

Corporate Performance and Resources Committee

Transformation Programme

Progress Report

July 2024

1. Purpose of report

- To consider an update which outlines progress in respect of the delivery of priorities/projects within the Council's Transformation Strategy and Work Programme.

2. Background

- Following the Local Government elections in 2022, it was agreed that this would be an opportune time to review the Authority's approach to transformation and ensure that the programme was fully aligned with the aims and objectives of the new Corporate Strategy.
- The roll out of this new approach would look to build on the work of the previous TIC Programme and be underpinned by the development and implementation of a Transformation Strategy. This is the first time that the Council has produced a Transformation Strategy, and it is intended that this would provide the strategic framework to drive a programme of significant change and transformation across the organisation over the next 5 years.
- The Strategy is focussed on delivering on the following thematic priorities:
 - Efficiencies and Value for Money
 - Income and Commercialisation
 - Service Design & Improvement
 - Workforce
 - Workplace
 - Customers and Digital
 - Decarbonisation
 - Schools

3. Workstreams Progress

- 8 Workstreams have been established to take forward the priorities identified within the Transformation Strategy. The table below provides an overview of progress in implementing these priorities and associated projects, together with some of the key outcomes achieved to date.

4. Programme Communications

- A Communications Plan has been developed and this will provide opportunities to raise awareness of the wider Programme and specific projects, and for staff and members to contribute views and suggestions for future projects.
- Regular transformation related articles are published in staff news and the Programme's webpages have been further developed.

- A series of staff roadshows have been held in the last 6 months which also provided front line staff with an opportunity to contribute their ideas for efficiencies and smarter ways of working. Further roadshows will be held during the remainder of 2024 and the team is also exploring further ways of engaging with front-line teams with a view to providing them with a further opportunity to contribute suggestions for smarter, more efficient ways of working.

5. Learning and Development

- The Transformation Programme has been aligned with the Council's Future Leaders Programme and 10 Future Leaders undertook transformation related projects as part of their development programme.
- All of the participants on the Council's Graduate Placement Programme are also offered an opportunity to spend a period working with the Transformation Team.
- However, there is an opportunity for any member of staff to participate in, or lead on, a transformation project and this is now formalised as part of the corporate talent development programme.

CORPORATE PERFORMANCE AND RESOURCES SCRUTINY COMMITTEE
TRANSFORMATION PROGRAMME –PROJECTS UPDATE

Workstream Priorities	Key Projects	Priorities/progress to date
<p>1. Efficiencies and Value for Money</p> <p><i>Aim: To continue to deliver financial savings through efficiencies or cost reductions and smarter ways of working</i></p> <p>Strategic Lead: Jonathan Morgan (Head of Housing and Public Protection)</p>	<p>Hold a series of budget sessions with Heads of Service to identify the potential for further financial savings at both a corporate and service level.</p> <p>Work with priority services to look at options to reduce various staffing costs, such as agency /overtime costs, through the implementation of more sustainable staffing structures.</p> <p>Further develop the Routine Spend Dashboard and associated reports to help monitor and control areas of high</p>	<p>Divisional Budget meetings were held with individual Heads of Service/Managers during the course of last year with a view to reviewing the deliverability of PBB proposals and to help in the identification of efficiency savings for 24/25 and beyond. A final report was presented to CMT in November 2023. This focussed on the high level, corporate themes to emerge from the exercise. The review identified 3 areas of work which will now be further progressed as part of this Workstream/other Workstreams. :</p> <p>Corporate Priorities - these included the use of AI/technology; insourcing opportunities; contract management and commissioning; income generation and commercialisation</p> <p>Service Enablers- the Transformation Team is currently working through the issues/perceived barriers with a view to identifying potential solutions.</p> <p>Service specific issues – a range of service specific opportunities were also identified during the divisional budget exercise. Further follow-up discussions will also be held with Heads of Service over the coming months to help support identification of opportunities to feed into the 2025/26 budget discussions.</p> <p>A specific piece of work has been undertaken with Residential Care Services to review agency spend. This has sought to make more effective use of the casual staff resource/and develop greater flexibility within existing workforce. A pilot of an in-house agency arrangement is currently being implemented in Residential Care services. Work is also being undertaken with Children’s Services to review their use/spend on agency.</p> <p>Work is also being undertaken to enhance the level of management information available in respect of use/spend on agency. This will be used to support the development of a data dashboard to cover agency/casuals and overtime use and costs.</p> <p>A Routine Spend Dashboard is used to help monitor/control and potentially reduce costs linked to a range of repetitive spend areas such as various staffing costs, staff travel, printing and postage. Summary reports are reported to the Transformation Board on a 6 monthly basis and departmental specific reports sent to Directors/Heads of Service. Specific pieces of work are</p>

