

NOTICE OF MEETING

Meeting:	RESOURCES AND TRANSFORMATION OVERVIEW AND SCRUTINY PANEL
Date and Time:	THURSDAY, 25 JULY 2024, AT 10.00 AM
Place:	COUNCIL CHAMBER - APPLETREE COURT, BEAULIEU ROAD, LYN DHURST, SO43 7PA
Enquiries to:	Email: andy.rogers@nfdc.gov.uk Andy Rogers Tel: 023 8028 5070

PUBLIC INFORMATION:

This agenda can be viewed online (<https://democracy.newforest.gov.uk>). It can also be made available on audio tape, in Braille and large print.

Members of the public are welcome to attend this meeting. The seating capacity of our Council Chamber public gallery is limited under fire regulations to 22.

Members of the public can watch this meeting live, or the subsequent recording, on the [Council's website](#). Live-streaming and recording of meetings is not a statutory requirement and whilst every endeavour will be made to broadcast our meetings, this cannot be guaranteed. Recordings remain available to view for a minimum of 12 months.

PUBLIC PARTICIPATION:

Members of the public may speak in accordance with the Council's [public participation scheme](#):

- (a) on items within the Resources and Transformation Overview and Scrutiny Panel's terms of reference which are not on the public agenda; and/or
- (b) on individual items on the public agenda, when the Chairman calls that item. Speeches may not exceed three minutes.

Anyone wishing to attend the meeting, or speak in accordance with the Council's public participation scheme, should contact the name and number shown above no later than 12.00 noon on Monday, 22 July 2024.

Kate Ryan
Chief Executive

Appletree Court, Lyndhurst, Hampshire. SO43 7PA
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AGENDA

Apologies

1. MINUTES

To confirm the minutes of the meetings held on 28 March 2024 and 13 May 2024 as correct records.

2. DECLARATIONS OF INTEREST

To note any declarations of interest made by members in connection with an agenda item. The nature of the interest must also be specified.

Members are asked to discuss any possible interests with Democratic Services prior to the meeting.

3. PUBLIC PARTICIPATION

To receive any public participation in accordance with the Council's public participation scheme.

4. ANNUAL PERFORMANCE AND PROVISIONAL BUDGET OUT TURN (Pages 5 - 30)

To receive the Annual Performance and Provisional Budget Out turn report.

5. PERFORMANCE MANAGEMENT FRAMEWORK (Pages 31 - 164)

To consider a new Performance Management Framework.

6. CUSTOMER STRATEGY (Pages 165 - 186)

To consider a proposed Customer Strategy.

7. TRANSFORMATION BUSINESS CASE (Pages 187 - 272)

To consider the business case for the Council's Transformation Programme.

8. COMMERCIAL AND RESIDENTIAL PROPERTY STRATEGY ANNUAL REPORT (Pages 273 - 290)

To receive the Annual update on progress with Commercial and Residential Property Strategy (Presentation).

9. ICT WORK PROGRAMME 2024/25 (Pages 291 - 302)

To receive the ICT Work Programme 2024/25.

10. FINANCIAL STRATEGY TASK AND FINISH GROUP ARRANGEMENTS (Pages 303 - 304)

To note proposed arrangements for the operation of the Financial Strategy Task and Finish Group in 2024.

11. PORTFOLIO HOLDERS' UPDATES (Pages 305 - 308)

An opportunity for the Portfolio Holders to provide an update to the Panel on

developments within their portfolios and on performance data from January to March 2024.

12. WORK PROGRAMME (Pages 309 - 310)

To note the Panel's work programme.

13. ANY OTHER ITEMS WHICH THE CHAIRMAN DECIDES ARE URGENT

To:

Councillors

Alan O'Sullivan (Chairman)
Barry Dunning (Vice-Chairman)
Alan Alvey
Jack Davies
Jacqui England

Councillors

Barry Rickman
Alex Wade
Christine Ward
Phil Woods

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RESOURCES AND TRANSFORMATION OVERVIEW AND SCRUTINY PANEL – 25 JUL 2024

ANNUAL PERFORMANCE AND PROVISIONAL BUDGET OUTTURN 2023/24

1. RECOMMENDATIONS

- 1.1 It is recommended that the Resources and Transformation Overview and Scrutiny Panel note the annual performance report and budget outturn for approval by Cabinet, and provide any comments to the Cabinet.
- 1.2 It is recommended that the Resources and Transformation Overview and Scrutiny note the specific recommendations intended to go to the Cabinet, being:
 - 1.2.1 It is recommended that the Cabinet note:
 - a) the Annual Performance Report for 2023/24;
 - b) the provisional outturn of the General Fund revenue and capital budgets for 2023/24;
 - c) the provisional outturn of the Housing Revenue Account and capital budgets for 2023/24; and
 - d) the year-end rephasings, as included within the provisional outturn figures.
 - 1.2.2 It is recommended that the Cabinet request Council approval of:
 - e) the establishment of a new Corporate Priorities Reserves, with an initial contribution of £1.5 million in 2023/24 and note the transfer of £262,000 in 2023/24 to enhance the Treasury Management Reserve.

2. PURPOSE OF THE REPORT

- 2.1 This report provides an overview of performance over the last year (April 2023 to March 2024) against our Corporate Plan 2020-2024 and sets out provisional outturn results for Revenue and Capital budgets for both the General Fund and Housing Revenue Account.
- 2.2 The Council's statutory Statement of Accounts will be completed and signed by the Responsible Financial (S151) Officer and will be presented as final to the Audit Committee following the completion of an external audit. Should there be any significant variations from the figures presented in this report, they will be highlighted at that Committee. The Outturn now presented is in management format.

3. INTRODUCTION

- 3.1 A new Corporate Plan was introduced in April 2024 and is in place covering the years 2024-2028.

- 3.2 The annual report for April 2023-March 2024 therefore represents the last year of reporting against our previous Corporate Plan, Community Matters 2020-2024.
- 3.3 The Annual Budget is an important element of the delivery of the Council's financial strategy which supports the delivery of core services and provides value for money to local taxpayers. Financial Monitoring Reports and Medium-Term Financial Plan updates are presented to Cabinet throughout the year, providing up to date information on current performance and the budget outlook over a medium-term period.
- 3.4 The Council's financial planning process supports the delivery of the corporate objectives and the setting of the annual budget and its performance is an important element of the overall Corporate Plan.
- 3.5 Financial monitoring reports have been presented to Cabinet in September 2023, November 2023 and February 2024. The February reported position for the General Fund, Capital Programme and Housing Revenue Account budgets were as follows:

	Original Budget Set Feb '23	Latest Budget Feb '24 Cabinet	Reported Variations up to Feb '24 Cabinet
	£'m	£'m	£'m
General Fund - Net Budget Requirement	22.468	22.468	0
General Fund - Business Rate Retention	(3.185)	(3.185)	0
General Fund - Capital Programme	15.031	13.881	(1.150)
Housing Revenue Account - Income	(32.553)	(32.696)	(0.143)
Housing Revenue Account - Expenditure	19.979	20.543	0.564
Housing Revenue Account - Capital Programme	27.610	28.021	0.411

- 3.6 This report at section 5 and the Appendices includes the provisional budget outturn position statements covering the General Fund (**Appendix 2A and 2B**), the Housing Revenue Account (**Appendix 2C**) and combined Capital Programme (**Appendix 3**).

4. ANNUAL PERFORMANCE REPORT

- 4.1 The Annual Performance Report (**Appendix 1**) illustrates the Council's achievements during 2023/24 highlighting each Portfolio's performance against the priorities set.
- 4.2 The annual report is a reflection on the previous year and recognises the achievements organised by their new portfolios. The Key Performance Indicators (KPIs) too, are backwards looking and will not represent the newly agreed set of KPIs that accompanied the new corporate plan 2024-2028. These new KPIs are being presented separately as part of our Performance Management Framework.

5. BUDGET OUTTURN

- 5.1 The General Fund Net Budget Requirement (Revenue) provisional outturn position confirms a spend of £20.649m against an original budget of £22.468m. Within those

figures, the net spend at Service Portfolio level is just £20,000 over the original budgeted sum for the year (£20.765m spend as against £20.745m original budget). The outturn variation that has reduced the net budget requirement has occurred outside of the service Portfolios and is due principally to additional interest earnings of £2.132m above the originally budgeted sum, a VAT refund of £668,000 and additional business rates income of £701,000. These positive variations mean that the General Fund has been able to support 2023/24 Capital Programme financing of £1.807m (the originally budgeted contribution was £700,000), enhance the Treasury Management Reserve by £262,000, create a new Corporate Priorities Reserve, with a contribution of £1.5m and transfer £767,000 to the Capital Programme Reserve.

5.2 Rephasings to future years included in the outturn total £2.502m and include:

5.3 The Financial Monitoring reports presented through Cabinet during the year included the reasoning for the in year variations and the summarised position is shown within **Appendix 2A**, with further detail on the new outturn General Fund variations being shown within **Appendix 2B**.

5.4 The original General Fund Capital Programme budget was set at £15.031m. This was reduced to £13.881m via financial monitoring through the year to take into account the scheme rephasings from 2022/23 and updated for new in year requirements. The outturn position confirms a spend for the year of £8.160m. Outturn rephasings to future years total £4.692m and project savings were £1.029m. This results in a year-end variation in comparison to the revised budget of -£5.721m.

5.5 The Housing Revenue Account provisional position confirms income for the year of £32.911 (an increase of £358,000 from the original budget) and revenue spend for the year of £20.216m (an increase of £237,000 from the original budget). After taking these variations into account, and after allowing for net transfers from earmarked reserves of £49,000 and contributions to capital of £13.222m, this results in an overall deficit for the year of £478,000, with this sum being transferred from the Acquisition and Development reserve. Excluding increased Contribution to Capital (Depreciation) charges of £492,000, included within capital financing costs, the HRA operational position for the year shows a surplus of £14,000.

5.6 The original Housing Revenue Account Capital Programme budget was set at £27.610m. This was increased via financial monitoring through the year to £28.021m. The outturn position confirms a spend for the year of £26.382m. Outturn project underspends, largely on the Development Programme were £1.639m, with no project rephasings to future years.

5.7 The following table summarises the positions as explained above (although all stated positions are still subject to change during the course of External Audit):

	Original Budget Set Feb '23	Provisional Outturn Position	Total Variation
	£'m	£'m	£'m
General Fund - Net Budget Requirement	22.468	20.649	(1.819)
General Fund - Business Rate Retention	(3.185)	(3.886)	(0.701)
General Fund - Capital Programme	15.031	8.160	(6.871)
Housing Revenue Account - Income	(32.553)	(32.911)	(0.358)
Housing Revenue Account - Expenditure	19.979	20.216	0.237
Housing Revenue Account - Capital Programme	27.610	26.382	(1.228)

6. CRIME & DISORDER/ EQUALITY & DIVERSITY / ENVIRONMENTAL IMPLICATIONS

6.1 There are none arising directly from this report.

7. OVERVIEW AND SCRUTINY PANEL COMMENTS

7.1 The Annual Performance Report and Provisional Budget Outturn is presented to the Resources and Transformation Overview and Scrutiny Panel on the 25 July 2024 with all members having been asked to input through this panel.

7.2 Detail to be added following panel

8. PORTFOLIO HOLDER COMMENTS

8.1 To be added

Further Information:

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Finance Service Manager
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Background Papers

Appendix 1: [Annual Performance Report 2023-2024](#)

Appendix 2 and 3: [Financial Monitoring Report](#)

Cabinet September 2023
Cabinet November 2023
Cabinet 7th February 2024

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ANNUAL PERFORMANCE REPORT 2023-2024



A letter from the Leader

This report is the final update on the key priorities set out in the Corporate Plan 2020-24. When it was published no one could have predicted what was to come for us all, adapting and overcoming the challenges brought about by the covid-19 pandemic, Brexit, the cost of living and energy crises, and climate change, the last four years have undoubtedly been a difficult time for the council. I am proud of the proactive approach we have taken to the challenges which came our way and the foundations we have laid to build upon over the next four years.

We saw the successful delivery of the 2023 District and Parish Elections, with 48 district councillors and 108 parish councillors elected for a four-year term. The political makeup of the council has changed after these elections, with a reduction in members after the finalisation of the electoral review, and our members representing a broader number of political parties. As Leader I chose the members of my cabinet, assigned their portfolios, and realigned the priorities as committed to in the Corporate Plan 2020-24. A period of induction was welcomed by members both new and returning which culminated in the Service Showcase, an event which provided an opportunity for staff and councillors to meet each other and learn more about what our diverse range of services do.

The cost-of-living crisis, brought about by the national rise in the price of food, utilities, fuel, inflation, and other economic factors, affected our residents this year. Many households found themselves struggling to pay their bills or going without heating or food. We recognise our responsibility to support our residents and provide accessible services to all, including those most in need. A group of officers came together to create an action plan, sharing resources and knowledge to coordinate our approach, activities, and initiatives we are undertaking, to support our residents who are most affected.

Following the government approval of the Solent Freeport in 2022, the programme moved into the delivery phase, a new Chief Executive of the freeport was appointed and priorities were agreed to support economic growth with focus on transport and wider infrastructure, employment



and skills, prosperous communities, environmental sustainability, and the development of a local delivery plan. I am excited for the potential benefits this may bring to the district including a share of a forecasted 7,000 new jobs, significant retained business rates and 303 hectares of developable land.

Looking to the future, a large amount of work has been put in to developing our new Corporate Plan 2024-28, which was adopted in April 2024. The plan outlines how we will conduct ourselves and new ways of working. It also introduces a new set of core values for the organisation. Our elected members, residents, partners, and staff all contributed to its development, which for the first-time included strategy days, staff engagement, gaining feedback from over 130 colleagues and member engagement sessions to inform our priorities. The plan then went through a period of public consultation which received 162 individual responses.

We are realistic about the challenges ahead for the organisation, including advancing technology, potential significant future budget gaps, attracting and retaining staff as well as climate and environmental considerations. In response, an ambitious Transformation Programme, named 'Future New Forest' has been developed and was approved in December 2023, providing a framework to respond to these challenges and setting out how we will transform the council so we can meet customer needs, protect finances, and embed sustainability as we move forward.

As we look to the coming year, we will be celebrating 50 years since New Forest District Council was formed in 1974. This milestone gives us the opportunity to look forward, embrace new ways of working and continue to provide the services our residents value over the next 50 years.

Cllr Jill Cleary

Leader of New Forest District Council

Portfolio highlights

2023-24

Leaders

An additional +£216k Rural England Prosperity Fund secured

90.7% website accessibility score

17,000+ subscribers to resident e-newsletter

70+ staff members contributing to a LGA Peer Review of HR department

KPIs on or above target raised to +84%

Environment and Sustainability

30,000 kilowatt hours of electric vehicle charging per month in our carparks

16 wildflower meadows planted

2 Public Space Protection Orders in force to protect the local landscape and animals

Launched new Garden Waste service

75% of new customers signed up using new online service

Over 20,000 wheeled bins delivered to garden waste residents

Community, Safety and Wellbeing

4534 attendees to Active Lifestyle classes

100% of high-risk food inspections undertaken

+£277k in community capital, revenue and transport grants awarded

Responded to 2453 fly tipping incidents

98.3% of New Forest residents surveyed were satisfied or very satisfied with where they live

80 attendees to the first Community Forum

Planning and Economy

995 planning decisions issued

£945k spent on recreational mitigation projects

50 businesses engaged with New Forest Apprenticeship and Skills Hub

140 businesses and residents benefitted from start-up business support

£100k in funding secured to improve digital planning processes

Housing and Homelessness Services

More than 71% of rough sleepers entered housing pathway

Answered +59000 tenants' calls, emails and webchats

54 additional affordable council homes delivered

Retrofitted 67 properties with energy efficiency measures including 30 Air Source Heat Pumps and 30 sets of Photo-Voltaic Panels

Overall tenant satisfaction score of 81%

Increased the energy performance rating of 353 properties

Carried out 18,649 repairs on tenants' properties

Finance and Corporate Services

Distributed £550,400 of energy rebate support to 1626 households

£7.8m of funding allocated to develop an operational services depot at Hardley Industrial Estate

+6200 responses to customer research informing Transformation Programme

Lowest paid staff paid £11.70 per hour, higher than the national living wage

+£111k distributed through the Household Support Fund to 252 households and issued food vouchers totalling +£455k

£208,018 distributed in Council Tax Support Fund



Leader's

Delivering a sustainable and prosperous New Forest and putting our community first

Ensuring the prosperity of the New Forest area remains a priority. An additional +£216,000 of grant awards was secured this year from the Rural England Prosperity Fund investment plan to support community investment improvement projects within the district, with all to be completed by March 2025.

Financed by the UK Shared Prosperity Fund allocation secured last year, work began to design and commence projects including electric vehicle charging infrastructure, shared transport improvements and green skills development.

Activity continued to increase the number of residents signed up to receive updates via the resident email newsletter, including regular promotion on social media, promotion at events such as the new forest show, inclusion in other council correspondence such as the annual electoral canvass or council tax letters and banners installed at information offices. 9.7% (+17,000 subscribers) of residents are now signed up to this service and 25 email bulletins were sent this year, with subjects ranging from the launch of the new Corporate Plan, and incident responses during this years' winter storms.

An online survey to gather feedback on the existing digital experience showed that 84% of respondents agreed it was easy to find the service or information they were looking for. Customers who made contact via the telephone were asked 'what made you call today instead of using an online service' and 47% of respondents (1,300 people) stated that they could not find or do what they needed to online.

In a reflection of the wider local government picture, recruitment and retention remained a challenge for the organisation. The percentage of vacancies filled first time fell to 74% and a number of proactive steps are now being taken to improve this area. This included improvements to our application processes, a new application form, the ability for applicants to upload a CV and covering letter, and a new informative candidate pack with relevant council information in one engaging format. An increased focus

Priorities 2020-2024

Working with regional and local partners to ensure the prosperity of the New Forest area.

Being an employer of choice.

Excellence in services to our residents and continuing to maintain front line services.

Ensuring effective democratic engagement and representation.

Putting residents at the centre of what we do and how we do it.

Modernising customer services and responding to changing needs.

on the promotion of available roles was also adopted, including an increased use of LinkedIn and other social media platforms, the use of new branding, social media imagery and videos, as well as the attendance by our staff to eight recruitment events throughout the year at schools, colleges, and job centres.

The first annual get together to celebrate long service milestones for colleagues who have been employed for 20/30/40 years was held in December 2023 and gave an opportunity for the Leader, Chairman, Chief Executive, and members of the leadership team to thank our longest serving team members.

A LGA peer review was commissioned to independently appraise our HR service and provide recommendations for improvement. Over 70 employees took part in individual, or group interviews and proposals will be considered as part of the development of the councils' wider people strategy.

Staff engagement continued with Chief Executive staff briefings, 'Monthly Meet' sessions and social events such as the Christmas quiz. The monthly wellbeing walks, introduced in 2022, continued to be well attended and gave an opportunity for staff to meet colleagues from other service areas.

Key performance indicators	Unit	Target	2022/23	2023/24	RAG
Portfolio indicators above or on target	%	Monitor	79.25%	84.06%	
Vacancies filled first time	%	85%	83%	74%	
Subscribers to residents' email	% of residents	14%	8.82%	9.7%	
Average customer rating of residents' email (usefulness, ease of understanding, relevant information)	Score out of 10	9	9.33	9.2	
Level of customer satisfaction with council services	%	60%	78%	-*	
Website optimisations resulting in an improved customer experience	Num	4	5	6	
Website accessibility (target is government set benchmark)	%	87%	89%	91%	

*Expected in the next resident survey



Planning and Economy

Encouraging development that meets local needs and enhances the special qualities

A CIL framework was adopted to allow funds targeted towards specific infrastructure needs. Officers provided ongoing support to Town and Parish Councils to understand their responsibilities and how to spend their CIL allocations. +£1.4m in CIL was collected this year and +£155,000 was passed to the Town and Parish Councils for them to spend directly on infrastructure that they identify.

+£945,000 was spent on recreational mitigation projects, which included 11 capital projects around the district, and work began towards another 11 for implementation in 2024 / 25. These projects are funded through developer contributions and provide alternative recreational green spaces for existing and future residents of the district.

The Totton Regeneration Partnership was formed, with the aim of realising benefit for the town centre as part of the wider Solent Freeport legacy. Totton town centre will also benefit from £136,000 funding allocated from the UKSPF, towards a number of projects benefitting the town which have a deadline for delivery by Spring 2025.

£100,000 in funding from the government was secured to improve digital planning processes. The funding will help to improve the tools that are used to digitally map data across the district.

Planning Committee members resolved to grant permission, subject to the completion of a legal agreement, on six areas of land within allocated strategic sites across the district, totalling 559 new dwellings. Full permission was granted on four areas of land within the strategic sites.

Approval was granted to commence a formal review of the New Forest Local Plan to align with current legislation and housing requirements. This major piece of work will see benefits across the district, enabling more control of where development can happen and potentially resist inappropriate development on non-allocated sites. The full review will include the preparation of a full evidence base, which will include a housing needs assessment, employment needs assessment, district wide design codes, statement of community involvement and a cross-party working group will be formed to oversee and scrutinise the preparation of the plan.

A new supplementary planning document, 'Planning for Climate Change' was adopted in March 2024. The key objective of the document is to encourage the development industry to maximise renewable uses and minimise expected carbon emissions when designing new buildings, aligning with the council's climate emergency commitments. The document supports the current Local Plan and will provide a basis for more detailed climate policies within the new Local Plan review process.

Work continued towards the adoption of a neighbourhood plan in Ringwood, which sets out local planning policies for the area, with the finalisation of a series of consultation periods. The plan has been independently examined and the

Priorities 2020-2024

Delivering the vision of the Local Plan and encouraging development that meets local needs and delivers positive economic, social, and environmental outcomes

Working with partners, applicants, and developers to ensure a positive, timely and enabling attitude to development

Working with the Partnership for South Hampshire authorities on a Joint Strategy and Statement of Common Ground to address future growth and unmet housing need

Using contributions to deliver green infrastructure projects that address the impact of development on the natural environment

Ensuring Building Control are engaged at the earliest stage to make future development projects safe

Explore different delivery models to deliver our housing target including maximising the number of affordable homes

Set a vision for the future of each of our towns

Continuing to work with partners and businesses grow the New Forest economy

Lobbying for essential improvements in broadband and mobile connectivity

Helping businesses, industries, and high streets respond to social, environmental, and technological changes and innovation

Supporting the visitor economy across the New Forest district

Continuing to promote the New Forest as a filming destination

recommendation is that the plan should proceed to local referendum in July 2024. In addition both Fawley and Sande Heath were designated as a neighbourhood area and will begin toward the development of their neighbourhood plans.

The council sponsored the 'Best New Forest Micro Business' award at the New Forest Brilliance in Business Awards in December 2023, an annual award ceremony which acknowledge the achievements of New Forest businesses.

Support was offered to local businesses across the district in the form of mystery shopping as part of the 'Shop Doctor' programme where 32 businesses signed up to participate and receive a visit this year. Officers also offered free business advice for new businesses, potential business start-ups and those thinking of becoming self-employed and 140 businesses benefitted from this support this year.

Planning and Economy (continued)

This year saw the council work in partnership with Solent Business & Skills Solutions to launch the New Forest Apprenticeship and Skills Hub, which provides businesses in the district with free advice about apprenticeships and skills training. Launching in February 2024 the scheme had a positive start with 50 businesses signing up.

Key performance indicators	Unit	Target	2022/23	2023/24	RAG
Number of houses completed each year (as set out in the Annual Authority Monitoring Report)	Num	400	193	-*	
Number of green infrastructure projects delivered each year	Num	3	5	3	
Number of Biodiversity Net Gain projects delivered each year	Num	-	15	-**	
Additional employment floorspace created within the district	m ²	-	3,491m ² (net)	-*	
New Forest District Council building control market share	%	55%	58%	56%	
Determination of planning applications within the nationally prescribed time frames	%	Major 60%, Minor 70%, Other 85%	Major 100%, Minor 81%, Other 86%	Major 86%, Minor 94%, Other 97%	
Number of projects that New Forest District Council are involved in to deliver sustainable transport options	Num	-	13	13	
Business engaged in the business engagement programme	Num	100	357	159	
Film:New Forest - Value of filming in the district	£	£75,000	£245,300	£63,000	
Subscribers to 'Helping local businesses grow' e-newsletter	Num	3,000	3,566	3,508	
New Forest locations available to film and TV productions via Film:New Forest location database	Num	80	107	112	

*Expected July 2024

**Not available. Position reviewed for 24/25 based on national guidance



Housing and Homelessness Services

Creating balanced communities and housing options that

The housing teams continue to work towards the strategic objectives set in the Housing Strategy 2018, as well as the Homeless and Rough Sleeping Strategy 2019, Private Sector Housing Strategy 2020 - 24, and the Greener Housing Strategy 2022.

At the end of March 2024 there were 45 households living in emergency accommodation which is a significant reduction from the peak of over 90 households in June 2022. The key reasons for evictions and homelessness were due to rent increases and affordability, as well as an increase in the end of private sector housing tenancies due to properties being sold.

Reducing rough sleeping continues to be a key area of focus for the housing teams and 37 rough sleepers were identified and supported into accommodation throughout the year. Ex-Rough sleepers who now are in accommodation benefit from ongoing support from specialist teams set up over the corporate plan period, which includes, onsite support workers, dedicated outreach workers and a specialist mental health worker, leading national best practice as a result.

An ongoing grant funded project to house ex-offenders set a target to accommodate 24 individuals in 2 years. Since the project started in October 2023 nine clients have been successfully housed and now live independently. A proactive approach is used to seek private rented accommodation and provide ongoing support to clients to open bank accounts and deal with referrals to specialist services as appropriate to support tenancy sustainment.

Penman House in Totton was completed on the site of the former Testwood Social Club. This development has 12 flats which meet the government's proposed Future Homes Standard, funded in part by a £684,000 Homes England grant.

Plans have been furthered on the former Hythe Medical Centre site. Demolition and clearance have begun to make way for 22 houses and flats. This stage has been fully funded by HM Government through the Brownfield Land Release Fund, following the successful award of £324,000 under the One Public Estate programme earlier this summer.

The purchase of 16 homes was completed in Fordingbridge, which are to be used for rent or shared ownership. The shared ownership properties proved highly sought after and five sold quickly on a first come first served basis.

Significant improvement works to two properties in East Boldre were completed. Significant improvement works to 2 properties in East Boldre were completed. These were 2 structurally unsound three-bedroom properties which have been reconfigured to maximise space and install Air Source Heat Pumps (ASHP). Further housing developments are under construction in New Milton, and Totton.

Priorities 2020-2024

Enabling the best use of housing to meet the needs of people, including support for a high quality, strong private rented sector

Improving the housing circumstances of those most in need

Increasing the supply of high-quality affordable homes.

Meeting local housing needs and promoting sustainable growth

30 Air Source Heat Pumps (ASHP) and multiple energy efficiency measures were installed this year towards the target of retrofitting 70 homes by 31 March 2025, funded by £500,000 from the Social Housing Decarbonisation Fund (SHDF). A resident survey of the properties with ASHPs newly installed under the previous wave of grant funding was conducted this year. Respondents said they would recommend the take-up of this type of heating and were happy with their installation and follow up service. Most said they understood how to use their heat pump and that it was easy to heat their home and was not too noisy.

We have committed to all council homes having an EPC rating of C, or better by 2030. 353 homes received work which improved their energy performance. These day-to-day repairs and maintenance activities are contributing to the council's target, with a further 100 homes receiving complex energy upgrades in the next year (2024 / 25).

A free to use online tool was launched, 'Cosy Homes New Forest' for private homeowners and landlords to find out how to improve the energy efficiency of their homes and create a refurbishment plan to make homes warmer, reduce carbon footprint, and cut energy bills.

Supporting around 5,200 tenants or leaseholders, a new Tenant Engagement Strategy was approved after consultation, setting clear priorities of listening to our tenants, putting tenants first, knowing our tenants and supporting engagement and how we communicate with tenants.

A £1.8 million Government grant was received to provide 12 resettlement homes for Ukrainian and Afghan families, which were delivered alongside the purchase of 14 ex-council homes as part of the council's development programme.

Housing landlord teams developed an innovative software partnership to design and develop a bespoke housing management software system, integrating with all other housing software modules to allow housing register applicants one journey through the service's software to become a social housing tenant. The solution will go to market in the coming year.

The onset of the Social Housing Regulation Act 2023 and enhanced powers granted to the Regulator for

Housing and Homelessness Services (continued)

Social Housing and the Housing Ombudsman saw the housing team fully prepare the service for the start of new consumer standards, tenant satisfaction measures and new regulations from April 2024.

Key performance indicators	Unit	Target	2022/23	2023/24	RAG
Additional council homes delivered by 2026 (cumulative figures)	Num	600	50 (285)	54 (339)	
Additional affordable homes delivered by others	Num	60	51	79	
Prevention duty cases successfully prevented	%	50%	56%	51%	
Private sector property inspections resulting in Category 1 hazards	%	<40%	24%	27%	
Rough sleepers entering accommodation pathway	%	32%	70.25%	71%	
Households in external emergency B&B accommodation	Num	<70	49	45	



Finance and Corporate Services

Enabling service provision and ensuring value for money for the council taxpayer

A balanced budget for 2024 / 25 was set in February 2024 with a Council Tax increase of 2.99%, in line with government parameters before the threshold is met to trigger a referendum. The council's Medium Term Financial Plan was updated as a part of that budget setting report, and actions are underway to address the forecast deficit.

The general fund budget outturn saw a saving of 8.1% for year, which includes a £668,000 one off VAT refund and an additional £2 million being generated through treasury management investments.

A Transformation Programme - 'Future New Forest' was approved this year, investing in the council's people and services, protecting the financial position, and embedding sustainability throughout. Development of the strategy was informed by customer research which included 73 public surveys, 14 attendees at focus groups held in three locations, 118 website surveys, 4,000 telephone and walk in surveys and 2,000 emails analysed. Subject to the approval of an invest-to-save business case, circa £1.75m in cost efficiency savings are forecast to be released by programme activities over the next three financial years. Key priorities and performance indicators of the programme underpin the new Corporate Plan and will reshape the way the organisation operates. Recruitment of a team of officers to support the programme has begun, creating six new jobs for the organisation.

A review of council accommodation began, with an initial budget approved of £100,000, to look at how and where we work to ensure we are accessible to residents across the district, as well as using our assets in the most sustainable way.

Both residential and commercial property investment projects have been paused this year, save for exceptional opportunities. Since April 2023 there have been no further offers or purchases because of increased interest rates and the lack of suitable properties in the market.

£7.8 million of funding was allocated to develop an operational services depot at Hardley Industrial Estate. The scheme will serve as an operational centre for the east of the district and will comprise of storage, fuelling, fleet washing facilities, maintenance workshop and office units.

A review of the council's approach to risk management was carried out, supported by the Audit Committee. Each identified risk was reviewed and evaluated on its potential impact on the council. A new Strategic Risk Register was approved in September 2023. This working document records challenges and risks faced by the council and helps plan the direction taken in mitigating those risks.

A new business rate relief policy was approved in November 2023 to support local businesses and organisations, which outlines factors which will be considered as part of an application for rate relief for National Non-Domestic Rates (Business Rates). This policy

Priorities 2020-2024

Protecting front line services through sound financial planning, including the collection of taxation with appropriate support for individuals and businesses

Using investments to support financial resilience and the local economy

Modernisation and innovative use of ICT to enhance operational efficiencies across all services

Providing support to residents with benefits and welfare reforms and supporting businesses to access financial reliefs and grants

carefully balances the potential benefit to the community, with the cost to council taxpayers by ensuring that funds are allocated and used in the most effective and economic way.

The Digital Strategy 2022-2025 continued, putting 'Customer first, digital by design' through delivery of the ICT project work programme and operation of our server and software platforms.

Significant work has taken place this year including the use of Microsoft 365 functionality across all services, the migration of our servers to Microsoft Azure, reporting and dashboards using Power BI, development of the Newforest.gov website and new SharePoint intranet (New Forestnet), a modern audio / visual suite in our council chamber, the launch of a new learning management system and phase 1 of the waste operations system to deliver digital garden waste services.

A decision was taken to support the five leisure centres within the district with exceptional and unforeseen utility costs. The Council and its Leisure Service Operator continue to work on reducing consumption through schemes designed to promote energy efficiency, including for example the replacement of the end-of-life boilers at New Milton Health and Leisure being replaced this year with more energy efficient air-source heat pumps. £277,000 funding from Sport England was secured through the Swimming Pool Support Fund for Revenue and Capital Investments to further mitigate increasing energy costs, as a result, solar panels and shower restrictors will be installed at Applemore Health and Leisure during 2024 / 25.

Capital investment by Freedom Leisure for completed and forthcoming projects stood at +£3.8 million with all five centres benefitting from investment and upgrade.

A national pay award was agreed this year adding an additional £1,925 to all spinal column points (SCP) up to no.47, with those SCPs above 47 having a pay increase of 3.88%, whilst chief executive and chief officer pay was raised by 3.5%. This brought our lowest paid staff to £11.70 per hour, higher than the national living wage.

Finance and Corporate Services (continued)

Key performance indicators	Unit	Target	2022/23	2023/24	RAG
Achieved a balanced budget with reasonable council tax increases	% / £	Greater of 2% or £5	2.99% / £5.63 (23/24 budget)	2.99% / £5.80 (24/25 budget)	Green
General Fund budget variations	%	+/-3%	-2.74%	-8.1%	Yellow
HRA Fund budget variations	%	+/-3%	-3.89%	-0.04%	Green
Value of Original Capital programme delivered	%	80%	84%	81%	Green
Increase in the value of residential investment	£m	£8m	£5.1m	-**	Grey
Increase in the value of commercial investment	£m	£30m	£29.3m*	-**	Grey
Maintain high level of Council Tax collected	%	98.50%	98.56%	98.56%	Green
Maintain high level of NNDR collected	%	98.50%	98.83%	98.96%	Green
ICT incidents resolved with SLA	%	95%	96.8%	98.8%	Green
Level of investment in the leisure centres by Freedom Leisure (cumulative)	£	£3.554m	£2.095m	£3.86 million	Green

*Reported figure includes invoiced and committed amounts for Platinum Jubilee Development.

** Projects on pause.



Community, Safety and Wellbeing

Engaging with our communities, improving health and wellbeing, and maintaining the quality of the place in which they live

Community grants were awarded this year to 29 local groups, comprising of £130,000 in revenue grants and £96,040 in capital grants, as well as community transport grants totalling £51,100. The grant funding totalling over £277k will go to a wide range of organisations from across the district who support the most vulnerable residents and communities. £190,542 funding was also provided to Citizens Advice New Forest who provide free advice and information to our residents.

Support continued for nine weekly food larders and five community hubs across the district with officer attendance to provide advice and information. Working with partners the council continues to chair a bi-monthly New Forest Partnership meeting and attend the Local Childrens Partnership. A directory of support organisations contact details was compiled and widely distributed.

East Boldre Baptist Church has been transformed into new community store which opened in February 2024, supported by a grant of £17,000 from the council. The community store provides residents with a local facility for food shopping, postal and banking services, employment and volunteering opportunities, and a space for communal activities. The store is operated as a not-for-profit, with reinvestment back into the business or used for community causes.

£300,000 capital funding, and a further £54,000 funded by the Home Office Safer Streets Fund, has been earmarked for the expansion of the current CCTV system to provide enhanced crime prevention measures with a particular focus on rural communities. In February 2024 a trial took place of new camera technology in Fordingbridge with a view to roll-out across the district over the next two years as part of continued efforts to maintain security for residents, businesses, and visitors.

A new 'Supporting our Residents' Action Plan was agreed in March 2024 outlining plans and initiatives for the next two years. Key themes include supporting people on low incomes, strengthening families and communities, promoting employment opportunities, addressing the high cost of housing, and improving the health and wellbeing for people on low incomes.

A team from the Safer New Forest Partnership carried out community engagement events across the district throughout the spring and summer and completed 412 surveys across 12 events. 98.3% of the 405 New Forest residents surveyed were satisfied or very satisfied with where they live. This year's Safer New Forest Partnership strategic assessment showed a 27% decrease in antisocial behaviour.

Throughout the year work continued to install two new changing places toilets in Ringwood and Brockenhurst, with both expected to be fully operational early in 2024. Both installations have been funded by the Department

Priorities 2020-2024

Working with partners to improve the health and wellbeing of our residents

Ensuring that public health prevention principles are embedded within core services of the council

Increasing the level of physical activity within the district

Providing affordable, accessible, and sustainable leisure facilities

Ensuring regulatory services are delivered for the benefit of our residents

Ensuring the New Forest remains a safe place to live, work and visit

Engaging with partners and the community to inform and contribute towards wider outcomes

Supporting the arts and cultural heritage of the New Forest

for Levelling Up, Housing, and Communities to improve access to suitable facilities for disabled people who are living in or visiting the district. These new sites join the four existing facilities across the district.

The public convenience replacement programme continued and the newly installed 'beach hut' style public toilets at Barton on Sea were opened this year. These bright coloured facilities were chosen to provide a contrast for those with visual impairments and are specially coated to offer resilience against coastal conditions. In addition, external lighting is powered with integrated solar tiles.

The food safety team completed its post covid recovery plan to inspect all high and medium risk food businesses. Support has been offered to new food businesses and a new programme of inspections began, prioritising poorly performing establishments, and 636 inspections, 34 re-inspections and 248 registrations of new businesses were carried out during the year.

The Air Quality Management Area in Lyndhurst was revoked last summer following air quality objectives being met for Nitrogen Oxide. Work is progressing on developing an Air Quality Strategy for the whole district, which by working with Stakeholders, will identify actions to continue to improve air quality.

An upgrade to Appletree Careline was completed, moving to a new digital platform, offering an enhanced future proof service to customers. The number of Appletree Careline services provided to customers at the end of March 2024 was 3,443. These services aim to allow customers to maintain their independence and offer peace of mind for both them and their relatives.

As of March 2024, there were 435 members on the Active Lifestyles referral scheme across the five health and leisure

Community, Safety and Wellbeing (continued)

centres (operated by Freedom Leisure), this number has increased consistently month on month since January 2023 when the figure stood at 279 members. Provision has been increased at a number of sites by around 30 hours per week to support demand and reduce waiting times.

Fitness memberships across the five health and leisure centres rose by 26% from 5,966 (March 2023) to 7,498 (March 2024) and around 78% of swim school places were utilised by local residents. Overall participation increased from around 110,000 visits to the centres in March 2023 to over 140,000 in March 2024.

The Health and Wellbeing action plan was updated to include new projects which included work with town councils and Hampshire County Council's public health team to develop two sensory walks in the district, launched as part of mental health week.

Although the data, as reported by Sport England as part of the annual Active Lives survey suggests a 4.2% rise in inactivity levels, this is not significant from base line trend figures. 2022 / 23 reported figures represented an increase, and it is likely that this was due to higher levels of activity in the years following the Covid pandemic. 2023 / 24 data shows 67% of residents are active, which is in line with neighbouring Hampshire authorities.

£250,000 funding was allocated towards a new 3G artificial sports pitch in Fordingbridge, benefitting local schools, local football and rugby clubs as well as being open for

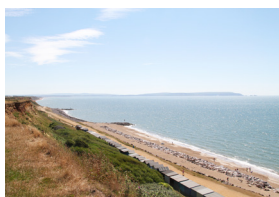
community events. This has been funded through housing developers in the town, who are required to contribute, per each new house built, towards new playing pitch provisions and associated facilities.

Work began towards improvement works in Calshot at St Georges Hall. Recognising the isolated location of this community and the need for improved facilities, funding of £375,000 was secured to carry out this project which will commence in May 2024.

The first community forum saw 80 attendees in October 2023 and welcomed partners, charity and faith groups and town and parish councils to come together to tackle the impacts of the cost-of-living crisis and share information. A second forum was held in March 2024 with the theme of community resilience to assist communities in preparing, responding and recovering from adverse incidents.

10 arts and culture projects were commissioned or co-commissioned this year using funding from the UK Shared Prosperity Fund, these projects worked with local creatives and communities and reached over 25,000 people. In addition, support for Folio continued, which provides networking opportunities, training, advice and signposting to 16 cultural organisations, over 200 freelancers and community group throughout the district.

Key performance indicators	Unit	Target	2022/23	2023/24	RAG
Participation in Community Safety engagement events and completion of annual crime and disorder survey	Num	400	529	412	Green
Residents' satisfaction on the low level of reported crime and anti-social behaviour within the district	%	95%	96%	98%	Green
Inactivity levels	%	Monitor	18.4%	22.6%	Red
Support Communities through programmes to improve the mental wellbeing of residents (cumulative)	Num	3	5	4	Green
Increase the engagement with lower socio-economic communities (cumulative)	Num	3	6	4	Green
Sedentary adults with recognised medical conditions enrolled in the Freedom Leisure Active Lifestyles referral programme	Num	100	347	435	Green
Inspections of higher risk and non-compliant food businesses to improve public safety	%	98%	100%	100%	Green



Environment and Sustainability

Working to reduce the impact on our special environment and protecting communities by managing our changing coastlines

Two Public Space Protection Orders (PSPOs) came in to force in July 2023. These orders ban the lighting of fires and BBQs and protect New Forest animals by banning feeding and petting or touching. The council has worked with the New Forest National Park Authority, Forestry England and the Verderers to enforce and educate the public around the new orders and how they can help protect the New Forest while they spend time here.

Work continued towards the delivery of the commitments of the Waste Strategy, which was approved in 2022 and aims to increase recycling rates and reduce waste and carbon emissions. A waste collection policy was approved in preparation for the rollout of the new service, planned for 2025. Procurement of goods and services continued, and the government provided £1.8m of capital funding for food waste vehicles and containers to support delivery. .

Over 20,000 wheeled bins, made with 95% recycled polymer, were delivered to properties across the district as part of the new garden waste service. Following phase one of the roll out of a new digital waste operational service this year, customers could sign up online to receive garden waste collections and 75% of customers chose this method.

The i-Tree tool was purchased this year which monitors the measurement and holistic value of the district's tree stock, including impacts on ecosystem and carbon reduction. Currently the ambitious 2:1 ratio of trees planted for every tree removed from council-maintained land is not being met. All available land is being considered for planting along with environmental benefits and a 'right tree, right place' approach has been adopted. A new Lyndhurst site opened in November 2023, for the storage and maintenance of young trees prior to their planting within the district, which reduces carbon emissions from long journeys to and from nursery sites.

A trial participation in the national 'No Mow May' campaign saw areas across the district left to grow throughout the spring. A total of 1.2km² across a 300mile² area was left to encourage vegetation growth, food for pollinators and a reduction in the council's carbon footprint. Learnings from this trial will inform the 2024 / 25 spring approach including wider promotion of the benefits of the campaign. Open Spaces teams also planted 16 wildflower meadows to support the biodiversity of the district.

Work continued between Street Scene and Enforcement colleagues to follow up on any evidence found when dealing with incidents of fly tipping. Swift action and an investigation by the Enviro Crime team led to Fixed Penalty Notices totalling £2,000 being issued, with a £400 fine handed to each of the five individuals identified from evidence found at a large fly tip of mixed waste on Park Lane, Holbury in late February 2024.

Priorities 2020-2024

Ensuring sustainability is at the centre of our decisions to preserve resources and the environment for future generations

Working with others to protect and enhance our natural environment

Reducing waste and increasing recycling

Developing plans and funding opportunities to protect our coastline

Supporting sustainability and the local economy through the strategic review and use of car parking assets

Developing a strategy for our assets at Keyhaven, considering environmental objectives, flood protection and the local economy

Ensuring our open space is clean, accessible, and well maintained, and contributes to the sustainable and natural environment of the New Forest

A Behavioural Insights trial was commenced this year funded by the UK Shared Prosperity Fund to reduce littering on the A35 between Lymington and Christchurch. The campaign aims to discourage people from throwing litter from their vehicles and help maintain a high 'litter score'.

Response to the climate emergency, led by the climate and nature emergency action plan, continued and associated risks have been added to the corporate strategic risk register. Work to improve the efficiency of council services has also been an area of focus, for example, retro fit improvements of housing stock, zero carbon gloves for operational staff and improvements to the energy efficiency of our corporate buildings. New Forest District Council was ranked the second highest of the Hampshire authorities in the Climate Action Scorecards where all authorities were surveyed by Climate Emergency UK to assess actions taken. We also supported the creation of the New Forest Community Energy Partnership, which aims to improve energy capacity and resilience across the district.

Almost half of fast electric vehicle chargers installed in council run car parks have been upgraded to rapid chargers to help motorists charge their electric vehicles quicker and to increase availability of the charging points. Work began this year on a project to install electric vehicle hubs at two car parks in Ringwood and Lymington, which will install 20 rapid chargers across the two sites in early 2024 / 25. Almost 30,000 kilowatt hours of electric vehicle charging is undertaken in council run car parks every month.

Environment and Sustainability (continued)

Winning second place for best large trade stand, 'Caring for the Climate' was the theme of this year's New Forest Show presentation in July 2023, showing the impacts of climate change on our coastline. Visitors took part in climate themed games and activities, as well as making pledges for the environment. Sustainability was carefully considered through all aspects of the planning for the show, reusing and repurposing items and using items made from sustainable materials.

Key performance indicators	Unit	Target	2022/23	2023/24	RAG
Trees removed from NFDC land	Num	-	314	549	
Trees planted on NFDC land	Num	-	296*	150	
Total fly tipping incidents responded to	Num	-	2552	2453	
Specialist fly tipping incidents responded to**	Num	-	26	25	
Household waste sent for reuse, recycling, and composting	%	55%	33.4%	34%	
Number of electric charging points	Num	10	12	8	
Total CO ² emissions saved through electric charging points	kg	9,250kg	18,000kg	***	

*Figure includes 60 trees planted for Queen Elizabeth II Jubilee and 236 trees as part of 2:1. 700 whips were additionally planted as part of Jubilee celebration.

**'Specialist fly tipping' refers to the incidents that have health or other implications, and require specialists (e.g., asbestos, or clinical waste).

