

Taunton Deane Borough Council

Corporate Scrutiny Committee – 26 March 2015

Joint Management and Shared Services - Close-down report

Report of the Corporate Transformation Programme Manager

(This matter is the responsibility of Executive Councillor Stock-Williams.)

1. Executive Summary

This report formally shares with those charged with project governance, the final position on the implementation of the Business Case for JMASS. It outlines what has been achieved, how this compares to Business Case requirement, shares any lessons learned, shares a “position statement” on some live issues and any remaining project risks, and offers some suggestions on the next stages of the programme of transformation.

The JMASS Joint Project Board and JPAG (Joint Partnership Advisory Group) have considered and approved the close down report and are now making it available to Scrutiny Committees and all Councillors in both councils.

2. BACKGROUND INFORMATION

- 2.1 In November 2013 both Taunton Deane Borough Council and West Somerset Council approved the adoption and implementation of the Business Case for Joint Management and Shared Services (JMASS). The Business case talked about the JMASS ambitions being progressed in a couple of phases.
- 2.2 The initial phase, of delivering “ONE team” of Officers to support both democratic bodies, was set out in detail in the business case. It proposed, that by joining up management and service delivery both Councils could benefit from financial savings (£1.8m ongoing across both Councils), increased service resilience, more effective, efficient and affordable service delivery and thus helping to deliver a sustainable financial future for both democratically independent organisations.
- 2.3 The second phase, described as “transformation” set out the potential for further financial savings to be delivered to both Councils. The detailed business case was not developed for this phase, as although confidence levels were and are still high on the potential to deliver savings, the unknown was the appetite for change in either Council. In order to help shape this phase a series of Member Briefings has been held over the last 9 months, where Leaders from other Councils have shared their stories of transformation. This has been useful and our Councils now need to be clear on their own ambitions for change.

2.4 This closedown report focuses on the initial phase and reports on our achievements against the agreed Business Plan outcomes.

3 Business Case Outcomes – Financials

3.1 As one of the key expected outcomes was financial savings - it is important that we are clear on what has actually been achieved. The Business Case set a target of delivering ongoing savings for both Councils of £1.8m by 2015/16. This was key to both Councils medium term financial plans. The ambition was, by reducing our staffing structures (to remove duplication of resource), that both Councils could better protect front-line service delivery to the communities they serve.

3.2 Earlier reports to JPAG and Scrutiny have shared progress against the financial savings targets. The table below summarises the final position:-

Table 1: FINANCIAL SAVINGS SUMMARY

	ORIGINAL BUSINESS CASE (£'000)			ACTUAL (£'000)			VARIANCE (£'000)
	TDBC	WSC	TOTAL	TDBC	WSC	TOTAL	Over / (Underachievement)
Staff Savings	1,182	207	1,389	1,114	225	1,339	(50)
Non-Staff Savings	400	100	500	356	107	463	(37)
TOTAL	1,582	307	1,889	1,470	332	1,802	(87)

3.3 The key messages from this are:-

- We have delivered a structure that provides ongoing revenue savings of £1.802m per annum (£1.470m for TDBC and £0.332m for WSC).
- We have over-delivered on the original savings target for West Somerset Council by £25k
- We are short of the original savings target for Taunton Deane Council by £112k.
- The overall shortfall against original Business Case Targets is £87k (4.6%).

3.4 As advised previously, during the implementation of the business case there was a need to adjust the target savings. Some services where no efficiencies could be gained through partnership working (eg Deane Helpline, Cemetery and Crematorium, DLO Administration, ICT and Customer Services) were included in the original savings targets and clearly should not have been. Taking these into account would have reduced the overall savings target by over £0.5m. We therefore had to work harder than expected to find savings during the development of the business plan. In this context, delivering actual savings of £1.802m (albeit slightly short of original target) is a massive achievement.