	<p>spend/identify opportunities for potential savings at a cost level.</p> <p>Seek to further strengthen the Council's management arrangements to support improvements in respect of value for money and quality in respect of services delivered by external providers.</p>	<p>also being undertaken in relation to staffing costs and staff travel expenditure. Although annual staff travel costs (mileage claims) are still £400k below pre Covid levels, they have been increasing on average between 5%-10% during the post pandemic period.</p> <p>The Transformation Board approved a business case to provide a resource to undertake a contract management health check across top 25 value contracts. Discussions have been held with Procurement/Internal Audit and other organisational colleagues to help identify priority areas for review and the approach/methodology to be adopted. A minor realignment has taken place within the Transformation Team with the aim of providing the necessary capacity to undertake this work. This work will commence shortly.</p>
<p>2. Income and Commercialisation</p> <p><i>Aim: To develop a more commercial approach to the delivery of Council services with a view to increasing the level of income generated.</i></p> <p>Strategic Lead: Chris Moore (Director of Corporate Services)</p>	<p>Commercialisation - Develop a business case report that identifies the Council's ambitions and further opportunities for commercialisation and the type of capacity and skills required to deliver this agenda.</p> <p>Cost Recovery - Develop a framework to support the implementation of a cost-recovery approach to the setting of Council fees and charges.</p>	<p>A Commercialisation Business Case has been developed and this has then helped inform the development of a Commercialisation Strategy. The Strategy was considered by Corporate Performance and Resources Scrutiny Committee on the 29th June 2024 and then approved by Cabinet on the 17th June 2024.</p> <p>Governance arrangements are currently being formalised which will include the establishment of a Commercialisation Board.</p> <p>A cost recovery approach to the setting of fees and charges is currently being rolled out on a phased basis across Council services. This will look to ensure that, where appropriate, the service is recovering the full cost of providing a service when setting their fees and charges. A pilot exercise was undertaken with the Council's Occupational Health services and a similar approach is now being rolled out to various functions/charges within Housing and Public Protection, Education and Place and Infrastructure. This work has already identified opportunities to increase income generation levels.</p>
	<p>Advertising & Sponsorship - Implement a programme which supports the roll out of advertising on Council roundabouts pilot to be completed & identify other opportunities for increasing income from advertising and sponsorship and ensure that a more coordinated approach is adopted in order to maximise the level of income generated.</p>	<p>A scheme to allow advertising on designated roundabouts throughout the County has been approved. Planning permission has been received for 2 roundabouts in Carmarthen and applications have been submitted for 2 more sites. This will aim to cover the costs of maintaining the roundabouts and generate additional income to support departmental budget pressures. This will form part of a package of opportunities that could be made available to potential sponsors.</p>