***Data unavailable

FINANCIAL MONITORING 2023/24

GENERAL FUND OUTTURN 2023/24

	Feb-23	Feb'24	Outturn 2023/24			
	2023/24 £'000's Original Budget	2023/24 £'000's Updated Budget	2023/24 £'000's New Variations Expend.	2023/24 £'000's New Variations Income	2023/24 £'000's New Variations Rephasings	2023/24 £'000's Outturn Position
PORTFOLIO REQUIREMENTS						
Community, Safety and Wellbeing	3,595	3,346	51	-159	-146	3,092
Environment and Sustainability	8,083	8,344	-1	11	-225	8,129
Finance and Corporate	3,450	3,319	-19	-52	-204	3,044
Housing and Homelessness	3,136	2,377	1	-11	-217	2,150
Leader	1,173	1,247	-102	-14	-126	1,005
Planning and Economy	3,414	3,815	-27	40	-255	3,573
Multi Portfolio adjustments - To be allocated	0	307	-198	0	-109	0
	22,851	22,755	-295	-185	-1,282	20,993
Reversal of Depreciation	-1,823	-1,773	212			-1,561
Contribution (from) / to Earmarked Revenue Reserves	-283	6	0	45	1,282	1,333
NET PORTFOLIO REQUIREMENTS	20,745	20,988	-83	-140	0	20,765
Minimum Revenue Provision	1,876	1,826	-96			1,730
Contribution to Capital Programme Financing (RCCO)	700	2,675	-868			1,807
Interest Earnings (Net)	-837	-2,337		-632		-2,969
VAT Refund		-668				-668
New Homes Bonus	-16	-16				-16
GENERAL FUND NET BUDGET REQUIREMENTS	22,468	22,468	-1,047	-772	0	20,649
COUNCIL TAX CALCULATION						
Budget Requirement	22,468	22,468	-1,047	-772	0	20,649
Less: Settlement Funding Assessment						
Transparency Code New Burdens				-9		-9
Services Grant	-155	-155		-7		-162
Guarantee Grant (MHCLG)	-699	-699		7		-692
Business Rates Baseline	-4,147	-4,147		0		-4,147
	-5,001	-5,001	0	-9	0	-5,010
Locally Retained Business Rates	-3,575	-3,575		58		-3,517
Estimated Collection Fund (Surplus)/Deficit Business Rates	390	390		-759		-369
Estimated Collection Fund (Surplus)/Deficit Council Tax	-262	-262				-262
Contribution to Corporate Priorities Reserve				1,500		1,500
Contribution to Treasury Management Reserve				262		262
Contribution to / from (-) Capital Programme Reserve	0	0	1,047	-280		767
COUNCIL TAX	14,020	14,020	0	0	0	14,020
TAX BASE NUMBER OF PROPERTIES	72,271.70	72,271.70				72,271.70
COUNCIL TAX PER BAND D PROPERTY	193.99	193.99				193.99
GENERAL FUND BALANCE 31 MARCH	3,000	3,000				3,000

FINANCIAL MONITORING 2023/24
 VARIATION ANALYSIS GENERAL FUND 2023/24

PORTFOLIO ADJUSTMENTS

Community, Safety and Wellbeing

	Outturn			
	2023/24 £'000's New Variations Expend.	2023/24 £'000's New Variations Income	2023/24 £'000's New Variations Rephasings	2023/24 £'000's New Variations Total
Health & Leisure Centres - Maintenance Programme	-92			
Health & Leisure Centres - Contract including Energy Painshare Contribution	178			
Health & Leisure Centres - Solar Panel Income		-12		
Grants - Rephasings -£25k underspends -£20k	-20		-25	
CCTV - Rephasings			-24	
Community alarms - Rephasing equipment budget			-35	
Sports & Comm Development - Arts Council grant		-17		
Emergency Planning - underspends	-15			
New Burdens Grant		-130		
Net Other - Mainly ICT corporate allocations rephased			-62	
	51	-159	-146	-254

Environment and Sustainability

Climate & Nature Action - Revenue spend incurred, Capital budget not used	69			
Public Lighting - Electricity underspend	-73			
Car Parks - Employees +£23k, Maintenance +£25k, Transport +£11k & net other +£11k	70			
Car Parks - Clocks (+£75k) & PCN's (+£72k) partially offset by Meter (-£60k) / Other (-£40k)		47		
Cemeteries - Maintenance budget vired from Contingency. Rephased into 24/25	25		-29	
Coastal Business Unit - Income received, expenditure to be incurred in future years			-87	
Foreshores - Income received in previous years, expenditure yet to be incurred		-50		
Keyhaven River - Employees/Maintenance spend +£19k & Mooring Fees income shortfall	19	8		
Refuse Collection - Fleet +£14k, fuel +£46k (see Recycling) & ICT allocation -£23k	35	2		
Recycling - Mainly Fuel -£46k (see Refuse), Sacks -£25k, ICT allocation -£23k & Fleet -£35k	-118			
Recycling - Mainly Transition Funding +£214k, Glass recycling -£77k, Garden & Trade Waste -£100k		20		
Street Scene - Mainly Fleet recharges -£15k, ICT allocation -£23k & additional income -£16k	-55	-16		
Corporate Allocations re ICT rephasings			-109	
Net Other	27			
	-1	11	-225	-215

Finance and Corporate

Corporate Management (Increased audit fees)	47			
Housing Benefits & Council Tax (Salary underspends)	-46			
Commercial Inv. Property - Queensway (vacant property - business rates)	34			
Commercial Inv. Property - Platinum Jubilee Business Park (business rates/letting fees)	79			
Commercial Inv. Property - 1b Junction Rd (vacant property - business rates)	7			
Commercial Inv. Property - Hythe Marina (additional income)		-28		
Commercial Inv. Property - 29-35 Salisbury Rd (additional income)		-14		
Commercial Inv. Property (net other)	-9	-10		
Salisbury Road (Totton scheme rephasing)			-140	
Budget vired from Contingency (Cemeteries Maintenance Scheme)	-25			
Contingency	-99			
Corporate Allocations re ICT rephasings			-64	
Other	-7			
	-19	-52	-204	-275

FINANCIAL MONITORING 2023/24

HOUSING REVENUE ACCOUNT OUTTURN 2023/24

	Feb-23	Feb-24	Outturn 2023/24	
	2023/24	2023/24	2023/24	2023/24
	£'000's	£'000's	£'000's	£'000's
	Original Budget	Updated Budget	New Variations	Outturn Position
INCOME				
Dwelling Rents	-30,227	-30,192	-31	-30,223
Non Dwelling Rents	-720	-674	-1	-675
Charges for Services & Facilities	-849	-873	-56	-929
Contributions towards Expenditure	-60	-60	-114	-174
Interest Receivable	-378	-578	-34	-612
Sales Administration Recharge	-33	-33	21	-12
Shared Amenities Contribution	-286	-286		-286
TOTAL INCOME	-32,553	-32,696	-215	-32,911
EXPENDITURE				
Repairs & Maintenance				
Cyclical Maintenance	1,640	1,564	-52	1,512
Reactive Maintenance	4,456	4,783	110	4,893
Supervision & Management				
General Management	7,132	7,151	-360	6,791
Special Services	1,846	1,824	-172	1,652
Homeless Assistance	144	146	32	178
Rents, Rates, Taxes and Other Charges	89	140	77	217
Provision for Bad Debt	150	150	77	227
Capital Financing Costs - Interest/Debt Management	4,522	4,785	-39	4,746
Capital Financing Costs - Internal Borrowing	0	0		0
TOTAL EXPENDITURE	19,979	20,543	-327	20,216
HRA OPERATING SURPLUS(-)	-12,574	-12,153	-542	-12,695
Contribution to Capital - supporting Housing Strategy	9,700	9,700	492	10,192
Capital Financing Costs - Principal	3,024	3,024	6	3,030
HRA Total Annual Surplus(-) / Deficit	150	571	-44	527
Use of HRA Reserve for Major Projects	-150	-150	0	-150
Return to Earmarked Reserves (Committed Schemes)	0	0	101	101
HRA TOTAL ANNUAL SURPLUS(-) / DEFICIT	0	421	57	478

FINANCIAL MONITORING 2023/24

CAPITAL PROGRAMME OUTTURN 2023/24

	Portfolio	Feb-23	Feb-24	Outturn 2023/24		
		2023/24 £'000's Original Budget	2023/24 £'000's Updated Budget	2023/24 £'000's New Variations Expend.	2023/24 £'000's New Variations Rephasing	2023/24 £'000's Outturn Position
UK Shared Prosperity Fund	LEADER/ALL	42	56		-22	34
Rural England Prosperity Fund	LEADER/ALL	240	240		-231	9
Disabled Facilities Grants	HSG (GF)	1,300	1,300	41		1,341
Sustainability Fund - Unallocated	ENV & SUSTAIN	250	250	-212		38
South East Regional Coastal Monitoring Prog (18-27)	ENV & SUSTAIN	2,631	2,543	-447	-258	1,838
Milford Promenade Handrail	ENV & SUSTAIN		6			6
Barton Horizontal Directional Drilling Trails	ENV & SUSTAIN	10	60		-53	7
Hurst Spit Beach Shingle Source Study	ENV & SUSTAIN	100		3		3
Milford Beach and Cliff Study	ENV & SUSTAIN	10				
Waste Strategy Container Roll Out	ENV & SUSTAIN	592	592		-63	529
Public Convenience Modernisation Programme	ENV & SUSTAIN	300	24	-10		14
Public Convenience Refurb. Scheme - Barton-on-Sea	ENV & SUSTAIN		258	-31		227
Public Convenience Refurb. Scheme - Beaulieu	ENV & SUSTAIN		15	-5		10
Public Convenience Changing Places	ENV & SUSTAIN	219	245	-7		238
Public Convenience Modernisation Programme - Tech. advisor	ENV & SUSTAIN		132			132
Cemeteries - Calshot Cemetery expansion	ENV & SUSTAIN			7		7
Health & Leisure Centres	COMM S&W		305	-159		146
New Depot Site: Hardley	FIN & CORP	4,875	3,324		-1,602	1,722
Ringwood Depot	FIN & CORP			7		7
V&P; Replacement Programme	FIN & CORP	3,062	2,738		-2,463	275
V&P; Replacement Programme - Waste Strategy	FIN & CORP	150	193			193
Platinum Jubilee Business Park, Ringwood	FIN & CORP	250	250	-135		115
Mitigation Schemes	PLAN & ECON	1,000	1,350	-81		1,269
TOTAL GENERAL FUND CAPITAL PROGRAMME		15,031	13,881	-1,029	-4,692	8,160
HRA - Major Repairs	HRA	6,500	6,276	-133		6,143
HRA - Decarbonisation	HRA	1,260	1,260	-515		745
Major Structural Refurbishments	HRA	1,000	1,000	77		1,077
Fire Risk Assessment Works	HRA	2,000	2,585	209		2,794
Estate Improvements	HRA	200	150	-40		110
Robertshaw House	HRA	500	500			500
Development Strategy	HRA	15,200	15,200	-1,221		13,979
Disabled Facilities Grants	HRA	950	1,050	-16		1,034
TOTAL HRA CAPITAL PROGRAMME		27,610	28,021	-1,639		26,382
GRAND TOTAL CAPITAL PROGRAMME		42,641	41,902	-2,668	-4,692	34,542

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RESOURCES AND TRANSFORMATION OVERVIEW AND SCRUTINY PANEL –

25 JULY 2024

REPORT FOR THE INTRODUCTION OF A PERFORMANCE MANAGEMENT FRAMEWORK

1. RECOMMENDATIONS

- 1.1 It is recommended that the Resources and Transformation Overview and Scrutiny Panel note the Performance Management Framework document for approval by Cabinet, and provide any comments to the Cabinet.
- 1.2 It is recommended that the Resources and Transformation Overview and Scrutiny Panel note the response to the related motion referred by Council to the Panel, be addressed through the consideration of this report, outlined throughout section 8.

2. EXECUTIVE SUMMARY

- 2.1 Our new Corporate Plan 2024-2028 was approved at Full Council on April 8, 2024. This set our key priorities, commitments, and measures over the four-year life of the plan. As part of the delivery of the Corporate Plan, we said it would be underpinned by a suitable and proportionate Performance Management Framework that will monitor progress.
- 2.2 This report introduces the New Forest District Council Performance Management Framework. The framework, in **Appendix 1**, explains how it will work, how strategic measures will cascade throughout the organisation and how staff at every level will contribute and come together to ensure we deliver on the commitments of the Corporate Plan.

3. INTRODUCTION & PURPOSE

- 3.1 Our Corporate Plan 2024-2028 lays out a vision for New Forest District Council. It sets the priorities, commitments, and Key Performance Indicators (KPIs) that will operate over the four years of the plan. It is important there is strong and robust governance in place to ensure we stay on track and can realise the ambitions set out in the plan. The Performance Management Framework is the tool that monitors the progress towards these ambitions and sets out the rules, practices, reporting methods and cycles, and accountability needed to achieve them.
- 3.2 Performance management is a vital tool in understanding the way the organisation works, provides an opportunity for scrutiny, and identifies the areas which are performing well and intervene with corrective actions where areas are not performing as expected. This framework has been developed to ensure everyone is working to deliver our Corporate Plan and other key strategies, which will shape the way we work by informing service plans as well as team and individual goals.

- 3.3 The adoption of the framework is the next step in a shift towards a performance-based focus across the organisation. It will help us ensure that our staff work together as one council, sharing knowledge and expertise across services and always adopt our key values and in all aspects of their work.
- 3.4 We should consider the framework alongside other key organisational factors such as Finance, Risk and our Transformation Programme – ‘Future New Forest’, which may influence what we do and how we deliver changes, and in a controlled and managed way.

4. THE NFDC PERFORMANCE MANAGEMENT FRAMEWORK

- 4.1 The Performance Management Framework is how progress towards the delivery of the commitments made in the Corporate Plan will be monitored, while also considering broader service objectives.
- 4.2 The framework pulls together performance monitoring functions from across all services into a single thread of activity that weaves down through the organisation and ensures delivery at every level. It is a structured approach that ensures appropriate, clear, and planned KPIs which align with the Corporate Plan are in place and are delivered with focus and dedication.
- 4.3 The diagram illustrates how the framework will drive activity, which is layered as follows:

Tier	Description	Monitors	Impact
Strategic	Large scale strategic drivers including, the Corporate Plan and ‘Future New Forest’ Transformation Programme	Corporate Dashboard, progress against KPIs, as agreed in the Corporate Plan.	Ensures delivery on our commitments and promotes effective scrutiny of progress towards delivery of key measures. It provides an opportunity to mitigate and intervene when things are not progressing as planned.
Operational	Operating plans and policies. Service plans, policies and procedures. Budget plans, risk, statutory duties.	Service dashboards, progress against KPIs, to include any relevant measures agreed in the Corporate Plan. Improvement plans, including any as directed by the ‘Future New Forest’ transformation programme.	The documents described link the strategic and front-line tiers and will drive the change, governing how we do things and will describe the activity needed to achieve goals at an operational level.
Front Line	Service delivery	Our staff will benefit from regular 121s and appraisals, with suitable measures that will be shaped by the Strategic	Teams and individuals will work in prescribed ways, with appropriate discretion and changed behaviours, focus

		and Operational level planning.	on excellent performance and delivering change.
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4.4 Those responsible for delivery will be clear of their roles and established monitors. Those accountable will seek insight and assurances that performance is as expected. Careful monitoring and scrutiny of progress towards key objectives, promotes continuous improvement through learning and deployment of corrective actions where necessary.

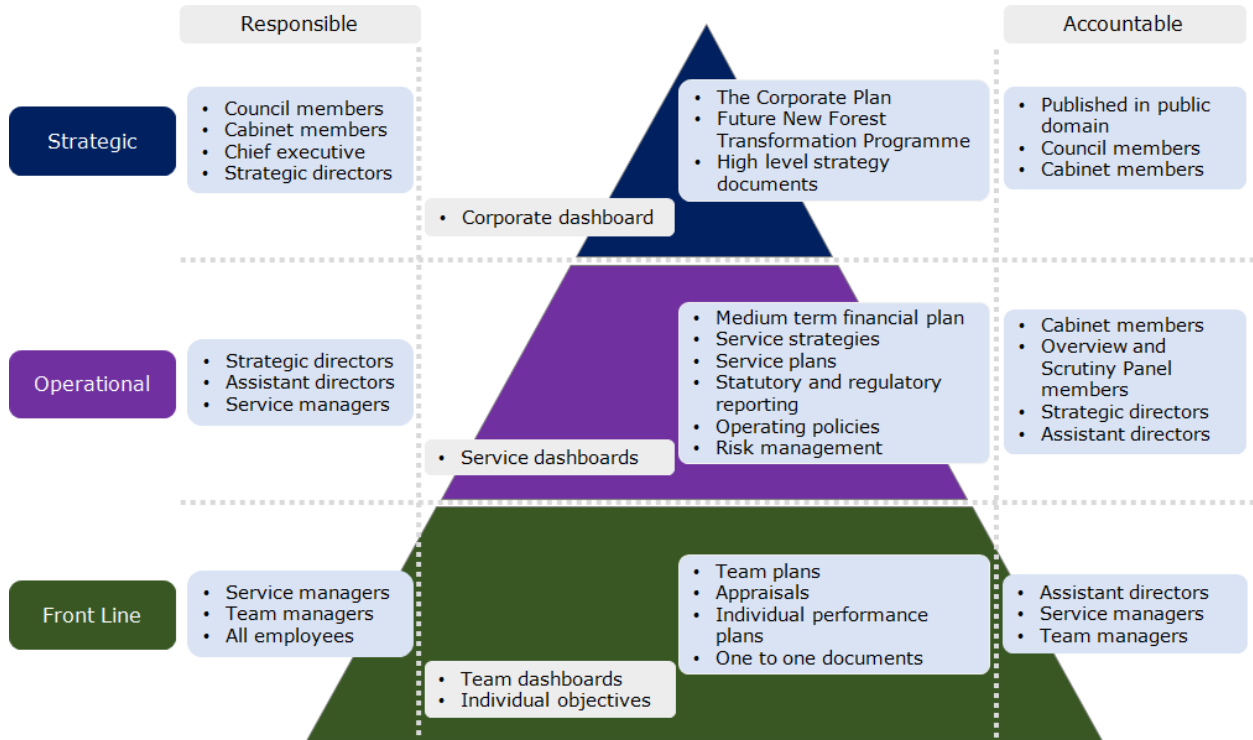


Figure 1 Performance Management Framework

4.5 We have developed key performance indicators (KPIs) that are focused, clear and align with the priorities of the Corporate Plan. The KPIs are owned and will be monitored within the relevant service area.

5. REPORTING

5.1 The dashboards, at every level will contain clear and unambiguous KPIs with targets. A handbook of NFDC definitions will be made available to all via SharePoint. Reporting is a collaborative business-based activity, provided by performance colleagues, driven by responsible officers and presented to those accountable.

5.2 All measures will be RAG rated (Red, Amber, Green) according to the performance against target.

- Green – On target or above target
- Amber – Below and up to 10% deviation from the lower threshold of the target
- Red – Over 10% deviation from the lower threshold of the target

- 5.3 In some cases, the standard thresholds will not be appropriate. In such instances, services will provide the most appropriate threshold to apply.
- 5.4 Accompanying text will give context which will aid readers to understand the story behind the KPIs.

Good performance – we will:

- Highlight our successes
- Continue to learn from them
- Feed into governance and reporting mechanisms

Poor performance – we will:

- Show learning
- Ascertain any factors which could have contributed to the poor performance
- Take remedial actions to address poor performance
- Explain when we expect these remedial actions to take effect.

6. REPORTING CYCLES

- 6.1 The Corporate Dashboard will be prepared as each quarter ends (July, October, January and April) for all measures where data has become available. Data will be collated, and services will be asked for any commentary as set out in the section above.

	Forum	Activity
1	Executive Management Team (EMT)	The dashboard will be presented. EMT will review the dashboard and pose questions for the services. EMT will request additional commentary and analysis.
1	Leadership Team Meeting	The dashboard will be presented. Leadership team will consider the dashboard, EMT comments and provide further narrative and analysis.
2	Overview and Scrutiny Panels	The dashboard will be submitted for review and scrutiny at panels. Members may require further information from Officers and make recommendations for any subsequent activity.
3	Cabinet	The dashboard will be submitted for review. Cabinet will consider all comments received, assign further action and ultimately approve the dashboard.
4	Publication	The dashboard will be published on newforest.gov.uk .

7. ACCOUNTABILITY AND CULTURE

- 7.1 The Performance Management Framework is not only about strategies and reporting KPIs, but it also ensures we move forward and grow as one council. Success requires a culture of continuous improvement and a performance-based approach to realising our strategic goals and key values.
- 7.2 We recognise the success of the framework is dependent upon everyone in our organisation working towards a set of agreed goals. All staff will therefore contribute to its success, and everyone will have a role to play in delivering the Corporate Plan.

- 7.3 The strategic direction will cascade throughout the organisation, ensuring appropriate measures are in place at every level. Ultimately, this will mean staff have goals and objectives that are linked to the strategic drivers of the council.
- 7.4 Our elected members, residents, partners, and staff all contributed to the development of our Corporate Plan and we will continue to be accountable to them throughout its lifespan.
- 7.5 The Corporate Plan introduces our new values. These underpin the council's vision and priorities by shaping our behaviours and the way we work. Our leadership team will direct and steer the development that helps us to grow.

Who	 Councillors, Leader, Portfolio Holders	 Scrutiny Panel Members, Councillors	 Chief Executive, Transformation and Improvement, Strategic Directors	 Assistant Directors, Service Managers	 Team Managers, Staff
How	Full Council, Cabinet, Portfolio Holder briefings	Overview and Scrutiny Panels	Executive Management Team, Change Control Board, Leadership, Programme meetings	Service briefings, Planning days, Service strategies, Service plans, Policy	Team meetings, Team plans, 121s, Personal development plans
Role and Responsibility	Vision and Direction. Approves the overall priorities and budget for the council. Leads the work of the cabinet, its programmes, and priorities. Shares the collective responsibility for decisions taken by the cabinet. Works with Strategic Directors.	Holds the executive and decision makers to account. Makes recommendations for improvement to the cabinet, other committees, the council or to local partners.	Leads the delivery of services. Ensures action is being taken to deal with areas of poor performance and risk. Develops areas of best practice and innovation. Leads the development and improvement roadmap.	Leads services. Accountable for service performance. Responsible for leadership, management and performance of key services. Leads on performance and the performance reporting cycle.	Reinforces the links between the Corporate Plan and individual objectives Motivates by providing feedback Aids understanding of performance management framework to teams and how individuals contribute to council priorities Delivers services.

These are supported by cross-cutting roles such as Finance, Risk, Democratic Services and Communications. All will have a role across the breadth of the organisation.

8. MOTION REFERRED BY THE COUNCIL

8.1 At the Council meeting of 13 May 2024, Cllr Richards moved the following motion:-

“This Council notes that:-

1. *The Leader’s foreword to the Corporate Plan states that ‘As a well-established community leader, the Council has long recognised the strong heritage and a world-class environment we operate within, and work to protect and enhance. Tackling climate and environmental challenges is key to ensure that the special nature of the New Forest can be enjoyed by future generations.’*
2. *Two of the four values of this Council are Ambition (We will be ambitious for our people and our place, embracing innovation and best practice) and Fairness (We will act fairly, honestly, and openly in all that we do).*
3. *The first priority of this Council’s Future New Forest transformation programme is “Putting our customers at the heart of what we do”.*
4. *This Council voted in October 2021 to declare a ‘Climate and Nature Emergency’.*
5. *This Council’s Corporate Plan 2024 – 2028 does not include measurable targets and a mechanism to report progress against such targets to our residents.*
6. *High performing organisations relish being measured as it allows them to demonstrate their outstanding performance.*
7. *That in the draft consultation version of the Corporate Plan, a measurement of “Overall emissions from council activity (Kg of CO2)” was included.*

This Council resolves that:-

1. *In order to be ambitious, transparent and put our customers at the heart of what we do SMART (Specific, Measurable, Achievable, Relevant and Timebound) targets should be published alongside the Corporate Plan for each item under the “It will be measured by” sections as soon as these targets have been agreed.*
2. *The mechanisms for reporting against the targets, and publishing progress on a minimum of an annual basis, will be set out alongside the targets.*
3. *The targets for Place Priority 2 “Protecting our climate, coast, and natural world” will be amended to include a measurement of “Overall emissions from council activity (Kg of CO2)” during this financial year and a target to then reduce these emissions agreed for each subsequent year of the corporate plan period, being reported against and published in line with point 2 above.”*

8.2 The motion was seconded by Cllr Parker and referred to the Resources and Transformation Overview and Scrutiny Panel for consideration. As the motion affects an

approved plan of the Council, namely the Corporate Plan, Cabinet will also review the motion through the onward consideration of this report. A draft amended motion is set out below for the Panel and Cabinet's onward consideration, which takes into account the technical view of Council officers and the arrangements that are already in place for target setting and monitoring of measures through the Climate Change and Nature Emergency (CC&NE) Annual Report.

This Council notes that:-

1. *The Leader's foreword to the Corporate Plan states that 'As a well-established community leader, the Council has long recognised the strong heritage and a world-class environment we operate within, and work to protect and enhance. Tackling climate and environmental challenges is key to ensure that the special nature of the New Forest can be enjoyed by future generations.'*
2. *Two of the four values of this Council are Ambition (We will be ambitious for our people and our place, embracing innovation and best practice) and Fairness (We will act fairly, honestly, and openly in all that we do).*
3. *The first priority of this Council's Future New Forest transformation programme is "Putting our customers at the heart of what we do".*
4. *This Council voted in October 2021 to declare a 'Climate Change and Nature Emergency'.*
5. *This Council's Corporate Plan 2024 – 2028 does not include measurable targets and a mechanism to report progress against such targets to our residents.*
6. *High performing organisations relish being measured as it allows them to demonstrate their outstanding performance.*
7. *That in the draft consultation version of the Corporate Plan, a measurement of "Overall emissions from council activity (Kg of CO2)" was included.*

This Council resolves that:-

1. In delivering our Corporate Plan 2024-2028, this Council stated that the plan would be underpinned by a suitable and proportionate Performance Management Framework that details the reporting regime for progress monitoring. This is now developed alongside a formal published set of KPIs, with targets (**Appendix 2**, 2024-2028 List of KPIs). Clear KPI definitions have been agreed with accountable officers (**Appendix 3**, NFDC handbook of definitions).
2. *The mechanisms for reporting against the targets, and publishing progress on a minimum of an annual basis, is set out in the Performance Management Framework and accompanying list of KPIs.*
3. *With respect to Place Priority 2 "Protecting our climate, coast, and natural world", and the consideration of the measure, "Overall emissions from council activity (Kg of CO2)", this motion is not supported*
 - a) *The overall emissions resulting from council activity will continue to be reported through the Climate Change and Nature Emergency (CC&NE) Annual Report. This report details the implementation and governance of activities resulting from the CC&NE Strategy and Action Plan and outlines the scope of emissions targets, performance measures and monitoring arrangements.*
 - b) *The resourcing implications of any additional targets and measures are not currently known or allocated.*

- c) *Cabinet recognise the value in more fully understanding this area and proposed to establish a Task and Finish group for 12 months, to consider this measure within the context of the Council's Climate Change and Nature Emergency Strategy and Action Plans. This will include consideration of adopted targets measures, scope, resource implications and prioritisation.*
- d) *Should the CC&NE Task and Finish group make recommendations for additional Climate Change and a Nature Emergency targets or measures to be adopted, these should reside within the CC&NE Action Plan as opposed to the Corporate Plan list of KPIs.*

9. GOVERNANCE AND APPROVAL PROCESS

- 9.1 The Performance Management Framework was presented to the Senior Leadership Team on May 7, 2024, with comments invited. It will be presented to the Resources and Transformation Overview and Scrutiny Panel on 25 July 2024. All members are invited to share comments through this panel. Panel comments will be added to the covering report which will then accompany the framework when it is presented to Cabinet for final approval.

10. RESOURCE IMPLICATIONS

- 10.1 There are no new resource implications being introduced arising from this report in the immediate. The framework will instil approaches to deliver our priorities utilising existing resources. It is possible that there are additional future resourcing implications to support the embedding of the framework.

11. FINANCIAL IMPLICATIONS

- 11.1 A clear focus of the framework is to set in place the enablers for delivering on our Corporate Plan and Future New Forest ambitions. This includes a continued focus on objectives, values and our responsibilities, including financial. Any direct costs arising from the production of the framework are kept to a minimum.
- 11.2 The embedding of our performance led culture will support our Transformation in delivering lean and efficient processes. This will result in financial benefits that will be tracked as part of our Future New Forest benefits realisation programme.

12. CRIME AND DISORDER & DATA PROTECTION IMPLICATIONS

- 12.1 There are no Crime and Disorder or Data Protection implications arising directly from this report.

13. ENVIRONMENTAL IMPLICATIONS

- 13.1 The Performance Management Framework will act as a supporting mechanism for delivering our commitments to tackling environmental challenges and seek to be environmentally sustainable. It will take our commitments and support these as tangible objectives that we can deliver in order to preserve our unique place.

14. EQUALITY AND DIVERSITY IMPLICATIONS

14.1 Fundamentals from The Performance Management Framework, which ask all staff to contribute towards delivery of statutory and corporate priorities, will be applied to all staff across the organisation uniformly.

For Further Information Please Contact:

Background Papers

Appendix:

1. [New Forest District Council Performance Management Framework](#)
2. [2024-2028 List of KPIs](#)
3. [NFDC handbook of definitions](#)

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Performance management framework

Strategic framework

Transformation and performance

June 2024

Version 1

Editions

Version	Description / amendments	Creation date	Issue Date
1.0	Issued version	30/04/2024	-
1.1	Amended for review cycle	17/05/2024	12/06/2024

Acknowledgment - Performance management guide for local authority officers,
Local Government Association

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Introduction

Background

Our Corporate Plan 2024-28 lays out a vision for New Forest District Council. Our aim is to improve outcomes for residents, visitors, businesses, and our partners. We are working towards creating a modern, sustainable, and continuously improving organisation. As an employer, we want to continue to be a great place to work.

Our staff work together as one council, sharing knowledge and expertise across services, and always adopt our key values and in all aspects of their work. Our staff deliver excellent services, and we want them to lead our improvement journey, always performing at their best. Our staff will understand what is expected of them in terms of their performance, goals, and behaviour. They will also know how their role contributes to achieving the council's priority outcomes.

Performance management is a vital tool in understanding the way our organisation works and to identify the areas which are performing well and intervene with corrective actions where areas are not performing as expected. This framework has been developed to ensure everyone is working to deliver our Corporate Plan 2024-28 and other key strategies and shape the way we work by informing service plans as well as team and individual goals.

Overall better performance will be driven through focusing on clear, challenging, and relevant goals and measuring performance against these. This framework encourages regular and on-going feedback, to engender a culture of learning, and continuous improvement. Effective performance management relies on clear objectives, actions which deliver those objectives and measures of success.

At its heart, we will deliver the commitment made in our Corporate Plan by implementing a rigorous performance management process.

Performance management

Our Performance Management Framework clearly articulates the vision set out in our Corporate Plan. It will ensure this vision becomes our common purpose, binding all the services provided by the council.

We will use data and insight to highlight and build from our successes. This insight will also help us understand areas for improvement. We will identify the actions needed to deliver better outcomes. This approach has been adopted to encourage a culture of continuous improvement across the organisation.

Our Performance Management Framework is a structured approach that ensures appropriate measures are in place which align with our Corporate Plan priorities. These measures are clear, planned, and delivered with focus and dedication. Our activities are geared towards delivering the Corporate Plan while also considering broader service objectives. The framework ensures delivery at every level of our organisation.

Underpinning the delivery of the commitments of the Corporate Plan is the council's Transformation Programme – 'Future New Forest'. This ambitious programme stands alongside the council's existing service areas and has its own plans and measures of success designed to influence the way the council operates, supports strategic objectives, and focuses on the future of the organisation.

Corporate Plan 2024-28

Our Corporate Plan plays a principal role in the strategic framework for the council. It is the overarching document that sets out our vision, values, priorities, and commitments up to March 2028.

The plan focuses on the challenges we face, and all that we can do as an organisation to address them. It builds on the foundations already laid out, maintaining our commitment to financial sustainability and excellence in service delivery.

Vision and values

The Corporate Plan introduces a new vision for the council.

To secure a better future by supporting opportunities for the people and communities we serve, protecting our unique and special place, and securing a vibrant and prosperous New Forest.

The plan also introduces our new values, which underpin the council's vision and priorities by shaping our behaviours and the way we work (Fig.6).

Priorities



The council is dedicated to supporting vulnerable residents, addressing financial hardships, and ensuring access to affordable housing. Community engagement, homelessness prevention, and improving housing quality are central to this priority.

- Helping those in our community with the greatest need
- Empowering our residents to live healthy, connected and fulfilling lives
- Meeting housing needs



Recognising the significance of the district's natural environment, the council aims to balance growth with conservation efforts. Strategies include sustainable development, climate resilience, and enhancing community spaces.

- Shaping our place now and for future generations
- Protecting our climate, coast, and natural world
- Caring for our facilities, neighbourhoods, and open spaces in a modern and responsive way



The plan seeks to foster economic growth while ensuring inclusivity and sustainability. Initiatives include promoting the Solent Freeport, supporting local businesses, and championing skills development and employment opportunities.

- Maximising the benefits of inclusive economic growth and investment
- Supporting out high-quality business base and economic centres to thrive and grow
- Championing skills and access to job opportunities

The Corporate Plan paves the way for the future. It makes our ambitions very clear and helps us to understand our focus for the future, the way we need to work and those parts of our work that will enable us to meet with our performance ambitions.

Delivering our framework

The adoption of the Corporate Plan 2024-28 gave an opportunity to look at our approach to performance management and service planning.

We have developed a Performance Management Framework (Fig.1) that takes the commitments outlined in the Corporate Plan, works with our 'Future New Forest' Transformation Programme, and builds continuous improvement opportunities and learning throughout everything we do.

The framework cuts through to all service areas, from the strategic Corporate Plan commitments, through to service plans, and team or individual plans, reflecting also statutory duties and regulatory frameworks. It is embedded through every level of the organisation.

We have developed key performance indicators (KPIs) that are focused, clear and align with the priorities of the Corporate Plan. The KPIs are owned and will be monitored within the relevant service area, and it is important that this framework is simple and does not add to the reporting burden of our services.

There are other important factors that shape our work such as those duties prescribed in law. We have a budget that we will work within, as stated in our Medium-Term Financial Plan (MTFP). We have a Risk Management Strategy which will ensure all services have considered risk to their delivery priorities. Associated mitigation and controls will be in place alongside our KPIs as a mechanism to ensure our performance stays on track.

The framework will aid us in driving improvements at every level of the organisation and will help shape the work we do.

Our performance management framework

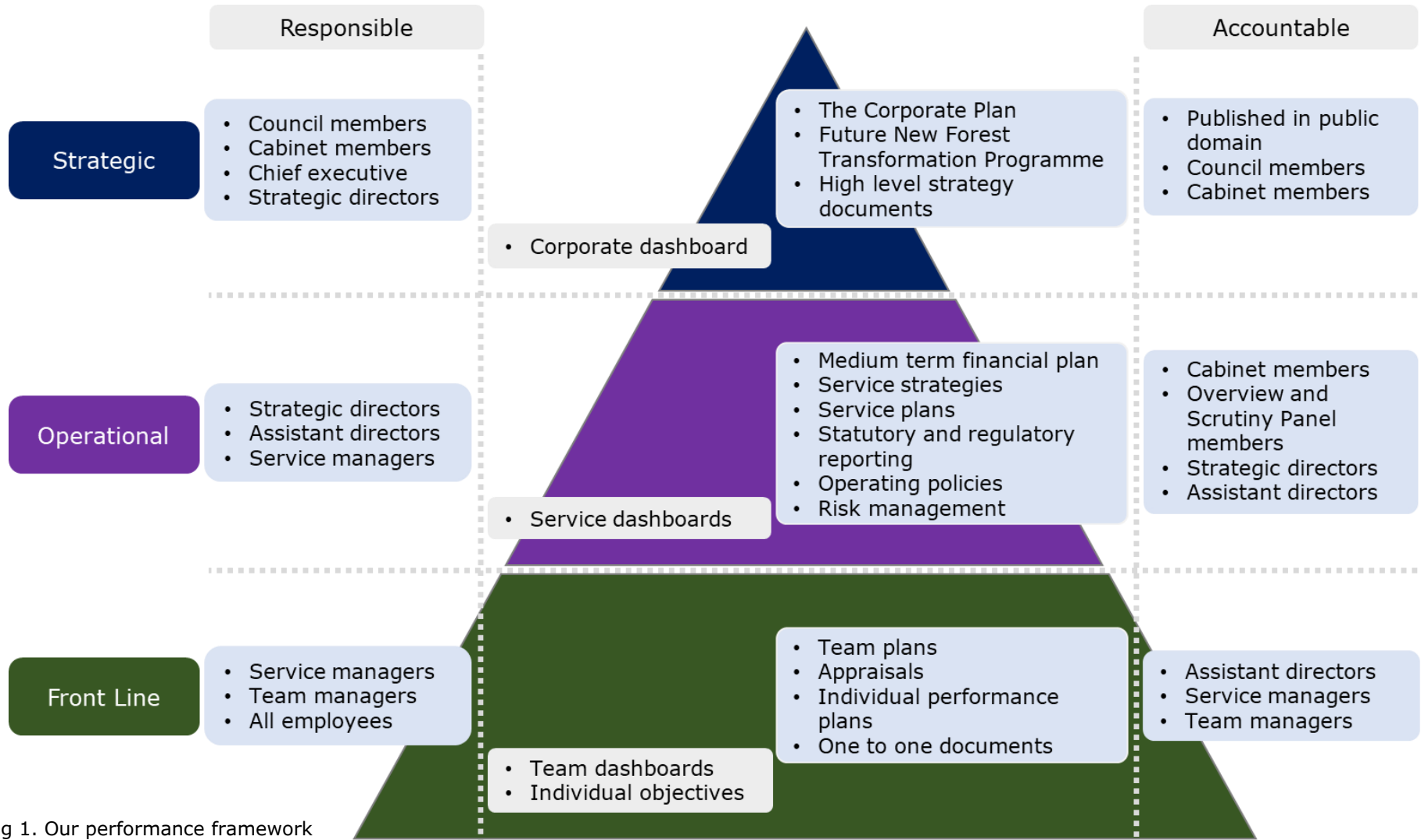


Fig 1. Our performance framework

	Strategic	Operational	Front Line
Description	<p>Large scale strategic drivers including</p> <ul style="list-style-type: none"> • The Corporate Plan • 'Future New Forest' Transformation Programme 	<ul style="list-style-type: none"> • Operating plans and policies. • Service plans, policies and procedures. • Budget plans, risk, statutory duties. 	<ul style="list-style-type: none"> • Service delivery
Monitors	<p>Corporate Dashboard, progress against KPIs, as agreed in the Corporate Plan.</p>	<p>Service dashboards, progress against KPIs, to include any relevant measures agreed in the Corporate Plan.</p> <p>Improvement plans, including any as directed by the 'Future New Forest' - Transformation Programme.</p>	<p>Our staff will benefit from regular 121s and appraisals, with suitable measures that will be shaped by the Strategic and Operational level planning.</p>
Impact	<p>Ensures delivery on our commitments and promotes effective scrutiny of progress towards delivery of key measures.</p> <p>Provides an opportunity to mitigate and intervene when things are not progressing as planned.</p>	<p>The documents described link the strategic and front-line tiers and will drive the change, governing how we do things and will describe the activity needed to achieve goals at an operational level.</p>	<p>Teams and individuals will work in prescribed ways, with appropriate discretion and changed behaviours, focus on excellent performance and delivering change.</p>

Fig 2. Monitors and impacts

Key performance indicators

The corporate dashboard

A corporate dashboard for the priorities outlined in the Corporate Plan will be produced on a quarterly basis. Within this dashboard, service performance against the Corporate Plan KPIs will be reported.

The dashboard focuses on these KPIs while drawing narrative from the services to provide context.

These KPIs will demonstrate the organisations successes and highlight areas for improvement, these measures are defined, unambiguous and clear in definition with agreed tolerance thresholds.

SMART principals

As part of the development of the Corporate Plan, we reached out to services to set KPI measures using SMART principles, that align closely to the commitments from the plan as well as being within the control of the council.

These measures should be:

- Specific – Clear in definition, unambiguous, standardised as far as possible and signed off by the service
- Measurable – We should be able to measure, develop or acquire the data needed to report the KPIs
- Achievable – the KPIs should provide sufficient motivation that it is within reach of the service
- Relevant - KPIs align and fit with the priorities set out in the Corporate Plan
- Time-bound - measures should have a clear time frame for delivery and set this expectation with the service

We also need our measures to be:

- Timely – data needs to be available. Ideally monthly, quarterly, and no longer than a quarter in arrears. Inevitably, we will have some annual measures.
- Balanced – have a combination of challenge, stretch but also highlight positive areas of focus. We should have a balanced spread across the priorities
- Comparable – definition should align with any national guidance such as Local Government Association (LGA) or the Office for Local Government (OFLOG) so that performance can be benchmarked and therefore appropriate targets can be set

Service plans

Service plans are developed by strategic directors and their service management teams. Service plans contain the work that is performed by each team and will be reviewed annually. This must include priorities that align with Corporate Plan objectives and any corresponding KPIs. It will also include any statutory requirements as part of the councils' obligations already set out in law.

These plans will capture key descriptions of each service, the work undertaken, development pathways, financial constraints, available resource, and a set of performance measures at the operational level.

All relevant performance measures, statutory, operational, and strategic for each service area will be structured to form a service dashboard. These dashboards will report agreed measures and will ensure that the services are performing well, provide an opportunity to deploy corrective action and remain on target to deliver the commitments made in the service plan.

Any relevant strategic measures as outlined by the Corporate Plan and Corporate Dashboard must be reflected in the service planning process and added to the services plan, asking the service to own and take responsibility for the performance of these measures.

This ensures accountability cascades through the organisation and the measures are owned by an accountable officer within the most appropriate service.

Reporting




As the strategic KPIs also appear in service plans and dashboards, services are able to regularly monitor performance before they feature in the corporate dashboard on a quarterly basis. This approach aims to avoid any surprises when measures are reported quarterly.

In order for service managers to meet their obligations, they will ask for this accountability from their service managers and teams.

Service managers will further break down the KPIs so they can be disseminated amongst their teams as areas of focus and built into the individual objectives for all staff.

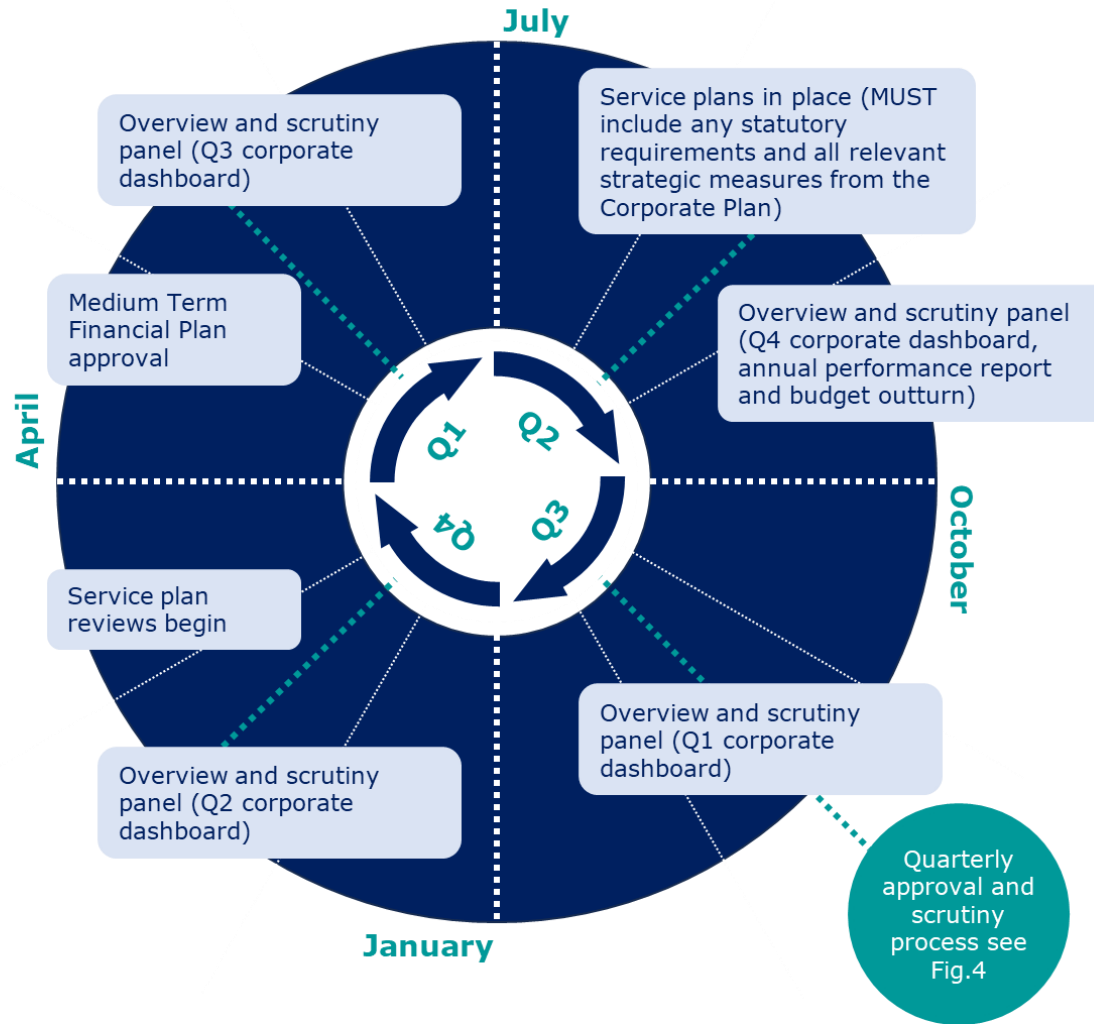
RAG rating

All measures will be RAG rated (Red, Amber, Green) according to the performance against target.

-  Green – On target or above target
-  Amber – Below and up to 10% deviation from the lower threshold of the target
-  Red – Over 10% deviation from the lower threshold of the target

In some cases, the standard thresholds will not be appropriate. In such instances, services will provide the most appropriate threshold to apply.

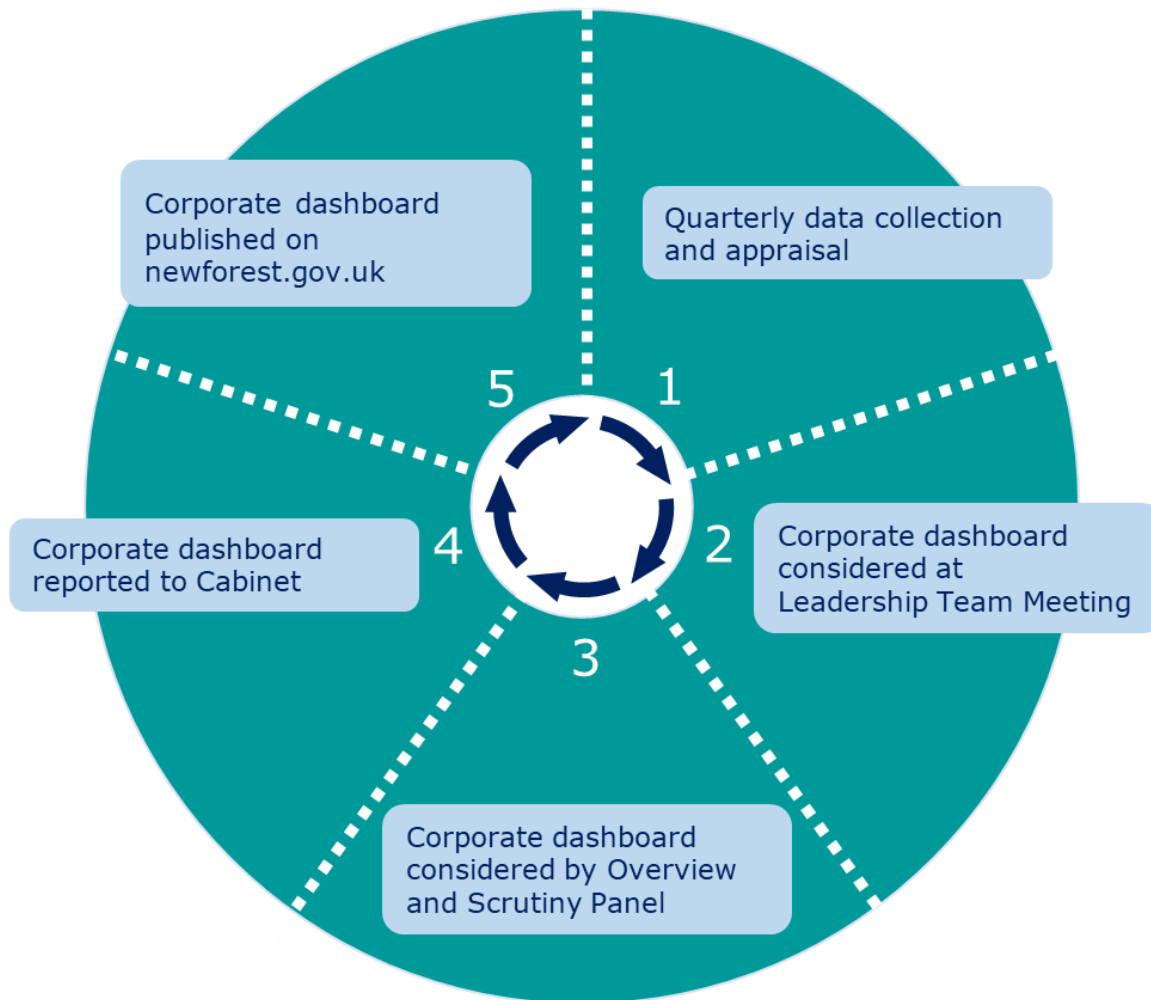
Reporting schedules



The corporate reporting cycle (Fig.3) covers a period of 12 months and encourages regular review of service plans to ensure they are effective and cover current operational level requirements reacting to current pressures.

The annual corporate reporting cycle guides this and outlines the governance in place prior to the publication of the Corporate Dashboard.

Fig 3. Annual corporate reporting cycle



A quarterly corporate reporting calendar (Fig. 4) will assist us in planning the publication schedule. There are a number of meetings where the dashboards will be presented and reviewed. Each plays an important role in ensuring there is appropriate scrutiny and accountability for performance.

Each quarterly dashboard will provide updated results, if available and present these alongside any targets and agreed tolerable thresholds.

All overview and scrutiny panels will be presented with the complete dashboard with each panel being responsible for an assigned subset of KPIs.

Fig 4. Quarterly reporting calendar

Exception reporting

All available data will be reported as per our quarterly schedule, and we follow the governance pattern described above.

We will apply the principals of exception reporting where there are areas of performance that are not within the agreed thresholds and are profiled to not meet targets. Accountable officers will be asked to provide additional information and this information will be added to the dashboard to enable panels and cabinet to consider any impact of poor performance.

This additional narrative will be vital and should cover the following:

- Any factors which could have contributed to the poor performance
- Remedial actions that will be undertaken to address poor performance
- When we expect these remedial actions to take effect.

When performance is within an agreed tolerance, accountable officers will also be asked to provide additional narrative context to aid understanding and to track activity which has had a positive impact on performance. Services will be encouraged to share areas of best practice.

Accountability

Transparency

Our elected members, residents, partners, and staff all contributed to the development of our Corporate Plan. Consultation focused on and shaped the priorities for the organisation between 2024 and 2028 and also prepared for challenges beyond.

Our services have considered the published Corporate Plan and have assisted in ensuring that the appropriate measures are in place that will enable us to meet our corporate priorities. We are therefore accountable to everyone who helped shape and continue to contribute to the success of our district.



The reporting cycle as detailed above enables scrutiny at all stages, this enables the dashboard to be updated with further clarity and context. Once approved by Cabinet the corporate dashboard will be published on the New Forest District Council website so that it is accessible in the public domain.

Roles and responsibilities

We recognise the success of the performance management framework is dependent upon everyone in our organisation working towards a set of agreed goals. All staff will therefore contribute to its success, and each have a role to play in delivering the Corporate Plan and applying our performance management framework (roles and responsibilities in detail at Fig.5).