- 3.5 Alongside these financial headlines, it is important to look at the timing of the delivery of savings. The Business Case assumption was that these savings would be delivered from 2015/16 onwards. We are pleased to report that we have delivered ahead of schedule and both Councils will benefit from savings of £255k during 2014/15 (£140k for TDBC and £115k for WSC). This over-achievement will be used to mitigate the shortfall for 2015/16 for TDBC, leaving £143k to fund other ambitions (£28k for TDBC and £115k for WSC).
- 3.6 More detail on the staff savings is included as Appendix A
- 3.7 The Business Case also set out some estimates on the one-off costs of achieving these savings (termination costs plus project costs) and also set out an indicative spending plan for some basic IT investment to support the changes ahead.
- 3.8 Costs are now known for the complete structure (except for Legal Services, Building Control, and one area within Operational Delivery which has been delayed until Dec 15 - where “average” estimates have been used).
- 3.9 The table below summarises the spending position on these costs:-

Table 2: GENERAL FUND ONE-OFF COSTS SUMMARY

	BUSINESS CASE (£'000) (funding available)			ACTUAL (£'000)			VARIANCE (£'000)
	TDBC	WSC	TOTAL	TDBC	WSC	TOTAL	Over / (Underspend)
TCA Govt Grant	600	150	750				
Funding From Councils	2,104	790	2,894				
Termination Costs				1,079	341	1,420	
IT Costs				31	15	46	
Project Costs				167	72	239	
TOTAL	2,704	940	3,644	1,277	428	1,705	(1,939)

3.10 The key messages from this are:-

- Post Business Case approval the Councils were successful in receiving £750k of Government TCA Funding to support the delivery of the business case ambitions. This has been added to the funding set-aside by the Councils in November 2013.
- Staff termination costs are £1,420k against estimated full year staff savings for both General Funds of £1,339k (see table 1). The overall pay-back period is therefore 1.06 years (1.52 years for WSC; 0.97 years for TDBC General Fund) which is well within acceptable pay back periods.
- Staff termination costs are £148k above original estimates – as predicted during the project update reports shared last year.

- More detail on the termination costs associated with the structure proposals are shown as Appendix B
- ICT costs are significantly under budget – which is to be expected in this early part of our programme of change. The investment has been focussed on ensuring the basic technology is in place to support joint working. The larger investment on systems integration and enabling technology for new ways of working needs to be made in the next phase of transformation. This ensures our limited funds will be invested in areas regarded as priorities and we invest in solutions that support the kind of organisation we want to be. More detail on the ICT spending to date and the current plans for improvements are set out in section 5 below. JPB and JPAG are currently looking at system integration for some service areas and these will be taking into consideration regarding ICT spend as part of this process.
- Project delivery costs are slightly underspent. The spending in this area has been made up of Project team costs, HR support and assurance reviews as expected in the Business Case. The underspend in this area will be needed to resource the forthcoming Review of Terms & Conditions.

3.11 The remaining budgets from this initial phase of the project totalling £2,082k (£1,939k as shown in table 2 above plus £143k of savings delivered in 14/15) will be carried forward to support the next phase of transformation.

4. Business Case Outcomes – HR Summary

4.1 The Business Case did not, quite rightly, have specific HR targets. It is important however that we reflect on the changes to our organisational numbers through this process.

4.2 We approached the structural changes in phases, to ensure we managed both the level of change within the organisation, and the HR process safely. At each phase, the proposals for change were issued for formal consultation with the Project Board, JPAG, JUB and the individual affected. When appropriate – the proposals were updated to reflect feedback received.

4.3 The following table shows the key data from each phase:-

Table 3: HR DATA

	Tiers 1-5	Tier 6 etc
No. of staff affected	106	468
No. of staff placed “at risk”	64	45
No. of staff requesting redundancy	27	10
No. of redundancies	23	4
No of Compulsory Redundancies	2	0

No. of staff slotted in / appointed to roles	81	*230
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* excludes traded and direct services plus other areas such as Business Development.

4.4 The “quick wins” identified in the Business Case (Building Control and Legal Services) were excluded from the restructure proposals and dealt with separately. They are not included in the above data table – but for completeness we currently have 11 staff in Building Control and 6 staff in Legal Services. An update on the “quick wins” is provided in section 7.3.

4.5 Staff absence levels remain at previous levels which is commendable during such a significant period and change and uncertainty affecting all staff.