	<p>Debt Recovery - Further strengthen case management arrangements to support the increased recovery of Council debt</p>	<p>An 'Invest to Save' initiative has result in additional staffing resources being deployed within the Council's debt recovery functions to support increased recovery work. This will look to build on a previous TIC 'Invest to Save' project.</p> <p>The increased focus on this area and the adoption of a more proactive approach to the recovery of debt has helped recover/secure over £2m of debt since September 2023.</p>
<p>3. Workplace</p> <p><i>Aim: To exploit the opportunities presented by a move to hybrid working and to further rationalise the Council's accommodation portfolio and modernise and improve the working environment within the remaining core buildings.</i></p> <p>Strategic Lead: Jake Morgan (Director of Communities)</p>	<p>Seek opportunities to further rationalise the Council's office accommodation portfolio and consolidate staff in smaller number of buildings at key sites across the County</p>	<p>The Workplace workstream has been examining how we can rationalise our accommodation portfolio whilst modernising and improving the workspaces in our retained core buildings. In the current financial climate building rationalisation is good a way to save money while protecting front line services. Reducing the Council's estate will also help save spends on utilities and contribute to us achieving our net zero carbon objectives. The programme to date has helped the Council deliver capital/revenue and environmental savings.</p> <p>A successful rationalisation pilot has already taken place with Housing and Education & Children's Services (E&CS) staff in Llanelli. E&CS staff based in Llanelli are now working together on a single floor of Ty Elwyn with Housing staff from Eastgate based on another floor alongside Health staff in Ty Elwyn, Llanelli. A service led re-design of the workspace accommodated the teams across 2 floors with 315 staff comfortably working from 120 desks, with better meeting facilities and flexible working spaces created.</p> <p>The workspace has been adapted in Spillman Street, Carmarthen to accommodate staff re-locating from Parc Dewi Sant, thus allowing for the disposal of the PDS site. These changes have resulted in in a 86% increase in capacity in Spilman Street. Prior to hybrid working, there were approximately 175 desks which has now increased to 326 desks. Previously, under the 1 desk per person ratio, there were 175 members of staff working out of Spilman Street, but this has now increased to 835. The authority has also realised over capital, revenue and environmental savings through the disposal of the PDS site.</p> <p>A similar project has been undertaken at Ty Parc yr Hun, Ammanford with staff relocating from Ammanford Town Hall and Childrens' Centre.</p>
		<p>There are 10 rooms now operational across core buildings.</p>

	Set up 6 corporate hybrid meeting spaces across the county, available to all through a booking system.	<ul style="list-style-type: none"> ○ Spilman Street (3) ○ Parc Myrddin (2) ○ Crosshands Depot (1) ○ Trostre Depot (1) ○ Ty Parc yr Hun (1) ○ County Hall (1) ○ Town Hall Llanelli (1)
	Continue to review the occupancy levels within core buildings by making effective use of data.	<p>The Occupeye Resource management system, door entry data and logon data from IT Services will provide usage data to Corporate Property to determine occupancy rates and overall use of a buildings. Data collected on the 1st and 2nd floors of Ty Elwyn has been used to make strategic decisions and tactical changes to layouts to address issues that have arisen.</p> <p>Additional sensors were installed in Parc Myrddin and Spilman Street on the 16th April 24 and will take 3-6 months to collect utilisation data.</p>
<p>4. Workforce</p> <p><i>Aim: To oversee the development of a Workforce Strategy and delivery of key workforce priorities to enable the Council to become a more modern and responsive organisation and an 'Employer of Choice'.</i></p> <p>Strategic Lead: Paul Thomas – ACE People Management</p>	Develop a new Workforce Strategy for the organisation which will set out the 'people' related aims and delivery priorities.	<p>A Workforce Strategy has been developed and this will provide the strategic framework to help us address our key workforce priorities over the course of the next 5 years. This will also be supported by the development of a workforce data framework to help us evaluate the impact of this work. The Strategy was approved by Cabinet in May 2024. A Delivery Plan has been developed which will provide a framework to support the implementation of the Strategy.</p> <p>Measures linked to the new Workforce Strategy have been agreed and are now being developed into a workforce data framework which will feed into the wider corporate data framework and dashboard.</p>
	Complete the implementation of new Staff Recruitment process and system	The implementation of the new staff recruitment process and system is nearing completion and the Oleo system is now live for all users Work is ongoing with secondary schools to develop links between the education recruitment service E teach and the Oleo system.
	Investigate opportunities to reduce agency and other staffing costs (corporate & schools) including the potential to establish an in-house agency/supply function and /or staffing hub	A specific project has been undertaken with Residential Care Services which has sought to reduce the use/costs of agency provision through making better use of the in-house resource including casual workers. A feasibility study has been undertaken to review the potential to set-up an in-house agency as a way of reducing agency costs and providing greater resilience within the staffing resource. This project, which has been undertaken as part of the Council's Future Leaders Programme, recommended that an initial pilot project is undertaken. A pilot arrangement commenced in April 2024 and is focussed on residential homes in the Llanelli