Poor performance management can create a defensive position, prompting staff to focus on hitting the targets only and not think about the broader service. We will embed a culture of honesty and transparency that looks to learn from and turn around any poor performance. It is important that we deliver the right services and achieve the right outcomes for our residents.

Effective performance management is rooted in continuous improvement, which will help drive change and help us to deliver our 'Future New Forest' Transformation Programme.

Who	 Councillors, Leader, Portfolio Holders	 Scrutiny Panel Members, Councillors	 Chief Executive, Transformation and Improvement, Strategic Directors	 Assistant Directors, Service Managers	 Team Managers, Staff
How	Full Council, Cabinet, Portfolio Holder briefings	Overview and Scrutiny Panels	Executive Management Team, Change Control Board, Leadership, Programme meetings	Service briefings, Planning days, Service strategies, Service plans, Policy	Team meetings, Team plans, 121s, Personal development plans
Role and Responsibility	Vision and Direction. Approves the overall priorities and budget for the council. Leads the work of the cabinet, its programmes, and priorities. Shares the collective responsibility for decisions taken by the cabinet. Works with Strategic Directors.	Holds the executive and decision makers to account. Makes recommendations for improvement to the cabinet, other committees, the council or to local partners.	Leads the delivery of services. Ensures action is being taken to deal with areas of poor performance and risk. Develops areas of best practice and innovation. Leads the development and improvement roadmap.	Leads services. Accountable for service performance. Responsible for leadership, management and performance of key services. Leads on performance and the performance reporting cycle.	Reinforces the links between the Corporate Plan and individual objectives Motivates by providing feedback Aids understanding of performance management framework to teams and how individuals contribute to council priorities Delivers services.

These are supported by cross-cutting roles such as Finance, Risk, Democratic Services and Communications. All will have a role across the breadth of the organisation.

Fig 5. Roles and responsibilities

Values

The behaviours we exhibit when performing our duties will demonstrate our core values.

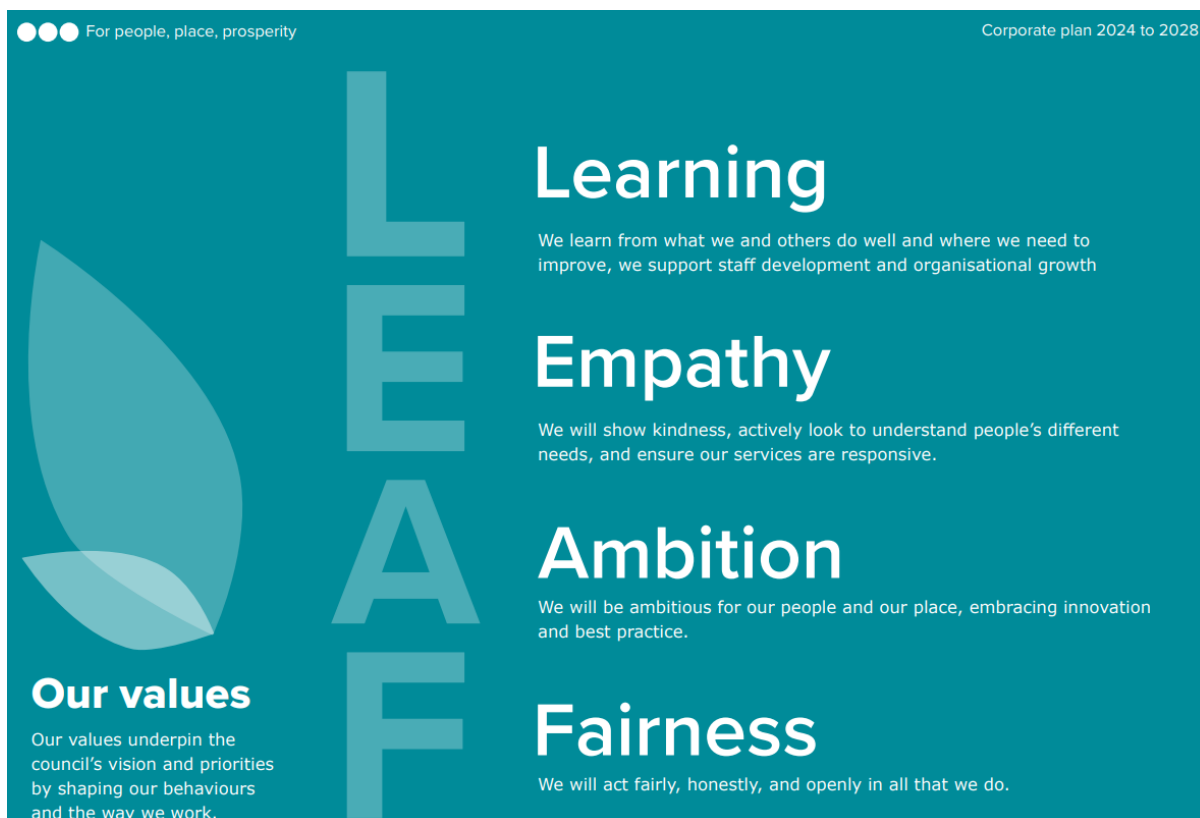


Fig 6. Our Values page taken from The Corporate Plan 2024 to 2028

Culture

Our leadership team will direct and steer the development that helps us to grow. They will seek approval for any investment needed to build any necessary infrastructure, following our governance arrangements. They will lead by example and exhibit our values and expected behaviours at all times. They will also direct staff to adopt these values and expected behaviours while undertaking their duties.

Similarly, staff will be required to demonstrate commitment to these values and behaviours, recognise their contribution to and support the delivery of the priorities in the Corporate Plan.

Our culture is one where we embrace new ways of working, welcoming our 'Future New Forest' Transformation Programme. We will be bold in changing our behaviours and the way we work.

We have demonstrated that we will listen to our residents and staff to encourage a culture of continuous improvement, willing to try new things, raise suggestions for improvement and actively reflect on things that are not as effective as they could be.

As an organisation, we will learn from and identify corrective actions to address areas of poor performance. We will be transparent, reporting these in our dashboards so all stakeholders have an accurate and honest appraisal of current position. We will remain positive about failure prevention, avoid blame culture and will learn from previous performance.

Equally when things go well, we will share successes and best practices and communicate these to our teams and the public. This will embed the effectiveness of the performance management framework.

It is essential to demonstrate our values and expected behaviours at all times so we can always deliver the best services to our residents. These behaviours should be reflected in every interaction with customers and colleagues. Our culture will lead us to focus on achieving positive outcomes and continually improve the services provided.

We will understand how we work with our elected Members, including the Overview and Scrutiny panels in a collaborative work environment. As ambassadors for the council, it is vital to represent the organisation in the best possible light.

Being financially aware will help in making informed decisions and optimising resources effectively. Our staff will actively engage in the performance management process to identify areas of improvement, receive feedback for excellent performance and share best practice.

Key performance standards

The following standards are applied to embed our performance management culture.

- Leadership - The leadership team play a pivotal role in the success of our performance management framework and embedding the framework into the way we work. Our leadership will encourage and enable learning and development by providing sufficient time, resource, and experience.
- Staff - A real commitment from all staff is needed to embed the framework into our behaviours and way we work. Staff must adopt a culture of continuous improvement throughout all levels of the organisation.
- Transparency - Staff are encouraged to flag risks and concerns to help prevent failure.
- Improvements - Reflection upon areas of failure or poor performance to identify change to help avoid future pitfalls is also to be encouraged.
- Communication - Performance management is to be approached in a positive manner, promoting good practice, communicating success, avoiding blame culture at all times, and learning from what we do well and where we need to improve.
- Support - Staff should be able to access support and advice whenever they need it to encourage learning and growth.
- Reinforcement - Demonstration of the benefits of performance management and celebrating successes, sharing best practices will be pivotal to the success of the performance management framework.

Theme	Priority	Overview and Scrutiny Panel	NFDC ID	Short Name	Good Performance Up/ Down	Return Format	Freq.	Bench-marking*	Baseline	Total 2024 Target
People	Helping those in our community with the greatest need	Housing and Communities	1	Percentage of homelessness duty cases successfully prevented.	Up	%	Q	-	50%	>50%
		Housing and Communities	2	Number of households in external emergency accommodation.	Down	Num	Q	-	50	<50
		Housing and Communities	3	Number of families with children under 16 in external emergency shared accommodation over 6 weeks	Down	Num	Q	-	7	<7
		Housing and Communities	4	Number of Appletree careline services provided to customers.	Up	Num	Q	-	3,443	Maintain
	Empowering our residents to live healthy, connected and fulfilling lives	Housing and Communities	5	Resident perception that their quality of life is affected by the fear of crime	Down	%	2 years	-	24.5%	20%
		Housing and Communities	6	Resident perception that they feel safe when outside in their local area	Up	%	2 years	-	85%	85%
		Housing and Communities	7	Investment in and rollout of public space CCTV system	Up	£	Q	-	0	TBC
		Housing and Communities	8	Number of education and awareness sessions in relation to serious crime.	Up	Num	Q	-	0	Monitor
		Housing and Communities	9	Number of positive interventions in response to Public Spaces Protection Orders (1 and 2).	Both	Num	Q	-	953	Monitor
		Housing and Communities	10	Number of cultural events and activities supported by New Forest District Council.	Up	Num	Q	-	0	24
	Meeting housing needs	Housing and Communities	11	Number of affordable social housing homes delivered by NFDC and its partners.	On forecast	Num	Annual	-	133	53
		Housing and Communities	12	Number of affordable council homes delivered against the 2026 Target set?.	On forecast	Num	Annual	-	339	34
		Housing and Communities	13	Percentage score for overall tenant satisfaction with the Council as a landlord, as determined in the Tenant Satisfaction Measures (TSMs)	Up	%	Annual	TBC	69.5%	75%
		Housing and Communities	14	Number of council homes achieving Energy Performance Certification band C.	Up	Num	Annual	-	2,546	100
		Housing and Communities	15	Percentage scores for the 5 safety and compliance management Tenant Satisfaction Measures (TSMs)	Up	%	Q	-	96.08%	96.80%
Place	Shaping our place now and for future generations	Place and Sustainability	16	Percentage of major planning applications determined in time	Up	%	Q	86.7%	86%	60%
		Place and Sustainability	17	Percentage of minor planning applications determined in time	Up	%	Q	81.9%	94%	70%
		Place and Sustainability	18	Percentage of other planning applications determined in time	Up	%	Q	86.1%	97%	80%
		Place and Sustainability	19	Percentage of successful planning appeals	Up	%	Q	-	25%	10%
		Place and Sustainability	20	The total outstanding net dwelling supply as set out in our development plan.	Down	Num	Annual	-	8,443	7,720 + delivery shortfall TBC
	Protecting our climate, coast, and natural world	Place and Sustainability	21	Kilogrammes of non-recycled waste produced per household	Down	Kg	Q	95.95kg	106.75kg	439kg
		Place and Sustainability	22	Households using our chargeable garden waste service as a percentage of total properties in NFDC.	Up	%	Q	-	26%	27%
		Place and Sustainability	23	Emissions from the council's vehicle fleet.	Down	Tonnes of CO2e	Annual	-	1,696	N/A
		Place and Sustainability	24	Percentage of household waste sent for recycling.	Up	%	Q	41.36%	32.37%	37%
	Caring for our facilities, neighbourhoods and open spaces in a modern and responsive way	Place and Sustainability	25	Number of fly-tipping incidents per 1,000 people	Down	Num	Q	-	13.94	Monitor
Place and Sustainability		26	Percentage customer satisfaction with the appearance of their local area.	Up	%	2 years	-	93%	85%	
Place and Sustainability		27	Equivalent number of 0.5 litre bottles filled at water-filling stations – waste averted	Up	Num	Q	-	22,880	23,000	
Prosperity	Maximising the benefits of inclusive economic growth and investment	Place and Sustainability	28	Squared metres of industrial/employment land developed.	Up	Sqm	Annual	-	21,209sqm	Monitor
		Place and Sustainability	29	Level (£) of retained business rates (at source)	Up	£	Annual	-	£0	£0
	Supporting our high-quality business base and economic centres to thrive and grow	Place and Sustainability	30	Perceptions of our high streets and town centres.	Up	%	2 years	-	-	82.50%
		Place and Sustainability	31	Vacancies of retail premises within town/local centres	Down	%	Annual	-	10%	Monitor
	Championing skills and access to job opportunities	Place and Sustainability	32	Employment rate percentage of working age adults (aged 16-64).	% increase is good	%	Annual	-	80%	Monitor
		Place and Sustainability	33	Proportion (in percentage terms) of employee jobs with hourly pay below the living wage.	% decrease is good	%	Annual	-	14.2%	Monitor
Future New Forest	Putting our customers at the heart	Resources and Transformation	34	Resident satisfaction with Council services	Up	%	2 years	-	62%	78%
		Resources and Transformation	35	Staff satisfaction score with NFDC ICT services.	Maintain	Num	Annual	-	-	3.5
		Resources and Transformation	36	Resident satisfaction score with the quality of NFDC digital services	Maintain	Num	Annual	-	-	3.5
	Being an employer of choice	Resources and Transformation	37	Percentage of vacancies filled first time.	Up	%	Q	-	73.5%	80%
		Resources and Transformation	38	Percentage staff turnover.	Down	%	Annually	14.33%	13.48%	11%
		Resources and Transformation	39	Average number of days sickness absence per employee.	Down	Num	Q	8.91	9.88	8
		Resources and Transformation	40	Number of council apprenticeships	Up	Num	Annually	-	12	Monitor
	Being financially responsible	Resources and Transformation	41	Percentage variance to Council budget +/- (General fund budget variations).	On forecast	%	Q	-	-8.1%	+/- 3%
		Resources and Transformation	42	Percentage variance to Housing Revenue budget +/- (HRA budget variations).	On forecast	%	Q	-	3.89%	+/- 3%
		Resources and Transformation	43	Percentage of Council Tax collected in year	Up	%	Q	-	98.65%	98.5% by Q4
		Resources and Transformation	44	Percentage of Non-domestic Rates collected in year	Up	%	Q	-	98.96%	98.5% by Q4
	Designing modern and innovative services	Resources and Transformation	45	Benefit realisation from ICT investment	Maintain	%	Every 6 Months	-	-	70%
		Resources and Transformation	46	Percentage of ICT incidents resolved within SLA.	Up	%	Q	-	98.8%	95%
		Resources and Transformation	47	70% of ICT projects to be delivered on time and on budget in the annual work programme	Maintain	%	Q	-	-	70%
		Resources and Transformation	48	Percentage unscheduled downtime for critical systems	Down	%	Q	-	-	<5%

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KPI DEFINITIONS

HANDBOOK

KPI Index

Corporate Plan 2024-28

Performance

July 2024

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1 INTRODUCTION

Referencing reportable KPIs identified in 2024-28 Corporate Plan to track progress against the set of theme priorities.

Further to a series of the Corporate Planning and Transformation workshops attended by the officers, the initial list of measures was suggested and later refined by the leadership team.

A number of indicators has been added from correspondence with Oflog (Office for Local Government) and the Resident Survey.

Each indicator page contains:

Theme Name – Priority
NFDC ID # – Short name
Long name
Rationale and context
Definition
Formula
Worked example
Good performance
Collection interval
Data Source
Return Format
Decimal Places
Reporting Frequency
Data Availability
Target Rationale
Target profile (2024 – 2028)
Reporting organisation
Spatial level
Further Guidance
Accountable service Manager
Data Owner

1.1 Purpose of this document

This document is to provide a formal representation of our commitment to measuring progress towards achieving desired outcomes.

It is intended to inform the public and the Members at the overview and scrutiny panels about the measures being presented.

PEOPLE THEME – Priority: Helping those in our community with the greatest need					
NFDC ID - Short name	001 - Percentage of homelessness duty cases successfully prevented.				
Long name	Percentage of homelessness duty cases successfully prevented. Homelessness duty cases picked up and worked to a successful outcome as a percentage of all received.				
Rationale and context	Strategic Priority to prevent homelessness through the use of multi-agency support, funds and advice.				
Definition	% Of Homelessness Duty Cases prevented				
Formula	Percentage of all people that the Council has a duty to take reasonable steps to help the applicant to secure the accommodation so that it does not cease to be available.				
Worked example	Number of cases prevented divided by all cases times by 100	Good performance	Good performance will be typified by an increase in the rate. 50% or more		
Collection interval	Monthly	Data source	Locata		
Return format	Percentage (%)	Decimal places	One		
Reporting frequency	Quarterly	Data availability	Monthly		
Target rationale	Preventing Homelessness and keeping people in their settled accommodation is the best outcome for the household. This usually result in costs savings.				
Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	>50%	>50%	>50%	>50%	>50%
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	>50%	>50%	>50%	>50%	>50%
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	>50%	>50%	>50%	>50%	>50%
	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total
>50%	>50%	>50%	>50%	>50%	
Reporting organisation	Housing Options, NFDC				

Spatial level	District council	
Further guidance	N/A	
Accountable Service Manager	Chris Pope	Agreed date: 08/04/2024
Data owner	Chris Pope	Agreed date: 08/04/2024

PEOPLE THEME – Priority: Helping those in our community with the greatest need					
NFDC ID - Short name	002 - Number of households in external emergency accommodation				
Long name	Total number of households in external emergency accommodation.				
Rationale and context	Strategic Priority to develop in-house emergency accommodation and reduce the use and need for external emergency accommodation.				
Definition	Total number of households in external emergency accommodation in current reporting period.				
Formula	Number of people residing in external emergency accommodation.				
Worked example	Number of households	Good performance		50 or less	
Collection interval	Monthly	Data source		Locata	
Return format	Number (Num)	Decimal places		N/A	
Reporting frequency	Quarterly	Data availability		Monthly	
Target rationale	Emergency Accommodation is not only expensive, but it is not the most suitable accommodation for people. Whilst EA is needed it should be used in times of emergency and for the shortest amount of time.				
Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	<50	<50	<50	<50	<50
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	<50	<50	<50	<50	<50
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	<50	<50	<50	<50	<50
	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total
<50	<50	<50	<50	<50	
Reporting organisation	Housing Options, NFDC				
Spatial level	District council				

Further guidance	N/A	
Accountable Service Manager	Chris Pope	Agreed date: 08/04/2024
Data owner	Chris Pope	Agreed date: 08/04/2024

PEOPLE THEME – Priority: Helping those in our community with the greatest need					
NFDC ID - Short name	003 - Number of families with children under 16 in external emergency shared accommodation over 6 weeks				
Long name	Total number of families with children under 16 in external emergency shared accommodation over 6 weeks				
Rationale and context	Strategic Priority to end the use of Bed and Breakfast accommodation				
Definition	Total number of families with children under 16 in external emergency shared accommodation over 6 weeks during current reporting period				
Formula	Number of families with children aged under 16 residing in emergency accommodation				
Worked example	Number of people	Good performance		7 or less	
Collection interval	Monthly	Data source		Locata	
Return format	Number (Num)	Decimal places		N/A	
Reporting frequency	Quarterly	Data availability		Monthly	
Target rationale	Government target to not use shared accommodation for families with children aged 16 or less for more than 6 weeks.				
Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	<7	<7	<7	<7	<7
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	<7	<7	<7	<7	<7
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	<7	<7	<7	<7	<7
	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total
<7	<7	<7	<7	<7	
Reporting organisation	Housing Options, NFDC				
Spatial level	District council				

Further guidance	N/A	
Accountable Service Manager	Chris Pope	Agreed date: 08/04/2024
Data owner	Chris Pope	Agreed date: 08/04/2024

PEOPLE THEME – Priority: Helping those in our community with the greatest need					
NFDC ID - Short name	004 - Number of Appletree careline services provided to customers				
Long name	Total number of Appletree careline services provided to customers				
Rationale and context	As there are increasing numbers of people being supported to live independently, we want to ensure any associated risks are mitigated. NFDC provides a Careline service which customers can subscribe to. Currently these are mainly analogue but there is a switch to digital underway. Customers will have a 'hub' or device installed in their homes. A number of peripherals are then connected to this device such as fall detectors and CO ₂ alarms. A number of residents at the same property can be provided with peripherals (also known as services) to a single device. This measure counts the number of such services to our customers.				
Definition	Total number of Appletree careline services provided to customers in current reporting period including, alarm monitoring, pendant, CO ₂ , fire alarm and fall detectors.				
Formula	Number of units peripherals				
Worked example	Number of units of peripherals (number of existing services + new Services)	Good performance		Good performance is a high number of subscribed services.	
Collection interval	Quarterly	Data source		Appletree Careline	
Return format	Number (Num)	Decimal places		N/A	
Reporting frequency	Quarterly	Data availability		Quarterly	
Target rationale	To build from existing customer base. We are cautious about increasing targets as there is a programme of work to digitise services which will involve connection of devices via 4 or 5g as opposed to a physical connection. Network bandwidth challenges may mean the service is not operable in some parts of our district.				
Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	Maintain	Maintain	Maintain	Maintain	Maintain
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	Maintain	Maintain	Maintain	Maintain	Maintain
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	Maintain	Maintain	Maintain	Maintain	Maintain
	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total

	Maintain	Maintain	Maintain	Maintain	Maintain
Reporting organisation	Appletree Careline, NFDC				
Spatial level	District council				
Further guidance	Moving to Digital Voice BT Help				
Accountable Service Manager	Brian Byrne		Agreed date: 30/05/2024		
Data owner	Carrie Hesp		Agreed date: 08/04/2024		

PEOPLE THEME – Priority: Empowering our residents to live healthy, connected and fulfilling lives					
NFDC ID - Short name	005 - Resident perception that their quality of life is affected by the fear of crime				
Long name	Resident perception that their quality of life is affected a great deal/fair amount by fear of crime				
Rationale and context	The total NFDC score of resident survey respondents stating that their quality of life is affected by the fear of crime a great deal or a fair amount.				
Definition	Taking the perception score from our service, those answering the top two satisfaction scores as a proportion of all scores.				
Formula	Total number of respondents answering top two scores / total number of respondents				
Worked example	(375 / 500) * 100 = 75.0%	Good performance	Good performance will be typified by a decreased rate		
Collection interval	2 years	Data source	Residents survey		
Return format	Percentage (%)	Decimal places	One		
Reporting frequency	2 years	Data availability	2 years		
Target rationale	<p>Low fear of crime and high satisfaction rate of living in the New Forest as a safe space.</p> <p>24.5% is our baseline figure. I would expect to see this reduced. Scores by areas range from 11% to 31%. Setting a target to 20% as this would mean proportionately, from a current score of 190 would need 38 fewer responding negatively. This will be challenging but will need this reduction for it to be significant.</p>				
Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	N/A	N/A	N/A	N/A	20%
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	N/A	N/A	N/A	N/A	N/A
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	N/A	N/A	N/A	N/A	20%
	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total
	N/A	N/A	N/A	N/A	N/A

Reporting organisation	Performance, NFDC	
Spatial level	District council	
Further guidance	N/A	
Accountable Service Manager	Richard Knott	Agreed date: 29/04/2024
Data owner	Saq Yasin	Agreed date: 29/04/2024

PEOPLE THEME – Priority: Empowering our residents to live healthy, connected and fulfilling lives					
NFDC ID - Short name	006 - Resident perception that they feel safe when outside in their local area				
Long name	Resident perception that they feel safe or very safe when outside in their local area				
Rationale and context	<p>The total NFDC score of resident survey respondents stating that they feel safe when outside in their local area.</p> <p>This should be the aggregated set of answers, and this can be broken down by during the day, after dark in the corresponding narrative.</p>				
Definition	This should be the aggregated set of answers, and this can be broken down by during the day, after dark in the corresponding narrative.				
Formula	Total number of respondents answering top two scores / total number of respondents				
Worked example	(375 / 500) * 100 = 75.0%	Good Performance	Good performance will be typified by an increased rate		
Collection interval	2 areas	Data Source	Resident survey		
Return format	Percentage (%)	Decimal Places	One		
Reporting frequency	2 years	Data Availability	2 years		
Target rationale	High percentage of population feeling safe when outside in their local area.				
Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	N/A	N/A	N/A	N/A	85%
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	N/A	N/A	N/A	N/A	N/A
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	N/A	N/A	N/A	N/A	85%
	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total
N/A	N/A	N/A	N/A	N/A	
Reporting organisation	Performance, NFDC				
Spatial level	District council				

Further guidance	N/A	
Accountable Service Manager	Richard Knott	Agreed date: 08/04/2024
Data owner	Saq Yasin	Agreed date: 08/04/2024

PEOPLE THEME – Priority: Empowering our residents to live healthy, connected and fulfilling lives					
NFDC ID - Short name	007 - Investment in and rollout of public space CCTV system				
Long name	Investment in and rollout of public space CCTV system				
Rationale and context	<p>The administration have invested £300k in the expansion of the public space CCTV system. Priority focus is on rural communities and areas not currently under coverage where evidence necessitates CCTV. Locations are reviewed and agreed by CCTV Steering Group. Investment is also within the Control Room and server room for expanded coverage.</p> <p>It is envisaged that between 15-18 additional cameras will be installed across the district.</p>				
Definition	Site surveys in readiness for installation, Parish Council agreement for additional revenue support and contributions, Control Room & Server Room upgrades, community engagement events and consultation and camera installation.				
Formula	N/A - progress report				
Worked example	Progress on key areas identified in definition	Good performance		Good performance will be progress in key definitions	
Collection interval	Quarterly	Data source		Steering Group update, approval and installation progress from primary contractor	
Return format	£	Decimal places		N/A	
Reporting frequency	Quarterly	Data availability		Quarterly	
Target rationale	Reduce fear of crime and disorder, improve community confidence in isolated areas and enhance preventative and protective measures against crime and disorder.				
Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	TBC	TBC	TBC	TBC	TBC
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	TBC	TBC	TBC	TBC	TBC
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	TBC	TBC	TBC	TBC	TBC
	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total
	TBC	TBC	TBC	TBC	TBC

Reporting organisation	CCTV, NFDC	
Spatial level	District council	
Further guidance	N/A	
Accountable Service Manager	Brian Byrne	Agreed date: 26/04/2024
Data owner	Brian Byrne	Agreed date: 26/04/2024

PEOPLE THEME – Priority: Empowering our residents to live healthy, connected and fulfilling lives			
NFDC ID - Short name	008 - Number of education and awareness sessions in relation to serious crime.		
Long name	Number of education and awareness sessions in relation to serious crime.		
Rationale and context	<p>The district council meets its community safety duties through the combined partnership under the name of Safer New Forest. In January 2024, a new duty defined as the Serious Violence Duty came into effect. This places requirements on the council and its partners in publishing a response strategy to serious violence with a view to identifying persons at risk and diverting them away from crime. The partnership published their strategy and through the coordinated effort of partners from Safer New Forest and a delivery group convening under the Partnership Action Group (PAG) will be identifying targeted interventions for delivery.</p>		
Definition	<p>The agreed cohort of serious violence is defined as:</p> <ol style="list-style-type: none"> 1. Most serious violence – existing definition (1a and 1b where it is GBH and above incl. death by dangerous driving). 2. Robbery (3a and 3b). 3. Possession of a weapon offences (7). 4. Public order (violent disorder [65] and riot [64/1] only). 5. Any violence with injury (1b) not included under MSV where a bladed implement was used. <p>This metric will measure the number of educational sessions held in relation to the above by the Safer New Forest Partnership.</p>		
Formula	Number of overall partnership interventions which are tracked and recorded through the Partnership Action Group (PAG) overseen by the Safer New Forest partnership.		
Worked example	Number of overall partnership interventions which are tracked and recorded through the Partnership Action Group (PAG) overseen by the Safer New Forest partnership.	Good performance	<p>Good performance will be typified by delivering the requisite number of education awareness sessions as referred by our partners.</p> <p>We will aim to meet the initial response of higher volume of interventions based on risk. In the medium to long term this should reduce based on positive outcomes and change in behaviour, and any associated reduction in serious crime.</p>
Collection interval	Quarterly	Data source	Safer New Forest Partnership data to include Police, Education, Probation, Youth Offending Team & Community Safety
Return format	Number (Num)	Decimal places	N/A
Reporting frequency	Quarterly	Data availability	Quarterly

Target Rationale	We are targeted to those individuals that are identified and referred to us. Referrals will come from our partners based on their assessment of risk. There is therefore no baseline or specific target.				
Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	Monitor	Monitor	Monitor	Monitor	Monitor
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	Monitor	Monitor	Monitor	Monitor	Monitor
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	Monitor	Monitor	Monitor	Monitor	Monitor
	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total
Monitor	Monitor	Monitor	Monitor	Monitor	
Reporting organisation	Community Safety, NFDC				
Spatial level	District council				
Further guidance	Serious Violence Duty - GOV.UK (www.gov.uk)				
Accountable Service Manager	Brian Byrne		Agreed date: 26/04/2024		
Data owner	Nikki Swift		Agreed date: 26/04/2024		

PEOPLE THEME – Priority: Empowering our residents to live healthy, connected and fulfilling lives					
NFDC ID - Short name	009 - Number of positive interventions in response to Public Spaces Protection Orders (1 and 2).				
Long name	Number of positive interventions in response to Public Spaces Protection Orders (1 and 2).				
Rationale and context	<p>The District Council following public consultation, implemented 2 Public Space Protection Orders which came into effect on July 1st 2023. The orders relate to fire setting and the feeding and petting of New Forest animals.</p> <p>The Council have delegated education and enforcement of the orders to the National Park Authority, Forestry England and the Verderers. The primary focus is on education with enforcement through the issuing of a fixed penalty notice being utilised when necessary. Alongside the reporting of positive interventions incidents where enforcement was necessary will also be reported.</p>				
Definition	Total number of engagements with members of the public vs that of issuing of fixed penalty notices to promote positive behaviour and wellbeing in the Forest.				
Formula	Number of individual engagements.				
Worked example	Quarterly response figures obtained from authorised officer organisations	Good Performance	Good performance is high intervention and low issuing of FPN.		
Collection interval	Quarterly	Data Source	National Park Authority, Forestry England & The Verderers.		
Return format	Number (Num)	Decimal Places	N/A		
Reporting frequency	Quarterly	Data Availability	Quarterly		
Target rationale	<p>We, along with our partners will undertake targeted interventions. Details are captured centrally.</p> <p>No target is possible as the numbers engaged depends on partner activity as well as visitor behaviour.</p>				
Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	Monitor	Monitor	Monitor	Monitor	Monitor
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	Monitor	Monitor	Monitor	Monitor	Monitor
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	Monitor	Monitor	Monitor	Monitor	Monitor
	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total

	Monitor	Monitor	Monitor	Monitor	Monitor
Reporting organisation	Community Safety (through NPA, Forestry England & The Verderers), NFDC				
Spatial level	District council				
Further guidance	Public Spaces Protection Orders - New Forest District Council				
Accountable Service Manager	Brian Byrne		Agreed date: 26/04/2024		
Data owner	Nikki Swift		Agreed date: 26/04/2024		

PEOPLE THEME – Priority: Empowering our residents to live healthy, connected and fulfilling lives					
NFDC ID - Short name	010 - Number of cultural events and activities supported by New Forest District Council.				
Long name	Total number of cultural events and activities supported by New Forest District Council.				
Rationale and context	Meets corporate plan priorities and service plan aims.				
Definition	NFDC provides signposting, sector specific and financial support to a number of arts and culture projects across the district.				
Formula	Number of projects				
Worked example	Number of projects = 25	Good Performance		25 and year on year increase	
Collection interval	Quarterly	Data Source		Project dashboard	
Return format	Number (Num)	Decimal Places		N/A	
Reporting frequency	Quarterly	Data Availability		Quarterly	
Target rationale	NFDC is striving to empower the residents by supporting cultural activities in the district. The number is anticipated to increase as we strengthen our role in cultural leadership and secure additional funding year on year.				
Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	6	6	6	6	24
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	6	6	6	6	24
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	7	7	7	7	28
	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total
	8	8	8	8	32
Reporting organisation	Environmental and Regulation, NFDC				
Spatial level	District council				

Further guidance	N/A	
Accountable Service Manager	Jo McClay	Agreed date: 18/04/2024
Data owner	Kealy Whenray	Agreed date: 18/04/2024

PEOPLE THEME – Priority: Meeting housing needs					
NFDC ID - Short name	011 - Number of affordable social housing homes delivered by NFDC and its partners.				
Long name	Total number of Affordable housing units completed by NDFC and its partners.				
Rationale and context	To meet Corporate Plan People Priority 3: Meeting Housing Needs				
Definition	Total number of Affordable Housing units, including shared ownership, low-cost homeownership and First Homes programmed and delivered by NDFC, Registered Providers and Developers.				
Formula	Number of homes forecast and delivered				
Worked example	Number of homes delivered against those forecast	Good performance	Good performance will be typified in the delivery of Affordable Housing units identified within the pipeline by the end of the reporting period.		
Collection interval	Quarterly	Data source	NFDC Affordable Housing Monitoring data base. Data from Registered Providers and Developers		
Return format	Number (Num)	Decimal places	One		
Reporting frequency	Annual	Data availability	Quarterly		
Target rationale	It is only possible to accurately set affordable housing completion targets for a limited period ahead, typically 12 months. Meaningful targets cannot be set for future years because annual delivery does not track averages. Furthermore predictions can rise or fall significantly as new opportunities may be introduced to the programme, or anticipated schemes fall by the wayside.				
Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	N/A	N/A	N/A	N/A	53
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	N/A	N/A	N/A	N/A	N/A
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	N/A	N/A	N/A	N/A	TBC
	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total
	N/A	N/A	N/A	N/A	TBC

Reporting organisation	Housing Strategy & Development, NFDC	
Spatial level	District council	
Further guidance	N/A	
Accountable Service Manager	Tim Davis	Agreed date: 26/04/2024
Data owner	Catherine Bonnett	Agreed date: 26/04/2024

PEOPLE THEME – Priority: Meeting housing needs					
NFDC ID - Short name	012 - Number of affordable council homes delivered against the 2026 target.				
Long name	Total number of additional affordable homes that completed during the year, including Buy Backs				
Rationale and context	To meet Corporate Plan People Priority 3: Meeting Housing Needs, and Housing Strategy objective to deliver additional council-owned affordable housing for rent and shared ownership				
Definition	The number of additional NFDC affordable homes for rent and shared ownership				
Formula	Number of homes forecast and delivered				
Worked example	Number	Good performance	Good performance will be typified in the delivery of Affordable Housing units to meet the target in the Housing Strategy		
Collection interval	Quarterly	Data source	NFDC Affordable Housing Monitoring data base		
Return format	Number (Num)	Decimal places	One		
Reporting frequency	Annual	Data availability	Quarterly		
Target rationale	It is only possible to accurately set affordable housing completion targets for a limited period ahead, typically 12 months. Meaningful targets cannot be set for future years because annual delivery does not track averages. Furthermore predictions can rise or fall significantly as new opportunities may be introduced to the programme, or anticipated schemes fall by the wayside.				
Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	N/A	N/A	N/A	N/A	34
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	N/A	N/A	N/A	N/A	N/A
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	N/A	N/A	N/A	N/A	TBC
	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total
N/A	N/A	N/A	N/A	TBC	

Reporting organisation	Housing Strategy & Development, NFDC	
Spatial level	District council	
Further guidance	N/A	
Accountable Service Manager	Tim Davis	Agreed date: 26/04/2024
Data owner	Tim Davis	Agreed date: 26/04/2024

PEOPLE THEME – Priority: Meeting housing needs					
NFDC ID - Short name	013 - Percentage score for overall tenant satisfaction with the Council as a landlord, as determined in the Tenant Satisfaction Measures (TSMs)				
Long name	Tenant satisfaction collected annually as part of the RSH dictated 'Tenant Satisfaction Measures' - Specifically 'Taking everything into account, how satisfied or dissatisfied are you with the service provided by New Forest District Council', reported as percentage				
Rationale and context	Key driver and measurement of success as dictated by the Regulator of Social Housing. Reference also the Tenant Engagement Strategy and Corporate Strategy driving customer service and tenant satisfaction				
Definition	Measurement of satisfaction in services and NFDC as a landlord for all Council Housing Tenants, including low-cost home ownership and low-cost rental accommodation (LCHO & LCRA) as set out in the Social Housing Regulation Act 2023				
Formula	A. Number of respondents (weighted where required) who reported they are very satisfied. FIRST added to A. Number of respondents (weighted where required) who reported they are fairly satisfied. THEN divided by B. Number of respondents (weighted where required) who answered the question (not including any tenants who gave an unprompted not known or not applicable response). Multiplied by 100.				
Worked example	264 (Very Satisfied) + 202 (Fairly Satisfied) divided by 575 = 0.81. 0.81 x 100 = 81%	Good performance	≥75%		
Collection interval	Twice yearly - for reporting Annually (April to March)	Data source	Externally collected and provided by independent research provider		
Return format	Percentage (%)	Decimal places	One		
Reporting frequency	Annual	Data availability	Bi-annually provided internally		
Target rationale	Aim to improve satisfaction through strategic actions to improve customer service				
Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	N/A	N/A	N/A	N/A	75%
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	N/A	N/A	N/A	N/A	80%
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	N/A	N/A	N/A	N/A	82%
	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total
N/A	N/A	N/A	N/A	84%	

Reporting organisation	Tenant Engagement/Housing Business Team, NFDC	
Spatial level	District council	
Further guidance	Transparency, Influence and Accountability (including Tenant Satisfaction Measures) - GOV.UK (www.gov.uk)	
Accountable Service Manager	Kirsty Farmer	Agreed date: 18/04/2024
Data owner	David Brown	Agreed date: 18/04/2024

PEOPLE THEME – Priority: Meeting housing needs					
NFDC ID - Short name	014 - Number of council homes achieving Energy Performance Certification band C.				
Long name	Energy Performance Data (EPC), will be completed yearly to include reactive equipment replacement and planned work activities.				
Rationale and context	Key driver and measurement of success in improvement energy performance of homes to meet the councils Greener Housing Strategy, Government Energy Performance target EPC 2030 and decarbonisation legislation for 2050.				
Definition	An Energy Performance Certificate (EPC). Is the UK's measurement of efficiency for domestic and commercial buildings. It is also used in the government's calculation for fuel poverty. Achieving EPC band C or above provides important data on a home's energy efficiency, average fuel consumption and the amount of carbon dioxide produced yearly. Using EPC data is beneficial to consider fuel poverty and decarbonisation together.				
Formula	Manual 12-month review of repairs and planned works. Update of assets to report on yearly improvement.				
Worked example	Previous years EPC data plus current years improvements.	Good performance	Good performance will be an increase in the numbers of homes with EPC band C or above and decrease in homes with EPC band D or lower for the councils 5200 homes.		
Collection interval	For reporting annually in April.	Data source	Uniclass, DRS, Keystone & Locata, External modelling software.		
Return format	Number (Num)	Decimal places	One		
Reporting frequency	Annual	Data availability	Annual		
Target rationale	Government target. Councils' own strategy, improving standards, Increased efficiency of housing stock and reduction in fuel poverty. The target for 2025 - 2030 will change to capture available funding opportunities and should be set yearly.				
Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	N/A	N/A	N/A	2,646	2,646
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	N/A	N/A	N/A	2,946	TBC
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	TBC	TBC	TBC	TBC	TBC
	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total
TBC	TBC	TBC	TBC	TBC	

Reporting organisation	Housing Maintenance, NFDC	
Spatial level	District council	
Further guidance	Clean Growth Strategy (publishing.service.gov.uk)	
Accountable Service Manager	Sophie Tuffin	Agreed date: 22/04/2024
Data owner	Callum Ranger	Agreed date: 22/04/2024

PEOPLE THEME – Priority: Meeting housing needs			
NFDC ID - Short name	015 - Percentage scores for the 5 safety and compliance management Tenant Satisfaction Measures (TSMs)		
Long name	An Average of Cumulative/Current Month Percentage Scores for all Building Safety TSM sections: <ul style="list-style-type: none"> ▪ Gas safety ▪ Fire safety ▪ Asbestos management ▪ Water safety ▪ Lift safety 		
Rationale and context	To provide monthly performance monitoring within the areas we need to publish yearly (FY) statistics for as a council. By publishing statistics onto our TSM Dashboard monthly, it highlights key areas where we are over/under performing prior to year-end data collation. This measure gives an overall picture of latest performance across all of the safety and compliance TSMs.		
Definition	The TSMs are a core set of performance measures against which all providers must publish their performance. This measure is an average score across the 5 measures		
Formula	Formula for BS01, BS02, BS03, BS04 and BS05 follows the following structure - ((Total required checks carried out as at year end) / (Total properties/dwellings required to have the check carried out as at year end)) x 100) - represented as 2 decimal place percentage. An average is then applied to all of these percentage figures, to give the final KPI.		
Worked example	The ((Sum/all numerators across the 5 measures) / (Sum of all denominators across the 5 measures) x 100). (Sum (4497 + 1386 + 1417 + 490 + 302) / Sum (4579 + 1450 + 1442 + 649 + 302) x 100) = 96.08%	Good performance	BS01 >= 97%, BS02, 03, 04, 05 >= 95% Average score is on or above target, higher values are better
Collection interval	Monthly	Data source	Uniclass, DRS, Keystone & Locata
Return format	Percentage (%)	Decimal places	Two
Reporting frequency	Quarterly	Data availability	Monthly
Target rationale	To uphold high standards and identify in the first instance areas of improvement.		

	<p>Individual figures can be made available on request.</p> <p>The current baseline figure is 96.08 using the worked example. At year-end, the water safety measure fell sharply and so we believe this has undercounted our performance. We therefore set a target that includes the water safety measure improving from 490 to a 550 count. This would represent a value of 96.8% which is more than our current baseline of 96.08. There will be small margins affecting this measure and underperformance in any of the 5 area will affect the overall score. Thresholds will need to set accordingly.</p>				
Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	96.8%	96.8%	96.8%	96.8%	96.8%
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	96.8%	96.8%	96.8%	96.8%	96.8%
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	96.8%	96.8%	96.8%	96.8%	96.8%
	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total
	96.8%	96.8%	96.8%	96.8%	96.8%
Reporting organisation	Housing Maintenance, NFDC				
Spatial level	District council				
Further guidance	Tenant Satisfaction Measures: Technical requirements (publishing.service.gov.uk)				
Accountable Service Manager	Sophie Tuffin			Agreed date: 29/04/2024	
Data owner	Callum Ranger			Agreed date: 29/04/2024	

PLACE THEME – Priority: Shaping our place now and for future generations			
NFDC ID - Short name	016 - Percentage of major planning applications determined in time		
Long name	Percentage of major planning applications determined in time. Major applications include those which propose 10 or more dwellings; where a site is 0.5 hectares or more and it is not known how many houses are proposed; the provision of a building or buildings where the floor space to be created is 1,000 square metres or more; or a development carried out on a site having an area of 1 hectare or more)		
Rationale and context	The Government specifies the period of time within which decisions should be made on planning and related applications. A timely manner is statutory defined as within 13 weeks or unless an application is subject to Environmental Impact Assessment, in which case a 16-week period applies. If the Council and an applicant agree, the period of time for deciding a planning application can be extended beyond the period specified by the Government. The Government sets out the criteria as to how it assesses the performance of local planning authorities in terms of speed of decision making. The Government’s current criteria is that at least 60% of major applications must be decided either within the time specified by the Government or within an extended period agreed between the Council and the applicant. National Planning report requirement.		
Definition	<p>Percentage of major development planning applications with Planning Performance Agreements, Extension of Time or Environmental Impact Assessments decided in time - Quarterly - This is the percentage of major development planning application decisions (PAs) that have a Planning Performance Agreement (PPAs), Extension of Time (EoT) and/or Environmental Impact Assessment (EIA) that have been granted within the agreed timeframe, each financial quarter.</p> <p>PA: This is short for 'planning agreement' which is used in the planning application statistics a shorthand term for covering Planning Performance Agreements.</p> <p>A timely manner is statutory defined as within 13 weeks or unless an application is subject to Environmental Impact Assessment, in which case a 16-week period applies, for all major applications. This was previously reported as NI 157a.</p>		
Formula	Number of major applications determined in 13 weeks/total number of major applications determined x 100		
Worked example	SUM=1000/1200 *100	Good performance	Good performance will be typified by maintaining levels at or above government target an increase in the rate.
Collection interval	Calendar Quarters (for the previous 3 months)	Data source	Planning software database
Return format	Percentage (%)	Decimal places	One

Reporting frequency	Quarterly	Data availability	Quarterly. Published Q end + 2 weeks		
Target rationale	Government Target				
Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	60%	60%	60%	60%	60%
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	60%	60%	60%	60%	60%
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	60%	60%	60%	60%	60%
	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total
60%	60%	60%	60%	60%	
Reporting organisation	Development Management, NFDC				
Spatial level	District council				
Further guidance	N/A				
Accountable Service Manager	Mark Wyatt		Agreed date: 26/04/2024		
Data owner	Martine Parkes		Agreed date: 26/04/2024		

PLACE THEME – Priority: Shaping our place now and for future generations			
NFDC ID - Short name	017 - Percentage of minor planning applications determined in time		
Long name	Percentage of minor planning applications determined in time. (A minor planning application is for works affecting up to 9 homes, or up to 1,000 sqm floorspace).		
Rationale and context	<p>The Government specifies the period of time within which decisions should be made on planning and related applications. A timely manner is statutory defined as within 8 weeks (56 days) or unless an application is subject to Environmental Impact Assessment, in which case a 16-week period applies. If the Council and an applicant agree, the period of time for deciding a planning application can be extended beyond the period specified by the Government. The Government sets out the criteria as to how it assesses the performance of local planning authorities in terms of speed of decision making. The Government’s current criteria is that at least 70% of 'minor' applications must be decided either within the time specified by the Government or within an extended period agreed between the Council and the applicant. National Planning report requirement.</p>		
Definition	<p>Percentage of minor development planning applications with Planning Performance Agreements, Extension of Time or Environmental Impact Assessments decided in time - Quarterly - This is the percentage of major development planning application decisions (PAs) that have a Planning Performance Agreement (PPAs), Extension of Time (EoT) and/or Environmental Impact Assessment (EIA) that have been granted within the agreed timeframe, each financial quarter.</p> <p>PA: This is short for 'planning agreement' which is used in the planning application statistics a shorthand term for covering Planning Performance Agreements.</p> <p>A timely manner is statutory defined as within 8 weeks or unless an application is subject to Environmental Impact Assessment, in which case a 16-week period applies, for all major applications. This was previously reported as NI 157a.</p>		
Formula	Number of applications determined in 8 weeks/total number of minor applications determined x 100		
Worked example	SUM=1000/1200 *100	Good performance	Good performance will be typified by maintaining levels at or above government target an increase in the rate.
Collection interval	Calendar Quarters (for the previous 3 months)	Data source	Planning software database
Return format	Percentage (%)	Decimal places	One
Reporting frequency	Quarterly	Data availability	Quarterly. Published Q end + 2 weeks

Target rationale	Government Target				
Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	70%	70%	70%	70%	70%
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	70%	70%	70%	70%	70%
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	70%	70%	70%	70%	70%
	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total
70%	70%	70%	70%	70%	
Reporting organisation	Development Management, NFDC				
Spatial level	District council				
Further guidance	N/A				
Accountable Service Manager	Mark Wyatt		Agreed date: 26/04/2024		
Data owner	Martine Parkes		Agreed date: 26/04/2024		

PLACE THEME – Priority: Shaping our place now and for future generations			
NFDC ID - Short name	018 - Percentage of other planning applications determined in time		
Long name	Percentage of other planning applications determined in time. (Applications not included in major or minor application).		
Rationale and context	<p>The Government specifies the period of time within which decisions should be made on planning and related applications. A timely manner is statutory defined as within 8 weeks (56 days). If the Council and an applicant agree, the period of time for deciding a planning application can be extended beyond the period specified by the Government. The Government sets out the criteria as to how it assesses the performance of local planning authorities in terms of speed of decision making. The Government’s current criteria is that at least 80% of 'other' applications must be decided either within the time specified by the Government or within an extended period agreed between the Council and the applicant. National Planning report requirement.</p>		
Definition	<p>Percentage of other development planning applications with Planning Performance Agreements, Extension of Time or Environmental Impact Assessments decided in time - Quarterly - This is the percentage of major development planning application decisions (PAs) that have a Planning Performance Agreement (PPAs), Extension of Time (EoT) and/or Environmental Impact Assessment (EIA) that have been granted within the agreed timeframe, each financial quarter.</p> <p>This includes householder developments, applications for advertisement consent and listed building consent. subject to the definition of "major" development it could also include the following use classes:</p> <ul style="list-style-type: none"> C1 (hotels) C2 (residential institutions) C4 (houses in multiple occupations for 3 to 6 residents) E (gymnasiums, indoor recreations not involving motorised vehicles or firearms) F1 (non-residential institutions) <p>Sui generis uses except drinking establishments and hot food takeaways): Certain uses do not fall within any use class and are considered ‘sui generis’. Such uses include: betting offices/shops, payday loan shops, theatres, houses in multiple occupation for more than 6 residents, hostels providing no significant element of care, scrap yards, petrol filling stations and shops selling and/or displaying motor vehicles, retail warehouse clubs, nightclubs, launderettes, taxi businesses, amusement centres, casinos, cinemas, concert halls, bingo halls and dance hall.</p>		
Formula	$\text{Number of applications determined between 8 and 13 weeks as calculated in planning software} / \text{total number of other applications determined} \times 100$		
Worked example	SUM=1000/1200 *100	Good performance	Good performance will be typified by an increase in the rate.