5. Business Case Outcomes - ICT Position Statement

5.1 Information on the spending to date is set out in section 3.9 and 3.10 above. Key projects completed or underway are summarised below:-

- Dedicated communication line installed to link Deane House and West Somerset House as the foundation for linking MS Outlook, networks, systems etc.
- TDBC and WSC’s MS Outlook environments were linked together to enable all staff (whether originating from TDBC or WSC to access contact details and view calendars
- The individual building security/access control systems were upgraded/to enable a single ID card to provide access to both Deane House and West Somerset House for all staff and members. This is being implemented across the organisation.
- Wi-Fi coverage is now available throughout Deane House and West Somerset House enabling wireless access for staff, members and visitors
- A ‘thin client’ implementation recently completed, enables users to access systems and network drives across both the TDBC and WSC networks.
- A single shared Intranet is currently being tested and customised and will provides a single repository/information store that can be accessed by all staff and members. This is important to provide consistent and accessible information (eg. policies, corporate information, newsletter) to all staff and avoid the necessity to duplicate information on separate networks

5.2 Total ICT capital spend to date is £45.48k with £30.74k charged to TDBC and £14.74k charged to WSC. The associated revenue budget associated with these projects are included in current budgets and as part of the budget setting process for 2015/16.

- 5.3 Learning from other Councils that have undertaken transformation, it is clear that investment in ICT is fundamental as the enabler for new ways of working, delivering customer centric services and services that are provided to customers in a way most convenient to their needs and expectations.
- 5.4 As both Councils become clear about what transformation means for them, and the expected outcomes for their communities and organisations, the ICT programme will be developed and refined to deliver the capability required to support it.

6. Business Case Outcomes – Service Performance

- 6.1 One of the parameters we were tasked with working within, was that our structural changes should not negatively impact on the service provided to the community. The performance monitoring reports shared during 2014/15 – a period of significant change as the new structures were introduced – shows a positive position with no real downward trends in service performance. Some further detail on this, including some information on customer satisfaction is set out in Appendix C
- 6.2 As you would expect in organisations undertaking such major organisation wide structural change, there does need to be a period of “settling down” before we can confirm with confidence that we have “got it right” in each service area.
- 6.3 There are areas of pressure that we need to watch carefully and review if necessary to ensure we have the resource levels appropriate to the functions carried out. We recognise that, in these early days of our new arrangements that our staff are working extremely hard to keep service delivery on track. It will take a bit of time to streamline and align processes and procedures (let alone technology systems) and we need to take care of our people during this challenging time. We commit to do this over the coming weeks.
- 6.4 Additionally, there are some areas where we may wish to check – for the organisation’s benefit as well as the individuals – that the roles people are in are suitable and expected outcomes can be delivered. We will need to work closely with our HR team and JUB to ensure this is done in a supportive and positive manner.

7 Business Case Outcomes - Timescales

- 7.1 The JMASS business case set a challenging timescale for implementation of the ONE Team (in place to deliver savings for the financial year 2015/16). We are on-track to have a one team structure in place by March 2015.
- 7.2 All milestones for the two-way partnership were met and in some cases exceeded i.e.
- Joint Chief executive in post by October 2013
 - Joint electoral services to meet the challenge of the European 2013 elections in May 2014.
- 7.3 Delivery of services covering wider partnership (beyond the 2 Councils) have not yet been met but are now progressing well. Despite the delays in delivering these wider

partnerships, the savings required from these services will still be delivered by 1 April 2015.

- The business case for a Legal shared services partnership (between TDBC, WSC and Mendip DC) received approval from all partners and is now on scheduled to be in place by 1 April 2015.
- A detailed business case for the Building Control shared services partnership (between TDBC, WSC, Mendip DC and Sedgemoor DC) is being presented to all partner organisations for consideration during February - March 2015. The partnership is scheduled to be in place for 1 July 2015. In the interim, TDBC and WSC are implementing a revised management structure that will deliver savings from 1 April 2015.

7.4 The next key phase of work is to progress the fundamental review of Terms & Conditions. The Business Case proposed this was carried out in tandem with the structural redesign. In early 2014, we flagged to JPB and JPAG our concerns on the practicality of doing this – and recommended this review was delayed until the end of the structural phase of the project.

7.5 This work will now start and is expected to take around 9 months to complete.

8 Closedown of Project Risk Register

8.1 The JMASS risk register has been monitored by JPB and JPAG throughout the delivery of the business case and updated at key stages of the programme.

8.2 On closure of the project, the risk register has been reviewed by the project team, JPB and JPAG. The status of the risk and details of how outstanding risks will be managed following closedown has been considered. Many will transfer to “business as usual” and be managed within services as part of their service risk registers.