		area. Initial feedback suggests that this pilot is proving to be very successful and has reduced agency use by 400 hours in the first 2 months of operation and has provided for greater continuity and resilience in the workforce.
	Work with the LGA to implement a pilot Workforce Planning pilot project within Social Care/Children's Services and then roll out a similar approach across other services	Following a successful workshop with managers in adult social care supported by the LGA and WLGA a revised tool kit for workforce planning has been developed. Pilot studies using the toolkit have been undertaken in Early Years, Social Care, Digital Services and parts of Place and Infrastructure. The toolkit has now been fully launched to all service areas via Intranet resources. HR Business Partners are undertaking direct engagement with their linked Heads of service to support the development of department specific workforce plans.
	Fully implement the new Learning Management System to support the provision of targeted Learning & Development interventions that support the strategic aims of the organisation while streamlining processes	The project to contract a new LMS system has been fully realised with the negotiation of a joint contract for all 22 Welsh LA's, WLGA, Social Care Wales and Natural Resources Wales. The 'Thinqi' system has been commissioned and content developed to meet the council's development needs including integrations with the HR systems and development of Essential learning. The system has now gone 'live'.
<p>5. Service Design & Improvement</p> <p><i>Aim: To provide for a more sustainable and creative approach to the review, remodelling and improvement of Council services.</i></p> <p>Strategic Lead: Gwyneth Ayres</p>	<p>Previous TIC Reviews – Improvement updates</p> <p>Review the position of previous TIC reviews currently still within the delivery/implementation stage and apply the appropriate sign off processes including the production of data to support on-going monitoring at a corporate level:</p> <ul style="list-style-type: none"> • Pensions • Debtors • Risk Management 	<p>The Workstream continues to receive regular updates on the implementation of previous TIC service reviews:</p> <p><u>Pensions</u> Regular feedback to the workstream has demonstrated a sustained approach to improvement. The service continues to make progress in respect of the rationalisation/automation of paper based transactional processes and the promotion of online customer access options. The pace of change has been affected by on-going capacity issues within the team and work associated with new national pension administration changes. The service is now producing consistent data reports to support the on-going monitoring at a corporate level and to ensure the improvements demonstrated to date are sustained.</p> <p><u>Debtors</u></p>

		<p>The improvement work in respect of this service is also looking to rationalise and automate transactional processes which will free up capacity to focus on more added value debt recovery tasks. This work is seeking to rationalise the frequency of invoicing arrangements and move to greater use of email/hybrid mail options and use of direct debit arrangements, where appropriate. Changes to the green waste payment collection process has led to a far more efficient process and a 90% payment rate.</p> <p>This has allowed the team focus on more added value tasks such as strengthening case management arrangements and the use of data. The service has also been in receipt of invest to save funding which is providing additional capacity to support an early intervention approach to debt recovery which has resulted in the recovery of over £2m debt since August 2023. The team are also making use of a Powerbi dashboard to support the monitoring and impact of this work.</p> <p><u>Risk Management</u></p> <p>Feedback to the workstream has demonstrated good progress towards achievement of the actions on the consolidated plan created as a result of a number of previous reviews. The workstream continues to monitor progress and is seeking feedback on 2 outstanding areas prior to considering 'sign off' on this review.</p>
	Undertake a service review of the Transport Maintenance Unit	This project has been undertaken as part of the Future Leaders Programme and has involved a dialogue with a range of stakeholders including management/operational staff and client-side representatives. A number of recommendations have emerged which set out suggested practical interventions and areas for further review. The Head of Environmental Infrastructure attended the Workstream to provide an overview of how the delivery plan will now be progressed with further updates to be reported back to the Workstream.
	Undertake a review of the Member Enquiries system/process.	Elected Members of Carmarthenshire County Council make on average 5,000 enquiries per year via what is known as the DSU Member Enquiry Process. Following feedback from elected Members the review of member enquiries investigated whether the administration and procedures in place are working effectively and following extensive engagement with elected members and officers, there were eight recommendations put forward. The implementation of the new Members portal is complete. The team is to work with Customer and digital workstream to review end to end process with view to establishing solutions for more timely and transparent responses as on part on-going developments.