Collection interval	Calendar Quarters (for the previous 3 months)			Data source	Planning software database
Return format	Percentage (%)			Decimal places	One
Reporting frequency	Quarterly			Data availability	Quarterly. Published Q end + 2 weeks
Target rationale	Government Target				
Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	80%	80%	80%	80%	80%
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	80%	80%	80%	80%	80%
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	80%	80%	80%	80%	80%
	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total
80%	80%	80%	80%	80%	
Reporting organisation	Development Management, NFDC				
Spatial level	District council				
Further guidance	N/A				
Accountable Service Manager	Mark Wyatt			Agreed date: 26/04/2024	
Data owner	Martine Parkes			Agreed date: 26/04/2024	

PLACE THEME – Priority: Shaping our place now and for future generations			
NFDC ID - Short name	019 - Percentage of successful planning appeals		
Long name	Percentage of allowed planning appeals. An allowed appeal being an appeal that is determined contrary to the Planning Authority recommendation.		
Rationale and context	<p>The Government measures the quality of decision making by looking at the percentage of the total number of decisions made by the authority on applications that are subsequently overturned (allowed) at appeal. Major and non-major applications are assessed separately. The Government sets out the criteria as to how it assesses the performance of local planning authorities in terms of quality of decision making. The Government’s assessment of quality of decision making is undertaken over a two-year period from the beginning of April to the end of March. The Government’s current criteria is that:</p> <ul style="list-style-type: none"> • No more than 10% of an authority’s total number of decisions on major applications made during the assessment period should be overturned at appeal; • No more than 10% of an authority’s total number of decisions on non-major applications made during the assessment period should be overturned at appeal. National planning reporting requirement. 		
Definition	Number of appeals submitted by applicants who were initially refused planning permission by the authority, appeals against the non-determination of a planning application by an applicant or an appeal against a condition imposed on a planning permission. A successful planning appeal outcome for the Council would be an application dismissed by the Planning Inspector in accordance with the Planning Authority decision, an appeal dismissed on what would have been the likely decision in the case of a non-determination appeal and an appeal dismissing an appeal seeking relief or variation of a condition of planning permission. An allowed appeal is a decision in favour of the appellant and against the Planning Authority decision.		
Formula	Number of appeal decisions that are allowed by the planning inspectorate/total number of appeals determined x 100		
Worked example	1 (appeal allowed) / 7 (total planning appeals submitted) = 1.14 * 100 = 14%	Good performance	Good performance will be typified by maintaining the <10% rate.
Collection interval	Calendar Quarters (for the previous 3 months)	Data source	Planning software database
Return format	Percentage (%)	Decimal places	One
Reporting frequency	Quarterly	Data availability	Quarterly. Published Q end + 2 weeks
Target rationale	Government Target		

Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	<10%	<10%	<10%	<10%	<10%
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	<10%	<10%	<10%	<10%	<10%
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	<10%	<10%	<10%	<10%	<10%
	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total
	<10%	<10%	<10%	<10%	<10%
Reporting organisation	Development Management, NFDC				
Spatial level	District council				
Further guidance	Planning Inspectorate Ministerial Statistics Background Quality Report 23rd November 2023 - GOV.UK (www.gov.uk)				
Accountable Service Manager	Mark Wyatt		Agreed date: 02/07/2024		
Data owner	Martine Parkes		Agreed date: 02/07/2024		

PLACE THEME – Priority: Shaping our place now and for future generations			
NFDC ID - Short name	020 - The total outstanding net dwelling supply as set out in our development plan.		
Long name	The total outstanding net dwelling supply as set out in our development plan.		
Rationale and context	Reporting requirement as set out in Annual monitoring report		
Definition	<p>‘Total outstanding net dwelling supply’ means the future identified/committed and achievable housing supply as of the base date (1 April each year) for the remainder of the Local Plan period. To meet the adopted Local Plan 2016-2036 Part 1 overall minimum housing requirement of at least 10,420 dwellings set out in Policy STR5, the ‘outstanding net dwelling supply’ for the remainder of the Plan period up to 2036 will need to be equal to or greater than the residual housing requirement for that period (the residual housing requirement = overall housing requirement 2016-2036 minus actual net housing completions to date). The KPI target is therefore for the ‘total outstanding net dwelling’ supply to be equal to or greater than the residual housing requirement for the remainder of the Local Plan period.</p>		
Formula	Total housing supply identified in adopted LP Pt1 minus housing delivered plus any additional windfalls		
Worked example	10420 (total supply in LP Pt1) - c.3000 (completed since 2016) + x (windfalls not previously identified)	Good performance	Good performance will be typified by continued good supply pipeline of housing whilst delivering housing completions
Collection interval	Annual	Data source	Annual monitoring with HCC
Return format	Number (Num)	Decimal places	One
Reporting frequency	Annual	Data availability	Annual - financial year end + 4 months
Target rationale	<p>The targets are based on the Local Plan 2016-2036 Part 1 Cumulative Housing Delivery Targets for the end of 2023/24, 2024/25, 2025/26 and 2026/27 (+ housing delivery shortfall in the Plan period to date).</p> <p>Considering a 4-month delay in the reportable data availability, the EOY targets will be reported in Q2 of the following year.</p>		

Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	N/A	N/A	N/A	N/A	7,720 + delivery shortfall TBC
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	N/A	N/A	N/A	N/A	7,320 + delivery shortfall TBC
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	N/A	N/A	N/A	N/A	6,920 + delivery shortfall TBC
	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total
	N/A	N/A	N/A	N/A	6,220 + delivery shortfall TBC
Reporting organisation	Planning Policy, NFDC				
Spatial level	District council				
Further guidance	N/A				
Accountable Service Manager	Tim Guymer		Agreed date: 05/06/2024		
Data owner	James Smith / Peter McGowan		Agreed date: 05/06/2024		

PLACE THEME – Priority: Protecting our climate, coast, and natural world					
NFDC ID - Short name	021 - Kilogrammes of non-recycled waste produced per household				
Long name	Amount of non-recycled waste collected by the council from households that is sent for disposal.				
Rationale and context	This is a recognised KPI that will be directly comparable with other LAs and will show progress against our waste strategy.				
Definition	"Non-recycled waste" is any household waste that is not sent for reuse, composting or recycling.				
Formula	Total non-recycled waste tonnage divided by the number of households in the District				
Worked example	15,000 tonnes / 83,000 households = 0.18 tonnes * 1000 = 180kg	Good Performance	Good performance is indicated by a reducing number		
Collection interval	Quarterly (but note 2-month lag for data e.g. Qtr1 data available end August)	Data Source	Various - our own, plus some from HCC, collated by Nicola Plummer		
Return format	Kg	Decimal Places	One		
Reporting frequency	Quarterly	Data Availability	Quarterly (but lag of 2 months from end of quarter)		
Target rationale	Quarterly targets reflect a 5% reduction on previous years				
Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	111 kg	107 kg	109 kg	112 kg	439 kg
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	TBC	TBC	TBC	TBC	TBC
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	TBC	TBC	TBC	TBC	TBC
	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total
	TBC	TBC	TBC	TBC	TBC
Reporting organisation	Waste and Transport team, Place Operations, NFDC				
Spatial level	District council				

Further guidance	WasteDataFlow Waste Management (www.wastedataflow.org)	
Accountable Service Manager	Chris Noble	Agreed date: 09/04/2024
Data owner	Nicola Plummer	Agreed date: 09/04/2024

PLACE THEME – Priority: Protecting our climate, coast, and natural world					
NFDC ID - Short name	022 - Households using our chargeable garden waste service as a percentage of total properties in NFDC.				
Long name	Households using our chargeable garden waste service as a percentage of total properties in NFDC				
Rationale and context	This is an indicator of service quality and our efforts to increase recycling of garden waste and progress against waste strategy				
Definition	The % of households who subscribe to our garden waste collection service				
Formula	Total number of households using the service / total number of households x 100.				
Worked example	(20,000 / 83,000) *100 = 24.09%	Good performance	Good performance will be typified by an increase in the rate.		
Collection interval	Quarterly	Data source	Bartec		
Return format	Percentage (%)	Decimal places	One		
Reporting frequency	Quarterly	Data availability	Available within first 2 weeks of new quarter		
Target rationale	Quarterly target reflects steady growth in subscription numbers				
Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	25%	26%	27%	27%	27%
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	TBC	TBC	TBC	TBC	TBC
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	TBC	TBC	TBC	TBC	TBC
	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total
	TBC	TBC	TBC	TBC	TBC
Reporting organisation	Waste and Transport team, Place Operations, NFDC				
Spatial level	District council				

Further guidance	N/A	
Accountable Service Manager	Chris Noble	Agreed date: 09/04/2024
Data owner	Samantha Marrache	Agreed date: 09/04/2024

PLACE THEME – Priority: Protecting our climate, coast, and natural world					
NFDC ID - Short name	023 - Emissions from the council’s vehicle fleet.				
Long name	Tonnes of CO ₂ e emissions from Council fossil-fuelled vehicles and plant				
Rationale and context	Council has committed to reducing emissions as part of climate and nature emergency				
Definition	Tonnes of CO ₂ e emitted by Council fossil-fuelled vehicles and plant				
Formula	The CO ₂ e emissions from fossil-fuelled vehicles, plant and small tools for the year. The litres of Petrol and Diesel consumed use conversion factors from the Carbon emission accounting tool, which is updated annually and will be adjusted accordingly. e.g.: 1 litre of diesel = 2.51233g CO ₂ e, 1 litre of Petrol = 2.19352 g CO ₂ e.				
Worked example	1 litre of diesel = 2.51233 g CO ₂ e, 1 litre of Petrol = 2.19352 g CO ₂ e.	Good performance	Good performance will be typified by a reducing number		
Collection interval	Annually	Data source	Data is taken from Fuel Tran for bunkered fuel, which is managed by Housing. Data is taken from Velocity for fuel cards. Aggregated and added to the Carbon Emissions accounting tool, provided by Facilities		
Return format	Tonnes of CO ₂ e	Decimal places	N/A		
Reporting frequency	Annual	Data availability	By end of first month after the end of the year		
Target rationale	Reduction will align to vehicle replacement/greener fleet strategy. This is to be agreed by [end of 2024].				
Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	N/A	N/A	N/A	N/A	TBC
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	N/A	N/A	N/A	N/A	TBC
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	N/A	N/A	N/A	N/A	TBC

	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total
	N/A	N/A	N/A	N/A	TBC
Reporting organisation	Waste and Transport team, Place Operations, NFDC				
Spatial level	District council				
Further guidance	N/A				
Accountable Service Manager	James Carpenter / Roxie King / Chris Noble		Agreed date: 12/06/2024		
Data owner	Simon Cooper		Agreed date: 09/04/2024		

PLACE THEME – Priority: Protecting our climate, coast, and natural world					
NFDC ID - Short name	024 - Percentage of household waste sent for recycling.				
Long name	Total tonnage of non-recycled waste collected by the council from households that is sent for recycling, composting or reuse				
Rationale and context	This is a recognised KPI that will be directly comparable with other LAs and will show progress against waste strategy.				
Definition	Household waste only. Any tonnages of waste recycled/composted/reused as a % of total household waste tonnages.				
Formula	Total household tonnage collected for recycling, composting or reuse / total household waste * 100				
Worked example	(20,000 tonnes / 60,000 tonnes) * 100 = 33.3%	Good performance	Good performance will be typified by an increase in the rate.		
Collection interval	Quarterly. However, reporting on actuals will be delayed as data reports nationally are subject to audit by Waste Data Flow	Data source	Various - our own, plus some from HCC, collated by Nicola Plummer		
Return format	Percentage (%)	Decimal places	One		
Reporting frequency	Quarterly	Data availability	Quarterly (but lag of 2 months from end of quarter)		
Target rationale	Recycling rate unlikely to see significant reduction until service change in 2025.				
Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	37%	37%	37%	37%	37%
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	TBC	TBC	TBC	TBC	TBC
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	TBC	TBC	TBC	TBC	TBC
	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total
TBC	TBC	TBC	TBC	TBC	
Reporting organisation	Waste and transport team, Place Operations, NFDC				

Spatial level	District council	
Further guidance	Local authority collected waste management - annual results 2022/23 - GOV.UK (www.gov.uk)	
Accountable Service Manager	Chris Noble	Agreed date: 09/04/2024
Data owner	Nicola Plummer	Agreed date: 09/04/2024

PLACE THEME – Priority: Caring for our facilities, neighbourhoods and open spaces in a modern and responsive way					
NFDC ID - Short name	025 - Number of fly-tipping incidents per 1,000 people				
Long name	Total number of fly-tipping incidents reported by the public, per 1,000 residents				
Rationale and context	A simple way of monitoring our progress in reducing fly-tipping via enforcement and behaviour change				
Definition	No. of fly-tipping incidents reported to NFDC by the public. Fly-tips reported by operatives or from other sources are NOT included - this is to provide parity with fly capture reporting				
Formula	No. incidents / (NFDC population * 1,000)				
Worked example	2,500 incidents / 175,000 (175,942 people (2022 media population estimate; source: Nomis) * 1,000 = 14.2 2,500/175,942 x 1,000	Good performance	Good performance = a reduction in this number		
Collection interval	Quarterly	Data source	Streetscene-collated fly-tipping data		
Return format	Number (Num)	Decimal places	One		
Reporting frequency	Quarterly	Data availability	At end of first month after end of quarter		
Target rationale	Accurate reporting with aspiration to reduce the number of fly-tipping incidents via enforcement and behavioural change.				
Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	<13.94	<13.94	<13.94	<13.94	<13.94
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	TBC	TBC	TBC	TBC	TBC
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	TBC	TBC	TBC	TBC	TBC
	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total
	TBC	TBC	TBC	TBC	TBC
Reporting organisation	Streetscene, NFDC				

Spatial level	District council	
Further guidance	N/A	
Accountable Service Manager	Iain Park	Agreed date: 09/04/2024
Data owner	Stewart Phillips	Agreed date: 09/04/2024

PLACE THEME – Priority: Caring for our facilities, neighbourhoods and open spaces in a modern and responsive way					
NFDC ID - Short name	026 - Percentage customer satisfaction with the appearance of their local area.				
Long name	Percentage of resident survey respondents satisfied with the appearance of their local area				
Rationale and context	The total NFDC score of resident survey respondents stating that they are very satisfied or fairly satisfied with the appearance of their local area.				
Definition	Taking the perception score from our service, those answering the top two satisfaction scores as a proportion of all scores.				
Formula	Total number of respondents answering top two scores / total number of respondents				
Worked example	(375/500) * 100 = 75.0%	Good performance	Good performance will be typified by an increased rate		
Collection interval	2 years	Data source	Resident survey		
Return format	Percentage (%)	Decimal places	One		
Reporting frequency	2 years	Data availability	2 years		
Target rationale	<p>The total NFDC score of resident survey respondents stating that they are very satisfied or fairly satisfied with the appearance of their local area.</p> <p>“How satisfied or dissatisfied are you with your local area as a place to live?” = 93%. This is an ever so slightly different question. We will ask a specific question around this. I would expect this to be around the 85% mark.</p>				
Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	N/A	N/A	N/A	N/A	85%
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	N/A	N/A	N/A	N/A	N/A
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	N/A	N/A	N/A	N/A	85%
	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total
N/A	N/A	N/A	N/A	N/A	
Reporting organisation	Place Operations & Sustainability, NFDC				

Spatial level	District council	
Further guidance	N/A	
Accountable Service Manager	James Carpenter	Agreed date: 26/04/2024
Data owner	Saq Yasin	Agreed date: 26/04/2024

PLACE THEME – Priority: Caring for our facilities, neighbourhoods and open spaces in a modern and responsive way					
NFDC ID - Short name	027 - Equivalent number of 0.5 litre bottles filled at water-filling stations – waste averted				
Long name	Equivalent number of 0.5 litre bottles filled at water-filling stations – waste averted				
Rationale and context	To monitor reduction in waste that we are promoting via provision of water refill stations, as part of waste and climate strategies				
Definition	The water usage at refill stations is monitored and this can be converted to 0.5 litre bottles.				
Formula	Litres of water used divided by 0.5 = No. equivalent water bottles filled				
Worked example	10,000 litres / 0.5 = 20,000 bottles	Good performance	Good performance = an increase in bottles		
Collection interval	Quarterly	Data source	Streetscene-collated building readings		
Return format	Number (Num)	Decimal places	One		
Reporting frequency	Quarterly	Data availability	At end of first month after end of quarter		
Target rationale	Accurate reporting. Currently no mechanism for increasing usage. Units are not operational during below winter cold conditions.				
Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	9,200	13,800	0	0	23,000
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	TBC	TBC	TBC	TBC	TBC
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	TBC	TBC	TBC	TBC	TBC
	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total
	TBC	TBC	TBC	TBC	TBC
Reporting organisation	Streetscene, NFDC				
Spatial level	District council				

Further guidance	N/A	
Accountable Service Manager	Chris Noble	Agreed date: 09/04/2024
Data owner	Stewart Phillips	Agreed date: 09/04/2024

PROSPERITY THEME – Priority: Maximising the benefits of inclusive economic growth and investment					
NFDC ID - Short name	028 - Squared metres of industrial/employment land developed.				
Long name	Squared metres of industrial/employment land developed.				
Rationale and context	Reporting requirement as set out in Annual monitoring report.				
Definition	Square meter of industrial/employment land developed by third party developers as recorded by annual monitoring figures recorded by NFDC and HCC				
Formula	Sqm of industrial/employment land developed				
Worked example	Sqm of industrial/employment land delivered following monitoring visit in accordance with permission	Good performance		Good performance will be an increase in floorspace	
Collection interval	Annual	Data source		Monitoring records from HCC	
Return format	Squared metres (sqm)	Decimal places		One	
Reporting frequency	Annual	Data availability		Annual - financial year end + 4 months (July/August)	
Target rationale	No specific target available but adopted Local plan sets targets for employment land to be delivered over the 20-year period (time frame of local plan 2016-2036).				
Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	Monitor	Monitor	Monitor	Monitor	Monitor
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	TBC	N/A	N/A	N/A	N/A
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	TBC	N/A	N/A	N/A	N/A
	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total
	TBC	N/A	N/A	N/A	N/A
Reporting organisation	Planning Policy, NFDC				
Spatial level	District council				

Further guidance	N/A	
Accountable Service Manager	Tim Guymer	Agreed date: 26/04/2024
Data owner	James Smith / Peter McGowan	Agreed date: 26/04/2024

PROSPERITY THEME – Priority: Maximising the benefits of inclusive economic growth and investment					
NFDC ID - Short name	029 - Level (£) of retained business rates (at source)				
Long name	The value of national non-domestic rates retained from business premises in the Solent Freeport Tax Site situated within the New Forest District Council area.				
Rationale and context	Freeports are areas designated by the government that will benefit from incentives to encourage economic activity. They offer occupiers business rates relief and other incentives to support capital investment, skills and employment. Business rates growth generated from the tax sites can be retained by New Forest District Council and reinvested in services for the benefit of local residents.				
Definition	Value of business rates growth generated from the Solent Freeport tax site				
Formula	Monetary value of business rates growth generated from the Solent Freeport tax site				
Worked example	Rateable Value X Appropriate Rating Multiplier = Retained Rates	Good performance	Good performance will be typified by an increase in the rate		
Collection interval	Annual	Data source	Records from business rate billing system		
Return format	£	Decimal places	N/A		
Reporting frequency	Annual	Data availability	Quarterly		
Target rationale	Where investment takes place on Freeport tax sites, resulting business rates above a specified base line are retained by the Freeport company provided that this investment is in line with Freeport objectives. These retained rates will then be re-invested across the Solent region to realise the objectives set out in the Freeport Full Business Case. As such, the level of retained business rates on New Forest tax sites is a helpful indicator on how the Freeport is progressing in relation to its ambitions within our district.				
Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	N/A	N/A	N/A	N/A	£0
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	N/A	N/A	N/A	N/A	£450,000
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	N/A	N/A	N/A	N/A	£750,000
	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total
	N/A	N/A	N/A	N/A	£950,000

Reporting organisation	Place Operations & Sustainability, NFDC	
Spatial level	District council	
Further guidance	Freeports business rates relief: local authority guidance - GOV.UK (www.gov.uk)	
Accountable Service Manager	Clive Tritton	Agreed date: 5/06/2024
Data owner	Martin Cole	Agreed date: 26/04/2024

PROSPERITY THEME – Priority: Supporting our high-quality business base and economic centres to thrive and grow					
NFDC ID - Short name	030 - Perceptions of our high streets and town centres.				
Long name	Resident survey respondents stating that stating that they are satisfied with the high streets and town centres in their local area.				
Rationale and context	<p>The total NFDC score of resident survey respondents stating that they are very satisfied or fairly satisfied with the high streets and town centres in their local area.</p> <p>This will need a specific question but given other perception questions, I would expect this to be around the 82.5% mark, lower than the 85 for other questions as we know this is lower and needs to grow.</p>				
Definition	Taking the perception score from our service, those answering the top two satisfaction scores as a proportion of all scores.				
Formula	Total number of respondents answering top two scores / total number of respondents.				
Worked example	(375/500) * 100 = 75.0%	Good performance	Good performance will be typified by an increased rate		
Collection interval	2 years	Data source	Resident survey		
Return format	Percentage (%)	Decimal places	One		
Reporting frequency	2 years	Data availability	2 years		
Target rationale	<p>The total NFDC score of resident survey respondents stating that they are very satisfied or fairly satisfied with the high streets and town centres in their local area.</p> <p>This will need a specific question but given other perception questions, I would expect this to be around the 82.5% mark, lower than the 85% for other questions as we know this is lower and needs to grow.</p>				
Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	N/A	N/A	N/A	N/A	82.5%
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	N/A	N/A	N/A	N/A	N/A
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	N/A	N/A	N/A	N/A	82.5%

	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total
	N/A	N/A	N/A	N/A	N/A
Reporting organisation	Place Operations & Sustainability, NFDC				
Spatial level	District council				
Further guidance					
Accountable Service Manager	James Carpenter		Agreed date: 29/04/2024		
Data owner	Saq Yasin		Agreed date: 29/04/2024		

PROSPERITY THEME – Priority: Supporting our high-quality business base and economic centres to thrive and grow					
NFDC ID - Short name	031 - Vacancies of retail premises within town/local centres				
Long name	Percentage of vacant retail units within town/local centres				
Rationale and context	Reporting requirement as set out in Annual monitoring report				
Definition	Percentage of vacant retail units following annual retail survey undertaken by policy team				
Formula	Number of vacant premises/total number of properties x 100				
Worked example	5 (vacant units) / y (total number of units) x 100	Good performance		Percentage of vacant units decreases	
Collection interval	Annual	Data source		Survey by Policy Team	
Return format	Percentage (%)	Decimal places		One	
Reporting frequency	Annual	Data availability		Annual - financial year end + 4 months	
Target rationale	No specific target available but collection of data allows analysis, particularly against comparable areas				
Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	N/A	N/A	N/A	N/A	Monitor
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	N/A	N/A	N/A	N/A	Monitor
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	N/A	N/A	N/A	N/A	Monitor
	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total
	N/A	N/A	N/A	N/A	Monitor
Reporting organisation	Planning Policy, NFDC				
Spatial level	District council				

<p>Further guidance</p>		
<p>Accountable Service Manager</p>	<p>Tim Guymer</p>	<p>Agreed date: 26/04/2024</p>
<p>Data owner</p>	<p>James Smith / Peter McGowan</p>	<p>Agreed date: 26/04/2024</p>

PROSPERITY THEME – Priority: Championing skills and access to job opportunities			
NFDC ID - Short name	032 - Employment rate percentage of working age adults (aged 16-64).		
Long name	The % of residents (aged 16-64) of New Forest District who are in employment ('Employment' measures the number of people in paid work or who had a job that they were temporarily away from (for example, because they were on holiday or off sick)).		
Rationale and context	Employment rate is one indicator of the health of a local and national economy. The Corporate Plan acknowledges the indivisible link between access to a place to live and employment as part of a joined-up approach to helping make the New Forest as prosperous a place as it can be. NFDC will work with partners to ensure the district meets the needs of its businesses and residents in order to support high quality employment, economic growth and investment.		
Definition	The % of residents (aged 16-64) of New Forest District who are in employment ('Employment' measures the number of people in paid work or who had a job that they were temporarily away from (for example, because they were on holiday or off sick)). These district level estimates are less precise than national or regional figures because they are based on smaller numbers of survey respondents.		
Formula	Number		
Worked example	Data from ONS	Good performance	A change to the employment rate is not a measure of performance of NFDC, rather it is an indicator of the wider health of the local and national economy
Collection interval	Annual. Current data covers the period October 2022 to September 2023 and was published in November 2023	Data source	The data source is the Office for National Statistics (ONS) Annual Population Survey
Return format	Percentage (%)	Decimal places	One
Reporting frequency	Annual	Data availability	Annual data October up to and including September, published year end + 2 months (i.e. November)
Target rationale	This is a monitor only indicator		

Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	N/A	N/A	N/A	N/A	Monitor
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	N/A	N/A	N/A	N/A	Monitor
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	N/A	N/A	N/A	N/A	Monitor
	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total
	N/A	N/A	N/A	N/A	Monitor
Reporting organisation	Economic Development, NFDC				
Spatial level	District council				
Further guidance	Estimates of employment are based on the Annual Population Survey. ONS data on employment, unemployment and economic inactivity in New Forest can be found at www.ons.gov.uk/visualisations/labourmarketlocal/E07000091/#employment-rate				
Accountable Service Manager	James Carpenter		Agreed date: 08/04/2024		
Data owner	Sally Igra		Agreed date: 08/04/2024		

PROSPERITY THEME – Priority: Championing skills and access to job opportunities			
NFDC ID - Short name	033 - Proportion of employee jobs with hourly pay below the living wage.		
Long name	Estimates of the number and proportion (in percentage terms) of UK employee jobs with hourly pay below the living wage, as defined by the Living Wage Foundation.		
Rationale and context	<p>Proportion of employee jobs paid below the living wage are an indicator of the 'quality' of jobs within a local economy, especially in a district where the hospitality sector is an important employer. Nationally, hospitality ('Accommodation and food services') had the highest proportion of jobs paid below the Living Wage in April 2021. The Corporate Plan acknowledges the indivisible link between access to a place to live and employment as part of a joined-up approach to helping make the New Forest as prosperous a place as it can be. NFDC will work with partners to ensure the district meets the needs of its businesses and residents in order to support high quality employment, economic growth and investment.</p>		
Definition	<p>The data is based on estimates from the Annual Survey of Hours and Earnings (ASHE). ASHE covers employee jobs in the United Kingdom. It does not cover the self-employed, nor does it cover employees not paid during the reference period. Hourly and weekly estimates are provided for the pay period that included a specified date in April. They relate to employees on adult rates of pay, whose earnings for the survey pay period were not affected by absence. Annual estimates are provided for the tax year that ended on 5th April in the reference year. They relate to employees on adult rates of pay who have been in the same job for more than a year. ASHE is based on a 1% sample of jobs taken from HM Revenue and Customs' Pay As You Earn (PAYE) records. Consequently, individuals with more than one job may appear in the sample more than once. ASHE data are weighted to UK population totals from the Labour Force Survey (LFS) based on classes defined by region, occupation, age and sex.</p>		
Formula	Number		
Worked example	Data from ONS	Good performance	A change to the proportion (in percentage terms) of employee jobs with hourly pay below the living wage is not a measure of performance of NFDC, rather it is an indicator of the wider health of the local & national economy and the quality of jobs within the district.
Collection interval	Annual Data; 2023 data released in January 2024	Data source	The data source is the Office for National Statistics (ONS) Annual Survey of Hours and Earnings (ASHE)
Return format	Percentage (%)	Decimal places	One
Reporting frequency	Annual	Data availability	Annual Data released year end + 1 month (i.e. January)

Target rationale	This is a monitor only indicator				
Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	N/A	N/A	N/A	N/A	Monitor
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	N/A	N/A	N/A	N/A	Monitor
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	N/A	N/A	N/A	N/A	Monitor
	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total
N/A	N/A	N/A	N/A	Monitor	
Reporting organisation	Economic Development, NFDC				
Spatial level	District council				
Further guidance	The data source is the Office for National Statistics (ONS) Annual Survey of Hours and Earnings (ASHE)				
Accountable Service Manager	James Carpenter		Agreed date: 08/04/2024		
Data owner	Sally Igra		Agreed date: 08/04/2024		

FUTURE NEW FOREST THEME – Priority: Putting our customers at the heart					
NFDC ID - Short name	034 - Resident satisfaction with Council services				
Long name	Percentage resident satisfaction with Council services in perception measures.				
Rationale and context	It is important that we deliver good services and that these are gauged by our residents. This measures uses satisfaction scores of our resident survey conducted every 2 years, starting from 2022.				
Definition	Taking the perception score from our service, those answering the top two satisfaction scores as a proportion of all scores.				
Formula	Total number of respondents answering top two scores / total number of respondents				
Worked example	(375 / 500) * 100 = 75.0%	Good performance		High	
Collection interval	2 years	Data source		Resident survey	
Return format	Percentage (%)	Decimal places		One	
Reporting frequency	2 years	Data availability		2 years	
Target rationale	Residents must consciously give a positive (and not indifferent or negative response).				
Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	N/A	N/A	N/A	N/A	78%
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	N/A	N/A	N/A	N/A	N/A
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	N/A	N/A	N/A	N/A	78%
	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total
	N/A	N/A	N/A	N/A	N/A
Reporting organisation	Performance, NFDC				
Spatial level	District council				

Further guidance		
Accountable Service Manager	Saq Yasin	Agreed date: 19/04/2024
Data owner	Saq Yasin	Agreed date: 19/04/2024

FUTURE NEW FOREST THEME – Priority: Putting our customers at the heart					
NFDC ID - Short name	035 - Staff satisfaction score with NFDC ICT services.				
Long name	Staff survey average satisfaction score of 3.5 or higher (out of 5) for the question what would be your overall rating of the NFDC ICT service				
Rationale and context	Designed to monitor how effective the ICT service is perceived to be by council staff with questions designed around specific topics to allow further focus. The aim is measuring the average 'satisfaction' internally on the quality of ICT services. 3.5 would be the target average across all responses to that question.				
Definition	[For the question, What would be your overall rating of the NFDC ICT service]. Average of all respondent scores				
Formula	AVERAGE of score responses				
Worked example	=AVERAGE (of all scores)	Good performance	>=3.5		
Collection interval	Annual	Data source	Internal Staff Survey scores		
Return format	Number (Num)	Decimal places	One		
Reporting frequency	Annual	Data availability	Annual		
Target rationale	Designed to measure perceived satisfaction from internal staff of the digital services offered to them in order to support delivery of council services. Where targets are not met, feedback will be explored and opportunities for continuous improvement explored.				
Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	N/A	N/A	N/A	N/A	>=3.5
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	N/A	N/A	N/A	N/A	N/A
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	N/A	N/A	N/A	N/A	>=3.5
	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total
N/A	N/A	N/A	N/A	N/A	
Reporting organisation	ICT, NFDC				

Spatial level	District council	
Further guidance	Industry best practice recognises staff surveys as a tool to collect feedback to feed into action plans for continuous improvement	
Accountable Service Manager	Rich Bird/ Kim Gray	Agreed date: 26/04/2024
Data owner	Rich Bird/ Kim Gray	Agreed date: 26/04/2024

FUTURE NEW FOREST THEME – Priority: Putting our customers at the heart					
NFDC ID - Short name	036 - Resident satisfaction score with the quality of NFDC digital services				
Long name	Resident survey average satisfaction score of 3.5 or higher (out of 5) for the question How do you rate the quality of digital services at the council				
Rationale and context	Designed to monitor how effective the councils’ digital services are perceived to be by our residents with questions designed around specific topics to allow further focus. The aim is measuring the average ‘satisfaction’ externally on the quality of Digital services. 3.5 would be the target average across all responses to that question.				
Definition	[For the question, How do you rate the quality of digital services at the council]. Average of all respondent scores				
Formula	AVERAGE of score responses				
Worked example	=AVERAGE (of all scores)	Good performance	>=3.5		
Collection interval	2 years	Data source	External Resident survey scores		
Return format	Number (Num)	Decimal places	One		
Reporting frequency	Annual	Data availability	Annual		
Target rationale	Designed to measure perceived satisfaction from our residents of the digital services offered to them in order to support delivery of council services. Where targets are not met, feedback will be explored and opportunities for continuous improvement explored				
Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	N/A	N/A	N/A	N/A	>=3.5
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	N/A	N/A	N/A	N/A	N/A
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	N/A	N/A	N/A	N/A	>=3.5
	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total
N/A	N/A	N/A	N/A	N/A	
Reporting organisation	ICT, NFDC				

Spatial level	District council	
Further guidance	Industry best practice recognises staff surveys as a tool to collect feedback to feed into action plans for continuous improvement	
Accountable Service Manager	Rich Bird/ Kim Gray	Agreed date: 26/04/2024
Data owner	Rich Bird/ Kim Gray	Agreed date: 26/04/2024

FUTURE NEW FOREST THEME – Priority: Being an employer of choice					
NFDC ID - Short name	037 - Percentage of vacancies filled first time.				
Long name	Percentage of NFDC vacancies filled in the first recruitment round.				
Rationale and context	We want to attract the best staff and ensure our recruitment processes are as effective as possible. We will consider new ways of ensuring we have a competitive advantage in recruiting new staff.				
Definition	This will count all new posts or existing posts that have become vacant. The first round of recruitment shall be the first wave of recruitment activity (ultimately, unsuccessful round)				
Formula	No of second or more recruitments waves for unique posts / total number of posts advertised over the reporting period.				
Worked example	If there were 5 posts, 2 recruited first time, numerator would be 2. Denominator would be 5. In this case, $2/5 \times 100 = 40\%$	Good performance		Good performance will be typified by higher percentages	
Collection interval	Calendar Quarters (for the previous 3 months)	Data source		iTrent	
Return format	Percentage (%)	Decimal places		One	
Reporting frequency	Quarterly	Data availability		We would want this at Q end	
Target rationale	80% is a good target to aim for, considering difficulties in recruitment Nationally in Local Government.				
Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	80%	80%	80%	80%	80%
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	80%	80%	80%	80%	80%
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	80%	80%	80%	80%	80%
	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total
80%	80%	80%	80%	80%	
Reporting organisation	Recruitment Team, Human Resources, NFDC				

Spatial level	District council	
Further guidance	N/A	
Accountable Service Manager	Heleana Aylett	Agreed date: 08/04/2024
Data owner	Heleana Aylett	Agreed date: 08/04/2024

FUTURE NEW FOREST THEME – Priority: Being an employer of choice					
NFDC ID - Short name	038 - Percentage staff turnover.				
Long name	The rate of staff leaving NFDC.				
Rationale and context	Although a degree of turnover is healthy and brings outside experience into the authority, high turnover brings unnecessary costs and retention rates need to be monitored in this respect				
Definition	This will include all turnover of staff including permanent, fixed term and temporary posts. It will include resignations and contract terminations.				
Formula	Number of leavers/Number of staff				
Worked example	If the total number of leavers in a year is 90, then 90/800 (total staff average) = 11%	Good performance		Good performance will be typified by a decreasing rate.	
Collection interval	Annual	Data source		iTrent	
Return format	Percentage (%)	Decimal places		One	
Reporting frequency	Annual	Data availability		Annual	
Target rationale	The turnover rate for 2022/23 was 13.48%. A realistic target would be 11%.				
Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	N/A	N/A	N/A	N/A	11%
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	N/A	N/A	N/A	N/A	11%
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	N/A	N/A	N/A	N/A	11%
	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total
N/A	N/A	N/A	N/A	11%	
Reporting organisation	Human Resources, NFDC				
Spatial level	District council				

Further guidance	N/A	
Accountable Service Manager	Heleana Aylett	Agreed date: 08/04/2024
Data owner	Heleana Aylett	Agreed date: 08/04/2024

FUTURE NEW FOREST THEME – Priority: Being an employer of choice					
NFDC ID - Short name	039 - Average number of days sickness absence per employee.				
Long name	Average number of days sickness absence per NFDC FTE employee.				
Rationale and context	We want to ensure our colleagues can remain at work well in an environment that supports their health and wellbeing. We will review our absence management framework to ensure it strikes the balance of proactive attendance management with effective health and wellbeing support.				
Definition	This will include all sickness absences over a 12 months rolling period for all employees.				
Formula	Number of sickness absence days / FTE				
Worked example	If there were 7000 sickness days / 800 FTE = 8.75 sickness days per FTE over 12 months	Good performance	Good performance will be typified by a decreasing rate		
Collection interval	Calendar quarters (for the previous 3 months)	Data source	iTrent		
Return format	Number (Num)	Decimal places	Two		
Reporting frequency	Quarterly	Data availability	Monthly		
Target rationale	The Councils current absence rate is 9.88 days per FTE. The CIPD Health and Wellbeing Survey 2023 identified the average public sector rate is 10.6 days per FTE. In 2020 the Councils absence rate was 8.66 days per FTE and CIPD identified a UK public sector average of 8 days. The Council is working toward returning to the pre-pandemic absence rate aiming for 8 days per FTE.				
Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	2	2	2	2	8
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	2	2	2	2	8
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	2	2	2	2	8
	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total
2	2	2	2	8	

Reporting organisation	Human Resources, NFDC	
Spatial level	District council	
Further guidance	CIPD Health and Wellbeing Data	
Accountable Service Manager	Heleana Aylett	Agreed date: 08/04/2024
Data owner	Sophie Taylor	Agreed date: 08/04/2024

FUTURE NEW FOREST THEME – Priority: Being an employer of choice					
NFDC ID - Short name	040 - Number of council apprenticeships				
Long name	Number of apprentices currently in posts at NFDC and the number of existing staff undertaking an apprenticeship.				
Rationale and context	Learning opportunities and the development of our staff will be a key element of becoming an Employer of Choice.				
Definition	This will include those on full apprenticeships and also existing staff undertaking an apprenticeship.				
Formula	Number of staff on recognised apprenticeships				
Worked example	Number of apprenticeships	Good performance		Good performance will be typified by an increase in the rate.	
Collection interval	Annual	Data source		LMS	
Return format	Number (Num)	Decimal places		One	
Reporting frequency	Annual	Data availability		Annual	
Target rationale	Delivery of the People Strategy will inform the resources required to be able to focus on the training and development of our staff, including apprenticeships.				
Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	Monitor	Monitor	Monitor	Monitor	Monitor
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	TBC	TBC	TBC	TBC	TBC
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	TBC	TBC	TBC	TBC	TBC
	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total
	TBC	TBC	TBC	TBC	TBC
Reporting organisation	Human Resources, NFDC				
Spatial level	District council				

Further guidance	N/A	
Accountable Service Manager	Heleana Aylett	Agreed date: 08/04/2024
Data owner	Heleana Aylett	Agreed date: 08/04/2024

FUTURE NEW FOREST THEME – Priority: Being financially responsible					
NFDC ID - Short name	041 - Percentage variance to Council budget +/- (General fund budget variations).				
Long name	The percentage in year anticipated budget variation from the approved budget.				
Rationale and context	To ensure that the Council's net expenditure remains within an acceptable variation level from the approved budget.				
Definition	All reported budget variations from the approved budget as a percentage of the set budget for the year.				
Formula	Net Budget variations/Total Original Net Budget Requirement				
Worked example	If budget variation is +£250,000 and total budget is £25m, reported variance would be 1.00%	Good performance		Good performance will be typified by variations remaining within tolerance set (+/- 3%)	
Collection interval	Quarterly	Data source		Unit 4/ Cabinet Financial Monitoring Reports	
Return format	Percentage (%)	Decimal places		One	
Reporting frequency	Quarterly	Data availability		Quarterly	
Target rationale	+/-3% variation is considered to be a reasonable tolerance level within reserve amounts available				
Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	+/- 3%	+/- 3%	+/- 3%	+/- 3%	+/- 3%
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	+/- 3%	+/- 3%	+/- 3%	+/- 3%	+/- 3%
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	+/- 3%	+/- 3%	+/- 3%	+/- 3%	+/- 3%
	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total
+/- 3%	+/- 3%	+/- 3%	+/- 3%	+/- 3%	
Reporting organisation	Accountancy, NFDC				
Spatial level	District council				

Further guidance	N/A	
Accountable Service Manager	Kevin Green	Agreed date: 09/04/2024
Data owner	Kevin Green	Agreed date: 09/04/2024

FUTURE NEW FOREST THEME – Priority: Being financially responsible					
NFDC ID - Short name	042 - Percentage variance to Housing Revenue budget +/- (HRA budget variations).				
Long name	The percentage in year anticipated budget variation from the approved budget.				
Rationale and context	To ensure that the Council's net expenditure remains within an acceptable variation level from the approved budget.				
Definition	All reported budget variations from the approved budget as a percentage of the set budget for the year.				
Formula	Net Budget variations/Total Original Income or Expenditure Budget				
Worked example	If budget variation is +£100,000 and total budget is £30m, reported variance would be 0.33%	Good performance		Good performance will be typified by variations remaining within tolerance set (+/- 3%)	
Collection interval	Quarterly	Data source		Unit 4/ Cabinet Financial Monitoring Reports	
Return format	Percentage (%)	Decimal places		One	
Reporting frequency	Quarterly	Data availability		Quarterly	
Target rationale	+/-3% variation is considered to be a reasonable tolerance level within reserve amounts available				
Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	+/- 3%	+/- 3%	+/- 3%	+/- 3%	+/- 3%
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	+/- 3%	+/- 3%	+/- 3%	+/- 3%	+/- 3%
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	+/- 3%	+/- 3%	+/- 3%	+/- 3%	+/- 3%
	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total
+/- 3%	+/- 3%	+/- 3%	+/- 3%	+/- 3%	
Reporting organisation	Accountancy, NFDC				
Spatial level	District council				

Further guidance	N/A	
Accountable Service Manager	Kevin Green	Agreed date: 09/04/2024
Data owner	Kevin Green	Agreed date: 09/04/2024

FUTURE NEW FOREST THEME – Priority: Being financially responsible					
NFDC ID - Short name	043 - Percentage of Council Tax collected in year				
Long name	The percentage of council tax due to be collected in the year.				
Rationale and context	The percentage of council tax due in 2024/25 collected in the year.				
Definition	The percentage of council tax due in 2024/25 collected in the year.				
Formula	The total amount of council tax collected as a percentage of the total amount of council tax due				
Worked example	If we are due to collect £100m and we collect £95m our collection rate is 95%	Good performance	We aim to be at least 95% by the end of Q4		
Collection interval	Calendar Quarters (for the previous 3 months)	Data source	NEC		
Return format	Percentage (%)	Decimal places	One		
Reporting frequency	Quarterly	Data availability	Monthly		
Target rationale	We aim to maximise collection. Cumulative target.				
Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	98.5% by Q4	98.5% by Q4	98.5% by Q4	98.5% by Q4	98.5%
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	98.5% by Q4	98.5% by Q4	98.5% by Q4	98.5% by Q4	98.5%
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	98.5% by Q4	98.5% by Q4	98.5% by Q4	98.5% by Q4	98.5%
	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total
98.5% by Q4	98.5% by Q4	98.5% by Q4	98.5% by Q4	98.5%	
Reporting organisation	Revenue and Benefits, NFDC				
Spatial level	District council				

Further guidance	N/A	
Accountable Service Manager	Ryan Stevens	Agreed date: 09/04/2024
Data owner	Ryan Stevens	Agreed date: 09/04/2024

FUTURE NEW FOREST THEME – Priority: Being financially responsible					
NFDC ID - Short name	044 - Percentage of Non-domestic Rates collected in year				
Long name	The percentage of non-domestic rates due to be collected in the year.				
Rationale and context	The percentage of non-domestic rates due in 2024/25 collected in the year.				
Definition	The percentage of non-domestic rates due in 2024/25 collected in the year.				
Formula	The total amount of business rates collected as a percentage of the total amount of business rates due				
Worked example	If we are due to collect £100m and we collect £95m our collection rate is 95%	Good performance		We aim to be at least 95% by the end of Q4	
Collection interval	Calendar Quarters (for the previous 3 months)	Data source		NEC	
Return format	Percentage (%)	Decimal places		One	
Reporting frequency	Quarterly	Data availability		Monthly	
Target rationale	We aim to maximise collection. Cumulative target.				
Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	98.5% by Q4	98.5% by Q4	98.5% by Q4	98.5% by Q4	98.5%
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	98.5% by Q4	98.5% by Q4	98.5% by Q4	98.5% by Q4	98.5%
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	98.5% by Q4	98.5% by Q4	98.5% by Q4	98.5% by Q4	98.5%
	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total
98.5% by Q4	98.5% by Q4	98.5% by Q4	98.5% by Q4	98.5%	
Reporting organisation	Revenue and Benefits, NFDC				
Spatial level	District council				

Further guidance	N/A	
Accountable Service Manager	Ryan Stevens	Agreed date: 09/04/2024
Data owner	Ryan Stevens	Agreed date: 09/04/2024

FUTURE NEW FOREST THEME – Priority: Designing modern and innovative services					
NFDC ID - Short name	045 - Benefit realisation from ICT investment				
Long name	70% of benefits realised at project closure across all ICT projects in the annual work programme.				
Rationale and context	Designed to track successful benefits realisation within ICT projects through regular investment of the Digital Strategy. Benefits could be financial, efficiency, effectiveness, compliance for example.				
Definition	Each project will have a defined set of objectives with this KPI monitoring YES / NO realisation. Further details of benefit realisation is covered within project level documentation.				
Formula	$(\text{Total Project Benefits Realised} / \text{Total ICT Project Benefits}) \times 100$				
Worked example	$(70 / 100) * 100 = 70\%$	Good performance		>=70%	
Collection interval	6 Months	Data source		ICT Project Reporting	
Return format	Percentage (%)	Decimal places		One	
Reporting frequency	Every 6 Months	Data availability		Every 6 Months	
Target rationale	Measuring performance of projects through benefits realisation to provide assurance of ICT investment and return on investment.				
Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	70%	70%	70%	70%	70%
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	70%	70%	70%	70%	70%
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	70%	70%	70%	70%	70%
	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total
	70%	70%	70%	70%	70%
Reporting organisation	ICT, NFDC				
Spatial level	District council				

Further guidance	KPI will depend on the number of projects in progress and reaching a status of closed. This time could mean the KPI is static for extended periods until project closure or post project realisation.	
Accountable Service Manager	Rich Bird	Agreed date: 26/04/2024
Data owner	Rich Bird	Agreed date: 26/04/2024

FUTURE NEW FOREST THEME – Priority: Designing modern and innovative services					
NFDC ID - Short name	046 - Percentage of ICT incidents resolved within SLA.				
Long name	Percentage of ICT incidents resolved within SLA.				
Rationale and context	To measure the volume of incident tickets being logged that are being resolved in a timely manner and within set parameters.				
Definition	Includes all ICT incidents that are logged with the ICT Service Desk which have been resolved within its service level agreement.				
Formula	$(\text{Total number of incidents resolved within SLA parameters} / \text{Total number of incidents}) \times 100$				
Worked example	$(95 / 100) * 100 = 95\%$	Good performance	Good performance is indicated by the target being met or within an agreed tolerance		
Collection interval	Quarterly	Data source	ICT Service Management Platform		
Return format	Percentage (%)	Decimal places	One		
Reporting frequency	Quarterly	Data availability	Quarterly		
Target rationale	Target to resolve incidents within an agreed SLA and restore digital services in a timely manner for staff to continue providing council services.				
Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	95%	95%	95%	95%	95%
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	95%	95%	95%	95%	95%
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	95%	95%	95%	95%	95%
	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total
	95%	95%	95%	95%	95%
Reporting organisation	ICT, NFDC				
Spatial level	District council				

Further guidance	Industry best practice such as ITIL, recognises the importance of resolving incidents within an agreed SLA.	
Accountable Service Manager	Kim Gray	Agreed date: 26/04/2024
Data owner	Kim Gray	Agreed date: 26/04/2024

FUTURE NEW FOREST THEME – Priority: Designing modern and innovative services					
NFDC ID - Short name	047 - ICT projects to be delivered on time and on budget in the annual work programme				
Long name	70% of ICT projects are delivered on time and on budget in the annual work programme when measuring against the latest project board approved project plan.				
Rationale and context	Designed to monitor project delivery being on time and on budget as two examples of typical project success measures.				
Definition	Each project will have an agreed budget with appropriate spend tracking against this amount. Project plans can evolve across the lifetime of a project so the tracked 'on time' element of the KPI will be against the latest approved project plan or approved strategic delivery date.				
Formula	$(\text{Total Projects on Time and On Budget} / \text{Total Number of ICT Projects}) \times 100$				
Worked example	$(70 / 100) * 100 = 70\%$	Good performance		>=70%	
Collection interval	Quarterly	Data source		ICT Project Reporting	
Return format	Percentage (%)	Decimal places		One	
Reporting frequency	Quarterly	Data availability		Quarterly	
Target rationale	Aiming to deliver projects in a timely manner and within agreed budget thresholds.				
Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	70%	70%	70%	70%	70%
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	70%	70%	70%	70%	70%
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	70%	70%	70%	70%	70%
	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total
70%	70%	70%	70%	70%	
Reporting organisation	ICT, NFDC				
Spatial level	District council				

Further guidance	KPI will depend on the number of active projects, can be updated quarterly to reflect in progress status of budget and plan then a final review of the project at closure stage.	
Accountable Service Manager	Rich Bird	Agreed date: 26/04/2024
Data owner	Rich Bird	Agreed date: 26/04/2024

FUTURE NEW FOREST THEME – Priority: Designing modern and innovative services					
NFDC ID - Short name	048 - Percentage unscheduled downtime for critical systems				
Long name	Percentage unscheduled downtime for critical systems				
Rationale and context	To measure availability of critical ICT infrastructure and applications				
Definition	Includes critical (tier 1) infrastructure services and applications that have a significant impact on service delivery if unavailable. This is for unscheduled downtime within hours (8am - 5pm Monday to Friday, excluding bank holidays)				
Formula	Percentage of unscheduled downtime within defined period This is a quantified amount of downtime for tier 1 systems (time unit) / availability for all tier 1 systems (time unit), expressed as a percentage				
Worked example	2/375 = 0.0053	Good performance	Good performance is indicated by the target being met and a decrease in the rate		
Collection interval	Quarterly	Data source	ICT Reporting: P1 incident management process		
Return format	Percentage (%)	Decimal places	Up to 2 (two)		
Reporting frequency	Quarterly	Data availability	Quarterly		
Target rationale	Target for critical system downtime to be kept to a minimum and core systems to be available as much as possible.				
Target profile	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024/25 Total
	<5%	<5%	<5%	<5%	<5%
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025/26 Total
	<5%	<5%	<5%	<5%	<5%
	Q1 2026	Q2 2026	Q3 2026	Q4 2026	2026/27 Total
	<5%	<5%	<5%	<5%	<5%
	Q1 2027	Q2 2027	Q3 2027	Q4 2027	2027/28 Total
<5%	<5%	<5%	<5%	<5%	
Reporting organisation	ICT, NFDC				

Spatial level	District council	
Further guidance	Industry best practice such as ITIL, recognises the importance of resolving incidents within an agreed SLA and proactive maintenance to prevent unplanned downtime.	
Accountable Service Manager	Kim Gray	Agreed date: 26/04/2024
Data owner	Kim Gray	Agreed date: 26/04/2024

RESOURCES AND TRANSFORMATION OVERVIEW AND SCRUTINY PANEL – 25 JULY 2024

CUSTOMER STRATEGY

1. RECOMMENDATIONS

- 1.1 That the Panel consider the Customer Strategy and recommend to Cabinet for approval.