8.3 Any risks still relevant will be carried forward into a new risk register as the transition to the next phase (transformation) commences. For clarity, the key risks for JPB and JPAG to manage now are:-

- Uncertainty for staff – In the interim, this risk still needs to be monitored as staff settle into their new roles.
- Capacity - In the interim, this risk still needs to be monitored as staff settle into their new roles. As mentioned in section 6 above, there are areas of pressure that we need to watch carefully and review if necessary to ensure we have the resource levels appropriate to the functions carried out.
- Members not equipped to operate in a shared management an services environment – this risk will need to be monitored over the election period.
- Failure to embed a flexible/’can do’ culture – It is early days for the newly established single officer structure and this is an ongoing risk during times of change. This is an area we need to invest in over the coming months.
- Service transformation delayed – this is an ongoing risk

- Loss of Knowledge/key personnel – this risk still needs to be monitored as staff settle into their new roles. Going forward, service specific registers will also reflect this risk as an on-going ‘business as usual’ issue.

9 Project Lessons Learned

9.1 It is good practice to ensure any lessons emerging from projects are captured and shared for wider organisational learning. It is equally useful to capture what worked as well as what could have been done differently.

9.2 Key staff and members were asked for their observations and feedback throughout the JMASS project – including the Joint Management Team, Tier 4 managers and the JMASS project team and Members of JPAG. Wider staff engagement and member engagement is also in place and will continue over the coming months as the arrangements “settle down”.

9.3 The team will continue to update the Lessons Learned log and ensure the learning captured is shared appropriately. A summary of the key points emerging from this review is as follows.

9.4 Firstly, the issues flagged as being of particular value were:-

- Staff and members valued the openness and consistency of approach regarding the processes and changes being undertaken
- All recognised the need for good governance arrangements and welcomed the discipline of reporting regularly to JPB and JPAG and the challenge offered by those groups.
- The importance of having dedicated project resource in place to deliver the Business Case (ie additional HR resource).
- Investing time to build and maintain good relations with the unions is important
- The importance of communication. Using a variety of methods throughout the period of change, (especially at key stages of the process). This was valued by staff.
- External challenge (assurance review) was valuable and provided confidence in the proposals.

9.5 The issues flagged that are particularly useful for “learning” are:-

- The need to maintain communications throughout and provide more information at key stages. Don’t feel you are communicating too much!
- Prioritise ICT requirements, manage expectations and communicate clearly and frequently what will be available and by when.
- Remember to treat people as individuals, important to remember when delivering a “process” at pace.
- Recognise the resource and time it takes from staff, managers, the project team and members to deliver change effectively.

9.6 As a result of the lessons learned to-date we are:

- Reviewing our communications plans, and our resources for internal communications.
- Investing and prioritising in staff engagement. This is crucial to the ongoing success of the ONE team.
- Reviewing and adjusting our Care and Support Plan for staff to ensure it is fit for purpose for the transition phase.
- In particular we are working with staff and members to identify the best ways to keep them up-to-date regarding current ICT capability (and any current limitations), what is planned and when it will be available.
- Reviewing the governance arrangements to ensure it remains fit for purpose going forward

10 Project Management Arrangements

10.1 Project governance arrangements were set out at the beginning and have remained largely unchanged throughout the implementation of the Business Case. The project has been led by the Director of Operations, and has been supported by the following key staff, who should be recognised for their achievements. Without the efforts and enthusiasm of this team, the results could not have been delivered.

Kim Bachelor	Transformation Programme Manager
Paul Harding	Project Lead
Martin Griffin	HR Lead
Laura Holland	HR Officer
Gail Cresswell	HR Support
Fiona Kirkham & Karen Penfold	IT Lead
Emily Collacott	Finance Lead
Debbie Rundle	Communications
Jo Comer	Admin Support

10.2 I also feel it is appropriate to recognise the key leadership roles played by the Leaders of the Councils, and the Members on Joint Partnership Advisory Board. The level of input, challenge, and support has been significant and been key to the positive results achieved.

10.3 The Joint UNISON Board have played an invaluable role throughout this project – from the development of the business case and all through the implementation. This has ensured the processes followed have been robust, and that the voice of the Union has been heard and is hard wired into our project governance. A big thank you to all those individuals involved.

10.4 The support and input from both the LGA and Local Partnerships should also be noted – both have been invaluable and helped us achieve the excellent outcomes shared earlier in this report.