	To undertake a review of the Carmarthenshire Integrated Community Equipment Service (CICES) in order that we can look at making the service more efficient and cost effective	A comprehensive review of the management and operation of the Joint Equipment store has been undertaken which and has involved discussions with internal staff and wider stakeholders, reviewing unit's processes and analysing the type and frequency of requests received. The review has identified a number of recommendations in relation to stock control systems and processes and delivery methods which if implemented should result in the delivery of a more cost effective service. A delivery/implementation plan has been developed in order to progress the identified recommendations
	To review the management and operation of staff travel arrangements across the authority with a view to making financial and environmental savings.	The Head of Environmental Infrastructure is leading on a group which is looking at options to increase availability of corporate/service based pool cars. Options being considered include increasing the number of service specific pool cars for high spend areas such as Children Services and also locating a corporate pool car(s) at County Hall to cater for demand from County Hall/Spilman Street.
<p>6. Customers & Digital</p> <p><i>Aim: To continue to make better use of technology to deliver smarter, efficient service processes and to deliver a better experience for customers.</i></p> <p>Strategic Lead: Ainsley Williams (Director of Place and Infrastructure)</p>	Implement a programme to rationalise and automate a number of paper-based processes such as outgoing mail, timesheets, invoices and documents requiring hard copy signatures.	<p>The workstream is overseeing the implementation of an on-going programme of work which is seeking to rationalise and/or automate a number of paper-based processes, such as the processing of outgoing mail, timesheets, invoices and the printing of documents for signing. The use of electronic signatures and hybrid mail solutions is being rolled out across a number of services and this is already delivering a more cost-effective and productive way of working and also supports staff to work in a more hybrid way. More and more services are now looking to make use of these electronic solutions. The use of hybrid mail solution is providing services with opportunities to make significant savings in relation to postage/printing and productivity.</p> <p>Progress also continues to be made in respect of the automation of paper-based time-sheets. The use of paper timesheets has reduced significantly in the Building Cleaning service with a phased approach to e-timesheets being rolled out. The remaining cleaning staff will be supported to move to electronic timesheets as the final phase. At the end of April 2024, 356 Home Care workers moved off paper timesheets and on to e-timesheets managed through ResourceLink. Schools Catering timesheets have now also been fully automated. The roll out in other operational services such as grounds maintenance, property and highways is linked to the roll out of new service IT systems.</p>
	Increase the number of enquires and requests dealt with at first point of contact	The Customers and Digital Workstream is reviewing the top 10 customer contact processes from an end to end perspective.

		<p>Work on-going in respect of waste related contacts, housing repairs and wider housing contacts. In respect of Housing Repairs, only first point of contact call coming via the Contact Centre.</p> <p>Part of the Corporate Performance & Resources Scrutiny Committee Task and Finish Group to review is to review the workings of the Contact centre and customer contact points within services.</p> <p>Waste processes are also being reviewed as part of the implementation of the new IT system and are also subject of end to end reviews to identify where AI/robotics could potentially be adopted.</p>
	Implement RPA (Robotics Process Automation) & (AI) Artificial Intelligence.	<p>Digital Transformation funding is being used to support the roll out of robotics technology in relation to specific processes. Robotics technology is being used to undertake two back-office processes within the HR services and has recently been deployed within the Free School Meals and School Essential Grant processes in Education and Childrens Services Department. The automation of these processes is already realising benefits to the services in terms of productivity improvements and the freeing up of officer time whilst also realising significant benefits to managers/customers as requests are processed immediately. Scoping exercises are currently being undertaken to identify and prioritise the next processes to be automated using robotics technology.</p> <p>The Transformation Board recently considered a business case for a pilot for 200 users for Microsoft Co-Pilot (AI Personal Assistant). This pilot will be evaluated by the Workstream during the course of 2024/25.</p>
	Roll innovation network across key areas of the County as part of the All-Wales network	<p>The deployment of the “Internet of Things” (IoT) innovation network across key areas of the County is complete and was implemented ahead of schedule.</p> <p>A collaborative pilot project with Swansea Council for bin monitoring and route optimisation is scheduled to be completed by August 2024.</p> <p>A scoping exercise has been completed in relation to use within the Housing Stock and the monitoring of empty properties</p>
7. Decarbonisation & Biodiversity	Develop and implement a Carbon Literacy programme for members.	<p>This has been completed, however, education and upskilling is an ongoing requirement and the “project “ will therefore remain as an continuous element of the strategic priority .</p> <p>Carbon Literacy for Elected Members APSE 8 specific training events have been delivered for council members with the national Association for Public Excellence(APSE) Training for Membe s and senior managers has also been delivered in collaboration with the WLGA and</p>