2. INTRODUCTION AND BACKGROUND INFORMATION

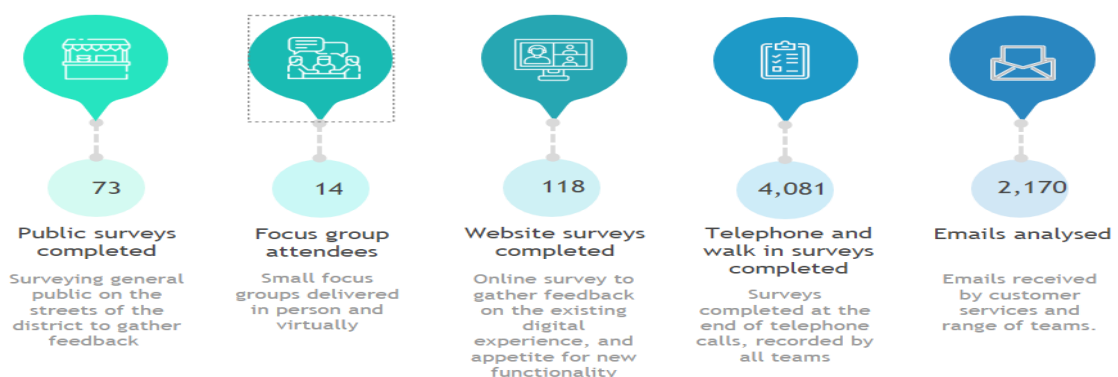
- 2.1 The recently approved Corporate Plan sets our vision of “Investing in our people and services to meet customer needs” and “putting the customer at the heart of what we do”, with the focus being on our customers to ensure we provide “easy to use services and efficient working practices and processes”. Underpinning the Corporate Plan is the Transformation Strategy, Future New Forest (Transforming tomorrow, together) which identifies four challenges facing the Council: financial, capacity, modernising services and climate. The strategy specifies four themes, of which Customer and Digital is one. The Customer and Digital theme is about how we redesign our services to improve the customer experience and make better use of technology. There are three objectives, these are:

1. Our customers will be at the heart of our digital-by-design approach
2. We will use data and insight to plan services, manage performance and direct our focus for transformation
3. We will have the right systems, processes, and devices to ensure work can be done in the right place, right time and in the most efficient way

- 2.2 The Customer Strategy sets out how we will provide services to our customers, whoever they are and however they want to interact with us. The Customer Strategy supports both our Corporate Plan and the Transformation Strategy and our commitment to our customers by ensuring the customer is central to our thinking when reviewing process, utilising technology to modernise services to be more efficient, releasing capacity and reducing our environmental impacts.

3. CUSTOMER INSIGHT

- 3.1 During the summer of 2023 we worked with Ignite consultancy to gather customer insight to understand our customers and to support shaping the strategy. The following activities were undertaken.



- 3.2 From the customer insight gathered there were some key themes, notably:
- customers want assurance that their contact is being dealt with along with clear timescales
 - customers want to be able provide information once
 - 33% of the emails received were follow-up
 - 66% of customers want to do things for themselves online
 - there should be a range of access channels – including non-digital for those customers unable to interact online

- 3.3 Customers also stated that:
- human contact gives us confidence
 - services are not always joined up
 - issues are usually resolved quickly when calling
 - staff are polite and professional
 - their feedback is not always listened to
 - they could not find, or do what they needed to do online, causing them to call

3.4 All of the insight gathered was considered when developing the Customer Strategy.

4. **CONSULTATION WITH STAFF AND PARTNERS**

4.1 Meetings were held with Change Champions who represented a range of teams from across the council. The group discussed the insight and research and current processes and procedures, alongside potential initiatives and technological enhancements which could be utilised to improve customer service. The strategy has also been discussed in Chief Executive staff briefings and shared with the Executive Management Team, the Leadership Team, and with teams providing customer services.

4.2 The draft strategy has been shared with Town and Parishes' where they provide an Information service on our behalf, residents who attended the focus groups in 2023, Tenant Involvement Group, and Citizens Advice New Forest. Feedback received from this consultation was reviewed and the strategy amended where appropriate.

5. **CUSTOMER OUTCOMES AND PRINCIPLES**

5.1 From the insight and research 4 key customer outcomes were considered which underpin the Customer Strategy, these are summarised as:

Understand	understanding the needs of our customers
Experience	providing customers with a positive experience
Access	providing a range of access channels for customers
Trust	keeping data secure and doing what we say

5.2 To achieve these outcomes four key principles have been considered, these are:

1	We will put customers at the heart of what we do
2	We will provide our customers with a consistent experience through all interactions with us
3	We will utilise technology to meet customer needs
4	We will use data to shape and improve service delivery

5.3 These outcomes and principles will be embedded into our culture across the Council, and we will ensure that when we are designing processes and procedures and implementing technology, we will do so with customer in mind to ensure we

meet our customers' needs. The strategy supports a two-way relationship with our customers, listening to feedback and working together to create efficient and accessible services and getting things right first time.

- 5.4 Within the strategy there is a Channel Strategy to support our digital by design approach as we know that some customers want to do things for themselves, have easy to use access to services and reduce the use of email. The strategy is clear to ensure that those customers not able to interact digitally will not be excluded.

6. CUSTOMER PROMISE AND STANDARDS

- 6.1 The Change Champions group developed a *Customer Promise* which defines the way that all staff across the council will deal with our customers and supports the delivery of the customer outcomes and principles. This ensures we listen and learn, provide a positive experience, be open and honest and take responsibility. The promise also defines how we want customers to interact with us.
- 6.2 The group have also developed corporate standards to support providing a consistent customer service across the council.
- 6.3 Managers will endorse and promote the promise and standards to ensure they are embedded and adhered to.

7. ACTION PLAN AND IMPLEMENTATION

- 7.1 The Customer Strategy is ambitious and within the strategy is an Action Plan which provides details on the range of activities, along with timescales, to be undertaken. The Action Plan has been considered to ensure alignment with the ICT Digital Strategy and workplan. There will be some *quick wins* and activities to embed the customer centric culture, but due to timescales for procurement, installing, testing and implementation, some changes will not occur straight away, such as a new Customer Relationship Manager.
- 7.2 Using resources from ICT, Transformation, Customer Services and key Officers from across the council, working groups will be established to deliver the activities in the Action Plan, and staff will be updated through various communication channels, including Monthly Meet and staff briefings, to ensure engagement.

8. CONCLUSION

- 8.1 The Customer Strategy sets out our vision and commitment to achieve the best possible experience for our customers and ensure there is a customer centric culture across the Council. It is ambitious and will take time to achieve. Although the strategy has utilising and enhancing technology to enable customers to self-service as an objective, we are committed to ensure nobody is excluded and that we still support vulnerable customers through telephone and face to face. The strategy applies to all council employees and having the customer at the heart of what we do will ensure processes are designed to meet their needs. This strategy supports the wider Transformation Strategy and Corporate Plan.

9. FINANCIAL IMPACT

- 9.1 There are financial implications with the investment in new technology that will support the customer strategy. These indicative costings, which are significant, are included in the Transformation Business Case. Understanding our customers, reducing avoidable contact, utilising technology, and working more efficiently will provide opportunities to reduce costs and/or release capacity.

10. CRIME AND DISORDER IMPLICATIONS

10.1 There are no crime and disorder implications.

11. ENVIRONMENTAL IMPLICATIONS

11.1 The customer strategy supports initiatives which promote positive environmental impacts, such as a reduction in paper usage.

12. EQUALITY AND DIVERSITY IMPLICATIONS

12.1 The customer strategy will ensure we understand the various channels different groups need to access our services and recognises that some customers are unable to access online services and is committed to supporting our vulnerable customers so that nobody is excluded. This includes providing access via telephone and in person for complex matters and considering customer needs when designing services.

For further information contact:

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and Customer Services
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Background Papers:

Draft Customer Strategy



Customer Strategy

2024-2028



Foreword

I am very pleased to support the publication of this strategy as part of the Council's ongoing transformation programme "Future New Forest, transforming tomorrow, together" where we will have committed to "investing in our people and services to meet customer needs". Customer is one of the four 4 themes that underpins the Transformation strategy, and will support and compliment other key strategies, such as digital and tenancy engagement, to ensure the customer is at the heart of what we do.

This strategy sets out the Council's vision and commitment to achieve the best possible experience for our customers, whoever they are (residents, businesses, or partners) and whenever they deal with us. This strategy sets out our plan to achieve this by implementing 4 key principles:

- creating a culture of putting customers at the heart of what we do
- ensuring customers receive a consistent experience when interacting with us
- utilising technology and embedding a digital by design culture across the Council
- use the data we hold to provide a better customer experience

Through consultation we recognise that many of our customers want a more immediate, personalised service and expect to be able to contact us when it is convenient for them. I am keen to ensure all customer channels, including digital, telephone and face-to-face, enhance the customer experience and are available to support our vulnerable customers. Equally our changes will aim to reduce avoidable contact and provide opportunities for greater customer feedback, whilst our capacity to reflect and respond to this will be built into our services to improve them. We will ensure our customers can interact with us easily, effectively, and when convenient, and we will manage expectations. A new set of customer standards will ensure a consistent experience from services across the council, and we will regularly monitor and review feedback and performance against them.

We want to ensure the customer receives a professional and modern experience when interacting with us and I am proud of how this strategy supports this aim.

Cllr Jill Cleary

Leader, New Forest District Council



Introduction

This strategy sets out the Council's plan for delivering our services to customers across multiple teams and communication channels.

We have recognised that our view of customers is not always joined up and that customers can be a customer of more than one service across the Council. We will transform how we work and deliver our services, focussing on understanding and examining our customers' experience, expectations to improve choices, our systems, and processes.

We must develop more cost-effective ways for our customers to interact with us, and support customers to self-help wherever possible by embracing technological solutions.

Therefore, we will ensure that:

- our customers have easy access to information
- we reduce demand through design of our services,
- we have the right skills and capacity to support complex or vulnerable customers
- we embed a positive customer focussed culture meeting agreed standards of service across the Council

The need for us to provide an effective and efficient customer experience is important to help us meet increasing demand for services, tackle complex problems and work within our resource levels. Our ambition is to get things right first time, every time, and deliver high quality, value for money services organised around our customers needs.

In delivering this Customer Strategy we aim to raise the profile of the customer throughout the organisation and ensure that our plans, decisions, actions, and culture, are customer focused. Customers will benefit from the delivery of this strategy as they will be able to give feedback, be listened to, have assurance, and have services designed to meet their needs. This will ensure we understand our customers, build trust, deliver services that are accessible and provide a consistent professional customer experience in a culture where we strive to continually improve the customer experience.

Our customers

Who are our customers?

We have 83,077 households and 7,900 businesses across the district, and a population of 175,778 residents, which is expected to increase to 182,800 by 2029.

The Council is the landlord to 5,200 tenants.

45% of our residents are economically inactive.

55.2% of our residents are of employable age.

29.4% of residents are aged over 65.

93% of residents access the internet (source: Residents Survey 2022).

3.6% of the population is aged 85 and above, this is forecast to be 6% in 2029.

28% of the population live in rural areas.

4 out of 114 neighbourhoods across the New Forest are in the top 20% most deprived neighbourhoods for income deprivation in England (2019 Index of Multiple Deprivation).

Customer experience in numbers

Delivering services to local residents and businesses, enabling them to report and request services, dealing with enquiries across all service channels and enabling residents to access information, is a significant part of our core purpose.

During 2022 and 2023

The following information about customer interactions gives just a flavour of the volume of interactions handled by our teams during 2022/23.

Number of phone calls - 151,801 from our Housing, Revenues and Benefits and Customer Services.

3,612 webchats and 102,063 emails to general inbox of highest customer contact teams and our website had over 1.1 million page views

There were 34,141 in person visits to our Information Offices.

The Council operates 4 Information Offices located in Hythe, Lymington, Lyndhurst and New Milton, and work in partnership with 4 town and parishes in Fawley, Fordingbridge, Ringwood, and Totton, to deliver in person customer services and support.

90% of customer interactions currently arrives via phone or email, even if an online form is used (Source: analysis of customer contacts 2023)

Our data tells us we have different types of customer enquiries for council services, and these can be summarised as follows:

- initial access. For example, reporting, paying, applying, or enquiring.
- report access (avoidable contact). For example, following up.
- mistaken access. For example, non-council services.
- ongoing interactions. For example, visits and inspections.

Our challenges

New Forest District Council (NFDC) has an ambitious Corporate Plan for 2024 to 2028 to meet the needs of local residents and businesses. We will be delivering this plan in the context of a rapidly changing world, and to support this we are delivering a transformation strategy.

To deliver the outcomes of the corporate plan, we are going to need to change as an organisation, responding to four key challenges identified in the transformation strategy which will impact every aspect of our operation. How we will interact with our customers is one of the objectives of the transformation strategy. We need to develop more cost-effective ways for our customers to contact us. We need to manage demand for our services, supporting customers to self-help and embrace technology, whilst recognising some customers will need support, and to improve the customer experience.

1. Modernising services

We will need to focus on customer needs and outcomes when redesigning services and seek feedback to improve. Our systems and processes need to keep pace with the advancing digital technologies and the impact these are having on people's lives and expectations.

There is growing demand for digital access to council services, accompanied by a high level of access to the internet and growing capability among our residents. We need to improve the customer experience by joining up our data and systems. We need to make it easier for customers to find the services they need and be able to connect with us at a time and place they choose.

2. Financial constraints

Rising costs of service delivery combined with new challenges and burdens means we are facing potentially significant budget deficits over the next four years. We must continue to find ways to reduce the cost of delivery and we must embed financial responsibility into all that we do. We will need to reduce service costs through redesign and encourage adoption of lower costs channels without impacting service quality.

3. Capacity and capability

The world is changing fast with the rapid growth of technology and artificial intelligence (AI). We need to develop new skills to respond to the opportunities and challenges we face. However, most councils are facing recruitment and retention problems. We need to identify and release capacity from parts of the organisation through greater use of technology to enable increased focus on our priorities. We need to develop a more agile workforce to respond to a changing local government landscape and a digital world without leaving our vulnerable customers behind.

4. Climate and sustainability

Meeting national and local targets to reduce emissions and support nature will require us to change the way we use resources and deliver services. We declared a Climate Change and Nature Emergency in 2021 and are committed to reducing emissions to reach net zero and supporting nature recovery. We must work in partnership with residents, businesses, and other public services to make a real impact. These changes will affect all aspects of council operations, and we will need to design services to be delivered in ways that promote positive environmental impacts.

Opportunities for change

We have undertaken extensive customer research to find out the views of our customers. This can be summarised as:

Connecting services

- Services are not always joined up
 - » Customers said they have to provide the same information to different teams
 - » 29% of telephone calls are transferred
 - » Customers are not always able to give feedback

A consistent customer experience

- There can be different customer experiences depending on which service you are accessing
 - » Customers said that they did not always get an acknowledgement or assurance on timescales
 - » 33% of emails received were follow up enquiries chasing the original enquiry

Increasing online capabilities

- Some customers want to be able to do more online
 - » 84% of customers from our web survey said it was easy to find information on our website
 - » 47% of customers said they could not find what they were looking for online, or do what they needed to do online
 - » 66% of customers want an online account where they can do things for themselves
 - » 74% of customers want to be able to upload documents online
 - » 71% of customers want easier forms to fill in

Increasing online capabilities

- We do not always utilise all the data we hold
 - » We hold lots of data and do not always use this to help design services

We are mindful that there are 10% of our customers who are not comfortable using online services and 7% of our population have no access to the internet. This strategy is clear in that we will continue to support our vulnerable customers.

Customer feedback 2023

"Provides an excellent service over the phone"

"Issues are usually resolved quickly when calling up the council"

"We don't like being passed around when we call"

"Human contact gives us confidence. We want to know it'll be done"



Customer outcomes

From reviewing customer feedback and the customer research we undertook, we have identified 4 key organisational outcomes that we will embed into our culture across the council as part of this customer strategy. This will underpin what we do and will ensure that customers have a professional experience when interacting with us.

In delivering our services we will understand our customers, provide a consistent and professional experience, enable customers to contact us in different ways and be trusted.

1. Understand

We will understand our customers and communities: who they are, what they need and their priorities and why they have contacted us. We will talk to them, listen to their feedback, and we will act on it where possible. We will create opportunities to engage with our customers. We will use customer data and insight to plan our services.

2. Experience

We will provide an efficient and professional customer experience. We will automate tasks where this can improve communication with customers and speed up outcomes. We will connect teams and share information so that customers do not have to repeat themselves. We will use feedback to continuously improve our customers' experience.

3. Access

Customers will be able to contact us in a range of different ways, according to their needs, including by phone and face to face. We will ask customers about how they need to be contacted and respect those needs whenever we can. We will invest in technology to make it possible for customers to access all services online, on any device, at any time.

4. Trust

Our customers will trust us to act on their requests and have confidence however they contact us. Customers will be able to track and check the status of their requests. We will always be fair and honest. We will keep data secure and use it for the benefit of customers, and we will have a reputation as a professional and efficient organisation.



Our customer promise

Our Customer Promise defines the way that all of our staff across the council will deal with our customers, whether they are residents, businesses, partners, or suppliers. Our Customer Promise will help us to deliver our outcomes of understand, experience, access and trust.

Listen and learn

To understand we will listen and learn by:

- actively seeking your feedback to improve services
- monitoring customer demand to identify what we can do differently and respond accordingly
- making it simple for you to tell us if we get something wrong and follow up with you where required
- providing you with opportunities to be involved in shaping our services

Positive experience

To ensure you have a positive experience we will be clear with you by:

- doing things when we say we will
- working towards making our website accessible to everyone
- providing information that is clear and easy to understand
- providing clear guidance on different ways you can contact us

Fair treatment

To ensure access we will be open, honest and respectful by:

- treating you fairly and with respect
- being understanding, approachable, open and honest
- providing a professional service
- updating you on progress so you know what is happening next and by when

Taking responsibility

To build trust we will take responsibility by:

- taking ownership for resolving your problem with you
- actively seeking to resolve customer concerns
- setting clear expectations about our services
- working together to get the best outcome

A respectful environment

We would like you to:

- treat us with respect and courtesy
- tell us what you think about our services
- use our website and online services to access services and information you need if you can
- sign up to resident emails if able to do so
- provide information we request in time
- tell us when something changes



Our 4 principles

Our Customer Outcomes and Promise will shape how we provide services to meet customer needs.

Our whole organisation approach will ensure we embed consistent behaviours, measure performance, and constantly review our services. We will design our services with our outcomes in mind to meet the needs of customers and make the best use of technology. This will help us meet our challenges, reduce the cost of delivering services and allow us to focus even more on supporting customers with complex needs.

Central to our principles is that the customer will have a positive experience wherever, and however, they interact with us. Our four principles will have our outcomes at their core, these are:

Principle 1

Understand: we will put customers at the heart of what we do.

Principle 2

Experience: we will provide our customers with a consistent experience through all interactions with us.

Principle 3

Access: we will utilise technology to meet our customer's needs.

Principle 4

Trust: we will use data to shape and improve service delivery.



Principle 1

We will put the customer at the heart of what we do.

We will consider what is important to our customers and take a whole organisation approach to bring services together so that we join up services. We aim to reduce avoidable contact, use our resources effectively and ensure our customers receive a good experience, by reviewing our processes and designing services to meet our customer needs and delivering first time resolution. We will ask for feedback to tell us how we are doing, and we will make improvements where appropriate. This will ensure we understand our customers.

To ensure we understand our customer we will:

- review and redesign services to meet customer needs
- understand and address the causes of avoidable contact
- actively listen to our customers and enable customers to give feedback
- work with partners to support our customers
- ensure access to our services are inclusive
- learn when we get it wrong and have a clear and transparent complaints procedure with a feedback loop to improve services and ensure lessons are learned
- embed positive staff behaviours at all levels across the Council
- set up a resident customer focus groups to hear their views
- ensure council policies are customer focussed

How will this be measured

Measure 1:

Devise a customer service training programme and deliver refresher training every 2 years.

Target: All staff dealing with customers

Timescale: End of year 1

Measure 2:

New starters to undertake customer service training as part of their corporate induction.

Target: 100%

Timescale: End of year 1

Measure 3:

Monitor complaint trends to ensure improvements have been embedded and problems not recurring.

Target: 100% of all complaints

Timescale: End of year 1

Measure 4:

Reduce face to face visits for payments.

Target: By 20%

Timescale: End of year 2

Measure 5:

Develop a customer focus group.

Target: To hold 2 meetings a year

Timescale: End of year 2

Measure 6:

Number of key customer interactions reviewed to understand the customer journey.

Target: To review the 10 highest customer interactions

Timescale: Year 2



Principle 2

We will provide our customers with a consistent experience through all interactions with us.

We want to make interacting with us easy and effective and our teams work together to give customers an easy, convenient, and joined-up experience, with assurances given so customers do not need to follow up with further contact. We join up information and train staff so that you do not have to give us the same information multiple times. Our aim is to achieve excellent customer service and provide customers with a consistent experience.

To ensure we provide a professional experience we will:

- have clear processes so customers understand how to contact us and understand what to expect
- keep customers informed and provide assurance and timescales
- take responsibility and aim to get a first-time resolution.
- adopt an “every contact counts” approach, adding value to every contact
- set up a Council wide Customer Focus Group to share ideas and good practice
- train staff with key skill which are logged on our Learning Management System (LMS)
- review how phone call calls are answered to free up resources to focus on other tasks
- work with town and parishes to understand and support our customers
- promote and embed our Customer Promise and standards
- standardise processes involving customers and bring these together where similar

How will this be measured

Measure 1:

Reduce phone calls and call transfers.

Target: 10% reduction

Timescale: End of year 2

Measure 2:

Customer satisfaction surveys.

Target: To confirm once systems in place and baseline agreed

Timescale: End of year 2

Measure 3:

Staff complete training on our LMS.

Target: 100%

Timescale: End of year 2

Measure 4:

Quality assessments through sampling of calls for high customer contact services.

Target: To be agreed once baseline confirmed

Timescale: End of year 2

Principle 3

We will utilise technology to meet our customer's needs.

We make better use of technology to provide modern and efficient services to our customers and opportunities for them to do things for themselves and "self-serve." We help customers use our website and provide alternative methods for access for those who are not able to. This will ensure customers can access our services.

To ensure customers can access our services we will:

- increase online services so that customers can do things for themselves
- simplify processes and automate where possible
- enable customers to interact and access services digitally at a time that suits them
- enable customers to provide information once
- implement a new Customer Records Management system
- review our wider technology such as phone, Webchat, and email management
- ensure our webpages are accessible, up-to-date and easy to read on all devices
- reduce our paper usage wherever possible
- have information available for staff to deal with customer queries
- have devices so work can be done in the right place, right time, and the most efficient way
- work with partner organisations to build digital skills
- have digital champions who will work with staff to educate and promote digital activities

How will this be measured

Measure 1:

Increase digital payments.

Target: TBC

Timescale: End of year 1

Measure 2:

Ensure website is accessible 24/7.

Target: 100%

Timescale: End of year 1

Measure 3:

Reduce use of paper to shift interactions to digital methods for high transactions.

Target: To be agreed once baseline confirmed

Timescale: End of year 2

Measure 4:

Increase online forms and self-services for high customer contact and key transactions.

Target: TBC

Timescale: End of year 2

Measure 5:

Reduce number of cheque payments.

Target: 50%, Timescale: End of year 2

Target: 100%, Timescale: End of year 3



Principle 4

We will use data to shape and improve service delivery.

We keep data secure, accurate, and compliant and only ask for information that we need. We research and analyse data to understand and to help make decisions about services. We will join up the data we hold across different services to provide a positive experience for the customer and aim to create a “golden record” of our customers so we can see all their data and avoid having to repeat providing information. This will ensure customers trust the council.

To ensure customers can trust our services we will:

- hold council wide data for staff to view when interacting with customers
- provide services using data and insight to ensure that we meet customer needs
- ensure our records are stored securely, are accurate and up to date
- provide a simplified customer experience
- improve data analysis and use it inform decisions with the customer in mind
- monitor performance data to inform and support decision making and responses
- join up our view of data to provide better customer service and better understand needs
- review and redesign customer journeys across all channels

- use data to size our services according to need and demand

How will this be measured

Measure 1:

Up to date data retention policies and compliance.

Target: 100%

Timescale: End of year 1

Measure 2:

Number of interactions through a customer portal.

Target: To be confirmed once portal is available

Timescale: End of year 2



Customer standards

We strive not only to meet customer expectations but to exceed them. To achieve our values and deliver our 4 principles to ensure our customers have a consistent experience, no matter which service they contact, we will implement the following customer standards:

We will:

- aim to deal with your request by the first person you contact for all non-complex contact
- aim to answer your call in 3 minutes
- acknowledge customer contact and give timescales for replying when not able to do so immediately
- give a name, department, and contact number to call back when leaving a message
- always communicate clearly and in plain language
- respond to enquiries and written communication within 10 working days
- embed corporate response standards when using email, letters, record taking, and voicemails
- have online services which are accessible 24//7
- adhere to our corporate style guide for communications
- acknowledge, clarify, and respond to complaint within 10 days

Channel strategy

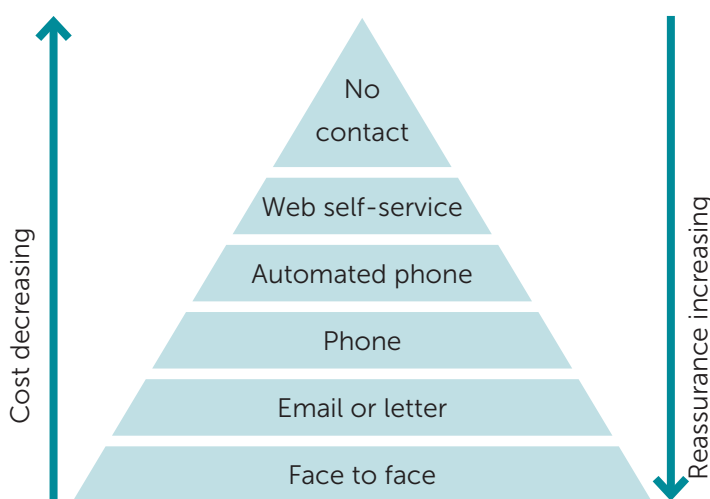
The channels through which public services are delivered and by which the public has contact with the Council, (for example by telephone, online, through social media, in person, or via other means), are an important part of how we provide our services, and there is an ongoing need for them to be managed effectively and efficiently for everyone. A channel strategy is an organisation's plan for the channels it will use to deliver services to, and interact with, its customers, and it explains how the council will meet the contact demands of its customers using the resources it has available and is not simply a plan to move service provision to online channels.

Research states that 99% of the UK is online and since the pandemic 65% of those have tried something new online, such as shopping or paying bills, and most (90%) have sustained this (Source: UK Consumer Digital Index 2022). We know that 93% of our residents have access to the internet (Residents survey 2022) and from our research we know our customers want to do more online, with access to easy-to-use forms, which are simple to complete, and at a time that suits them.

From our research we know customers like to contact the Council by telephone, as this gives assurance. However, we know that getting customers to do more online is cost effective and cheaper for the council, but assurance is needed. Providing access to services and being able to self-serve which is accessible and easy to use will mean customers can interact when convenient to them and avoid having to contact the council.

There is still the need for face to face and telephone contact and this is an important part

of our strategy to ensure we support vulnerable customers and that they are not excluded, our services will be inclusive and accessible. This may include using our offices to create hubs and have support available to customers where they can be supported.



This diagram shows how communication types that are high in reassurance will be high in cost, whilst types that are low in cost will be low in reassurance.

The channel strategy is part of the wider customer strategy and describes how the vision, outcomes and objectives of the customer strategy will affect how customers can contact the council in the future. There will be a mix of access channels, giving the customer choice, which are accessible, well managed and designed and customer experiences will be reviewed to improve access and customer journeys.



Our key channel strategy principles

Digital by design

We will provide a choice of contact channels, including telephone, for all our services.

We will prioritise development of digital channels for high demand, low complexity services, and services with high levels of avoidable demand.

Easy to access

We will simplify how customers contact us by providing one primary customer portal and minimising published phone numbers.

We will ensure our services are accessible and do not exclude those with disabilities or additional needs, for example translation services.

Meet customer needs

We will direct customers to the channels most likely to meet their needs.

We will prioritise telephone and face-to-face for customers who cannot use digital channels, have complex needs, or where these channels can help prevent future demand.

Keep customers informed

We will use digital channels to proactively update customers about cases they have raised and issues affecting their neighbourhoods, to reduce the need to contact and chase us.

We will keep all case-related information and updates between staff against their case, to provide them with the latest updates.

Minimise email and post

We will minimise the use of email and post as a channel for new requests and providing documents by utilising and encouraging use of digital channels.

Digital payments

We will prioritise digital channels for payments unless specific exemption criteria are met.



Key tasks

This strategy is ambitious and central to achieving our aims and meeting our future challenges. As we embark on our transformation journey, the four customer outcomes and principles will be applied to all transformational activity to ensure they support the objectives. We will embed this strategy over 4 years and there are several key tasks to undertake to provide the foundations to implementing.

Each part of this journey needs to be assessed to ensure it meets our aims, resources are planned, and it is responsive to changing technology and evolving customer expectations and needs. To understand and develop this strategy there are some key tasks aligned to our transformation strategy that need to be undertaken, these are:

Year 1:

Define a core set of digital capabilities and devices to support service redesign

Identify opportunities to streamline and automate business processes

Align the Digital Strategy and road map

Review the activity analysis of high transactional services

Review action plans identified from research

Scope and procure digital solutions, including a Customer Relationship Management (CRM) system, that supports our digital by design approach

Year 2:

Service and process redesigns

Identify data sets to monitor performance and provide real time information

Review standards are embedded

Develop and embed CRM solution and customer focused digital solutions

Embed customer feedback

Year 3:

Review corporate standards

Align Digital Strategy and review

Measure 4:

Review strategy

Annexe 1

Action plan

Whilst working through the key activities there are still actions which can be undertaken to embed this customer strategy over the next two years, which we will continually review. There are summarised as:

Principle 1

We will put customers at the heart of what we do.

Actions:

Year 1: Establish a residents Focus Group

Year 1: To review how customers can give their feedback

Year 1: Understand and address the causes of avoidable contact in high customer contact services

Year 2: Review the induction programme for new starters

Year 2: Devise a customer service training programme which is undertaken every 2 years

Year 2: Develop feedback channels for customers

Principle 2

We will provide our customers with a consistent experience through all interactions with us.

Actions:

Year 1: Launch customer standards and staff to attend awareness sessions

Year 1: Establish a council wide Customer Focus Group

Year 1: Launch Customer Promise

Year 1: Review Service Level Agreements with Town and Parishes

Year 2: Adopt a "make every contact count" approach

Year 2: Sample check to ensure customer standards adhered to

Year 2: Liaise with key partners for feedback on customer experience

Principle 3

We will utilise technology to meet customer needs.

Actions:

Year 1: Scope and procure CRM and consider wider customer access channels

Year 1: Review use of paper to shift to digital

Year 2: Review website to ensure it is accessible

Year 2: Review our online forms

Year 2: Provide real-time information on key performance indicators

Year 2: Review CRM and access channels to ensure meeting specifications

Principle 4

We will use data to share and improve service delivery.

Actions:

Year 1: Identify datasets that help us to understand customers and demand

Year 2: Join up data to avoid customers having to duplicate information

Year 2: End to end mapping of high customer contact journeys

RESOURCES AND TRANSFORMATION PANEL – 25 JULY 2024

CABINET – 7 AUGUST 2024

TRANSFORMATION BUSINESS CASE - CUSTOMER & DIGITAL SERVICES (INCLUDING ORGANISATIONAL DESIGN) AND APPLETREE COURT

1. Recommendations

1.1 That the Panel provide feedback to the Cabinet on the content of this report and appendices.

1.2 That the panel note the following proposed recommendations to Cabinet:

That Cabinet (subject to the required Council approval to funding):

- I. Approve the Customer & Digital Services (including Organisational Design) business case at appendix A and adoption of the preferred future organisational design option Bv2.
- II. Support the intention to let out the south wing of Appletree Court (ATC) to third party tenants as set out in appendix B.
- III. Note the opportunity to further enhance ATC through works to the ground floor north wing, but these to be progressed subject to further approval (at additional cost), dependant on the success of the letting activity.
- IV. Delegate responsibility to oversee delivery of these recommendations to the Transformation Programme Board.

That Cabinet seek Council approval to:

- V. allocate £2.709m on an invest-to-save basis to deliver the necessary technology and organisational changes to deliver the preferred future organisational design option.
- VI. allocate up to £1.75m for improvements to the East wing of ATC on an invest-to-save basis, to facilitate the third party letting of the south wing and the generation of c£300,000 per annum in income.

2. Introduction and Background

2.1 The Customer & Digital Services (including Organisational Design) business case (appendix A) has been developed following the adoption of the transformation strategy, Future New Forest, in December 2023. It enables the implementation of the transformation programme by setting out a clear future organisational design for the council to leverage new technology, service and process redesign as well as looking at how some teams are structured in order to improve customer experience and the efficiency and effectiveness of the organisation. Organisational design is the structures, processes and roles needed to achieve the organisations objectives.

2.2 The Appletree Court business case (appendix B) considers options to exploit the commercial opportunities of Appletree Court and make better use of the currently underutilised office accommodation.

- 2.3 Assets and accommodation are 'out of scope' for the Customer & Digital Services (including Organisational Design) business case although they remain a significant aspect of the transformation programme and it is appropriate to consider the organisations accommodation requirements in line with any changes to organisational design.
- 2.4 The business cases appended support delivery of the four approved key objectives of Future New Forest to:

Customer & digital services

Redesign services to improve customer experience, make better use of technology and reduce manual effort. Services should be digital by design, irrespective of how customers contact us.

People & capabilities

Review how we organise and develop our people, making sure roles, structures, behaviours and skills evolve to meet new service designs and needs.

Assets & accommodation

Make better use of assets, improve sustainability and change the way we work. This includes spaces that staff work in and customers visit as well as the stores and depot.

Finance & delivery

Strengthen how we manage finance, strategy and performance. This includes how we manage the delivery of financial and non-financial benefits from transformation and how we develop a data-driven approach to strategy and performance.

3. Customer & Digital Services (including Organisational Design) Business Case - Options Appraisal

- 3.1 The Customer & Digital Services (including Organisational Design) business case (appendix A) takes the vision and objectives for transformation and assesses how different options might deliver those objectives, including the costs and benefits of each. It is closely aligned, and provides a delivery vehicle for, the Customer Strategy.
- 3.2 The options have been developed using the data collected and evidence gained over the past year, including opportunities arising out of customer research undertaken, activity analysis and the process design workshops. The preferred model outlined within the business case is specific to NFDC and has been determined by EMT through several organisational design workshops.
- 3.3 A number of options for the future organisation design have been considered from the continuation of a service led approach where services adopt their own technology and processes, largely in isolation, to a more cross cutting enterprise approach where all services adopt the same or similar technology and processes to maximise efficiencies. This is best illustrated in the transformation continuum diagram at Figure 1.



- Customer contact more likely to be handled in service
- Customer service standards may differ across the organisation
- Digital services will look and feel different without very strong standards
- Less need to tackle complex technology and data silos but duplicated investment
- Driven by service-specific technology
- Scope for savings constrained by service boundaries
- Less structural change required
- Harder to build resilience
- Can be easier to gain manager/ staff buy-in (less cultural change)

- Customer contact more likely to be centralised
- Consistent approach and standards for customer service
- Digital services use standard capabilities and same look and feel
- Higher complexity of resolving legacy technology and data silos
- Driven by fewer enterprise tools with common capabilities
- Greater scope for savings
- Greater need for structural changes
- More opportunities to build resilience
- Bigger 'sell' to the organisation

Figure 1: The transformation continuum

3.4 The current vertical service led model means that there is an inconsistency in customer experience and technology depending on which service is being used. Phone and email are the main channels used with multiple published email addresses and phone numbers available to customers. Figure 2 is a high-level illustration of the current model.

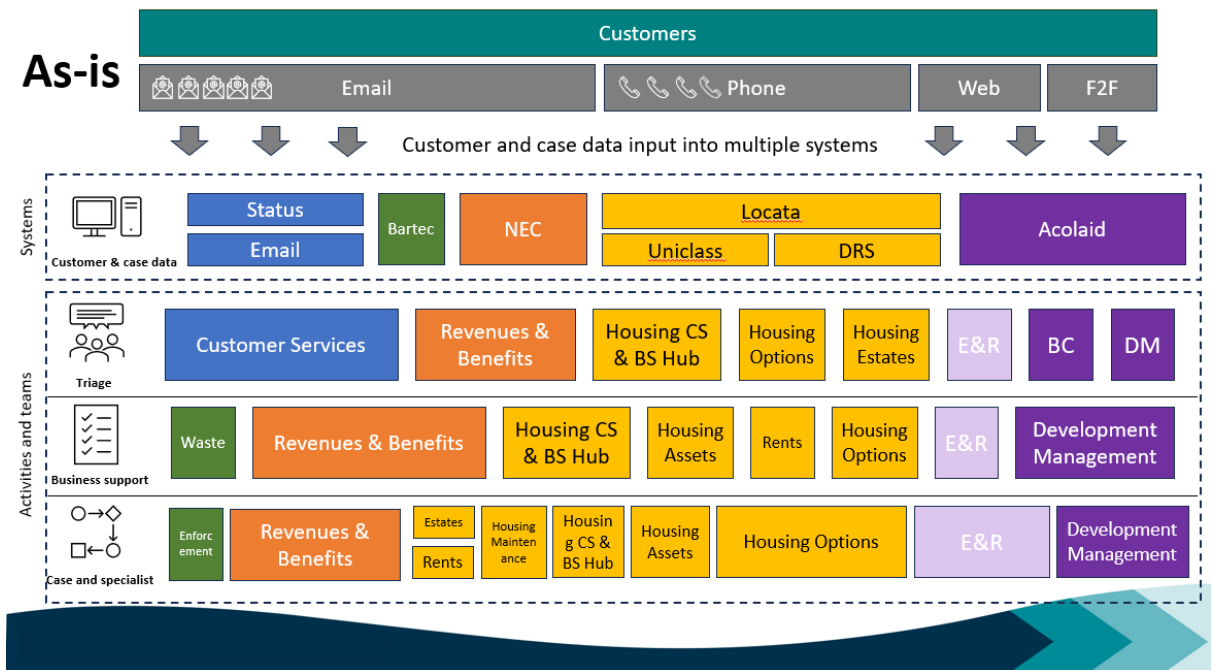


Figure 2: As-is organisational design model

3.5 EMT has collectively agreed that the approach should be somewhere in the middle of the continuum, where efficiencies can be gained from deploying the same technology and processes to improve the customer experience with some structural changes in support. This option as illustrated in Figure 3 is ambitious in support of the strategic

outcomes for transformation and allows for further future opportunities to do things differently whilst maintaining a level of stability by managing the pace of change.

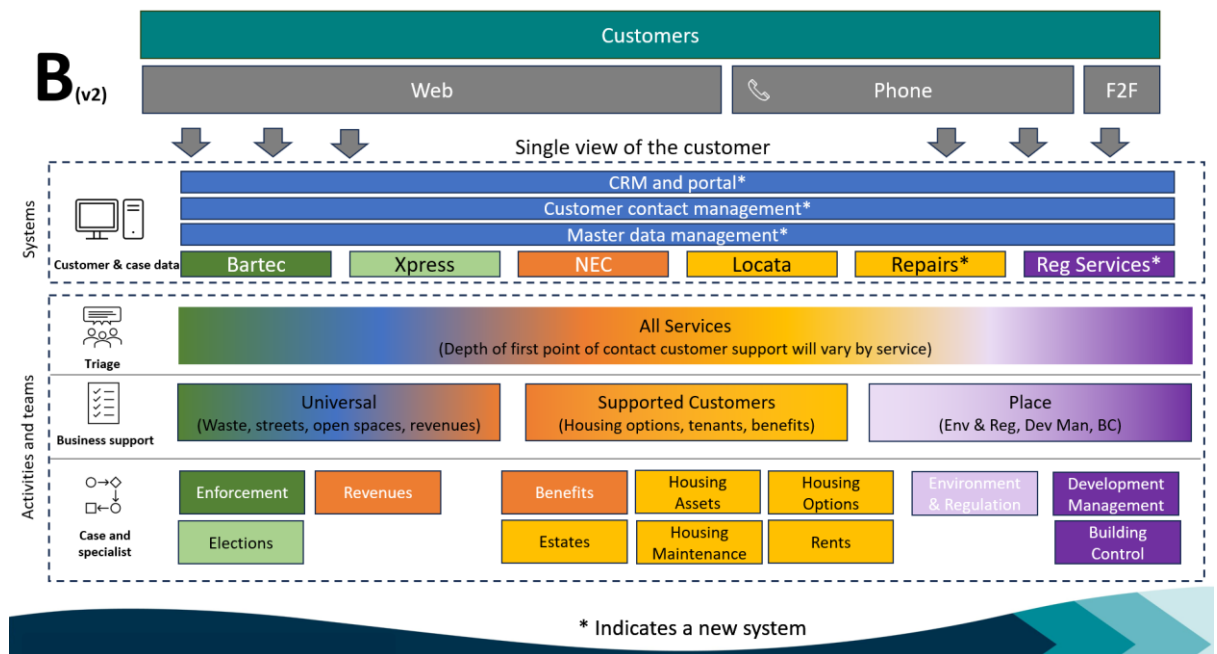


Figure 3: Target organisational design model

3.6 In brief the preferred option B(v2) for the target future organisational design includes:

- Enterprise technology capabilities applied to all services i.e. a single view of the customer through one CRM (Customer Relationship Management) and customer portal, customer contact management and master data management.
- A single customers services team, dealing with most enquiries for some services and smaller subsets for others.
- Aggregated business support functions into three teams aligned to universal, supported and place services.
- Leaving case management and specialist activities largely unchanged.

3.7 This modernised approach and use of technology is consistent with many other organisations, public and private. Page 17/18 of business case at appendix A details the technology assessment undertaken.

3.8 The business case itself has been drafted by Ignite Consulting Ltd. in conjunction with NFDC and brings together the extensive work undertaken over the past 18 months into a clear, evidence-based proposal. It provides the justification to invest in new technology and organisational changes to deliver a future operating model. It does not define the detailed delivery of the programme but enables the organisation to mobilise the programme with the necessary resources secured to start implementing changes.

3.9 Some of the technology investment identified within the business case is required irrespective of the transformation programme as legacy systems in housing maintenance, regulatory services and the existing CRM approach the end of life and require replacement. Bringing all these systems under the umbrella of transformation enables their procurement and implementation to be considered in line with the

transformation objectives and exploits any cross-cutting opportunities and integration that exists.

- 3.10 A detailed assessment of the options, their costs and benefits is detailed in the business case at appendix A.

4. Appletree Court Business Case – Options Appraisal

- 4.1 The accommodation review of Appletree Court is the first element of a wider piece of work to consider the strategic use of our assets and accommodation. It is an important aspect of meeting our future working aspirations in terms of service, staff and cultural needs in line with Future New Forest. This scheme will also support revenue generation towards the MTFP, through rental income, in line with the commercial mindset objective of the transformation strategy.
- 4.2 Appletree Court remains a suitable location within the district from which to deliver services and provide back-office support. It provides an attractive and pleasant working environment for staff and Members. However, due to the change in working patterns since the pandemic the building is underutilised, reaching a peak occupancy of 40%. This has now reached a stable level and has not significantly increased in the last two years.
- 4.3 In September 2023 Cabinet approved a budget of up to £100,000 to carry out a feasibility study to identify how the office accommodation at Appletree Court could be adapted to best suit the hybrid method of working now adopted by the majority of staff, explore the opportunities to utilise the entire building and inform the wider development of the Council's accommodation requirements as part of its transformation agenda.
- 4.4 Subject to refurbishment and the continued adoption of hybrid working, whereby one desk per member of staff is no longer a requirement, there is sufficient capacity within the East Wing (and latterly, potentially the North Wing) from which to provide Council services, freeing the South Wing for revenue generating external lettings.
- 4.5 Working with consultants Peter Marsh Consulting (PMC) the original feasibility brief required a report detailing the suitability and works required for selected areas to create open plan office space, for approximately 200 members of staff at any one time. The brief required a similar standard to that of the offices in the south wing of the building, containing both standing and seated desking, break out & meeting space, office storage and staff welfare facilities. Costings received, together with an updated marketing appraisal of the South Wing, did not offer an agreeable payback period on which to offset the investment.
- 4.6 PMC were asked to apply some value engineering and de-risking approaches, to produce a scaled back option that would still meet the desired look and feel, with less significant structural and MEP interventions. This exercise resulted in 2 further options.
- 4.7 Following an officer steering group workshop, PMC returned with additional options, tabled as 5 and 5a, of which 5a is the recommended approach. The costs were reduced in these areas by excluding from the scope offices, breakout spaces and meeting rooms that were already refurbished, in whole or part, as part of the South Wing refurbishment project that took place prior to the Covid pandemic. This was developed with a critical view of the common parts and underused spaces, to introduce a higher number of breakout, touch down, and collaboration zones. In addition, the consultant proposed areas along each longitudinal corridor in the East Wing where sections of wall would be replaced with full-height glass partitions, to create a more open plan aesthetic with additional natural light.

4.8 Assuming that good progress is made with securing a tenant for the South Wing (in whole or part), a Phase 2 scheme may see additional investment made in the Ground Floor, North Wing. Preliminary designs and costings have outlined that for an investment of c£500k, the existing space can be opened up to make a large, flexible collaboration zone. Staff feedback has indicated the preference for additional medium and large meeting rooms, training suites, refurbished interview rooms, and departmental 'hubs' where external visitors can be brought for meetings and appointments. This model also has potential to be used as a letting stream, by allowing local organisations and partners to lease meeting space.

5. Consultation Undertaken

- 5.1 EMT, the Transformation Programme Board and the Member Steering Board have been consulted on the options within the business case and briefings have been held with the wider leadership team, staff and all members in respect of both business cases.
- 5.2 The options considered have been informed by the extensive customer research undertaken during 2023.
- 5.3 Teams and individuals will be further engaged and consulted ahead of any changes.

6. Financial Assessment

- 6.1 The Medium Term Financial Plan identifies a savings target of £1.75m arising from the transformation programme. The business cases appended propose options to support delivery against this target and the wider transformation objectives as detailed.
- 6.2 The Customer & Digital Services (including Organisational Design) business case details the costs and benefits of each option considered, summarised below:

Option	Est. one-off costs	Est. benefit	Net recurring costs	Net benefit	GAP to MTFP
Option A	£1,959,000	£900,000	£376,000	£524,000	-£1,226,000
Option B	£2,034,000	£1,610,000	£406,000	£1,204,000	-£546,000
Option B(v2)*	£2,109,000	£1,260,000	£406,000	£854,000	-£896,000
Option C	£2,109,000	£1,890,000	£406,000	£1,484,000	-£266,000

*preferred option

- 6.3 Option B(v2) requires one off funding of £2.109m and is estimated to contribute a net £854,000 annually to the identified MTFP gap. The estimated one-off costs are identical for options B(v2) and option C as the technology investment is the same for both options. Making this initial investment allows the implementation of B(v2) as a phase 1 approach with an option to move closer to option C and release further savings in the future as required.
- 6.4 It is expected that the financial benefits will be delivered through a combination of mechanisms, including FTE staff reductions where improved technology and processes release capacity. This is covered in greater detail at 3.3.5 of Appendix A at page 31.