10.5 The formal meetings of JPB and JPAG have been in place throughout the project period. JPB and JPAG have received highlight reports to track progress against the project plan and its various workstreams. They have also received proposed tier 4/5 and tier 6 structure reports and updates on financial savings and costs throughout the programme.

- 10.6 In addition, Scrutiny Committees at both WSC and TDBC have requested and received update reports at key stages:
- April 2014, WSC Scrutiny Committees received a report on ICT progress
 - September 2014, WSC Scrutiny Committee received an interim JMASS update
 - November 2014, TDBC Corporate Scrutiny Committee received an interim JMASS update
- 10.7 To conclude the close-down of this phase of JMASS this report has been presented to JPB, and JPAG. A report will then be circulated to all members for information and presented to WSC Scrutiny Committee and for information
- 10.8 JPAG, at their meeting of 3 March 2015 :-
- Noted the outcomes from the implementation of the JMASS Business Case.
 - Formally recorded their thanks to project team members, the Leaders of the Councils, Member of JPAG, and Members of JUB for the successful delivery of this key strategic project for the Councils.
 - Supported the request to formally close-down this project note the project closedown arrangements that are in hand.
 - Supported the direction of travel outlined in section 13 (next steps) and the move to a transition phase of the project pending the transformation vision being crystallised.

11 Close-down Actions

- 11.1 There are some specific actions for the project team to progress as part of project closedown. The key tasks include:
- Ensuring contact information is updated and shared with key partners and stakeholders (eg - structure charts and contact details etc).
 - Disbanding/decommissioning of the project support team eg. HR support and admin support.
 - Update, finalise and archive programme information and documentation
 - Ensure risks are transferred to business as usual or captured for transformation phase.
 - Identify any outstanding actions, detail how they will be delivered and monitored going forward.
 - Communicating and celebrating our success – internally and externally. and prioritise engagement with staff,
 - Ensure handover to Assistant Directors of activities/responsibilities to business as usual operations. Eg. One Team newsletter
- 11.2 The Transformation Programme Manager will lead on these tasks and ensure JPAG are kept up to date with progress during this transition phase.

12 Project Conclusions

- 12.1 The business case identified a number of outcomes and measures of success that covers the key areas of cost, performance and customer satisfaction. A summary of the delivery against their measures has been included as Appendix D
- 12.2 I am pleased to report we have delivered ongoing savings of £1.8m per annum across both Councils. This has been essential in delivering balanced budgets for both Councils for 2015/16. An officer structure is now in place that supports and delivers services to both independent Councils, offering increased resilience and capacity to face the challenges ahead.
- 12.3 Having met the costs of implementation we are able to carry forward the remaining budget of £1.939 to support the Councils in the next phase – transformation.
- 12.4 The HR process followed has ensured that staff were fully engaged and consulted on the changes and has delivered a good result for the Councils, with only 2 compulsory redundancies in the entire process.
- 12.5 Maintaining service performance and customer satisfaction during the implementation of the JMASS programme was important. Service performance has been maintained throughout the councils and this has been achieved through the commitment of managers and staff to continue to deliver quality services to their customers.
- 12.6 The Customer satisfaction survey undertaken at WSC during 2014 returned the highest satisfaction levels since beginning the survey in 2011. TDBC have completed an overall satisfaction survey for the first time in 2014 and have now established a baseline for comparison in future years.
- 12.7 Increased resilience was another key driver for the JMASS programme. Services are becoming more resilient as service teams are coming together through exchange of skills and knowledge and review of their processes and systems.
- 12.8 Fundamental to the success of the business case, JMASS has delivered a single staffing structure that supports two separate, democratically independent Councils with separately elected members who continue to deliver local democracy for their areas
- 12.9 The arrangements in place to safely close-down this phase of the programme are sound. I am satisfied that the close-down actions are clearly identified and responsibilities have been actioned, and that project risks will be dealt with effectively.

13 Next Steps

- 13.1 The next few months will in reality be a “transition” phase – between JMASS structural change and transformation. A period where we will progress the review of Terms & Conditions, continue to work with Members on their vision for the future, and prioritise engagement with staff, and simply aim to “consolidate” across our organisations post structural change.

- 13.2 The key task for Members is to now work to clarify their transformation vision. This hugely important piece of work will progress over the coming months and will need to conclude in the summer if transformation plans are to progress in a timely manner and help produce financial savings for future years.
- 13.3 A paper setting out some very early thinking on “transformation” will be shared at the next meeting of JPAG for discussion. This will aim to pull together the key messages we have picked up from the various site visits, and Member Briefings that have taken place over the last period.