<p>Aim: To support the Council in delivering transformational change in support of key decarbonisation and biodiversity objectives and targets.</p> <p><i>Strategic Lead: Rhodri Griffiths (Head of Place and Sustainability)</i></p>	<p>Develop a carbon costing model.</p>	<p>the Welsh Government. SPF funding has been secured for Coleg sir gar accredited course IEMA Environmental Sustainability Skills for Managers and a mandatory training element for all staff is currently being developed in conjunction with the college's green skills academy</p> <p>This is the single recommendation that the Council received from Audit Wales following publication of their report 'Public Sector Readiness for Net Zero Carbon by 2030' (July 2022). In the absence of national guidance on costing methodology, draft costing ESTIMATES produced for 3 April 2023 workshop. That estimation is however recognised to be subject to a wide degree of tolerance and we are assisting the Welsh Government Energy Service / WLGA to develop a national costing model. The national Model is due in late summer 2024.</p>
	<p>Develop a new Decarbonisation Strategy</p>	<p>Support for the development of a "New approach" for development was secured through advice to CMT and Cabinet with the endorsement of the Cabinet Member for Sustainability Decarbonisation and Climate Change and the Cross-party advisory group on climate change and the nature recovery on 17 July 2023.</p> <p>A number of briefing tools, reporting templates have been developed to aid the collation of information by departments to accommodate into departmental chapters. 12 Drop-in clinics, 121 support sessions and a number of tailor-made workshops for departments have been undertaken and a special HOS session delivered. As of June 2024, three out of five departmental returns have been returned. A number of case studies have also been returned for incorporation into the strategy.</p> <p>The revised target for delivery is now December 2024.</p>
<p>8. Schools</p> <p>Aim : To assist schools in identifying cost reductions and better ways of working, and support the development of more sustainable school budgets and help protect front line provision.</p>	<p>Carry out Expenditure / Routine Spend Benchmarking activities and share data with secondary schools to stimulate discussion and facilitate sharing of good practice in sustainable budget setting.</p> <p>Develop and extend the use of Financial Efficiency templates with identified schools to support and challenge those in financial difficulty. Initial priority schools</p>	<p>The Expenditure/Routine Spend Benchmarking exercise is now well established as an annual exercise that is valued by secondary heads. The outcomes are used strategically in schools and shared with governing bodies. A primary schools' version is in the process of being developed and will be shared with schools in September in time for the 2024-25 planning cycle.</p> <p>Efficiency templates were developed to support discussions with 11 schools over the course of the year to support a more forensic analysis of school budget positions and identification of areas where efficiencies can be made. Future support in this area will be provided by seconded headteachers to work with the increasing number of schools requiring intervention. This will also need to be more closely aligned with monitoring of deficit recovery plans.</p>

Strategic Lead : Gareth Morgans (Director of Education and Children)		
	Review the impact of Schools' Property 'Handyvan' Service initiative to ensure cost effectiveness for schools and the LA and inform sustainable future development. Initial report and evaluation complete, ongoing monitoring with final evaluation	The initial pilot has been completed with the establishment of the service as 'proof of concept' in primary schools. Implementation has led to a reduction in risk to primary school buildings through facilitating more proactive maintenance. Funding was secured for a third year pending a growth bid for sustainable funding moving forward. Plans are being developed for a secondary schools' service following success of primary schools' service.
	Investigate high expenditure areas in school budgets, e.g use of agency/supply and establish links with the wider corporate agenda. Align with corporate work in this area	An extensive review of agency use/spend in across both primary and secondary schools.. This identifies a range of attitudes to supply acquisition and use of the Agency Framework. A summary with support and advice for reducing agency spend is being developed for sharing with schools in time for academic year 2024-25.