- 6.5 The costs presented exclude provision for contingency and it is proposed that a contingency sum of £600,000 is set aside to cover additional funding, including third party support, outplacement costs and any unplanned programme costs to boost capacity.
- 6.6 The financial outturn position for 2023/24 enabled the establishment of a Corporate Plan Priorities reserve, and it is proposed that this reserve be used to contribute £1.5m to the funding requirement.
- 6.7 The ICT work programme (£625,000 annual revenue budget) already makes provision for some of the technology replacement and infrastructure identified in the business case and it is proposed that this existing revenue budget be used to contribute £1m to the funding requirement.
- 6.8 The Appletree Court works require invest to save funding as follows:

Option	Primary project cost (A)	Cost per sq ft	Fees and additional works (B)	Total (A+B)	+ / - 10% cost range	Payback (years)
Option 5a* 181 desk spaces	£1,581,916	£154	£170,000	£1,751,916	£1.4m to £1.8m	6-7

*preferred option

- 6.9 A breakdown of all options is contained within appendix B. The fees and costs column above allows for professional fees for further design work up to tender stage and circa £80,000 of estimated costs for sub-division works associated with the south wing.
- 6.10 The predicted revenue for South Wing as a lettable model is as follows:

Floor	Area sq.ft	Rent per annum (furnished)	Est. Business Rates liability per annum (£90p/sqm)	Total per annum based on furnished
Ground	3,003	£55,558	£25,110	£80,668
First	3,358	£62,130	£28,080	£90,210
Second	3,305	£61,134	£27,630	£88,764
TOTAL	9,666	£178,822	£80,820	£259,642

- 6.11 Option 5a requires one-off funding of up to £1.75m and contributes up to £300,000 annually (including recoverable Service Changes) to the identified MTFP gap via rental income of the South Wing. Making this initial investment allows the implementation of 5a as a phase 1 approach with an option to invest in improvements to the North Wing Ground Floor, at an estimated cost of £500,000, at a later date. All options are inclusive of contingency at 9%. The recommended option is subject to variance at tender stage.
- 6.12 The overall total one-off funding requirement is £4,459,000 and the resultant estimated net annual financial benefit (saving) is £1,154,000.

Option	Est. one-off costs	Est. benefit	Net recurring costs	Net benefit	Payback (years)
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Customer & Digital Services (including Organisational Design) business case					
Option B(v2)	£2,109,000	£1,260,000	£406,000	£854,000	Year 5/6
Contingency	£600,000				
ATC business case					
Option 5a	£1,750,000	£300,000	-	£300,000	Year 5/6
Total funding requirement					
	£4,459,000	£1,560,000	£406,000	£1,154,000	Year 5/6

6.13 If approved this will be funded from

Funding stream	
Corporate plan priorities (earmarked reserves)	£1,500,000
ICT Digital Work Programme Funding (revenue)	£1,000,000
Supplementary budget (reserves)	£1,959,000
	£4,459,000

6.14 The latest MTFP allows for annual funding of £250,000 (covering 2023/24 – 2025/26) towards core transformation team resources. Less has been spent in year 1, and to align resources with the delivery of the programme the annual budget is required up to and including the 2027/28 financial year.

7. Conclusions

- 7.1 The proposed organisational design model (Bv2) supports the strategic outcome of putting our customers at the heart of what we do. The investment in technology, improved processes and structural changes will ensure customers are kept informed on progress and instil confidence in service delivery with better and more timely feedback. Investing in data tools and skills will help us better understand the needs of our customers and communities and design our services accordingly, and increasing the number of services available online, whilst maintain telephone and face-to face contact for those who need it most will provide customers with the option to access services at the time which suits them best.
- 7.2 Implementation of the organisational design and ATC accommodation works proposed in the respective business cases will also provide the opportunity to identify and release net financial benefits. Notwithstanding the financial return both business cases also support the wider transformation objectives including significant improvements to the customer experience, using our assets to support the efficient and effective delivery of our future service provision and enhancing their financial contribution through commercial opportunities.
- 7.3 There are significant risks of not transforming including a continued service-by-service approach resulting in re-work, duplicated investment and fragmented customer experience, not achieving the £1.75m MTFP target and improvements being piecemeal and superficial. Staff would also continue to need to deal with high demand, capacity and a lack of cultural change.

8. Risk Considerations

- 8.1 Both business cases involve complex change projects which will alter ways of working and the organisation's culture. Appendix A includes the risks associated with not

transforming and a change impact assessment which considers the significance and management of the proposed changes. Other risks include:

Risk	Mitigation
Failure to deliver digital projects	Technical and project resources identified and included in the business case. All projects to be run through the discipline of the transformation programme management office and reported on through the governance arrangements in place.
Payback period not met	Regular monitoring and reporting will identify slippage at an early stage and steps taken to mitigate impact.
Financial benefits not realised	Detailed benefit tracking will be established to monitor the achievement of all transformation objectives. Regular monitoring and reporting will identify slippage at an early stage and steps taken to mitigate impact.
Lack of buy in to support changes	Organisation development and change management expertise will ensure regular staff communication and engagement.
Letting opportunities for ATC not realised	Works to be undertaken on a phased basis.

9. Financial Implications

- 9.1 The financial implications are set out in the body of the report, explicitly within section 6. The business cases propose invest-to-save projects totalling £4,459,000, aimed to positively contribute to the Council's MTFP with an estimated net ongoing annual benefit of £1.154m.

10. Environmental Implications

- 10.1 Climate and sustainability is one of the four key drivers of transformation and meeting national and local targets to reduce emissions and support nature will require changes to the way we use resources and deliver services. The business cases will ensure a clear strategic focus on future environmental sustainability of the council by enabling customers to contact us differently, staff to work in different ways and making better use of our assets.

11. Equality and Diversity Implications

- 11.1 A change impact assessment is included in appendix A and a detailed equality and diversity impact assessment will be undertaken as plans emerge to understand and mitigate any adverse impacts to customers and staff of service delivery changes.

12. Data Protection Implications

12.1 None arising directly from this report. Changes impacting the collection and use of personal data will be appropriately assessed and taken under advisement of the Council's Information Governance team.

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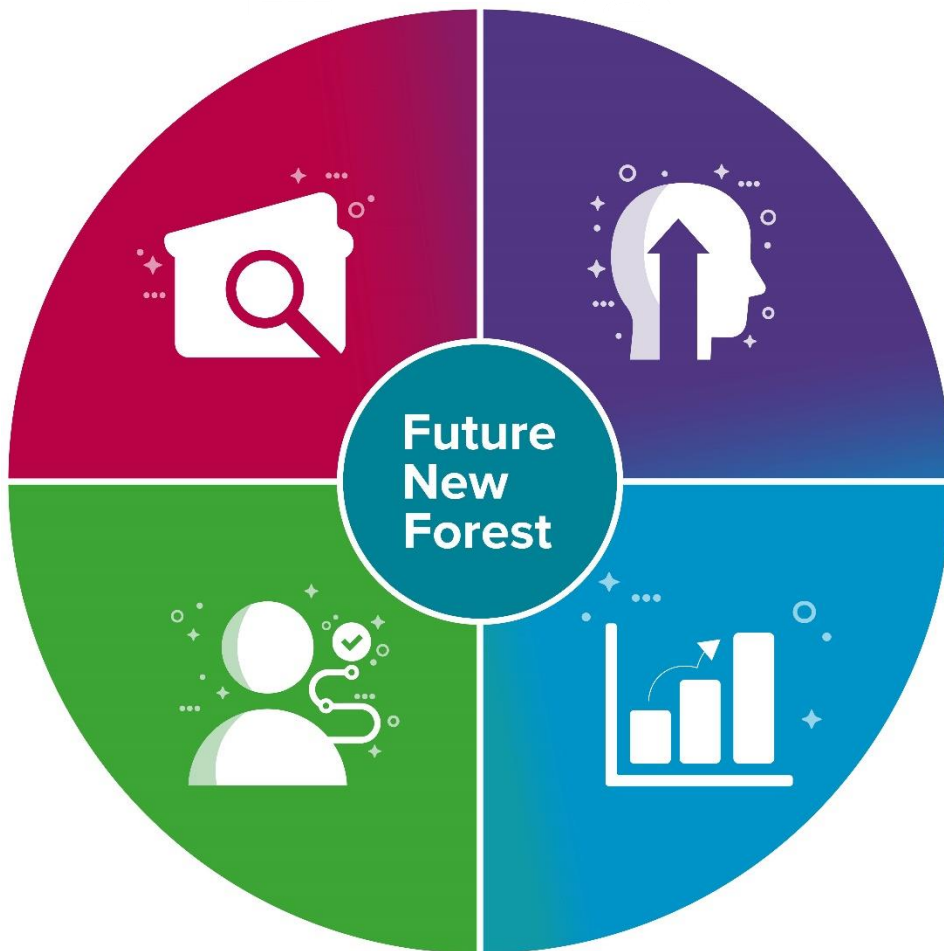
Background Papers:

Cabinet 6 December 2023 -
Transformation Strategy

Cabinet 6 September 2023 – Feasibility
Study to deliver Long Term Value from
Appletree Court, Lyndhurst

Future New Forest

Customer & Digital Services (including Organisational Design) Business Case



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1. Introduction

1.1. Purpose

This business case has been developed following New Forest District Council's (NFDC or 'the council') adoption of a new transformation strategy at the Council meeting on 6 December 2023. The business case inherits the vision and objectives of the transformation strategy and assesses how different options for transformation might deliver those objectives.

The goal of the business case is to collect, analyse and present enough data and insight to enable the council to select a preferred option, with sufficient confidence in the costs and benefits to approve the necessary funding. It is a sample-based exercise, built on our extensive work with you over the last 15 months, to develop evidence and test justification for a course of action.

The business case will shape the Future New Forest programme structure and plan, but it does not define, or seek to quantify in detail, every workstream and task involved in delivery. Once approved, the business case enables the organisation to mobilise the programme and get into action.

This business case has been drafted by Ignite Consulting Ltd and reviewed and approved by NFDC in line with the [version control table](#). References to 'we', 'us' or 'our' in the document means Ignite rather than NFDC.

1.2. Executive summary

This business case is part of a strong golden thread from the council's Corporate Plan and the transformation strategy that supports it (see section 2.1). It is based on a very strong evidence base, covering a comprehensive range of datasets, developed with NFDC in a series of work packages over the last 18 months (section 2.2).

The purpose of the business case is to assess whether there is justification for investing in significant transformation across the council, including the extent to which it contributes to the requirements of the MTFP and the financial target for the transformation strategy.

While any business case has an overt financial focus, this one also assesses the extent to which the proposed transformation programme could address the customer and staff outcomes expressed in the transformation strategy (section 3.3.6).

Following significant engagement with staff across the organisation, in both this phase of work (section 3.2) and the preceding engagements, a series of options for the future organisational design of the council were developed based on the evidence base and strategic outcomes sought (section 3.3).

The Executive Management Team (EMT) assessed the financial and organisational consequences of these options over a series of four co-design sessions in March and April 2024.

This process resulted in the development of a future organisational design for the council (section 3.3.4) that seeks to balance all the considerations that are important to NFDC – financial, cultural, technological and customer feedback.

This future organisational design will leverage new technology, service and process redesign as well as changing the way the council's teams and roles are structured in order to improve the efficiency and effectiveness of the organisation.

The successful implementation of this design will provide the opportunity to identify and release annual net financial benefits in the region of £0.9m (section 3.3.5) in return for an estimated delivery cost of £2.1m (section 3.3.7), of which £0.8m is considered by EMT to be required irrespective of transformation in order to replace outdated systems and maintain service delivery. This represents a payback period of just over four years, or three years if the £0.8m of essential investment is excluded (section 4.1).

Notwithstanding this financial return on investment, the preferred option of EMT does not fully meet the target set for the transformation strategy within the context of the MTFP. There will be a need to identify additional strategies to support the delivery of the required savings.

To support the identification of additional savings, we refreshed the spend analysis we first conducted in October 2022 using the council's latest revenue outturn data. This enables us to benchmark NFDC's spend with its comparator group of councils (section 3.2.4). We used this analysis, along with your contract register and budget data, to assess the potential for spending reductions.

This analysis has identified some areas where further consideration should be given but they are likely to be challenging to deliver. As a result, they are considered more likely to be medium- to long-term savings opportunities and potentially outside the horizon of the current MTFP.

The delivery of the preferred design option, as part of the wider transformation strategy, will be challenging for the council. It will require strong leadership support (section 5.1) and an integrated and effective governance architecture (section 5.2), both of which will need to maintain a clear and consistent focus on the strategy, its target outcomes and the programme delivering them.

2. Context

2.1. Strategic context

In December 2023 the council's Cabinet considered the new draft Corporate Plan 2024 to 2028 and the transformation strategy covering the same period.

The Corporate Plan is the single most important strategy that shapes the way the council works and defines its ambitions. In doing so it brings together strategic and service objectives, helping the organisation to work towards the same vision, values and priorities.

The three priority themes of the Corporate Plan 2024 to 2028 (People, Place, Prosperity) are all underpinned by the transformation strategy and the Future New Forest transformation programme that will be developed in response to the strategy.

The vision for Future New Forest is: "Investing in our people and services to meet customer needs, protecting the council's financial position, and embedding sustainability through our Future New Forest transformation programme."

Future New Forest also plays a key role in the delivery of the Medium-Term Financial Plan 2023 to 2027 (MTFP), which established cumulative savings targets of £1.25 million for the general fund and £500k for the housing revenue account arising from the transformation programme.

This business case sets out options for the delivery of the financial benefits but also supports delivery of all four Future New Forest strategic outcomes, as shown in Figure 1 below:

Strategic outcome	How will the investment outlined in the business case support delivery of this outcome?
Putting our customers at the heart of what we do	<ul style="list-style-type: none"> ✓ By investing in technology such as customer relationship management we will be able to keep customers informed on progress and instil confidence in service delivery. ✓ By investing in our data tools and skills we will be able to understand our customers better and meet the needs of our diverse communities. ✓ By increasing the number of services available online, whilst maintaining telephone and face-to-face contact for those who need it most, we provide customers options to access services at the time which best suits them.
Being an employer of choice	<ul style="list-style-type: none"> ✓ By redesigning inefficient processes and investing in technologies to automate steps where appropriate, we will create capacity to respond to rising demand without overburdening staff. ✓ Investing in new tools and technologies will also mean investing in skills development and training to use them.
Being financially responsible	<ul style="list-style-type: none"> ✓ By redesigning inefficient processes and investing in technologies to automate steps where appropriate, we will create opportunities to reduce costs. ✓ By remodelling parts of the organisation, we will create opportunities to reduce costs and build resilience.
Designing modern and innovative services	<ul style="list-style-type: none"> ✓ By replacing outdated, poorly performing systems we will enable the design of modern, digital services. ✓ By standardising and applying common design patterns and digital capabilities across the council we will design more consistent and usable services.

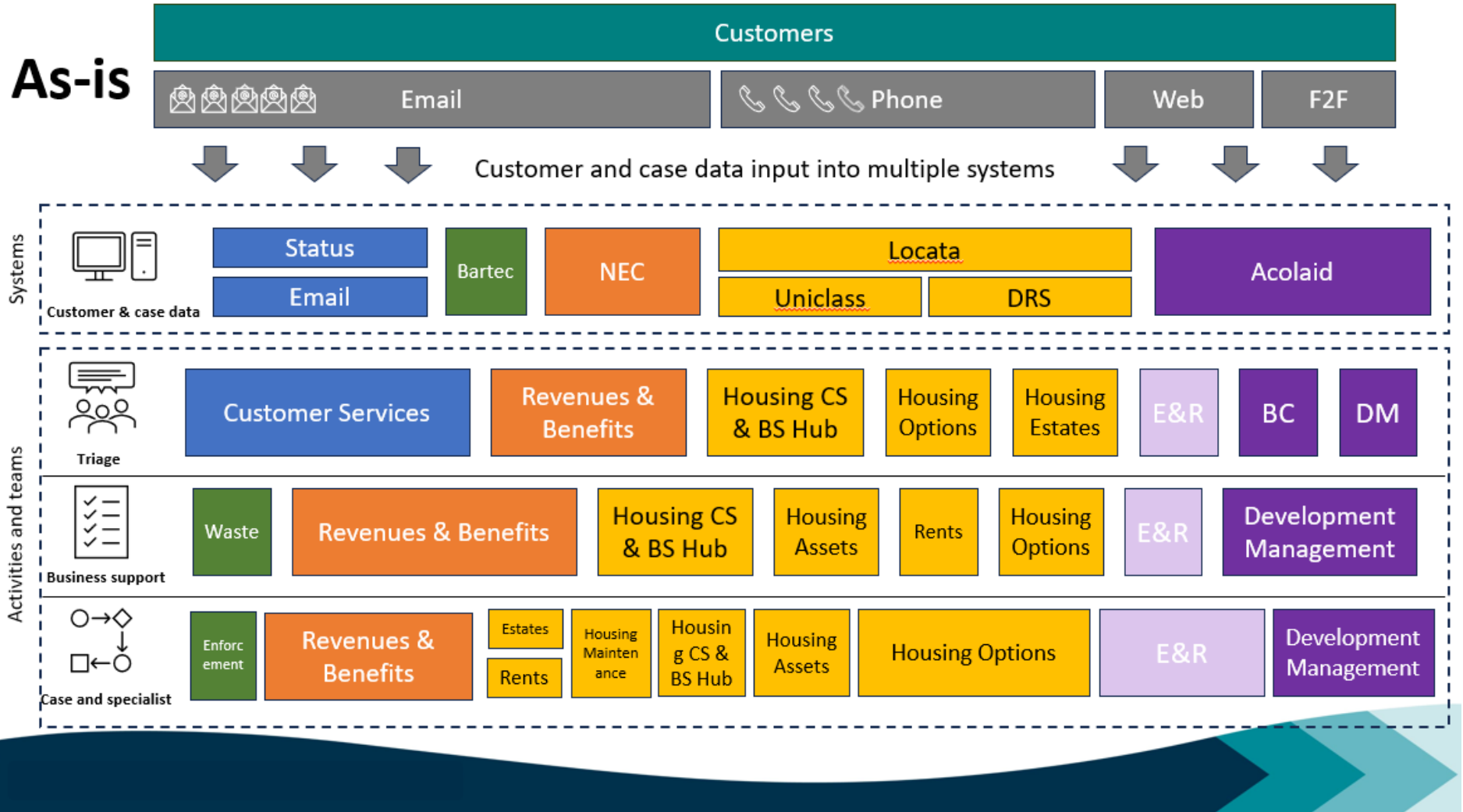
Figure 1: Strategic alignment of the business case

2.2. Existing arrangements

The preparation for this business case has involved extensive engagement with staff and customers to understand NFDC's current ways of working. We have:

- analysed customer demand across the range of services and channels currently available (phone, face-to-face, email, web)
- conducted more than 4000 customer surveys as well as a series of focus groups, see Appendix 1: Summary of customer research
- held 10 workshops with staff looking at a cross section of council services.

This in-depth research and analysis provided a clear picture of how NFDC works today, and this is illustrated in Figure 2 and summarised below.



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Figure 2: Diagram illustrating current NFDC structures and ways of working

Phone and email are main channels

Phone and email are the main channels used by customers currently.

There are multiple published email addresses and phone numbers for customers to use. This sometimes results in misdirected calls and emails because customers are confused or reluctant to spend time finding the right route in.

E-forms create emails not cases

Most e-forms generate emails rather than creating cases in line of business systems. This means that data provided by customers in e-forms is usually manually re-keyed by staff into other systems. This is wasted effort and increases the risk of data errors.

There is a very basic Customer Relationship Management (CRM) system, Status, that is used to log a range of service requests via e-forms or by customer services staff. Cases are not managed through this system, they are sent to service teams via email and Word documents. The Word documents created by Status use an outdated Word format that is not supported by some council devices, resulting in manual effort to convert and open them. Status is not fit for purpose because it benefits from little, if any, product development and is increasingly unlikely to meet modern standards regarding system maintenance, design and security.

Some e-forms are built in Status whilst others are built using Verj.io (formerly ebase). These forms are generally better designed and have richer functionality but, again, most simply generate emails. The biggest user of Verj.io forms is the revenues and benefits service. This team has managed to integrate one Verj.io form with the NEC revenues and benefits system, to remove the need for rekeying, but the effort and time this took was significant, and external technical consultancy was required.

There are also e-forms developed using other technologies such as Microsoft Forms, eg for damp and mould reports.

Case management via email

Email is currently central to the management of case work across most NFDC services. This causes the following problems:

- Customers can email most services direct, rather than using a form and this means they choose what information to include and often miss important details. This results in additional emails back and forth to fill in gaps.
- Once emails arrive, they are commonly forwarded to multiple NFDC individual and group mailboxes. Staff do not know who is owning the enquiry, so it is common for staff to reply-to-all. This results in a proliferation of emails and it is not unusual for staff mailboxes to fill up so no more emails can be received.
- There is no easy way to know the status of a case which is being managed via email. Managers cannot 'see' the case via reports or dashboards and therefore performance issues and bottlenecks are often invisible until customers chase or complain. Customers have no visibility of their case and no means of tracking progress, resulting in more calls and emails.

Silo-ed teams, systems and data

Phone calls are managed by multiple teams using the Enghouse Interactive TouchPoint contact centre management software.

Customer Services handle calls for waste and a mixture of other services but calls for revenues and benefits, housing and much of environment and regulation and planning and building control are directed to hubs or mini contact centres hosted in those services. In total there are 8 separate contact centres for external customers, plus the ICT service desk.

Most contact centre teams will create cases directly in line of business systems and/or email details to colleagues. Some of those line of business systems are old, perform poorly or are not meeting business needs, eg Uniclass and DRS which are used to log and schedule housing repairs.

Business support teams are likewise located with the service they support. Having multiple customer and business support teams aligned to each service gives service managers a high degree of control over their resources but you are less able to benefit from economies of scale.

The vertical, service-based approach causes the following problems:

- Inconsistent service levels for customers of different services, eg tenants can call to report a housing repair from Monday to Friday but the housing options line is only open on three days, and not for the full working day.
- Smaller teams lack resilience and the loss or long-term absence of 1 or 2 important individuals can have a disproportionate impact on service levels.
- It is difficult to analyse demand across channels and services because data is recorded differently or not at all. This is a barrier to effective channel shift initiatives.
- Customer data is stored in a fragmented fashion in multiple systems and customers get frustrated when they must repeat information they have already provided. Further, staff handling customer calls do not have a fully rounded picture of the customers' history, needs or circumstances.

Legacy ICT challenges

Historically systems have been chosen based on individual service needs without regard to strategic factors such as interoperability, common data standards or digital design principles. At times services have felt compelled to go their own way due to a lack of ICT resources at the centre to provide enterprise architecture, business analysis and project management support.

Steps are being taken to shift to a more strategic approach but the legacy of the service-driven approach is a set of ICT challenges including:

- Patchy digital services with fully digital services in some areas (eg housing applications) and gaps in others (eg rent accounts).
- Duplicated spend on the same digital capability, eg multiple e-forms platforms.
- Inconsistent customer experience across services as shown in Appendix 2: Examples of e-forms driven by different technologies.
- Different solutions to similar problems, eg some services have a dedicated customer portal just for that service while others are waiting for a corporate solution.
- Outdated systems such as Status, Acolaid and Uniclass that cause operational difficulties and/or are not being developed by the supplier, with limited resources to support implementation of replacements.
- Some systems have the capability to integrate and share data in real time (eg Bartec) whereas others are more limited and rely largely on transferring flat files due to the need for multiple integrations (eg Locata).

2.3. Scope

The transformation strategy covers four strategic themes:

- Customer and digital services
- People and capabilities
- Assets and accommodation
- Finances and delivery

For full details of what each of these areas of scope include see Appendix 3: Future New Forest scope.

In developing this business case, we were asked to treat assets and accommodation as out of scope due to work already underway to develop an asset strategy. For the other three themes, some of the strategic objectives were more of a focus than others when developing the business case. Figure 3 below lists all 12 transformation strategy objectives and shows whether they were:

- **Directly in scope** – the options explored in the business case will impact the delivery of these objectives and we have considered this when assessing options. For example, in relation to objective F1, different options will be more or less likely to deliver the MTFP targeted savings.
- **Indirectly in scope** – the options explored in the business case will impact the delivery of these objectives, but we have not gathered data or formally assessed this. For example, in relation to objective P2, different options will require different levels and types of skills development and training, but we have not considered this in detail.
- **Out of scope** – none of the options relate to or address these objectives. This applies to all three assets and accommodation objectives.

As discussed in section 1.1, the business case is a sample-based exercise and the council agreed the scope of council processes to review (see section 3.2.2) to gather data to inform the potential efficiency savings available. We provided a list of candidate processes from which the council selected the sample.

transformation strategy Objective	Directly in scope	Indirectly in scope	Out of scope
Objective C1 Our customers will be at the heart of our digital-by-design approach	✓		
Objective C2 We will use data and insight to plan services, manage performance and direct our focus for transformation	✓		
Objective C3 We will have the right systems, processes and devices to ensure work can be done in the right place, right time and the most efficient way	✓		
Objective P1 We will ensure our values, behaviours and culture are aligned and support the future organisation		✓	
Objective P2 We will invest in our people to ensure we have the skills, experience and equipment that we need		✓	
Objective P3 We will ensure the work is done in the right way in the right place, reviewing roles and structures as necessary	✓		
Objective A1 Our assets will support efficient and effective delivery of our future service provision			✓
Objective A2 We will continue to challenge our asset portfolio to reduce environmental impact and enhance their financial contribution			✓
Objective A3 Our accommodation will meet the needs of our staff, customers, culture and ways of working			✓
Objective F1 Through transformation, we will deliver agreed levels of savings in line with MTFP targets and council priorities	✓		
Objective F2 We will adopt a more commercial mindset, open to innovative service models and guided by strategic priorities		✓	
Objective F3 We will shift to a more empowered and accountable, less top-down, management culture		✓	

Figure 3: Scope of business case in relation to transformation strategy objectives

2.4. Objectives

Any spending decisions must be backed up with SMART (specific, measurable, achievable, relevant, time-bound) investment objectives, and the selected option should be the one most likely to deliver those objectives. The council has a range of measures already defined which are relevant to this business case; these are listed below with their source and notes on how they might be made SMART-er.

Customer and digital services

We will achieve a resident survey average satisfaction score of 3.5 or higher (out of 5) for the question 'How do you rate the quality of digital services at the council?'

Source: Corporate Plan 2024-28

Note: This objective could be improved by specifying the timeframe for achieving the score. The council could also consider capturing this data via real-time feedback from users of digital services rather than periodically via the resident survey.

People and capabilities

Percentage staff turnover.

Source: Corporate Plan 2024-28

Note: This objective could be improved by specifying the target percentage (either as a number or in terms of a reduction over time). The timeframe is also relevant since transformation can result in an initial increase in staff turnover whilst changes are made before stabilising. However, because staff turnover is affected by many factors this may not be the best measure of the success of the chosen transformation option. An alternative would be to consider a specific measure around the development of new skills eg digital and change skills.

Finances and delivery

£1.25m annually recurring savings from the general fund and £500k annually recurring savings from the housing revenue account delivered by April 2027.

Source: Medium Term Financial Plan, Cabinet 21 February 2024

2.5. Risks of not transforming

The risks associated with implementation are discussed later in this document. This section discusses the risks of not pursuing any of the options in the business case.

The council identified a need for transformation via a report to Cabinet on 5 October 2022 and this was reinforced through the adoption of the transformation strategy in December 2023. The transformation strategy explains the drivers for change and the risks of not getting into action are detailed in Figure 4, linked to each driver.

Driver for transformation	Risk of doing nothing
Modernising Services	NFDC could continue with a service-centric approach to developing new and improved digital services to meet current and future customer needs. The risks of this approach are: <ul style="list-style-type: none"> • more re-work, as similar problems are solved in isolation, service-by-service.

	<ul style="list-style-type: none"> • duplicated investment, as each service seeks its own vertical solution resulting in multiple customer portals, multiple e-forms platforms, multiple data analytics platforms. • fragmented customer experience, as customers have to register with multiple portals and use digital services that all look and feel different.
Financial Constraints	The transformation programme has a £1.75m target to achieve within three years. If none of the options in the business case are chosen there will be a delay while other approaches to closing the budget gap are sought, risking failure to achieve the savings in the target timeframe.
Capacity and Capability	<p>If demand is not better managed and efficiencies are not found, there is a risk that staff in areas of high demand may leave the organisation.</p> <p>The evidence gathered to support the business case shows that there is a lack of empowerment and a risk aversion in NFDC's culture that frustrates some staff and slows progress. There are recruitment challenges and skills gaps. If the council cannot agree on a transformation option there is a risk that there will be little cultural change and limited opportunities to invest in new skills. This could make the council less attractive to future, younger workers as the current workforce ages and retires.</p>
Climate and Sustainability	Sustainability cuts through the whole organisation and must be 'designed in'. Without transformation, there is a risk that changes are piecemeal and superficial.

Figure 4: Risks of not transforming aligned to transformation drivers

3. Options analysis

3.1. The transformation continuum

Any organisation considering fundamental transformation will be faced by choices. There is always more than one response to the drivers for change. Councils consist of a wide range of service teams and need to consider whether they want change to be led at a service level or an enterprise, or whole-council, level. This is not a binary choice but a continuum, and the council needs to decide where it wants to aim on this continuum.

Figure 5 illustrates the idea of the transformation continuum and outlines some of the possible implications of positioning the organisation towards the service-led end or the enterprise end of the continuum.

There is no right or wrong answer to where the council wishes to place itself, but the choices it makes will impact the investment required, the benefits that can be achieved and the challenges faced during implementation.

We used the transformation continuum as a framework for developing and discussing design options for NFDC with the Executive Management Team (EMT) in four co-design workshops held in March and April 2024.


Service led
Enterprise

- Customer contact more likely to be handled in service
- Customer service standards may differ across the organisation
- Digital services will look and feel different without very strong standards
- Less need to tackle complex technology and data silos but duplicated investment
- Driven by service-specific technology
- Scope for savings constrained by service boundaries
- Less structural change required
- Harder to build resilience
- Can be easier to gain manager/ staff buy-in (less cultural change)

- Customer contact more likely to be centralised
- Consistent approach and standards for customer service
- Digital services use standard capabilities and same look and feel
- Higher complexity of resolving legacy technology and data silos
- Driven by fewer enterprise tools with common capabilities
- Greater scope for savings
- Greater need for structural changes
- More opportunities to build resilience
- Bigger 'sell' to the organisation

Figure 5: The transformation continuum

3.2. Development of options

3.2.1. Activity analysis

The purpose of the activity analysis was to:

- understand the time spent on different activities across the whole council.
- understand how different roles are involved with similar activities or processes.
- categorise the different types of activities to inform conversations about organisation design options.

Activity analysis provides a council-wide evidence base **built by NFDC staff** showing how time is spent on key activities, processes and customer journeys.

Representatives from all NFDC teams were provided with templates to complete, shown at Appendix 5: Activity analysis template. These templates were pre-populated with activities relevant to their service and they had the option of adding additional activities where required. Every activity was mapped to one of 17 activity types, which form the basis of the analysis, explained in Appendix 6: Activity types glossary. The rest of this section uses these activity types throughout so it is advisable to review the glossary to understand what each involves.

A summary of the activity analysis is provided in Appendix 7: As-is activity summary. At a very high level, we made the following observations based on the data gathered:

- Leadership and management is lower than average – normally 7-8%
- Triage is higher than average – normally 10-11%
- Mobile business support is lower than average – normally 6-7%
- Business support and case management together are higher than average – normally 18-19%
- Specialist is higher than average – normally 15-20%

These and other insights and analysis were used during four co-design sessions with EMT to identify and discuss a range of future organisation design options, described in section 3.3.

3.2.2. Process analysis

The purpose of the process analysis was to demonstrate, using a sample cross-section of council processes, that there are genuine opportunities to deliver transformation outcomes through the redesign of council processes. This evidence base was then used, in conjunction with the activity analysis dataset, to inform benefits estimations associated with the design options explored in section 3.3.

In November 2022 we carried out a demand review and a range of customer journey assessments. This exercise highlighted council teams with high demand processes that may benefit from a review of effectiveness and efficiency.

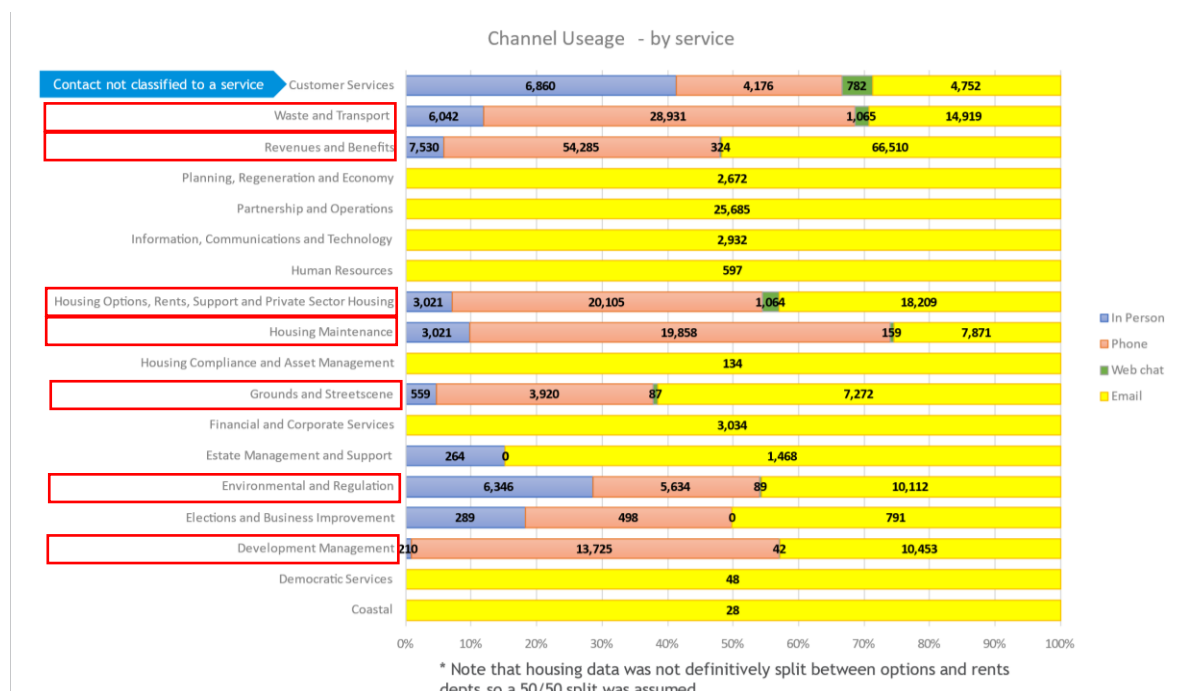


Figure 5: Demand review summary: channel usage by service

We used this data to propose a list of potential processes for review from which NFDC selected ten high demand services for process analysis:

- Report a missed domestic bin
- Report a Council Tax change of address
- Enquire about Council Tax
- Enquire about and pay rent
- Apply for the housing register
- Report a housing repair
- Report a fly-tip
- Apply for a taxi driver licence
- Apply for planning permission
- Apply for a job (recruitment end-to-end process)

We assigned a design pattern to each process that was used as a basis to review the main stages of service delivery and identify staff and customer pain points across all the process stages.

The application of design patterns also enabled the identification of common pain points across the range of services and a means to infer that the issue existed more widely across the organisation.

Subject matter experts for each process completed a pre-workshop survey and attended a workshop to discuss the survey outcomes as well as providing detail for the process stages. Pain points were identified and captured. Where a solution to a pain point had already been identified, this was also captured.

154 improvement opportunities were identified and assigned benefit categories. Some opportunities were linked to more than one benefit category. Opportunities by council department and their benefit category are shown in Figure 6 below:

Service	Cashable benefit potential		Non-cashable benefits		
	Staff capacity release	Non-staff budget saving	Improved customer experience	Improved service effectiveness	Shift activity
Business Support & Customer Services (Housing)	15	1	16	3	0
Development management	13	1	1	2	3
Finance	2	0	0	0	0
Grounds & Street Scene	9	0	3	7	1
Housing Register	10	0	10	3	1
Housing Rents and Support	2	0	1	1	0
Human Resources	12	0	21	5	2
Licensing	10	0	9	2	1
Revenue and benefits	16	1	11	3	1
Waste operations and administration	6	0	8	3	0
Grand Total	95	3	80	29	9

Figure 6: Summary of opportunities uncovered in process workshops, by category and team

Where an opportunity was categorised as potentially cashable, we met with staff who were involved in the delivery of the business process to capture metrics that would allow us to calculate the potential time and cost saving.

For staff capacity release opportunities metrics were captured for:

- Transactional volumes of service requests or enquiries, as appropriate.
- The potential estimated time saving for the step or stage of the process that realisation of the opportunity would impact.
- The type of activity being undertaken, aligned with the activity types captured in the activity analysis exercise.
- The extent to which the opportunity could be delivered in the first 12 months of operation.

For non-staff budget savings metric were captured for:

- The unit being saved. For example, printing, mileage.
- The number of estimated units that could be saved if the opportunity benefit could be realised.

Non-staff cost savings were found in three service areas totalling an estimated **£15,000pa**.

Staff capacity release savings equating to ~**5.6FTE** of effort at a nominal value of **£203,000** were identified and estimated.

The chart below shows the size of staff capacity and non-staff budget savings estimated:

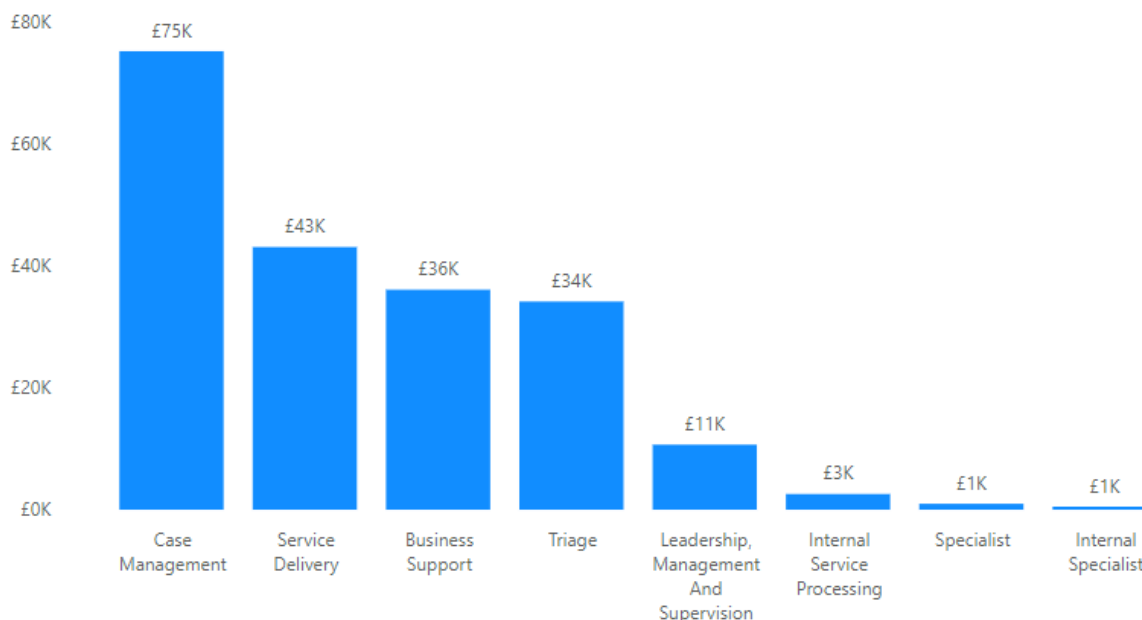


Figure 7: Breakdown of benefit by activity type

3.2.3. Technology assessment

As outlined in section 2.2, the council's past technology choices have been service-led without a strong strategic framework, leading to inconsistent decision-making. **If the council wants to move away from being at the service-led end of the transformation continuum, it will need to invest in enterprise digital capabilities.** By enterprise capabilities we mean digital solutions that can be applied across a range of services to create standardised digital services and processes and joined up views of data.

Through the process analysis workshops, combined with meetings with the council's data, development and delivery manager, we developed a view of the council's current technology transformation capabilities. Figure 8 and Figure 9 below summarise and explain this view.

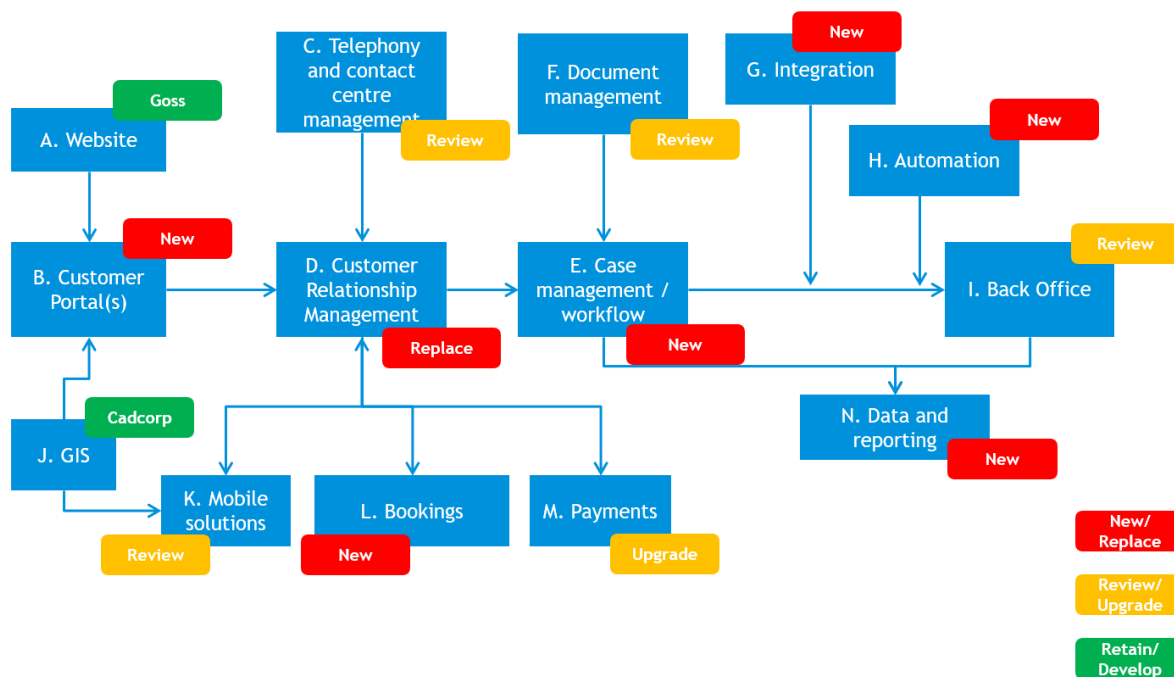


Figure 8: High level digital transformation capabilities map

Capability	Recommendation	Rationale
A. Website	Retain Goss CMS	The GOSS content management system (CMS) is used to manage the council’s website. It is a widely used platform in local government and we saw no evidence that it needs to be replaced. A caveat to that recommendation is that there are suppliers of customer relationship management (CRM) solutions that include a closely integrated CMS, and if the council were to choose such a solution it may be worth considering a change.
B. Customer portal	Invest in new corporate solution	The council has some service-specific customer portals, eg the Locata platform provides a portal for people to apply to join the housing register and bid for properties. However, there is no overarching customer account and portal to provide customers with a view of their accounts and cases in one place. This is a key gap.
C. Contact centre management	Review current Enghouse solution	The council’s current solution from Enghouse is adequate but there are more powerful solutions available which would provide additional capabilities to manage demand across channels and encourage adoption of digital channels.
D. Customer relationship management	Replace Status with modern solution	Status is not fit for purpose and it is essential that it is replaced. Modern CRM platforms will provide significantly greater capabilities and a much better customer experience.
E. Case management	Invest in new corporate solution	Various line of business applications hold case data currently but few have a concept of workflow guiding the case management process, few cases can be tracked by the customer online and many requests are managed via email. A corporate case management solution would enable a far higher proportion of case types to be managed digitally from end-to-end and tracked online.

Capability	Recommendation	Rationale
F. Document management	Review document management solutions	Every service has its own approach to managing documents and it will be difficult to shift to a single solution across the council. A pragmatic approach is to review document management needs as processes are redesigned and seek to apply a standard set of principles, using different technologies.
G. Integration	Invest in new integration capabilities	One of the most common causes of inefficiency and silo-ed working is the lack of integration between different systems. The council will need to enhance its integration capabilities, although this may be possible with tools and capabilities introduced through D and N rather than investing in a dedicated integration platform.
H. Automation	Invest in new automation capabilities	Automation will be another key driver of efficiency. The council has some existing automation capabilities through its Microsoft 365 E5 licence, ie the Power Platform. However, these capabilities are limited and to automate processes driven by line of business applications will require investment in new automation modules from existing suppliers.
I. Back Office	Review selected back-office systems	The council has already identified a number of systems for replacement eg the regulatory services and housing repairs systems. In replacing these, careful consideration should be given to how new systems will interact with the enterprise digital tools and capabilities.
J. GIS	Retain Cadcorp	Whilst there may be a need for additional GIS skills, we saw no evidence that Cardcorp needs to be replaced.
K. Mobile solutions	Review current capabilities	There are some limited mobile working tools currently in use and it is likely that enhanced mobile working capabilities will be introduced as a result of other investments, eg a new housing repairs system and an enterprise case management solution. A pragmatic approach is to review mobile working needs as processes are redesigned and seek to apply a standard set of principles, using a mix of service-specific and enterprise capabilities.
L. Bookings	Invest in new booking solution	The council has no corporate booking solution currently. This is a key gap.
M. Payments	Upgrade existing solutions	The council has recently upgraded the online payments solution but there are older elements of the overall payments architecture which need to be upgraded.
N. Data and reporting	Invest in new enterprise data solution	The council has no data warehousing solution to enable data from multiple sources to be loaded, cleansed, transformed and matched. This is a key gap assuming the council wants to create a more joined up data architecture to support a master data management (MDM) approach to underpin data-led decision making. MDM involves creating a single master record for each person, place, or thing in a business.

Figure 9: Explanation of technology capability recommendations

The capabilities described in Figure 8 and Figure 9 are not the same as individual systems or solutions. For example, B, D, E, F, G, H, K and L might all be delivered, wholly or in part, by a modern digital platform such as Microsoft Dynamics, Netcall Liberty Create or Jadu Connect.

In addition to investing in new capabilities to enable transformation, **it is likely that the council will need to invest in key enabling and digital skills** such as:

- Project management
- Business analysis
- Data analysis and engineering
- Data integration

The current ICT team has some capacity and capability in these areas but more will be required to deliver a programme of technology-driven process improvement.

3.2.4. Spend analysis

Redesigning business processes can save time and release capacity, creating choices about how much of that capacity to release as cashable benefits, ie by reducing the size of the staff establishment. However, that is only one approach to delivering financial savings. If the transformation programme is to achieve the MTFP target savings, all potential approaches need to be considered. One of these is through challenging the asset portfolio to enhance its financial contribution (transformation strategy objective A2), however this work was outside of our scope. Another approach is by examining budgets across the council to seek opportunities to reduce spend or increase income.

As part of our work we carried out an updated benchmarking review of NFDC spend against its CIPFA nearest neighbour councils, using the latest published revenue outturn data. We also identified and quantified both statutory and discretionary spend against the council's priorities and KPIs as detailed in the Corporate Plan 2024 to 2028.

The detailed results of this work have been provided to NFDC as a separate report, but in the context of this business case it is worth noting that **NFDC's net annual expenditure of £19.6m is significantly lower than the net comparator average of £28.6m**. This difference appears to be due to a combination of genuinely lower spend than similar councils and lower levels of income from fees and charges.

Our report outlines a number of potential areas where the council could consider reducing spend and/or increasing income. Increasing income through fees and charges to bring NFDC closer to its nearest neighbours would require Member approval but does not entail significant organisational transformation. Reducing spend where there is not currently a strong alignment between the council's Corporate Strategy and/or Key Performance Indicators is likely to be more challenging without significant engagement with Members and community stakeholders. **This means that efficiency savings combined with increased revenue from assets and fees and charges are the most likely ways of achieving the MTFP targets in the short to medium term.**

3.3. Options, costs and benefits

Using the evidence base developed from the activity analysis and process analysis, we ran three co-design sessions with EMT on 5 March, 26 March and 16 April 2024. We used the data gathered in two main ways.

Estimating potential benefit

There was strong qualitative and anecdotal evidence that there were significant opportunities to redesign processes to deliver efficiencies. The process redesign workshops provided us with specific quantifiable examples. We used this sample dataset and combined it with the activity analysis data, which covered the whole organisation, to extrapolate the potential

benefit from process efficiency alone. Our approach is described in Appendix 8: Benefits extrapolation methodology.