14. Finance Comments

- 14.1 The report sets out the progress being made towards the financial targets set in the Business Case. Delivery of these targets is essential to the financial health of West Somerset Council. The key challenge now is to progress the planning for transformation with a view to delivering further significant and ongoing savings for the Council.

2. Legal Comments

- 15.1 Any implications will be considered as appropriate.

3. Links to Corporate Aims

- 16.1 The JMASS programme is a key element in the achievement of the Council's corporate aim around a transformed council.

4. Environmental and Community Safety Implications

- 17.1 There are no direct environmental or community safety implications resulting from the implementation of the JMASS programme.

5. Equalities Impact

- 18.1 Equality impact assessment have been completed at each stage and included with all structure proposals reports for consideration.
- 18.2 Following completion of the staffing restructure by 31 Mar 2015, a staff survey is planned during 2015 and workforce profile will be drafted to report the gender profile, age profile, religion, sexual orientation and disability as a comparison against the previous survey.

6. Risk Management

- 19.1 A JMASS risk register is maintained and monitored by JPAG (Joint Partnership Advisory Group) bi-monthly.

7. Partnership Implications

- 20.1 The JMASS programme is key to the development of partnership working both with WSC and other authorities.

8. Recommendations

Members of the Corporate Scrutiny Committee are requested to note the position statement of the JMASS project.

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Staff Savings Position										APPENDIX A		
	TARGET SAVINGS			SAVINGS FROM PROPOSALS					WSC Over/(Under) Target	TDBC Over/(Under) Target	TOTAL Over/(Under) Target	
	WSC	TDBC	TOTAL	WSC	TDBC	TOTAL	TDBC (HRA)	GRAND TOTAL				£k
	£k	£k	£k	£k	£k	£k	£k	£k			£k	
Tiers 1-3: JMT	(25)	252	227	(11)	278	267	(77)	190	14	26	40	
Tiers 4-6:												
Assistant CEO	19	42	61	11	26	37	2	39	(8)	(16)	(24)	
Housing & Community Development	22	75	97	29	63	92	60	152	7	(12)	(5)	
Property & Development	16	35	51	5	(10)	(5)	(4)	(9)	(11)	(45)	(56)	
Housing & Communities - Business Support Team	0	13	13	(3)	54	51	(52)	(1)	(3)	41	38	
Planning & Environment	36	115	151	54	104	158	0	158	18	(11)	7	
Business Development	0	0	0	(2)	4	2	0	2	(2)	4	2	
Growth & Development - Business Support Team	6	50	56	(15)	76	61	0	61	(21)	26	5	
Corporate Services	30	100	130	24	123	147	12	159	(6)	23	17	
Resources	79	232	311	79	232	311	(4)	307	0	0	0	
Operational Delivery	39	155	194	31	109	140	(2)	138	(8)	(46)	(54)	
Housing Partnership	6	15	21	11	29	40	(3)	37	5	14	19	
Building Control - subject to consultation	8	11	19	7	8	15	0	15	(1)	(3)	(4)	
Legal Services - subject to Full Council Approval	4	27	31	5	18	23	2	25	1	(9)	(8)	
Total Tiers 4-6	265	870	1,135	236	836	1,072	11	1,083	(29)	(34)	(63)	
All Tiers Total	240	1,122	1,362	225	1,114	1,339	(66)	1,273	(15)	(8)	(23)	
Business Case Assumptions	207	1,182	1,389	207	1,182	1,389	0	1,389			0	
Variance Over/(Under) the Business Case	33	(60)	(27)	18	(68)	(50)	(66)	(116)			(50)	

Termination Costs					Appendix B
	WSC £k	TDBC £k	GF Total £k	TDBC(HRA) £k	TOTAL £k
Tier 1-3	133	248	381	39	420
Tier 4-6:					
Assistant Chief Exec	7	28	35	0	35
Corporate Services	9	36	45	20	65
Housing & Communities	21	83	104	218	322
Property & Development	20	78	98	22	120
Planning & Environment	61	246	307	0	307
Resources	44	175	219	4	223
Operational Delivery (inc Building Control est)	46	185	231	0	231
Tier 4-6 Total	208	831	1,039	264	1,303
Overall Estimated Total	341	1,079	1,420	303	1,723
Business Case Estimate (inc Chief Exec)	339	934	1,273	387	1,659
Variance Over/(Under) the Business Case	2	146	148	(84)	64
Payback period (years)	1.52	0.97	1.06		

Service Performance

Performance of JMASS against the business plan is reported as part of both Council's performance management framework and is reported quarterly to JMT, Scrutiny Committee and the Executive / Cabinet at both Councils.

