshire's countryside environment for the benefit of residents and visitors

**Older People & Vulnerable Children and Adults - Core Purpose**

- Inclusion of those who are most vulnerable in our society
- Access to universal services for all
- Removing barriers inhibiting inclusion and access to universal services for vulnerable older people who have additional needs
- Early identification of triggers leading to crisis and prevention of high level vulnerability

**Living and Wellbeing - Core Purpose**

To promote and improve:

- the health and wellbeing of the population
  - physical and mental wellbeing
  - belonging to the community and involvement in activities to enhance life
- Whilst promoting individual and community responsibility for their own health.

**Learning and Skills - Core Purpose**

To enable effective partnerships between businesses, education/training providers and communities, and maximise external funding in order to:

- Help all residents, including the most vulnerable, to find out what education, training and volunteering support/information is available to them, and what they need to do to gain employment or start a business.
- Help businesses to find out how to develop their workforce and find new employees with the general and specialist skills which they require.
- Work towards realising the full potential of Herefordshire residents and businesses, enabling them to grow, compete and prosper in a global economy

**Herefordshire 2020 – Core Purpose (initial headlines)**

- Unique democratic role
- Providing community leadership
- Doing the things only we can & should do
- Economy, jobs, wages

**Transport and Travel - Core Purpose**

- To deliver a cleaner, healthier more prosperous county(create and maintain a successful economy)
- To maintain connectivity for all and to reduce social isolation of the elderly and those without access to a car (enable residents to be independent and lead fulfilling lives)