The strength of this approach is that it establishes a benefit baseline that is derived from real opportunities identified and quantified by NFDC staff. However, it is acknowledged that there is no exact science to efficiency calculations in a business case context and there are still assumptions and variables in the data. For example, while some staff were confident to estimate the time that could be saved by a specific opportunity (and had data to support this), others had to take a best guess approach.

Developing options for future organisational design

The activity analysis provides a mechanism to explore design options through the lens of activity types, rather than starting with existing team structures. We can look at how activity of the same type is distributed across the organisation, at different levels, as different proportions of different roles. We can then suggest different ways of grouping similar activities and explore the implications of each. Options A to C below were the original options presented to EMT. These options can be seen as moving from left to right on the transformation continuum, with option A at the service-led end of the scale and option C at the enterprise end of the scale.

3.3.1. Option A

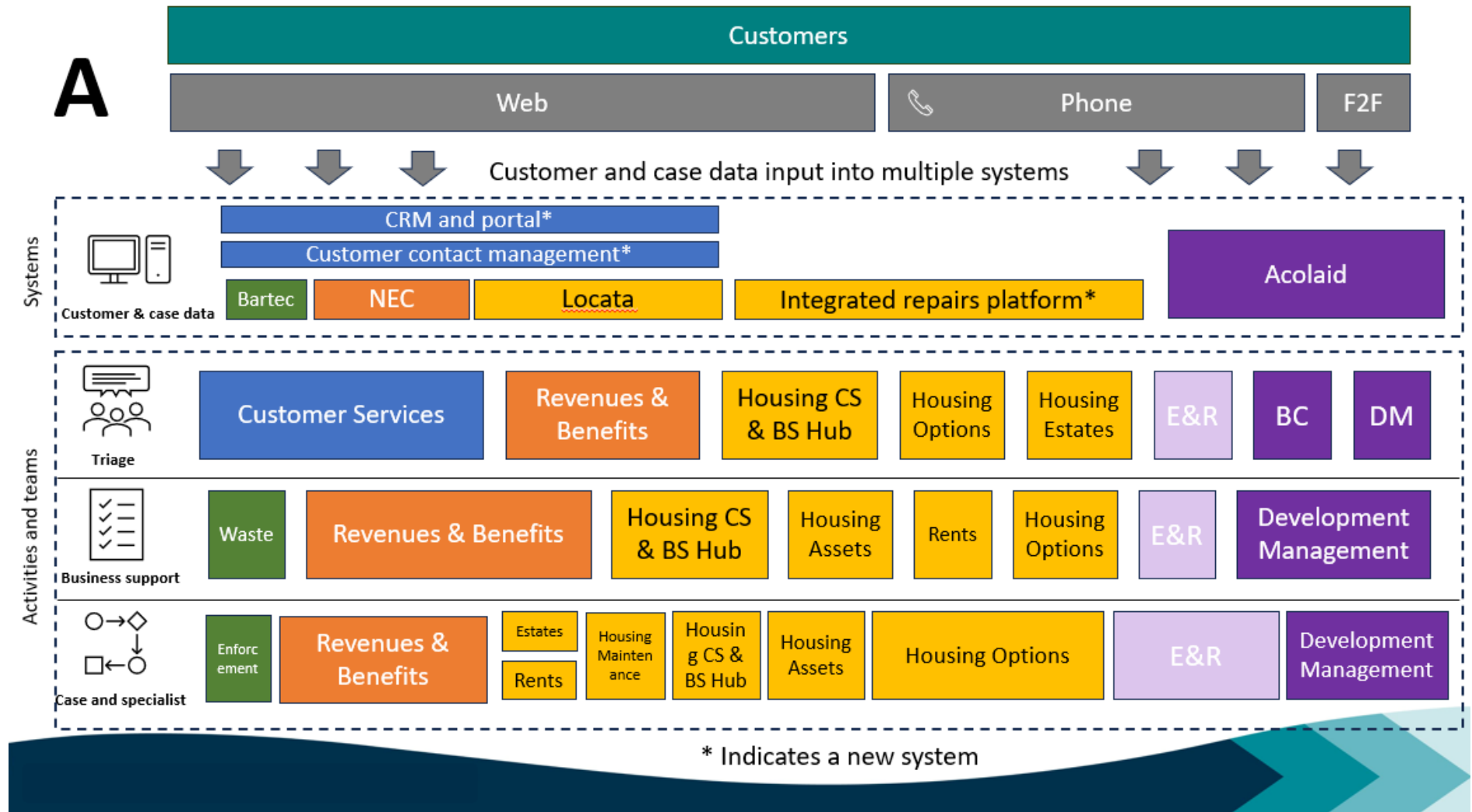
Option A (Figure 10) involves changes to channels, processes and systems but **no significant structural change**. This option would involve investing in a new, modern CRM to replace Status and using it to manage enquiries as cases, rather than emailing them around the organisation. Along with improving efficiency within current structures, this would create greater visibility, enable customer to track enquiries and cases that are not resolved on first contact and provide better management information.

The council could also consider investing in an enhanced contact centre management system to provide enhanced functionality to shift customers to online channels. This could enable removal of email addresses from the website and drive customers to use structured online forms instead. **Option A delivers benefits by increasing the range of online services and then strongly encouraging channel shift to ensure customers use them.**

Under option A, the council would continue to manage triage and business support activity via separate teams aligned with each service. As such, it is unlikely that investing in technology to combine customer data across services would offer much value. For this reason, this option does not include investment in master data management (MDM). It is important to acknowledge that some benefits identified in the process design workshops would be difficult to deliver in this case.

Option A would enable the council to deliver **incremental benefits with relatively low organisational disruption**, maintaining service stability whilst modernising services and delivering efficiencies. However, the lack of significant structural changes means that **there would be fewer opportunities to enhance the resilience of services or to realise the financial benefits associated with remodelling staff and management structures**. If the efficiency gains consist of many small opportunities spread across multiple roles and teams which changing structurally it is harder to release them as cashable savings. The most likely approach would be to use staff turnover as the benefit release mechanism, which gives the council less control.

A



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Figure 10: Design option A

3.3.2. Option B

Option B (Figure 11) involves **similar process, channel and technology changes as option A but introduces a degree of structural change as well.**

This option involves two main customer service teams handling the majority of triage activity. One team manages demand for universal services – waste, street scene, environmental, council tax - and a second team serves customers requiring a higher level of support as current tenants or customers in housing need. We have called these two teams the 'Universal' customer team and the 'Supported' customer team.

The advantages of this option include the **creation of two larger teams, creating greater resilience and fewer hand-offs.** Housing options customers would be served by the expanded housing hub, meaning they would benefit from the same access to telephone support as other housing customers. The customer demand that is currently handled directly by the housing estates team would also come into this team.

Under option B we have included investment in master data management, ie aggregating and linking customer data to create more joined up views across services. For the universal customer services team, this would mean creating a joined-up view in the CRM of customer data such as council tax account information, any relevant benefits and discounts, bin collection dates and events (eg contaminated or missed bins) and a view of open and historical cases.

For the supported customer service team, you would seek to create a joined-up view of housing customer data across rents, repairs, planned maintenance, tenancy casework and housing need. This would address the problem housing staff have highlighted that this data is spread across systems and modules, resulting in wasted time spent searching for data and poorer customer service.

All but the simplest enquiries for place services – environment and regulation (E&R), planning and building control - would continue to be directed to those services, but the volumes are lower here. There would also be opportunities to incrementally shift more enquiries for these services to the universal customer team over time. However, this option has a limited scope for master data management, excluding data related to place services.

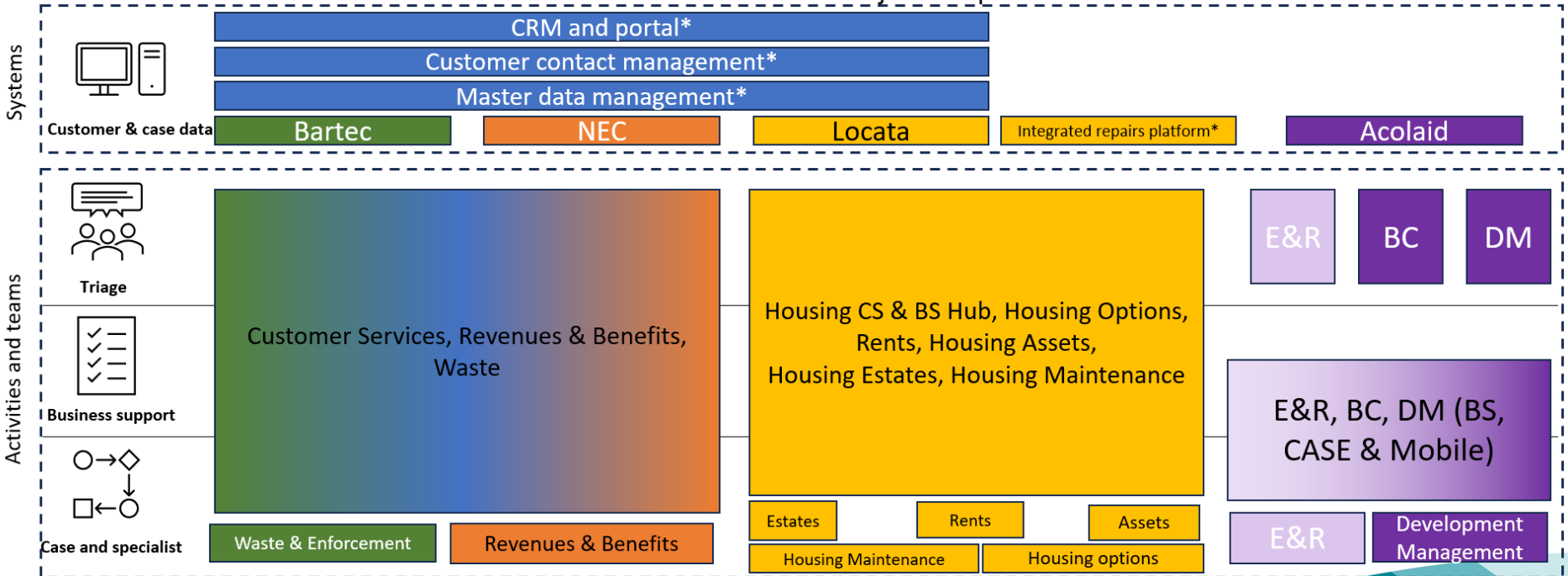
With option B, we have also assumed that the **business support activities are carried out by the universal and supported customer teams.** For example, most council tax processing would be completed in the universal team with only complex cases being handled outside the team. An example for the supported customer team is that it would handle all validation and initial assessment of housing applications.

The advantage of this approach is that you have **two teams dedicated to managing enquiries, setting up cases, validating applications and resolving simple requests for their respective customer groups.** The culture and purpose of these teams is to resolve as much as possible without hand-offs, freeing up capacity for specialists to focus on complex cases, quality assurance and enhancing performance.

B



Customer and case data starts to be aggregated and matched to create more joined up views



* Indicates a new system

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Figure 11: Design option B

3.3.3. Option C

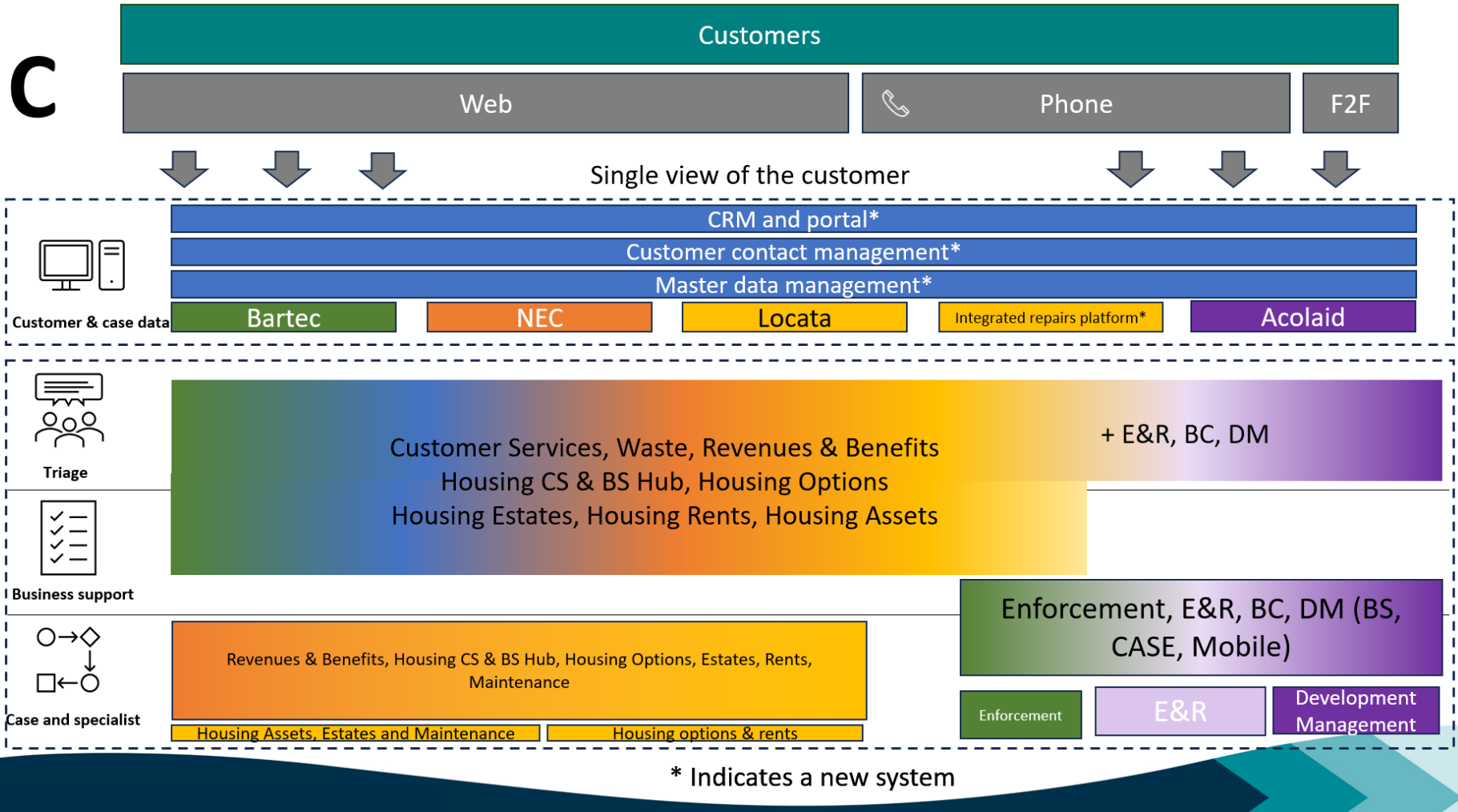
Option C (Figure 12) **goes further in terms of structural change and technology deployment than option B**, although it could also be seen as a natural evolution of that option.

In this option rather than two customer support teams there would be **one single customer service team for maximum economies of scale** and there would be a greater focus on including E&R, planning and building control customer and business support activity.

This option would mean deploying the enterprise capabilities such as CRM, master data management and contact management across the full scope of public-facing services. The scope of the master data management work is wider with a greater onus on joining up data views across most high-volume council services.

Most requests would be logged via the CRM (whether via self-service or by staff) and there would be a greater need for integration between the CRM and line of business systems. This increases the complexity and cost but offers the greatest scope for joined up customer service.

This option also entails **closer aggregation of case and specialist activities in two main clusters**: a people focused cluster covering revenues, benefits and housing and a place focused cluster covering environmental enforcement, E&R, planning and building control. There is the potential to look across the place functions and create **a multi-functional team based out in the district**, carrying out non-specialist inspections, gathering evidence and monitoring and enforcing environmental standards across the district.



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Figure 12: Design option C

3.3.4. EMT feedback and revised option B for NFDC

During the co-design process, EMT provided the following feedback:

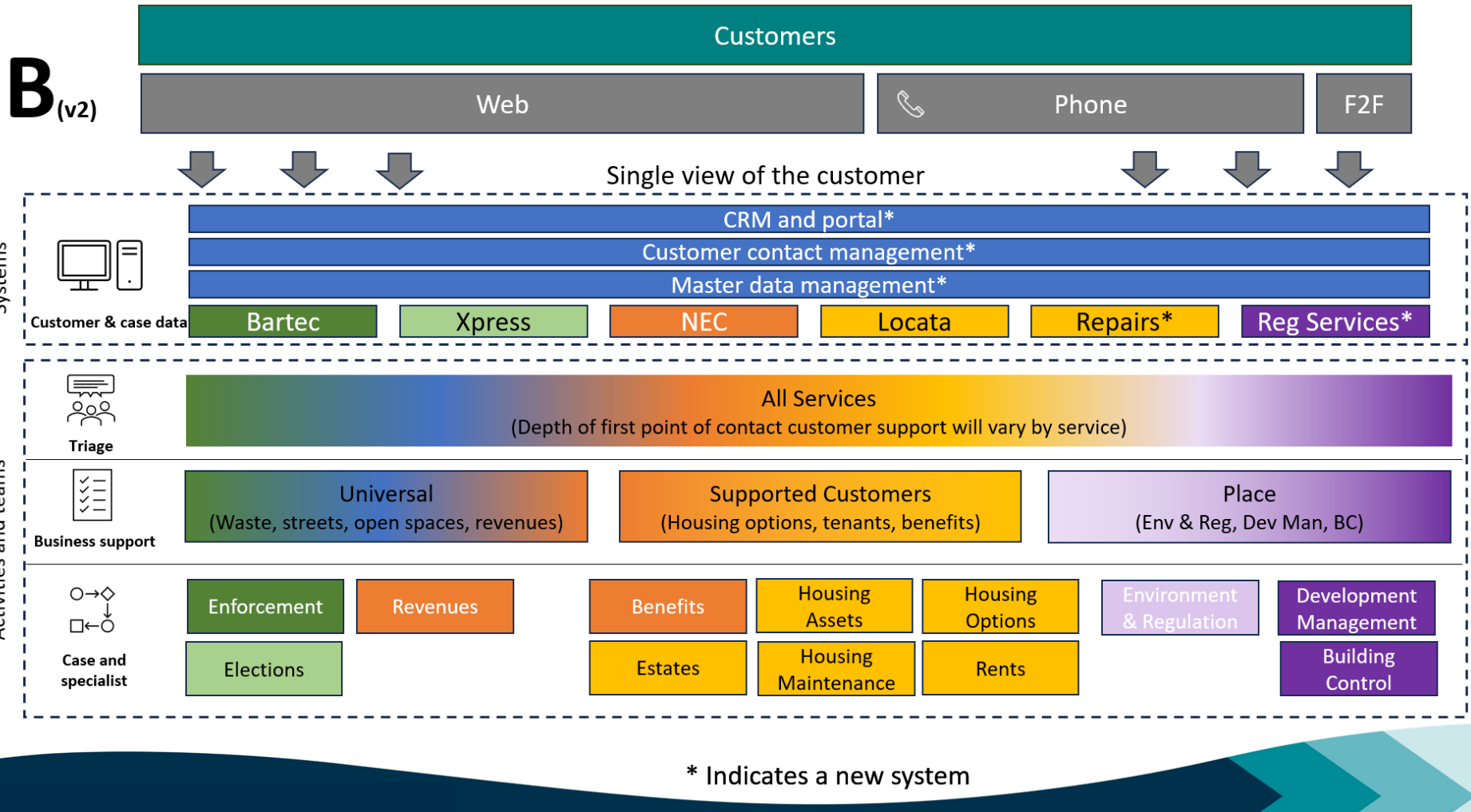
- The target position is somewhere in the middle of the transformation continuum, with some structural change.
- Structural change at the case management and specialist level must be balanced with the need to retain in-depth professional knowledge and experience, especially in the context of a challenging recruitment market.
- Supportive of the universal/supported customer split of Option B.
- Elections activity, eg handling elections triage activity, should be considered in scope of the design.
- Keen to see enterprise capabilities applied to all services, including place services, as shown in Option C.
- Preference for a single customer services team, not aligned with business support.
- The customer service offer is likely to be different for different services. For some, eg waste, is should be a 'deep and wide' offer, managing all waste enquiries without hand-offs. For others, eg planning, it would be narrower and shallower, with simpler enquiries handled by the customer services team but complex enquiries being handed-off and case-specific enquiries going direct to the case officer.
- Business support could be somewhat aggregated, into three teams aligned to universal, supported and place customers/services.

This feedback resulted in a fourth design option which borrowed elements of option A (separation of triage and business support), option B (the universal/supported customer concept) and option C (enterprise capabilities applied to all services). We have called this option B(v2) because it feels like an evolution of option B and is in the middle of the transformation continuum.

Figure 13 illustrates option B(v2) and it is important to understand that this is a high-level view of an operating model, not a future service structure. There are different paths to the final design for different services and there will be design questions which will need further discussion during detailed design and implementation if this option is selected. For example:

- There are a range of strategic and support services not illustrated in Figure 13. How might the design of these teams need to evolve to reflect the wider reorganisation of public-facing services?
- While Figure 13 shows the benefits service aligned with the 'supported customer' group, is it viable or desirable to separate this service from the revenues service?
- Is there an appetite for an enhanced, visible presence in the community via some form of multi-skilled team carrying out non-specialist inspections, gathering evidence and monitoring and enforcing environmental standards across the district (as referred to in option C)?

and Figure 14 provides a comparison with the two versions of option B and draws out some of the key implications of choosing option B(v2).



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Figure 13: Design option B(v2)

Design component	Option B (v1)	Option B (v2)	Implications of Option B(v2)
Data and technology	Application of enterprise capabilities to the universal and supported customer services but not to place services.	Application of enterprise capabilities across all services	All services can benefit from these tools. A combination of MDM and CRM enables a fully connected view of the customer using data from all relevant systems. This will enable a better customer experience but the cost of delivery but will be higher.
Triage	Rationalisation of multiple service-based customer contact operations into two teams, one focused on universal services and one on customers that need extra support. Place services continue to manage customer contact in service.	Creation of a single customer service team managing most enquiries for some services and a smaller subset for others.	<p>The ‘depth’ of the customer service offer for each service would be established through detailed design work. The potential to realise benefit in this layer is higher due to greater aggregation and more organisational change. It is essential to minimise the number of systems customer services needs to use; the CRM should be the primary system. Enquiries referred to ‘back office’ teams would be recorded via CRM to enable tracking of progress and continuous improvement.</p> <p>Creating training and cross-skilling plans to take on new services or enquiry types will be critical. The relationships between this team and the back office will need to be strong. The culture/vision for a single customer services team should articulate that they are much more than a switchboard.</p>

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Design component	Option B (v1)	Option B (v2)	Implications of Option B(v2)
Business support	Business support activity is also incorporated into the universal / supported customer teams. The goal of these teams is to resolve enquiries and set up clean, valid cases for case workers and specialists to resolve.	Business support is managed separately from triage but is aggregated into three teams aligned with the universal, supported and place services. Revenues work is aligned with universal and benefits with supported.	<p>Multiskilling of business support staff in each team is essential to build resilience and release benefit. If revenues and benefit staff are multiskilled across the two services currently then the impact of separating them will need to be managed carefully.</p> <p>There is less scope for benefit delivered by aggregating triage and business support activity, although there may be future potential to push more case activity into this layer.</p> <p>Where customers currently walk in or attend appointments to provide documents, payments or other business support type information they will be interacting with the single Customer Services team. There is potential for increased handoffs, delays or poorer customer experience (waiting time etc) if the right balance isn't found.</p>
Case and Specialist	This activity is largely managed in similar team structures as now, with the potential to empower the customer teams to take on more simple case work.	This activity is largely managed in similar team structures as now, although benefits activity would be more closely aligned with housing activity.	<p>With the customer services team managing a narrower range of enquiries for some services than others there is a need for careful design of the triage activity handled in the back office. The CRM should be used by back-office teams to manage referred enquiries and cases to enable tracking and visibility.</p> <p>There will be less opportunity to rationalise, standardise and optimise duplicated and similar activity/ processes e.g., change of circumstances, direct debits.</p>

Figure 14: Comparison of design options B and B(v2)

3.3.5. Financial benefits

The benefit extrapolation exercise outlined at the beginning of section 3.3 provided us with our baseline benefit estimate for option A. In other words, option A is based purely on process efficiency benefits with no assumptions around benefits derived from wider remodelling of teams or changes to leadership and management structures.

All other options inherit the baseline benefit figure and are then adjusted to reflect the degree of remodelling and leadership and management benefits we believe are achievable, based on our experience of similar programmes with other councils.

Figure 15 provides a summary of the estimated financial benefits for each option. Numbers have been rounded for ease of reference and in each case represent a middle figure in a +/- 10% range.

Option	Estimated annual benefit	Notes
Option A	£900,000	Extrapolated from quantified sample of process efficiency opportunities
Option B	£1,610,000	As Option A plus significant remodelling benefit from reorganising triage, business support and some case management activity.
Option B(v2)	£1,260,000	As Option A plus some remodelling benefit, largely from reorganising triage activity.
Option C	£1,890,000	As Option B plus additional benefit from wider remodelling of leadership and management activity.

Figure 15: Estimated benefit by option

Where will financial benefits come from?

Whilst the process analysis did show the potential to realise some small non-staff budget savings, for example through reduced printing and distribution costs, the majority of financial benefits from process efficiencies, remodelling and leadership and management are likely to be realised through workforce reductions.

The average fully-loaded FTE cost for NFDC is ~£44k (excluding service delivery roles such as waste operatives, grounds maintenance roles and housing maintenance roles). Based on this average cost, to realise the entire MTFP target of £1.75m through staff costs would require a reduction of 40 FTE, or approximately 5% of the workforce. However, it is expected that the financial benefits will be delivered through a combination of mechanisms, not all of which involve FTE reductions. Section 4.1 explores other mechanisms to realise some of the savings which would reduce the amount delivered through FTE savings.

Where will FTE savings come from?

It is not possible at the business case stage to say exactly where FTE reductions might take place. This will be affected by the option chosen, decisions about releasing capacity back into the organisation or removing cost and the outcomes of process reviews and technology changes such as automation. However, we can describe the key areas or drivers of FTE savings:

- **Cross-council aggregation**

Where new teams are formed that bring together activity from multiple teams into a new, horizontal team, it is expected that this aggregation will result in FTE savings.

- **Aggregation within departments and services**
Where activity is reorganised and somewhat aggregated within vertical structures, some FTE savings should be expected but the potential is less than with cross-council aggregation.
- **Within case and specialist teams**
The council has been clear that there is little or no appetite to redesign case and specialist activity. However, if processes are digitised, automated and customers do more online, it is likely that some of this benefit will flow down to case and specialist roles. There may be some opportunity to tactically realise FTE, potentially working with natural turnover of staff.
- **Leadership and management**
If the council chooses to redesign leadership and management activity to achieve more consistent spans of control and greater empowerment of staff, it is likely that there will be an overall reduction in the number of managers, given the high number of roles with some element of management (134 roles out of ~420 distinct roles / 32%). However it must be recognised that many roles with a 'manager' designation are spending considerable time on non-management activity which will still need to be done, unless other changes release capacity.

3.3.6. Non-financial benefits

The nature of the business case is to focus on the costs and financial benefits of the programme due to the fact the programme has a significant financial target to deliver. However, it is important not to lose sight of the other transformation strategy benefits.

The non-financial benefits that closely relate to the design options are:

- Improve customer outcomes
- Release capacity
- Enhance performance culture

In addition to these, the transformation strategy also identifies two other non-financial benefits:

- Staff skills development
- Ensuring sustainability by reducing the impact of services on the climate

For all options, the way the programme is managed and the extent to which leadership focus is given to non-financial benefits will determine the extent to which they are realised. However, the option chosen will have an impact on non-financial benefit delivery, for example:

- **Improve customer outcomes** – we know from the customer research that customers currently feel frustrated about repeating information and sometimes perceive that the council isn't joined-up. Option A largely preserves current structures and, whilst it would deliver enhanced digital services, there is less scope than with other options to join up the customer experience at the front end.
- **Release capacity** – redesigning processes and shifting customers to digital channels can release staff capacity, and all options have the potential to do this. However, redesigning teams to build resilience and enabling some teams to carry out a wider range of duties is another way to do this, and options B and C have the greatest potential in this regard.

3.3.7. Costs

We worked closely with the council's Transformation and ICT teams to identify and estimate programme costs. These are summarised for each option in this section.

Assumptions

- We have presented costs as 'one-off costs' and 'recurring costs' and made no assumptions about the use of capital funding.
- All costs have been modelled over a two-year period.
- We have assumed the additional permanent staff required to maintain and develop the CRM will be recruited at the start of the programme and play a key role in implementation.
- Where there is investment in new ICT systems, we have assumed that all new systems will be cloud-based and paid on a Software-as-a-Service (SaaS) basis.
- Where current systems are being replaced by new systems, we have assumed that:
 - in year one the council will need to pay dual-running costs for both old and new systems. This may be avoidable.
 - the costs for current systems are saved by year two, and these savings have been netted against the costs of the new system. It may take longer to replace and decommission current systems.

Scope

We have included costs for:

- Additional organisational design support to assist with activities such as the development of the people strategy, training plans, job evaluation and transition management.
- Backfill of staff within the organisation to provide existing staff with the capacity to get involved with programme delivery.
- One-off costs associated with the introduction of new technology, usually implementation support from technology providers.
- Recurring costs of new technology, both SaaS costs and, in the case of the CRM, additional permanent resources to further develop the system beyond year two.
- One-off and recurring costs of systems which the council would be likely to replace irrespective of transformation, but which have the potential to contribute to transformation objectives, namely:
 - Digital housing maintenance system to replace the current DRS and Uniclass systems.
 - Planning and regulatory services system(s) to replace the current Idox Acolaid system.

We have excluded costs for:

- Roles already in the base budget which will play a role in programme delivery (eg programme and project management roles, website content design).
- Any additional asset management resources or services to develop and implement the asset management strategy, due to being asked to exclude assets from the business case. To be clear, assets remain in scope of the transformation strategy and are likely to be an important contributor to the savings target.
- Contingency (see below).

Contingency

The costs presented exclude provision for contingency but there are other items which, depending on the option chosen, may require additional funding. The costs include our view of the minimum level of resources required for the council to potentially deliver the transformation programme without the support of a dedicated transformation partner. However, most local authorities tend to seek a transformation partner to support them through a programme of this scale. The potential services provided by a transformation partner may include:

- Programme planning and mobilisation
- Organisational design
- Financial modelling and benefit tracking
- Culture change and transition planning
- Provision of resources where the council needs additional transitional capacity such as business analysis and service design.

On this final point, the business analyst and service design resource, to design and build new digital processes using the technology enablers (especially CRM), is currently limited and will constrain the pace at which you can work through the organisation. The programme costs assume two new technical business analyst roles plus one FTE released from the ICT team. We recommend the council considers ways to boost the capacity in this area.

There are other variables the contingency will need to cover. Different options presented entail different levels of structural change, which can bring additional costs. Estimated technology costs have been based on market analysis but are also subject to change.

Following discussion with the council's s151 officer, a contingency sum of up to £600k may be considered necessary to cover potential outplacement costs and any unplanned programme costs.

Costs by option

Figure 16 below shows the estimated one-off and recurring costs for each option, excluding contingency.

The costs are similar across all options with the difference in cost driven by the extent to which the council wishes to adopt MDM to connect and drive value from its datasets.

Cost type	Option A	Option B	Option B(v2)	Option C
One-off costs	£1,959,000	£2,034,000	£2,109,000	£2,109,000
Recurring costs	£376,000	£406,000	£406,000	£406,000

Figure 16: Estimated programme costs by option

The costs shown in Figure 16 comprise programme delivery costs (programme and project managers, backfill, OD support) and the costs of specific technology projects. Of these technology costs, £816k of the one-off investment and £52k of the additional revenue costs included in the business case are for replacement housing, planning and regulatory services systems which will require replacement irrespective of transformation.

The costs for options Option B(v2) and Option C, which include the widest application of MDM, are broken down in Figure 17 below. For options A and B the breakdown is identical except for the digital data platform costs.

Project	Total one off	Net recurring
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Contact centre	£24,000	£34,000
CRM	£314,000	£233,000
Digital data platform	£150,000	£30,000
Digital housing maintenance system*	£230,000	£27,000
Locata data warehouse	£5,000	£2,000
Planning and regulatory services system*	£586,000	£25,000
Programme delivery resources	£780,000	
Revenues and benefits	£20,000	£55,000
Grand Total	£2,109,000	£406,000

Figure 17: Programme costs breakdown

* These two projects will need to be funded irrespective of transformation, due to the current systems approaching end of life.

4. Financial assessment

4.1. Cost benefit analysis by option

Costs and benefits for each option are presented in Figure 18 below. These are based on current prices and the council may wish to carry out its own net present value (NPV) calculation.

Option	Est. one-off costs	Est. benefit	Net recurring costs	Net benefit	GAP to MTFP
Option A	£1,959,000	£900,000	£376,000	£524,000	-£1,226,000
Option B	£2,034,000	£1,610,000	£406,000	£1,204,000	-£546,000
Option B(v2)	£2,109,000	£1,260,000	£406,000	£854,000	-£896,000
Option C	£2,109,000	£1,890,000	£406,000	£1,484,000	-£266,000

Figure 18: Net benefit by option with MTFP gap

Figure 18 shows that none of the four options fully meets the MTFP target of £1.75m so the council will need to employ additional strategies to meet the financial target for the transformation programme. Potential strategies include:

- Being more ambitious in targeting and realising process and channel efficiencies, for example by pushing harder for automation or closing more expensive customer channels.
- Increasing the revenue received from assets, for example by rationalising the amount of office space used by council teams and renting spare space to tenants.
- Using the spend analysis outlined in section 3.2.4 to guide a conversation with members around strategic reductions of services, aligned with corporate priorities.

It is important to recognise that £816k of one-off investment and £52k of additional revenue costs included in the business case are for replacement housing, planning and regulatory services systems which would be the subject of funding requests even if the council was not considering a transformation programme. On this basis, **there is an argument for excluding them from the payback calculations below but they have been included for transparency and completeness.**

We have assumed that no cashable benefits will be realised until year three and then we have assumed full realisation in year three. This profile may need to be smoothed during detailed planning. Figure 19 shows the payback for each transformation option over a six-year period. In summary:

- Option A is not projected to break even within a six year payback period.
- Option B is projected to break even mid-way through year four.
- Option B(v2) is projected to break even mid-way through year five.
- Option C is projected to break even by the start of year four.

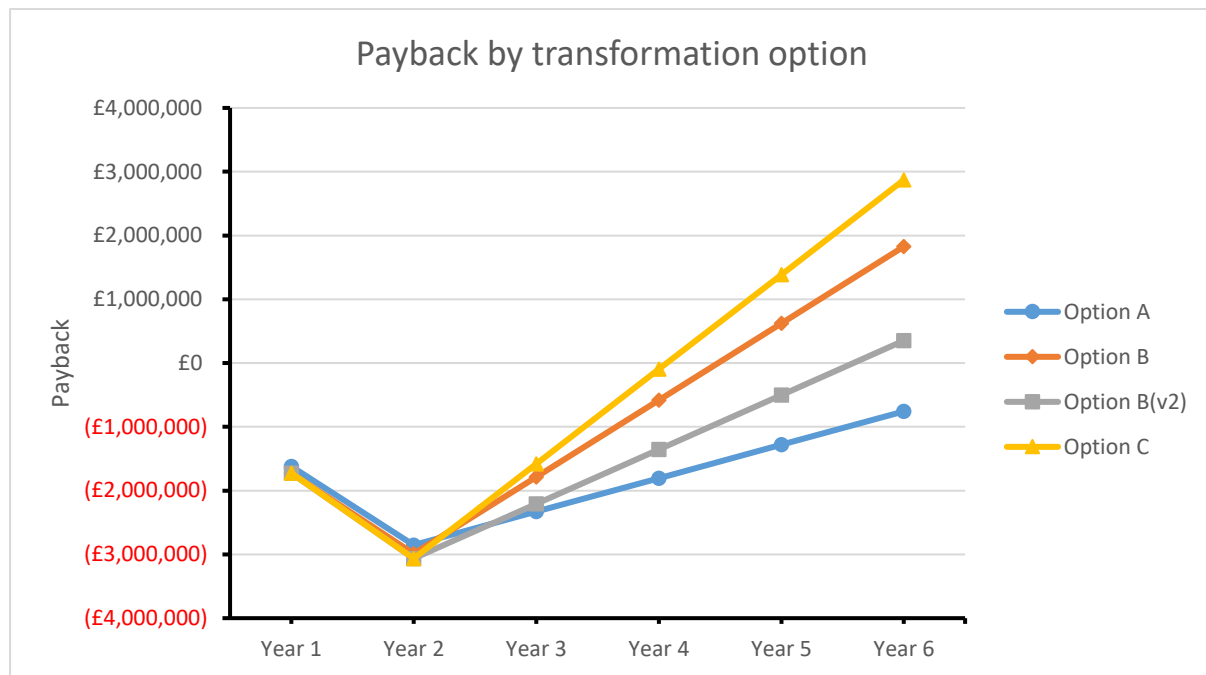


Figure 19: Payback by transformation option

4.2. Funding

When the council has chosen a preferred option, it will need to consider the appropriate sources of funding and the balance of capital and revenue. Figure 18 clearly illustrates the level of one-off and annually recurring revenue estimated for each option to inform the funding request.

5. Implementation

5.1. Leadership, culture and change

A critical success factor for all transformations is **strong leadership that is visibly and consistently aligned with the outcomes of the transformation strategy.**

Aligned leadership extends from elected members to senior and middle managers. Members set the strategic direction for the council and therefore must understand and support the need for the organisation to change to meet strategic goals. Senior leaders must present a united front, communicate the case for change and direction of travel clearly and set an example. Middle managers play a vital role in ensuring the change is translated into everyday team behaviours and ways of working.

It is important to understand that **benefit realisation decisions, such as whether to remove cost from the organisation or reinvest released capacity, are a function of leadership**, not the transformation programme. These decisions are often difficult but they are a necessary consequence of delivering successful transformation and leadership must ensure that their decisions are clearly communicated to the wider organisation.

However, leadership is not the sole domain of elected members and managers. Effective transformation programmes involve all staff in the change process: “People own what they help create” (Myron Rogers). The council must **involve staff and invest in change management** for the programme to be a success.

5.1.1. Change management

This section provides an overview of the change management activities the council should consider, irrespective of which transformation option is chosen.

Ignite’s business change approach is based on the five stages shown in Figure 21:



Figure 20: Ignite's business change approach

Figure 21 below illustrates the key activities and leadership skills required at each stage of the change management process.

	Engaged (Senior leaders)	Aware	Committed	Ready	Performing
Outcomes	Leaders have defined: <ul style="list-style-type: none"> Organisational vision Case for change How change will be managed How ready the council is for change 	Everyone understands: <ul style="list-style-type: none"> What the changes are Why we are doing them When they will be affected How they will be supported Where they can learn more 	Everyone understands: <ul style="list-style-type: none"> Their role in making this a success How they can contribute to design solutions, the changes and the way change is managed in their areas 	<ul style="list-style-type: none"> Staff have role clarity and are prepared to adopt change People understand what is expected of them – roles, systems, processes, behaviours and performance 	<ul style="list-style-type: none"> Changes have transitioned to 'business as usual' Council teams have established ways of working in the new world Performance is being proactively managed
Key activities	<ul style="list-style-type: none"> Key messages and language are developed to engage the organisation in the transformation Clear narrative on the transformed NFDC vision Initial organisational readiness assessment 	<ul style="list-style-type: none"> Stakeholder impact analysis High-level change impact assessments Interactive staff/member engagement and communications campaigns 	<ul style="list-style-type: none"> Detailed change impact assessments Tailored communications for service areas, functions, other stakeholders Immersive communications and engagement – org-level and team-level 	<ul style="list-style-type: none"> Training and upskilling for new/changed ways of working Scenario-based walkthroughs / pilots Readiness strategies and assessments 	<ul style="list-style-type: none"> Continual feedback loops Adoption strategies and assessments Consequence management for good and poor performance
Leadership Development	<ul style="list-style-type: none"> Owning and driving change How changes will be managed at NFDC Leadership principles during transformation and beyond 	<ul style="list-style-type: none"> Leading teams through change Effective change communication 	<ul style="list-style-type: none"> Strategic decision-making Empowering teams Resistance management 	<ul style="list-style-type: none"> Effective performance management Transition support 	<ul style="list-style-type: none"> Post-transition support Sustaining change

	Engaged (Senior leaders)	Aware	Committed	Ready	Performing
Leadership Success Criteria	<ul style="list-style-type: none"> Leadership consensus on the level and scale of transformation, the urgency of change and the consequences of maintaining the status quo Shared vision on how the leadership team will lead change 	<ul style="list-style-type: none"> Communicate the vision consistently and frequently Communicate openly and authentically – benefits as well as potential challenges Involve all stakeholders (i.e., staff, members etc.) to inform design solutions and how change will be managed 	<ul style="list-style-type: none"> Managers are driving change in their areas and proactively managing resistance Staff are empowered to take decisions, contribute to the changes and change process Role-model desired culture and behaviours (e.g., risk appetite) 	<ul style="list-style-type: none"> Managers are leading readiness activity in their areas The progress of changes is regularly assessed and adjusted as necessary, e.g., addressing unforeseen challenges 	<ul style="list-style-type: none"> Consistently ensuring changes are embedded and there is no return to 'old' ways of working Recognise and reward those that demonstrate the desired behaviours

Figure 21: Change management activities and leadership skills

5.1.2. Culture change

The Future New Forest transformation strategy is explicit about culture change being a key outcome of the programme. Objective P1 states “We will ensure our values, behaviours and culture are aligned and support the future organisation” and objective F3 states “We will shift to a more empowered and accountable, less top-down, management culture.”

Culture is sometimes regarded as an intangible and nebulous concept which is difficult to change in practice. However, there are many examples of organisations that have achieved significant cultural shifts. It is important to be clear about what the target culture looks like and what needs to change.

From the workshops and analysis we have done so far, we have identified four key cultural themes emerging, shown in Figure 22. These will be critical areas to address during the transformation, as they will be enablers to you achieving your strategic outcomes.

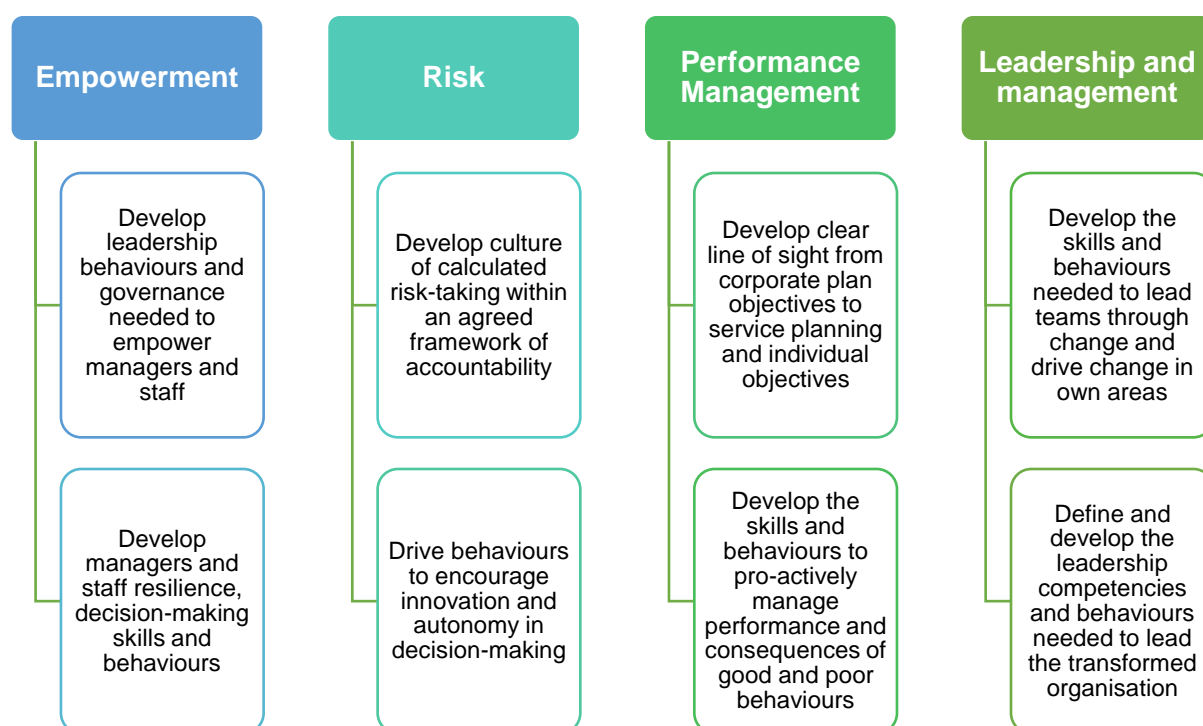


Figure 22: NFDC culture change themes

Having identified the target culture, there are practical steps you can take to start to reflect and embed the target culture through deliberate choice of behaviours, symbols and systems. Leadership is key and the way leaders and managers behave will have a significant impact on the successful delivery of culture change.

5.1.3. Change impact assessment

Appendix 9: Draft change impact assessment for Option B(v2) illustrates the potential changes involved for option B(v2) with an impact rating for each change, based on the following change categories:

- Process – this change will involve designing and implementing new business processes.
- Organisation – this change will entail changing organisational structures and roles.
- Technology – this change will entail introducing new technology.
- Behaviours – this change will require staff to change their behaviours.
- Skills – this change will require staff to learn new skills.

5.2. Delivery

5.2.1. Governance

Although the scope for this business case excludes assets and accommodation, this is still one of four themes in the transformation strategy and the programme that emerges from this business case must be:

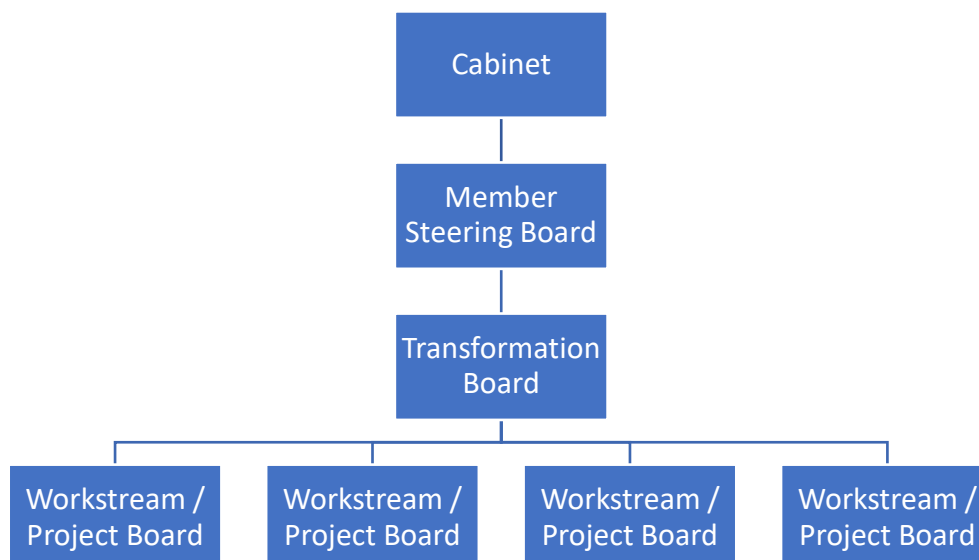
- Comprehensive, covering all transformation themes and activities including people and capabilities and assets and accommodation.
- Managed as a single, integrated programme composed of distinct projects and workstreams.
- Governed by an overall board which has decision-making power (in line with appropriate delegations) over all aspects of the programme.
- Visible to members, senior leadership and staff at levels, in terms of objectives, milestones and progress.

In section 3.2.3 (Technology assessment) we highlighted the importance of planning how new systems will interact with the enterprise digital tools and capabilities. In section 4.1 (Cost benefit analysis by option) we noted that the housing repairs and planning and regulatory systems would be the subject of funding requests even if the council was not considering a transformation programme, and that these account for 38% of the estimated one-off costs of the programme and 13% of the estimated recurring costs.

The implications of including these major system replacement projects in the transformation programme are:

- The projects will report into the overall transformation programme governance.
- The projects will be enablers of transformation programme benefits.
- System requirements and selection will be influenced by the wider transformation. For example, the ability to share data and integrate with enterprise systems such as CRM will be essential requirements of new systems.
- Processes will be redesigned to reflect transformation design principles and to make the most of the new system capabilities rather than new systems being configured to reflect existing ways of working.
- Organisation design changes will impact the configuration of new systems. For example, the creation of a single customer services team will require thought about how to share case information with that team to enable them to handle enquiries.

A governance structure that oversees and encourages a joined-up approach, and has ultimate decision-making power across all workstreams, will be required. The detailed governance framework must be developed when the programme is mobilised and workstreams, roles and responsibilities are known and allocated. However, an indicative governance framework is shown below.



5.2.2. Approach

Managing a whole-organisation transformation programme is complex and requires careful planning and consideration of the right approach.