In Q1 and Q2 for TDBC and WSC there were no 'red' measures, where performance is significantly off track as a consequence of JMASS.

For Q3 there are a total of nine measures which are being reported as being red (significantly off track/ won't meet the target at the end of Q4). Two of these measures relate to TDBC and seven to WSC. Of these, six relate to affordable housing projects at WSC where the delay is outside of the control of WSC officers and had no connection with JMASS. Another red indicator relates to TDBC complaint handling times. This has been an ongoing issue which predates JMASS. A further measure relates to the take-up of low cost home improvement loans via the Somerset West Private Sector Partnership for WSC, again there has not been caused as a direct or indirect consequence of JMASS, this is more down to being a demand lead activity.

The final red measure in Q3 relates to processing times for licensing applications for TDBC. These are currently running at 80% being processed within 14 days against a target of 95%. A backlog had built up in Q1 and Q2. This can partly be attributed to JMASS but specifically the manager organising the service so that licensing applications for both Councils were processed by the licencing team rather than being supplemented, as had been the case, by environmental health officers. Additional training & reallocation of officers was implemented to facilitate faster processing of applications and enquiry resolution. These measures have facilitated the determination of the majority of backlogged applications so that the figures for Q4 are anticipated to improve. However the combined drop through Q2 & Q3 means the annual target will not be achieved.

Customer satisfaction surveys

Customer satisfaction surveys have been undertaken at both WSC and TDBC and the outcome of the most recent survey (compiled at 30th June 2014) was provided within the Q1 performance report recently reported. WSC results show an increase in customer satisfaction from previous years, 81.5% were satisfied with the way that WSC runs things and 89.2% agreed that WSC provided value for money.

TDBC have conducted an overall customer satisfaction survey for the first time in 2014 and therefore have now established a baseline for comparison in future years. That was an online only survey.

Both WSC and TDBC will be undertaking a customer satisfaction survey during 2015. Paper surveys will be issued with Council tax bills in March 2015 for both Councils. Online surveys will also be available for both WSC and TDBC residents and will be promoted on the paper survey forms included with the Council tax bill. Results from the survey will not be published until after the election. Publication is likely to be around end of June 2015 and will be included as part of the usual Q1 performance reporting cycle.

Health and wellbeing of staff

A key area for monitoring during these times of change and uncertainty is the health and wellbeing of staff.

For 2014/15 the first quarter absence rates were 1.64 days (projected as 6.58 days per annum) for Taunton Deane Borough Council employees and 2.76 days per FTE (projected as 11.04 days per annum per FTE) for West Somerset Council employees. West Somerset Council's absence rate was influenced by the low headcount and a small number of employees on long-term absence. These employees have in the main, either returned to work or left employment.

Following the TUPE transfer of West Somerset Council employees on 1 August to Taunton Deane Borough Council, absence data is now be provided on the basis of the one workforce and reported in the quarterly performance management reports.

At the end of the second quarter the average number of working days lost to sickness absence was 3.77 per FTE (projected as 7.55 days per annum per FTE).

At the end of the third quarter the average number of working days lost to sickness absence was 5.71 days per FTE (projected 7.6 days per annum per FTE)

This compares to the target set for the year of 8.2 days or lower per FTE (which was the actual level of sickness within TDBC for 2013/14).

