

## Cheltenham Borough Council

### Corporate peer challenge – 16 to 19 September 2014

#### Action plan – progress update

Key suggestion and ideas for consideration	Management Comments	Proposed action	Progress at September 2015	Lead officer
Align strategies and plans in line with your new corporate plan and then effectively communicate to all	The corporate strategy for 2015/18 is currently being developed.	In developing the new corporate strategy ensure alignment to existing strategies and plans. Once strategy is drafted and approved ensure that it is communicated clearly to stakeholders and employees.	GREEN The corporate strategy has been aligned to the Medium Term Financial Strategy and sets the framework for the Asset Management Strategy. Once approved the corporate strategy was made available on the council website and a copy was circulated to all partners.	Richard Gibson Strategy and engagement strategy.
Consider longer term financial planning, greater level of sensitivity analysis and scenario planning	The council currently produces a three year plan on the basis that it is hard to estimate beyond this period. Production of a plan for a longer period which could cut across several borough and general election periods would be significant work. However the proposal is an interesting one which will be considered.	Obtain copy of the MTFS produced by Sevenoaks DC to ascertain the level of detail and to talk to the finance team to ascertain how it is prepared. BTG group to consider how scenario plans and sensitivity analysis can be used on the strategy to ensure that options are fully tested and understood.	AMBER The section 151 officer has discussed the approach taken by Seven Oaks with their Director of Finance and has a copy of what they produce for publication. This information has now passed to the interim Section 151 Officer and the GOS team for consideration and discussion at the councils internal Bridging the Gap meeting.	Mark Sheldon Director of resources
Reflect how to use the considerable talents that members bring	There is a wealth of talent within the member pool and they bring a range of skills and knowledge. Members are engaged in working groups both cabinet and scrutiny. Overview and scrutiny committee to consider what actions they feel are appropriate.	Ask members to complete an audit of skills Cabinet to use this when setting up working groups Cabinet and managers to consider how members could be engaged on an informal basis through workshops to help support policy development	GREEN A member skills audit was carried out in December 2014 and 15/40 members responded. This information was presented to the Group Leaders and has been used to make direct contact with members about specific task groups. This will be revisited as part of member induction after the 2016 elections.	Rosalind Reeves Democratic services manager
Consider how scrutiny might reappraise its work programme with particular reference to the opportunity to play a part in scrutinising the progress of critical projects	The committee are considering the report at their meeting on 3 November and will consider the proposal	The O&S Committee will consider Project Initiation Documents for all major projects and decide how and when they want to scrutinise the project. This process has been trialled on two occasions and officers and members seems comfortable that it is working but the process has not yet been formalised.	AMBER The committee have considered two PIDs to date and both members and officers seemed comfortable with the process, though it has not yet been formalised.	Rosalind Reeves Democratic services manager
Clarify and communicate the purposes, accountabilities and key personnel for your range of delivery vehicles	This had already been identified by members and managers are taking steps to ensure that members are aware of the roles and accountabilities.	Appropriate member seminars and through useful information leaflets.	GREEN Following member feedback the 'who does what' for UBICO will be circulated to all members by the end of September 2015. This will now be adapted for the other commissioned services and rolled out.	Ken Dale Business improvement manager
Consider a fundamental review of project management, risk management and procurement	There have been reviews undertaken on both the AG&M project and the cemetery and crematorium – both of which provide useful lessons learnt as to whether it is the process, culture or application. The peer review team are right to suggest that given the direction	SLT/SM to have a session considering the lessons learnt from both the cemetery and crematorium project and the AG&M project and consider what lessons learnt mean for existing processes. Risk management training is already	AMBER Ken: a project workshop was facilitated by GCC in April 2015 and as a result a number of actions were agreed and thee related to; <ul style="list-style-type: none"> <li>- Organisational capacity &amp; control</li> <li>- Benefits management</li> <li>- Financial and resource management</li> <li>- Governance</li> </ul>	Mark Sheldon Director of resources