Short term absence - 51%

Long term absence - 49%

(long term absence is defined as a continuous period of 28 calendar days or more)

Extract from Nov 2013 Business Case - Outcomes and Measures			
Customer satisfaction:			
1	Overall customer satisfaction is at least maintained.	<p>Monitoring the overall customer satisfaction is vital, especially when services are undertaking transformation. To ensure an effective baseline, a customer satisfaction survey will be undertaken at the time of annual Council Tax billing in Feb / Mar 2014 and annually thereafter.</p> <p>Current service specific customer satisfaction surveys will continue and will also be a valuable baseline and measure going forward.</p>	<p>Customer satisfaction surveys undertaken at WSC and TDBC during March-June 2014</p> <p>WSC customer satisfaction results summary: 81.5% are satisfied with the way that WSC run things 89.2% agree that the council provide value for money. Both of these measures are the highest they have been in 4 years, since beginning the survey in 2011.</p> <p>TDBC have completed an overall customer satisfaction survey for the first time in 2014 and therefore have now established a baseline for comparison in future years.</p> <p>During 2015 Customer satisfaction surveys will be undertaken by both WSC & TDBC. Surveys will be sent out with the Council Tax bills in March. Results will be reported via the quarterly performance reports presented to Scrutiny, Executive/Cabinet & Council.</p>
Cost:			
1	Sustainable senior management structure in place that reduces the General Fund management overhead for both councils and can drive forward service integration and transformation.	Appointment of Senior Managers (top 3 tiers) has been completed by 1 Jan 2014	Oct 2013 - Joint Chief Executive in post Dec 2013 - Directors in post (tier 2) Jan 2014 - Assistant Director Structure in place (tier 3) (excluding 2- Resources AD in post Feb '14 and AD-Property & Development in post May '14)
		The 2014/15 overhead (General Fund) for the top 3 tiers of management will have reduced by approx £227k compared to 2013/14.	<p>Staff Savings: Forecasted savings are £1,339m</p> <p>Non-Staff savings: Forecasted savings are £463k</p> <p>Overall (staff and non-staff) forecast savings achieved were £1,802m £1,470m for TDBC and £332k for WSC.</p> <p>Overall, the savings delivered were short of the business case target by £87k (4.6%). WSC had been over-achieved by £25k and a shortfall of £112k for TDBC.</p> <p>Some staff savings have been delivered earlier than forecast in the Business Case therefore an additional one-off saving of</p>
2	Single workforce in place reducing the General Fund pay overhead.	Staff costs for the remainder of the organisation (e.g. excluding senior management – 3 tiers) will, in 2014/2015 be approx £1.162m	

		lower than the 2013/14 base.	£255k has been delivered. This will be used to mitigate the TDBC shortfall for 2015/16 leaving £143k to fund other ambitions.
3	Further significant savings made from non-pay budgets.	From 2015/16 a potential further £500k will have been saved from non-pay budgets, by comparison to 2013/14, as a result of service efficiencies made/new ways of working.	
Performance:			
1	Service quality improved or maintained during a period of financial restraint	Service Performance is (at least) maintained at 2012/13 figures during 2013-15 by reference to data collected from Central Government returns. Service-specific customer satisfaction for both Councils is maintained at 2013/14 levels during 2014-16	<p>In Quarter 1 and 2 for TDBC there are no 'red' measures, where performance is significantly off track as a consequence of JMASS.</p> <p>In Quarter 1 and 2 for WSC there is only one measure which was reported with a 'red' status where a dip in performance was believed to be attributable to the temporary loss of specialist staff as a result of the staff reorganisation. The area planning manager post has now been filled.</p> <p>The performance report for Quarter 3 (Dec-Mar 2015) are currently progressing through JMT, Scrutiny and Executive/Cabinet for comment.</p> <p>Both Council's service performance will continue to be monitored as part of the performance management framework with quarterly reports being presented to Scrutiny and Executive/Cabinet</p>
2	Greater consistency and 'joined-up' service delivery across the 2 areas (and increased as roll-out develops)	Single service teams operating across both authorities by 1 April 2015 lead by a joint manager. Consistency of application form designs and aligned processes in place by 1 April 2015.	<p>The JMASS programme remains on track to deliver a joint management structure and a single staffing structure delivering services for TDBC and WSC by March 2015</p> <p>As wider partnership teams, the Private Sector Housing team will be in place 1 March, Legal Shared Services in place 1 April and the Building Control partnership in place 1 July 2015 (subject to member approval)</p> <p>Joint Management Team in Place (tiers 1-3)</p>

			<p>Senior Management Team in place (tier 4 managers) Joint Staff forums held, service team meetings held, One Team newsletter established promoting the One Team culture.</p> <p>The majority of work within service teams to align processes will commence post 1 April '15</p>
3	<p>Services important to our local communities, are providing value for money.</p>	<p>SPARSE/CIPFA benchmarking information</p>	<p>Benchmarking of services will be undertaken as part of the transformation phase.</p>