	of travel it is important to ensure that our risk management, procurement and project management processes are able to support the pace of change.	planned for all managers at the end of October. Consideration should be given to separate risk sub groups for key programmes and projects.	The groups tasked with taking these actions forward reported progress to SLT and Service Managers on 13/07. The council's procurement strategy was updated taking in account the report and recommendations from Grant Thornton on the AG&M overspend and approved by Cabinet on 14/7/15. Staff have been made aware of the revised strategy and supporting toolkit.	
Reassess how you manage the interface between priorities and capacity	The senior leadership team undertake a resource management process which reviews capacity and priorities. Given the pace of change and the reduction in capacity within the organisation it is agreed that it is important to undertake a review of our approach.	Reassess the approach to resource management to ensure that it is appropriate. The review to be aligned to the development of the new corporate strategy and to be in place by 31 March 2015.	GREEN Some small improvements have been made to the resource planning process. SLT consider resource planning on a quarterly basis and are asked to commit resources to projects and programmes or reassign priorities. As part of the development of the corporate strategy process, an assessment of the resources required was made and committed to by SLT.	Ken Dale Business improvement manager
Consider ways to engage and consult more widely the public and customer through consultation	Consultation is undertaken on specific issues rather than a blanket approach on all services. This has been found to be more effective as it targets specific issues and is a more cost effective way of engaging with the public.	As part of the development of the corporate strategy for 2015/18 undertake a consultation exercise to ensure that there is wider engagement on the strategic direction of travel for the council.	GREEN The draft corporate strategy was considered by the Overview and Scrutiny Committee and formed part of the public consultation on the Budget Strategy in December 2014.	Richard Gibson Strategy and engagement strategy.
Consider a staff survey and keep focus on staff morale through change	GO shared services have recently appointed a new head of HR. This will be discussed with her as to how best this could be achieved in an effective and meaningful way. Employees do have the ability to post comments on the intranet and this is a useful way of testing opinion on specific matters.	Employee sessions to be held in November and the idea of regular staff surveys or other means of engagement to be tested out with them at these sessions	GREEN An employee engagement survey was launched by the Chief Executive on 11th June 2015. 115 employees completed the on-line survey by the closing date, 17th July 2015. A summary of the data will be shared with all employees via managers and the intranet and the SLT will determine any actions that need to be taken to improve engagement.	Andrew North Chief Executive
Keep your IT requirements and plans front and centre	Since the peer review was undertaken further work has been undertaken on the infrastructure of the network which has helped to stabilise the current systems. Support has been provided through our GO partners to assist the shared service in helping to improve the current infrastructure.	IT Business relationship manager post created for period of six months to support the shared service with service redesign and transformation. Regular updates to users Infrastructure upgrades to stabilize the system Regular updates to SLT on progress	AMBER The ICT Business Relations Manager has now been appointed to a permanent post in the ICT shared service. Significant progress has been made to stabilise the ICT infrastructure and the council received PSN accreditation for 2015. Further investment to support the acceleration and completion of the ICT infrastructure programme was supported by Council on 20/7/15. A briefing note outlining progress with the upgrade strategy and the reason for further investment was issued to both staff and members in July 2015.	Mark Sheldon Director of resources

Key messages from staff focus group	Management comments	Proposed action		Lead officer
Greater visibility of the senior team	As there are now fewer direct employees nearly all of which are based in the municipal offices this will be easier to manage	Employee sessions to be held in November and exec board to test out with employees as to what they want via visibility	GREEN Three employee sessions were held on 28th November, 1st and 8th December 2014. Employees were asked to help create a 'Cheltenham Commitments' document by answering 2 questions, 1) What commitments do you want from the organisation and 2) what commitments are you willing to give to the organisation. Visibility was not mentioned. Following this on 24th March 2015 at the 2020 manager's session we asked what would managers want to see from leaders and visibility was one of the top items. Ongoing progress is being monitored as part of the 2020 programme.	Andrew North Chief Executive
Ensuring appraisals are effective and make a difference to staff	Appraisal process has been updated. Session held with service managers to	Employee focus group to be set up to ascertain how the process worked this	GREEN At the Employee Sessions in Nov 2014 we sought feedback on the refreshed appraisal	Jan Bridges Learning &

	get feedback on the process	year and what other improvements are required.	documents and competency framework to ascertain whether they needed further refinement. We asked employees to tell us: what they liked; their dislikes and how to improve them.  Employees told us the paperwork was simpler and more relevant to their roles and helped to generate discussions about performance. Improve it by increasing the frequency of reviews and ensure agreed development is actioned. Provide clarity on what 'excellence' looks like. To address these, the appraisal guidance has been amended to include a quarterly review of both actions and development. L&OD plan to undertake training needs analysis reviews with all managers and a what 'excellence' looks like document has been created and agreed with SLT and Service managers.	Organisational Development Manager
Promote more effective working with members	Member/officer relationships are key to a successful organisation.	Training sessions have already been organised for employees on report writing, O&S and working with members	GREEN Employee sessions covering report writing and scrutiny were held in September and October 2014. Consideration will be given as to whether a session on Member/Officer relations should be included as part of the post-election Induction 2016.	Rosalind Reeves Democratic Services Manager
Develop a communication plan for change (you said...we did)	There is already the Cheltenham Futures programme which has a communication strand, and work is ongoing to develop an engagement and communication plan for 2020 Vision	Develop appropriate communication strategies for key change programmes	GREEN For 2020, the council's main change programme, a communication and engagement plan has been devised and is run by the programme office. 2020 also has its own web presence which is used to communicate key messages.	Pat Pratley Deputy Chief Executive