Some of the considerations for mobilisation and detailed planning include:

- How to structure the programme – how many workstreams and projects are there and how will these feed into the governance process?
- How to plan and deliver different projects – some programme activities, eg the procurement of new technology, lend themselves to a waterfall delivery approach, with distinct sequential tasks or phases. Others, such as the design and delivery of new digital processes, might suit an agile approach where requirements are flexible and delivery is iterative.
- How and when to realise financial benefits – when does the MTFP require financial benefits to be delivered, how many phases or ‘benefit drops’ will there be and how will you determine the balance between releasing capacity back into the organisation vs realising savings through staff reductions?
- How to manage any staff reductions – will you aim to work within natural turnover, will you offer voluntary redundancies, to what extent will cost be a factor?

The council will need to ensure the programme office is sufficiently resourced with programme management and support roles and allow adequate time to mobilise and recruit essential programme roles. In our experience, a mobilisation period of at least three months is required.

5.2.3. Risks and dependencies

A detailed risk analysis should be carried out as part of programme planning and mobilisation, however we have provided an initial analysis of some known and high-level risks in Figure 23 below.

Risk	Impact	Probability	Overall risk rating	Explanation and mitigation
Financial uncertainty resulting in changing savings targets and/or funding challenges for the programme	4	3	High 12	The past four years have seen several major shocks to the UK economy which have placed further pressures on public services. If the council's finances are hit by further external pressures this could impact programme funding.
Too much change in too short a period	4	3	High 12	The scope of change for the programme, including implementing two major new line of business systems as well as introducing new enterprise capabilities, reviewing a large number of processes and redesigning teams, is significant. There is a risk that the organisation cannot sustain this much change within a two-year programme. Mitigation could include extending the implementation period, reducing the scope of technology change or increasing the programme support in key areas such as business analysis, change management and testing.
Lack of capacity and capability in key transformation skills such as programme management, change management, business analysis, customer engagement and digital process design.	4	2	Medium 8	The programme costs include both temporary and permanent roles to support the transformation. These represent the bare minimum required to deliver the programme. The council could consider increasing the number of roles, eg recruiting more business analysts than currently budgeted, or identifying a transformation partner that can bring in additional capacity and capability.
Cannot recruit to key programme roles	4	3	High 12	All temporary programme roles have been budgeted on a salary basis rather than contractor day rates. In practice, fixed-term roles are often unattractive to job seekers. People often want the security of a permanent role or the higher remuneration of contracting. Recruit early to gain visibility of the risk and consider creative responses, eg target new graduates or look for internal secondments that can be backfilled more easily.
Capacity savings are difficult to realise due to impacting parts of roles rather than whole roles.	4	2	Medium 8	Select a design option which allows for a reasonable degree of organisational redesign. If an option with low levels of organisational redesign (eg option A) is chosen, the probability increases because redesigning roles provides an opportunity to take advantage of multiple small process efficiencies.

Risk	Impact	Probability	Overall risk rating	Explanation and mitigation
Capacity savings are less than forecast.	4	2	Medium 8	This can happen for a range of reasons, such as a resistance to change processes, failure to implement new technology effectively, failure to achieve desired levels of channel shift. The probability can be reduced through the rigorous application of design principles, strong benefits management and strong change management.
Programme costs are underestimated	4	2	Medium 8	The business case includes significant costs of technology which have not been confirmed through procurement. However, these costs are all informed by market research so there is a good degree of confidence in them. The risk can be mitigated through strong and pragmatic financial management, balancing overspend in some areas with underspends in others. It may be necessary to reduce the scope of technology investment if high priority items, eg CRM, come in higher than anticipated. Potential redundancy costs are a significant variable which can be managed, in part, through policy and approach.
Change of political leadership, control or priorities	4	2	Medium 8	Whole organisation transformation is disruptive. Whilst this can be mitigated through effective change management (see below), it cannot be avoided altogether. It is important that the political leadership of the council recognises this and is supportive of the change throughout the programme, dealing with any staff concerns in partnership with senior leaders.
Lack of senior management buy-in	4	2	Medium 8	The importance of strong leadership has been made throughout the business case. There must be high levels of trust and openness at EMT and once decisions are made, all senior leaders must demonstrate support and stick to key messages when talking to their teams.
Backtracking when transformation becomes consequential	4	2	Medium 8	Closely related to the above, this happens when leaders commit to a change at a design stage without fully thinking through the implications, then withdraw support once the consequences of the change become real, eg when it is time to make difficult decisions about staff and structures. Mitigations include allowing sufficient time to discuss and understand the impact of change, frequent reiteration of key principles and objectives and strong leadership from the SRO.

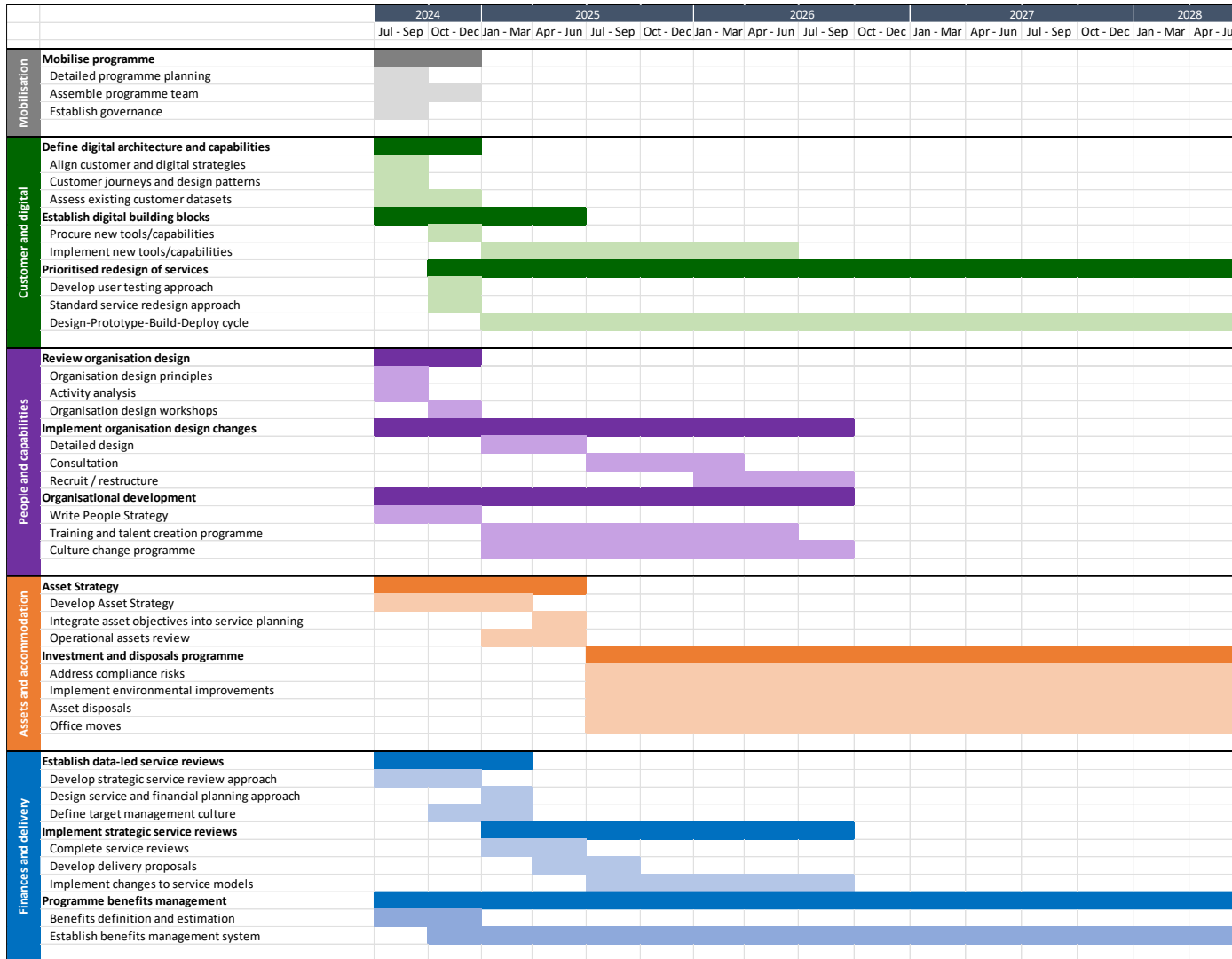
Risk	Impact	Probability	Overall risk rating	Explanation and mitigation
Failure to invest in change management	4	3	High 12	When there is a lot of programme activity and pressure on costs it is common for organisations to deprioritise change management. This is always counter-productive in the long-term, with investment in technology often failing to deliver benefits due a refusal to change processes and a tendency to workaround new systems. Mitigation can be through working with a transformation partner or investing in change management skills in-house, or both.
Unwanted loss of staff	3	3	High 9	Change causes uncertainty and this can lead to staff deciding to leave rather than commit to the change journey, resulting in loss of valuable knowledge and experience. Clear programme communication, service planning, careful application of HR change policies and procedures and proactive management of key individuals can all help.

Figure 23: Initial high-level risk assessment

The roadmap shown in 5.2.4 provides a high-level view of the transformation programme and timeline but does not illustrate the many **dependencies** that exist between the activities shown. These will also be drawn out during programme planning, but it is worth highlighting some of the important ones:

- The design and build of new processes will be heavily dependent on the delivery of the new digital tools and capabilities. An agile approach that moves quickly from design to build is most likely to build confidence and deliver results but this will only be possible if key building blocks are in place and their capabilities are well-understood.
- Organisation design changes may be dependent on service and process design changes, which, as noted above, may be dependent on new technology.

5.2.4. High level plan



NFDC%20Transformation%20Roadmap%20

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Figure 24: Indicative high-level plan showing a July start date

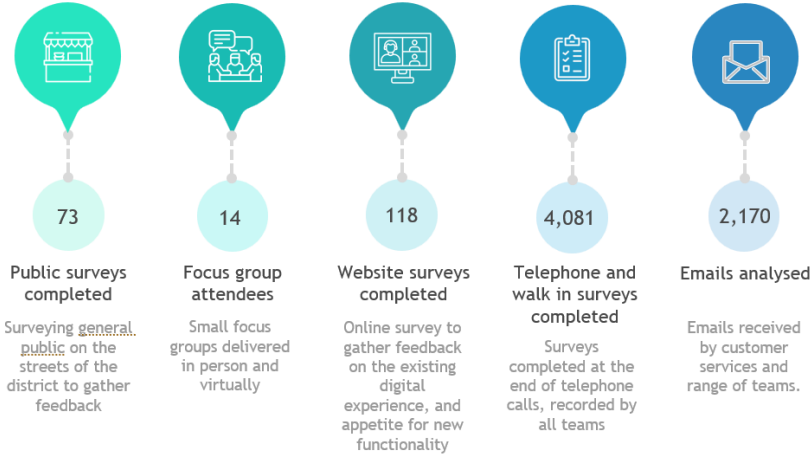
Version control

Version	Description	Updated by	Date
0.1	First draft	Ignite Consulting	07/05/2024
0.2	Amendments following feedback from Kate Ryan, Alan Bethune and Rebecca Drummond	Ignite Consulting	28/05/2024
0.3			
0.4			

6. Appendices

6.1. Appendix 1: Summary of customer research

What customer research did we do?



Themes - what did customers say?



What is the quality of the customer experience? **ignite**

"Very helpful but took ages for anyone to answer the phone. [...] I waited 20 minutes before someone pick phone up"
Website survey

"your emails don't give a timescale for you to respond"
Lymington focus group

"human contact gives us confidence. We want to know it'll be done"
New Milton Focus Group

"The best experience customers can get is via phone"
NFDC manager

"we don't like to be passed around when we call"
New Milton Focus Group

"I usually use your chat service and love it. The ladies are so helpful and efficient."
Web survey


71%
Want easier forms


8%/9%
Email/visits to give docs


74%
Want to upload


59%
No timescale


68%
No copy of form


66%
Support online account

How efficient and joined up are we? **ignite**

"I needed an answer today, not whenever"
Focus group member

"Somebody nobody"
Focus group member describing how staff did not know what was happening in their own teams

"I just want to get this sorted, instead of going around the houses"
Focus group member


29%
Calls to CC transferred


4.5%
Calls not for NFDC

Duplication of information when accessing services - not joined up

Issues are usually resolved quickly when calling up the council


57%
F2F visits are payments


95%
F2F visits resolved

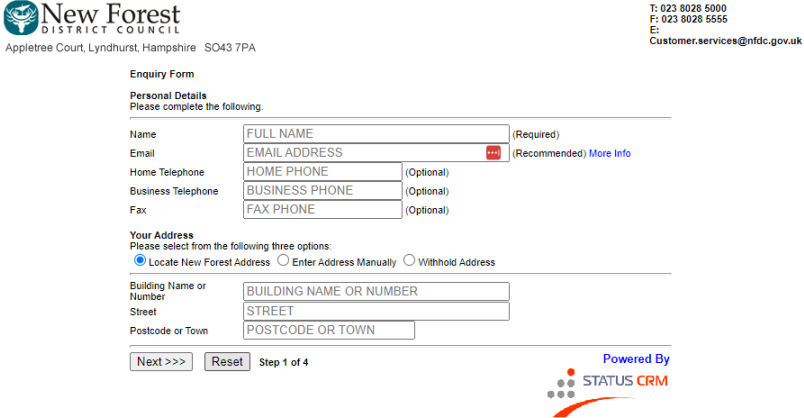
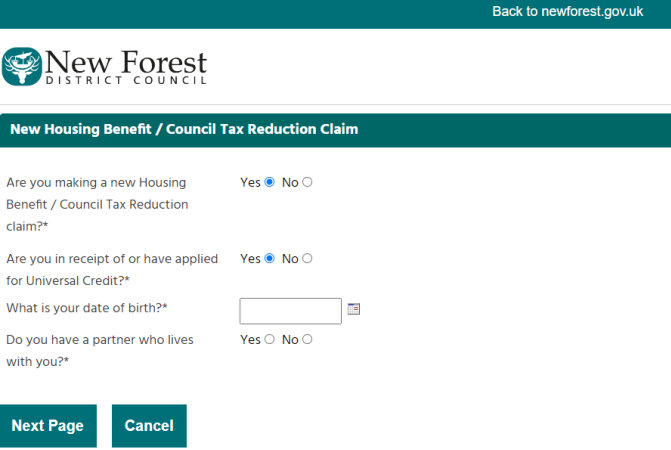
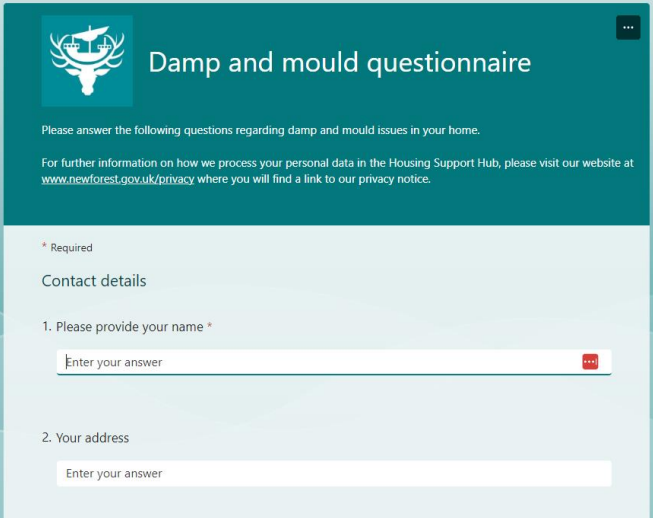
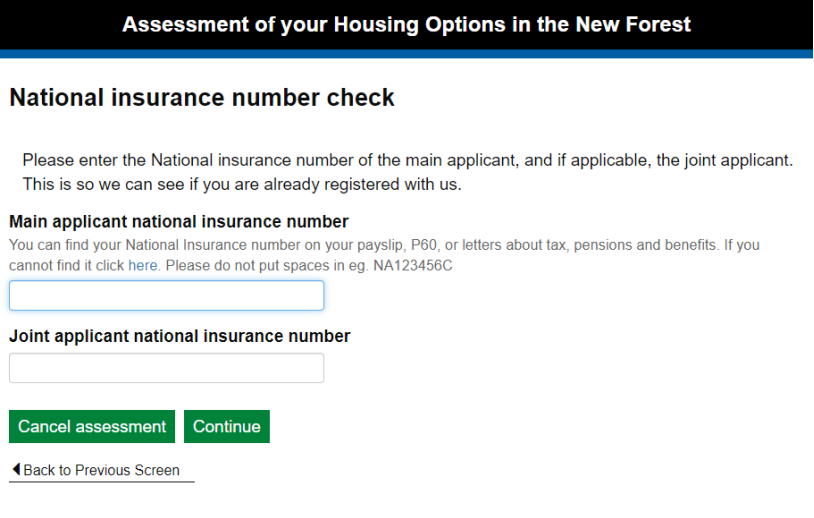

33%
Emails are follow ups


12%
Of all emails had a CC


8%/9%
Email/visits to give docs


95%
Forms create emails not cases

6.2. Appendix 2: Examples of e-forms driven by different technologies




 <p>New Forest DISTRICT COUNCIL Appletree Court, Lyndhurst, Hampshire SO43 7PA</p> <p>T: 023 8026 5000 F: 023 8026 5555 E: Customer.services@nfdc.gov.uk</p> <p>Enquiry Form Personal Details Please complete the following.</p> <p>Name: FULL NAME (Required) Email: EMAIL ADDRESS (Recommended) More Info Home Telephone: HOME PHONE (Optional) Business Telephone: BUSINESS PHONE (Optional) Fax: FAX PHONE (Optional)</p> <p>Your Address Please select from the following three options: <input checked="" type="radio"/> Locate New Forest Address <input type="radio"/> Enter Address Manually <input type="radio"/> Withhold Address</p> <p>Building Name or Number: BUILDING NAME OR NUMBER Street: STREET Postcode or Town: POSTCODE OR TOWN</p> <p>Next >>> Reset Step 1 of 4</p> <p>Powered By STATUS CRM</p>	 <p>Back to newforest.gov.uk</p> <p>New Forest DISTRICT COUNCIL</p> <p>New Housing Benefit / Council Tax Reduction Claim</p> <p>Are you making a new Housing Benefit / Council Tax Reduction claim?*</p> <p>Yes <input checked="" type="radio"/> No <input type="radio"/></p> <p>Are you in receipt of or have applied for Universal Credit?*</p> <p>Yes <input checked="" type="radio"/> No <input type="radio"/></p> <p>What is your date of birth?*</p> <p>Do you have a partner who lives with you?*</p> <p>Yes <input type="radio"/> No <input type="radio"/></p> <p>Next Page Cancel</p>
<p>Status CRM e-form</p>	<p>Verj.io e-form</p>
 <p>Damp and mould questionnaire</p> <p>Please answer the following questions regarding damp and mould issues in your home.</p> <p>For further information on how we process your personal data in the Housing Support Hub, please visit our website at www.newforest.gov.uk/privacy where you will find a link to our privacy notice.</p> <p>* Required</p> <p>Contact details</p> <p>1. Please provide your name *</p> <p>Enter your answer</p> <p>2. Your address</p> <p>Enter your answer</p>	 <p>Assessment of your Housing Options in the New Forest</p> <p>National insurance number check</p> <p>Please enter the National insurance number of the main applicant, and if applicable, the joint applicant. This is so we can see if you are already registered with us.</p> <p>Main applicant national insurance number You can find your National Insurance number on your payslip, P60, or letters about tax, pensions and benefits. If you cannot find it click here. Please do not put spaces in eg. NA123456C</p> <p>Enter your answer</p> <p>Joint applicant national insurance number</p> <p>Enter your answer</p> <p>Cancel assessment Continue</p> <p>Back to Previous Screen</p>
<p>Microsoft forms e-form</p>	<p>Locata e-form</p>

6.3. Appendix 3: Future New Forest scope

Customer and Digital Services	
<p>In scope:</p> <ul style="list-style-type: none"> • The redesign of all service processes to identify ways to improve customer experience, enhance performance and release capacity • Partnership working across the public and not-for-profit sectors to join up services and processes to make access to key services better for our residents, businesses and visitors. • Redesign includes changes to processes, technology, channels and ways of working • All software applications supporting front- and back-office operations are in scope. This could mean optimising the use of those applications, replacing components of them with enterprise solutions (eg customer portals), integrating them or, in some cases, replacement. 	<p>Out of scope:</p> <ul style="list-style-type: none"> • Decisions about how capacity released through service design is realised • Changes to formally documented policies that have been adopted by elected members
People and Capabilities	
<p>In scope:</p> <ul style="list-style-type: none"> • People strategy development • All services and teams • Changes to existing roles and job descriptions • Changes to organisational structures to better align capacity and capability to priority services/processes • Training and development plans • Aligning performance with new organisational structures, roles and capabilities to improve transparency and accountability • Meeting our capacity and capability gaps by working in partnership with other organisations across the public and not-for-profit sectors 	<p>Out of scope:</p> <ul style="list-style-type: none"> • Changes to pay and grading structures
Assets and Accommodation	
<p>In scope:</p> <ul style="list-style-type: none"> • Asset strategy development 	<p>Out of scope:</p>

<ul style="list-style-type: none"> • All operational buildings including disposal decisions • Changes to customer and/or staff accommodation including office moves 	<ul style="list-style-type: none"> • Decisions around commercial asset management / investment portfolio
<p>Finances and Delivery</p>	
<p>In scope:</p> <ul style="list-style-type: none"> • Strategic reviews of services • Benefits management • Service planning • Financial planning and budget management processes • Leadership, management and performance culture 	<p>Out of scope:</p> <ul style="list-style-type: none"> • Leadership decisions on the method of realising benefits identified and estimated through the activities of the transformation programme

6.4. Appendix 4: Transformation strategy objectives

	<p>Customer and Digital Services This theme is about how we redesign services to improve customer experience, make better use of technology and remove manual effort. Services should be digital by design, irrespective of how customers contact us.</p>
<ul style="list-style-type: none"> • Objective C1 Our customers will be at the heart of our digital-by-design approach • Objective C2 We will use data and insight to plan services, manage performance and direct our focus for transformation • Objective C3 We will have the right systems, processes and devices to ensure work can be done in the right place, right time and the most efficient way 	
	<p>People and Capabilities This theme is about how we organise and develop our people and culture, making sure roles, structures, behaviours and skills evolve to meet new service designs and needs.</p>
<ul style="list-style-type: none"> • Objective P1 We will ensure our values, behaviours and culture are aligned and support the future organisation • Objective P2 We will invest in our people to ensure we have the skills, experience and equipment that we need • Objective P3 We will ensure the work is done in the right way in the right place, reviewing roles and structures as necessary 	
	<p>Assets and Accommodation This theme is about how we use assets, improve sustainability and change the way we work. It includes the spaces that customers visit and staff work in as well as the stores and depots.</p>
<ul style="list-style-type: none"> • Objective A1 Our assets will support efficient and effective delivery of our future service provision • Objective A2 We will continue to challenge our asset portfolio to reduce environmental impact and enhance their financial contribution • Objective A3 Our accommodation will meet the needs of our staff, customers, culture and ways of working 	



Finances and Delivery

This theme is about how we manage finance, strategy and performance. It includes how we manage the delivery of financial and non-financial benefits and how we develop a data-driven approach to strategy and performance.

- **Objective F1**
Through transformation, we will deliver agreed levels of savings in line with MTFP targets and council priorities
- **Objective F2**
We will adopt a more commercial mindset, open to innovative service models and guided by strategic priorities
- **Objective F3**
We will shift to a more empowered and accountable, less top-down, management culture

6.5. Appendix 5: Activity analysis template

There are 17 dropdown options for activity mapping. The glossary we have provided explains these in further detail. Please allocate a dropdown to each activity. If you are unsure you can leave these blank and we can allocate on your behalf.

B	C	D	E	F	H	I
Business area	Service	Customer journey	Activity type	Service Activity	Activity Mapping	Role 1
Regulatory Services	Building Control	No	Operational management	Managing people including team meetings, 1:1s, authorising leave and managing rotas, work allocation, performance management, recruitment, budget management	Leadership, management and supervision	
Regulatory Services	Building Control	No	Functional management	Coaching/mentoring staff in an area of professional expertise; supervision and approval of technical work of other staff; input to policy or strategy as a technical expert; modifying processes and procedures in response to statute or organisational priorities	Specialist	5.00%
Regulatory Services	Building Control	No	Reporting and returns	Compiling and submitting statutory returns	Case management	20.00%
Regulatory Services	Building Control	No	Reporting and returns	Performance monitoring against statutory and local KPIs	Corporate performance management	10.00%

% of time allocated to this particular activity. Try not to allocate %'s less than 5%.

Where we have example activities for your department we will pre-populate these. Use them as much as possible but you can amend or delete them. If you add new ones you must complete column F and we encourage you to add columns D,E and G - but if you're not sure just leave them blank and an Ignite colleague will add this later

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6.6. Appendix 6: Activity types glossary

Activity type	Activity description
Leadership, management and supervision	<ul style="list-style-type: none"> • Leading, managing, team leading or supervising/allocating staff activity
Strategy and policy	<ul style="list-style-type: none"> • Development of the corporate plan and target outcomes • Developing or input into strategies based on political aims and council/community need • Writing strategy and high-level policy • Input of functional/professional knowledge into development or changes to policies • Customer and community engagement strategy development
Corporate performance management	<ul style="list-style-type: none"> • Designing, developing and supporting the council's overall performance framework including the service and financial planning process • Designing KPIs and useful measurements • Internal, industry and external benchmarking • Gathering/analysing/presenting information on corporate targets • Designing interventions and initiatives to improve performance
Corporate governance and compliance	<ul style="list-style-type: none"> • Activity that ensures the organisation is running effectively and in accordance with council rules and policies • Managing democratic processes such as elections and committees • Audits and monitoring council processes and decision-making • Risk management and civil contingencies
Strategic/corporate programme delivery	<ul style="list-style-type: none"> • Managing or supporting corporate programmes and projects that sit outside of 'business-as-usual' to deliver specific council targets eg construction of a leisure centre to achieve a health-related target • Project management and PMO activity on corporate programmes
Commissioning, clienting and contract management	<ul style="list-style-type: none"> • Designing and commissioning the delivery of services either internally or externally • Procurement of services through tendering or competitive bidding • Implementing frameworks through which services can be procured • Creating, executing and managing the performance of corporate contracts, SLAs and/or KPIs • Clienting the services delivered by external organisations, using expertise to ensure standards are appropriately maintained
Communications, marketing and engagement	<ul style="list-style-type: none"> • Providing communications, marketing, social media or media work to internal and external customers • Designing initiatives to engage with customers and gather insight • Liaising with PR companies • Strategic marketing, brand promotion, communications plans, and campaigns aligning messages and themes
Community/customer enabling	<ul style="list-style-type: none"> • Delivering initiatives to reduce or reshape demand for public services. eg, behavioural insights and nudge theory, training and education for service users, empowering communities to reduce local environmental and social problems. • Community engagement activities, often discretionary in nature and specific to the circumstances of the council • Advising, supporting or intervening earlier in the lifecycle of a potential problem (usually with a view to medium or long-term prevention)

Triage	<ul style="list-style-type: none"> • Dealing with and resolving common customer enquiries that are quick to resolve (ie take less than 15 minutes). These enquiries could be received via physical mail, email, face-to-face, phone or online. • Understanding the nature of a customer's enquiry and directing more complex enquiries and cases to the relevant officer or department • Directing customers to self-service channels (eg online) • Assisting customers with self-serve options (eg helping a customer to complete an online form)
Mobile business support	<p>Activity that is based out in the community or locality that involves following a set of business rules to guide you through the process and can be easily taught or instructions followed, eg:</p> <ul style="list-style-type: none"> • resolving problems on the ground, monitoring standards, compliance and contract monitoring, straightforward enforcement activities, enabling, prevention and site visit activities that do not require a specialist or professional to carry them out • 'In-the-field' support to desk-based teams eg putting up notices, taking photos, gathering evidence
Business support	<p>Desk-based tasks supporting customer facing services that can be easily taught and/or involve following a set of simple instructions or business rules to guide you through a process, eg:</p> <ul style="list-style-type: none"> • Chasing customers for further information/documentation for simple application types, reports or requests for a service • General case administration, including creating cases in business systems based on information provided by the customer, producing and issuing correspondence, adding (scanning or exporting) incoming information into document management systems • Supporting officers with file retrieval, printing and filing • Processing payments and issuing invoices
Case management	<ul style="list-style-type: none"> • Managing customer cases that require initial training and some ongoing development and support but not a professional qualification or extensive experience. • Cases are likely to follow a fairly standard set of rules and stages but may have some complexity and involve an element of interpretation of legislation. • Managing cases includes processing customer applications, requests and reports, updating business systems and writing reports.
Specialist	<ul style="list-style-type: none"> • Providing expert input/advice to help customers, colleagues, members and partners – eg holding case reviews or dealing with complex questions from staff. • Ownership of complex cases that require a high degree of professional input and/or carry significant reputational and/or financial risk • Activities carried out in the community or locality that require a professional qualification and/or a high degree of autonomous decision-making and risk management, eg a food inspection. • Professional oversight and quality assurance of how 'technical' work is delivered across the council

Service delivery	<p>Delivery of direct, community- or venue-based services eg</p> <ul style="list-style-type: none"> • Collecting refuse, sweeping streets, maintaining green spaces • Managing and working in leisure centres, museums, art galleries, theatres or community centres • Working in schools • Managing sheltered housing schemes on site, delivering home care <p>Note: office-based business support that supports the delivery of these services should be better defined by one of the above options eg collecting a missed bin would be service delivery, but the processing of the missed bin phone call and passing jobs to operatives is triage</p>
Internal triage	<ul style="list-style-type: none"> • Resolving internal customer queries by phone, face-to-face, web or email and dealing with straightforward service requests • Forwarding more complex casework to relevant officers • Directing internal customers to self-service channels via the intranet or portals
Internal service processing	<ul style="list-style-type: none"> • End-to-end handling of straightforward internal customer cases eg new starters, new suppliers • Case administration, transactional processing and updating back office systems and accounts • Maintaining internal records and inventories • This activity usually includes following a set of rules to guide through the processing
Internal specialist	<ul style="list-style-type: none"> • Management of complex internal customer cases that require professional expertise to make a judgement or decision • Providing specialist or expert support and advice in support areas of the council (e.g. HR, finance, legal etc) • Professional oversight and quality assurance of how 'technical' work is delivered in support areas of the council

6.7. Appendix 7: As-is activity summary

Activity Type	FTE Total	Cost Total	% FTE	% FTE*	% Cost
Leadership, Management And Supervision	23.51	£1,392,757	3%	5%	5%
Strategy And Policy	13.72	£834,167	2%	3%	3%
Corporate Performance Management	8.85	£453,479	1%	2%	1%
Corporate Governance And Compliance	6.40	£352,952	1%	1%	1%
Strategic/Corporate Programme Delivery	1.07	£38,927	0%	0%	0%
Commissioning, Clienting And Contract Management	20.33	£1,072,296	3%	4%	3%
Communications, Marketing And Engagement	4.44	£220,701	1%	1%	1%
Community/Customer Enabling	4.44	£176,928	1%	1%	1%
Triage	73.31	£2,207,549	10%	15%	7%
Mobile Business Support	9.89	£400,814	1%	2%	1%
Business Support	44.95	£1,506,165	6%	9%	5%
Case Management	62.53	£2,421,830	8%	13%	8%
Specialist	170.67	£8,325,180	22%	35%	27%
Service Delivery	283.99	£9,402,644	37%	n/a	31%
Internal Service Processing	8.68	£279,222	1%	2%	1%
Internal Specialist	28.78	£1,443,722	4%	6%	5%
Internal Triage	4.86	£183,947	1%	1%	1%
TOTALS	770.42	£30,713,281			

* This column shows the percentage FTE per activity type **excluding** the 283.99 FTE of 'service delivery' activity. This activity type includes all direct 'on the ground' delivery teams eg waste collection crews, grounds maintenance teams and housing repairs operatives. The reason for presenting this view of the data is that different councils have very different levels of service delivery activity, depending whether they have adopted an in-house or an outsourced model, or a blend. Excluding this variable allows better comparison with other councils.

6.8. Appendix 8: Benefits extrapolation methodology

Step 1: Allocating benefit to activity types for each opportunity

Most opportunities have the potential to save some staff time. Some opportunities would save time for multiple roles working on different tasks. In this case we would record multiple benefits as shown. In this example, HOUREN01 has two distinct benefits recorded.

The estimated FTE saving for each benefit is recorded separately.

Benefit ID	Opportunity ID	Benefit description	FTE	Activity type
B1	HOUREN01	Faster resolution of phone calls	0.05	Triage
B2	HOUREN01	Fast processing of rents cases	0.1	Case processing
B3	HOUREN02	Fast processing of rents cases	0.01	Case processing

Each benefit will be associated with the appropriate activity type.

Step 2: **Add up all the capacity saving benefit across all opportunities by affected activity type**

Total estimated benefit for this activity type across all sampled processes (invented number)

Note: Not all activity types are shown. We have made a judgement call as to which activity types might be impacted by which opportunities.

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	Total benefit by activity type						
	Triage	Business support	Case management	Internal specialist	Internal service processing	Service delivery	Leadership and management
Total benefit across sample processes	1.09	0.97	1.93	0.01	0.00	1.30	0.35
Total FTE all processes	73.31	44.95	62.53	28.78	8.68	283.99	23.51

Total FTE for each activity type
We'll need this later on.

Step 3: Using the activity analysis data, calculate how **much time in total** the teams involved in the sample processes **spend on the affected activity types**.

Some opportunities impact multiple teams. We have mapped teams to processes

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Total FTE for selected activities by teams involved in sample processes							
	Triage	Business support	Case management	Internal specialist	Internal service processing	Service delivery	Leadership and management
Business Support & Customer Services (Housing)	6.24	4.43	5.36				0.27
Customer Services & Information Offices	13.68	0.57	0.30			0.04	0.78
Development Management	1.81	5.12	4.15				1.00
Enforcement	1.10	0.36	2.89			0.15	1.04
Environmental and Regulation	3.28	1.17	5.95			0.60	1.67
Homelessness and Housing Options	5.56	1.78	7.62				0.53
Housing Maintenance Operations	1.50	0.50	0.16			48.35	1.50
Housing Rents and Support	1.98	1.43	2.37				0.46
Human Resources	0.60	0.40	0.73	3.37	3.73		0.70
Revenues and benefits	11.36	7.18	15.42				1.34
Streetscene	0.86	0.44	0.13			43.19	0.74
Waste Administration, Projects & Performance	1.25	1.67	0.10				0.30
Waste Operations	0.45	0.26	0.72			114.62	2.15
TOTALS	49.67	25.32	45.90	3.37	3.73	206.95	12.48

Step 4: Estimate how much time the teams involved spend on **each activity type related to that specific process**. This will be a proportion of the total time shown at Step 3

Estimated time spent on each activity type per process							
	Triage	Business support	Case management	Internal specialist	Internal service processing	Service delivery	Leadership and management
Check Rent Balance / Pay Housing Rent	3.23	0.00	0.00	0.00	0.00	0.00	0.15
Recruitment (end to end)	0.30	0.00	0.00	0.49	1.29	0.00	1.59
Apply for a new taxi driver licence	1.47	0.00	1.16	0.00	0.00	0.00	0.08
Report fly tipping	0.48	0.10	1.19	0.00	0.00	4.03	0.54
Apply to join the housing register	1.72	0.00	3.30	0.00	0.00	0.00	0.06
Report a housing repair	4.74	0.68	4.99	0.00	0.00	34.00	0.92
Council tax moves and enquiries	6.25	1.68	1.13	0.00	0.00	0.00	0.28
Planning permission	2.63	0.44	0.00	0.00	0.00	114.62	2.30
TOTALS	21.92	7.24	11.77	0.49	1.29	152.65	6.10

260 Using data gathered through all four phases of our work, make an informed estimation of the FTE spent on each activity for each process by one or more affected teams. Data shown is a real estimate based on a combination of activity analysis data, channel data and call logging analysis.

Each calculation is different so a comment in each cell explains the basis of the calculation, explicitly stating any assumptions.

Step 5: Extrapolate total benefit per activity type

	Triage	Business support	Case management	Internal specialist	Internal service processing	Service delivery	Leadership and management	TOTAL
Total benefit across sample processes	1.09	0.97	1.93	0.01	0.00	1.30	0.35	5.7
Total FTE all processes	73.31	44.95	62.53	28.78	8.68	283.99	23.51	
Extrapolated FTE capacity	3.64				1.00	2.42	1.35	24.27
Cost per FTE	£30,112	£33,509			2,182	£33,109	£59,235	
Extrapolated FTE cost	109,751.80	£201,681.45			0.00	£80,073.28	£79,955.50	£898,024.04

A. Across the sample processes, we identified 1.09FTE of capacity release related to triage.

C. Across the whole council there is 73.31FTE of triage activity.

Using average cost per FTE for each activity type from the activity analysis, we can convert the FTE to a potential financial saving

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Estimate	per process							
	Triage	Business support	Case management	Internal specialist	Internal service processing	Service delivery	Leadership and management	
Check for Rent	3.23	0.00	0.00	0.00	0.00	0.00	0.15	
Recruitment (end to end)	0.30	0.00	0.00	0.49	1.29	0.00	1.59	
Apply for a new taxi driver licence	1.47	0.00	1.16	0.00	0.00	0.00	0.08	
Report fly tipping	0.48	0.10	1.19	0.00	0.00	4.03	0.54	
Apply to join the housing register	1.72	0.00	3.30	0.00	0.00	0.00	0.06	
Report a housing repair	4.74	0.68	4.99	0.00	0.00	34.00	0.92	
Council tax moves and enquiries	6.25	1.68	1.13	0.00	0.00	0.00	0.28	
Missed bin	2.63	0.44	0.00	0.00	0.00	114.62	2.30	
Apply for planning permission	1.09	4.35	0.00	0.00	0.00	0.00	0.19	
TOTALS	21.92	7.24	11.77	0.49	1.29	152.65	6.10	

Calculation:
 $(A / B) * C = \text{Total extrapolated benefit for this activity type}$

B. Across the sample processes, we estimated that 21.92FTE is spent on triage in total

6.9. Appendix 9: Draft change impact assessment for Option B(v2)

Columns marked with a X means this category of change applies and the number of X's feeds into the overall impact of change rating.

Key Changes	Process	Organisation	Technology	Behaviours	Skills	Impact	Change Interventions (examples)
Establish one council customer services team acting as the main entry point for most services	X	X	X	X	X	High	<p>Establish vision and culture – eg collaboration, customer-centric and continuous improvement</p> <p>Communications and engagement – engage staff to communicate the rationale, benefits and how this aligns with strategic objectives</p> <p>Change leadership and sponsorship – provide leadership development to lead teams through change</p> <p>Training and development –to equip staff with the knowledge, skills and behaviours to handle a wide range of queries using new technology, e.g., customer service skills, knowledge of relevant services, using the CRM</p> <p>Role clarity and job design – supported by clear and transparent HR processes</p> <p>Performance management and feedback loops – establish performance reviews and continuous feedback</p> <p>Sustainability planning – develop a plan to ensure the changes stick and are continuously monitored and improved</p>

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Key Changes	Process	Organisation	Technology	Behaviours	Skills	Impact	Change Interventions (examples)
Establish three multi-skilled business support teams aligned to universal, supported and place	X	X	X	X	X	High	<p>Many of the above interventions apply, plus:</p> <p>Process standardisation – involving staff in the design and upskilling of workflows</p> <p>Pilot – if possible, piloting the new teams in a smaller scale setting to test processes, gather feedback and identify any potential challenges</p>
Implement an integrated repairs platform	X		X		X	Medium	<p>Vision and goal setting – engaging staff in how these systems support the council’s strategic ambitions and how MDM will improve data quality, consistency, and accessibility, leading to better decision-making and service delivery</p> <p>Communication and engagement – include early demos of the system, enabling staff to practice in a safe environment</p> <p>Leadership support – role-modelling and driving adoption of the new systems</p> <p>Process redesign and automation – involve staff in configuring new workflows to automate and streamline processes</p>
Implement a new CRM system and portal	X		X	X	X	Medium/High	
Implement a new/enhanced Contact Centre management system	X		X		X		
Implement master data management to create joined up data views across services			X	X	X		

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Key Changes	Process	Organisation	Technology	Behaviours	Skills	Impact	Change Interventions (examples)
Implement workflow and case management, creating a standardised approach to managing customer records	X		X	X	X	Medium/High	<p>Training – how to use the technology in the context of their new roles and processes</p> <p>Behavioural development – following standardised workflows, accurate data entry and confidence/capability in driving channel shifts</p>
Increase the range of online services and driving channel shift with customers	X		X	X	X	Medium/High	<p>Data Governance Framework - involve staff in defining the roles, responsibilities, and decision-making processes related to data management, quality control, security, and compliance</p> <p>Data quality – establish and upskill users in data quality standards and procedures</p> <p>Testing – involve staff in user acceptance testing - evaluate usability and functionality</p> <p>Adoption planning – on-going support, e.g., appointing champions</p> <p>Performance – define metrics to monitor the usage, effectiveness, and impact of CRM</p>

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APPLETREE COURT REFURBISHMENT BUSINESS CASE

1. Introduction and Background

- 1.1 Following the Covid-19 pandemic, NFDC have observed a shift in working patterns and behaviours. With the successful implementation of a hybrid working policy, many teams are now accustomed to working from home, or an alternative NFDC location, for up to 50% of their contracted week.
- 1.2 Appletree Court, in the centre of Lyndhurst, is a large and attractive premises from which many of NFDC's core services are delivered. This includes the Council Chamber, where most Planning and Council meetings are held; and the Information Office, which is the busiest within the District for residents and customers.
- 1.3 Post-pandemic, consideration was given to the future use of Appletree Court, and whether it still meets the needs of the business. There has been a search for alternative premises in the District over several years, but no suitable alternative property or location has been identified. A development appraisal received from leading property consultants in January 2023 showed the sale or redevelopment of Appletree Court for alternative use was unlikely to yield a capital sum sufficient to fund a relocation to alternative premises or the construction of new headquarters premises elsewhere in the District.
- 1.4 Since the introduction of hybrid working, our own utilisation studies have confirmed that Appletree Court has been underoccupied. Consecutive studies have reached a steady state, where approximately 40% of the office is utilised by staff at a weekly peak, equating to around 150 staff. This study did not include parts of Appletree Court which had in the past been used for office staff, being the former "legal corridor" on the North Wing Ground Floor, and the Second Floor of North Wing (the former "leisure corridor"). The real-term utilisation percentage is therefore much less than the 40% as reported.
- 1.5 Without a strong business case to support a relocation, a modernisation of the rest of the building would secure Appletree Court as the Council's principal administrative centre for the medium to long term. A key strand of the Transformation Strategy is ensuring that our staff accommodation is meeting the needs of our staff and visitors. If NFDC offer an attractive, modern, and vibrant workplace, aligned to this aim, then staff retention and wider organisational engagement should increase.
- 1.6 This rationalisation and improvement of existing space will allow NFDC to create lettable space for third party tenants and critically generate income and savings of upto £300k per annum to support the MTFP. This also demonstrates a more efficient and effective use of a property asset which is at the heart of the principles around our Assets and Accommodation strategy within the Transformation programme.

2. Scope

- 2.1 In considering how to achieve best value from Appletree Court, as both a principle administrative centre and a lettable opportunity, Officers sought a budget of £100k to commission third-party feasibility studies. These studies were intended to take a critical view of the layout, usage, and environmental quality of the building, and support a case for change.

- 2.2 Six areas were in scope for the initial retained portion of the building:
- i. North Wing - Ground, First and Second Floors
 - ii. East Wing - Ground, First and Second Floors
- 2.3 The South Wing was excluded from scope in its entirety, due to a refurbishment project in 2018. The look and feel was derived from the corporate branding guidelines, and saw the rollout of height adjustable desks, improved décor and carpeting, energy efficient lighting, and new seating options such as a workspace café and breakout booths.
- 2.4 The feasibility brief required a report detailing the suitability and works required for each of the six areas to create open plan office space, for approximately 200 members of staff at any one time. The brief required a similar standard to that of the offices in the South Wing of the building, containing both standing and seated desking, break out and meeting space, office storage and staff welfare facilities. The target up to 200 staff members allowed for growth of existing teams, and the potential future relocation of services from outlying locations, e.g., Marsh Lane Depot.
- 2.5 From early assessments of the building structure via existing record drawings, it was understood that the East Wing has several long spanning loadbearing walls. Assuming that significant structural alterations would be cost prohibitive, the brief required the consultant to apply creative logic to the existing space.
- 2.6 Peter Marsh Consulting (PMC) were selected to deliver the feasibility works having provided the best overall proposal. The PMC team consisted of Project Managers, Architects, Structural Engineers, M&E Engineer, and a Quantity Surveyor, who all attended Appletree Court to carry out a thorough inspection of the building and existing facilities. At the mid-point of the process PMC joined the NFDC Project Team, which included colleagues from the Estates, Facilities, ICT and Sustainability teams at Appletree Court, to present and 'workshop' their initial findings and proposals prior to finalising their report.

3. Key Findings and Options Appraisal

3.1 Outcome 1

- i. The first outcome report confirmed that within the North and East Wings, there is ample opportunity to accommodate 200 staff via a mixture of workplace styles. It was noted that each of the in-scope areas had differing levels of design restriction, based on the building structure.
- ii. PMC produced a summary RAG assessment, showing the suitability of each zone against the brief:

RAG Metric	(A) North Wing – Ground Floor	(B) North Wing – First Floor	(C) North Wing – Second Floor	(D) East Wing – All Floors
Brief	Area = 252 m2 Provisional Desk Spaces – 44 Semi Open Plan Spaces Possible	Area = 278 m2 Provisional Desk Spaces – 42 Semi Open Plan Spaces Possible	Area = 339 m2 Provisional Desk Spaces – 56 Semi Open Plan Spaces Possible	Area = 1,300 (estimate) m2 Desk Spaces – 174 Central corridor and structural form limits degree of open plan space possible.
Costs	Price per m2 - £2,235	Price per m2 - £2,273	Price per m2 - £2,673	Price per m2 - £2,036
Programme	Modest levels of intervention – deliverable over a 6-10 week programme	Levels of intervention may require a longer programme of 8-12 weeks	The inclusion of a new platform lift would increase the lead time for works on this floor, whilst the onsite delivery period should be 10-12 weeks	Modest levels of intervention – deliverable over a 6-10 week programme
Sustainability	Sustainable heating, cooling and ventilation strategies all deliverable.	As left	As left	As left
Accessibility	Ground floor access near to current reception	Platform lift meets minimum requirements.	Requires platform lift to meet minimum accessibility standards	Lift access provided in stair core that joins South Wing.

- iii. In addition to the structural and architectural works, PMC included allowances for alterations to heating systems, for cooling in areas where required; and for the installation of mechanical ventilation heat recovery units to bring tempered fresh air into each working area to create a more healthier and sustainable working environment.
- iv. Ultimately, the projected cost for the refurbishment of all in-scope areas (including construction, contingency, and professional fees) was within a range of £4.2 to £5.2m, which the Council was not able to justify against the expected level of letting income from the south wing.
- v. Three costed options were also produced, based on a 'mix and match' approach to Wings and Floors. Each of these three options were more than £3m.

3.2 Outcome 2

- i. Accordingly, a revised target was agreed to provide 175 desk spaces, rather than the original target of 200, with a £2m cost cap. Based on accessibility limitations, the North Wing Second Floor was removed from scope. North Wing First Floor was also removed, as it was felt that the focus of the investment should be within the East Wing.
- ii. To meet the revised budget of £1.5m to £2m, PMC removed some recently refurbished areas from the scope of the original proposal and reduced the requirement for MEP. This included taking out some of the proposals for air circulation on the basis that better use of existing windows and trickle vent systems is an acceptable, if less optimal, solution for the Council.
- iii. Two further options were proposed, of which Option 5 (solely focused on the East Wing) offered the most acceptable cost to benefit ratio to the Council. The Project Team asked PMC to apply some additional refinements with a view to reducing the cost further.

3.3 Outcome 3

- i. The Project Team and PMC held a further design workshop at Appletree Court. PMC focused on improvement opportunities in the East Wing, de-risking some of the earlier proposed interventions. They amended their existing Option 5 and developed a new Option 5a, which is proposed as the preferred option.
- ii. The project cost is reduced by removing all previously refurbished areas from scope, recognising that they have already been decorated to a good standard. Initial floor

plan concepts provide adequate space to accommodate 181 desks, at approximately 7sqm per desk. This is above the minimum standard of 4sqm per desk.

- iii. The projected cost of Option 5a (including construction, contingency, and professional fees) is £1.4m to £1.8m. Any further interventions to value engineer or reduce the brief will compromise the purpose of the project and fail to deliver against the objectives.

4. Costs

- 4.1 The summary of all options, include high-level indicative cost estimates can be summarised as follows:

Option	Area	Range
Initial Option 300+ desk spaces	North Wing – Ground Floor, First Floor, Second Floor East Wing – Ground Floor, First Floor, Second Floor	£4.3m - £5.2m Payback 18-19 years
Option 1 205 desk spaces	North Wing – Ground Floor, First Floor, Second Floor East Wing – First Floor	£2.2m - £2.7m Payback 9-10 years
Option 2 212 desk spaces	North Wing – Ground Floor, First Floor East Wing – Ground Floor, First Floor	£2.1m - £2.6m Payback 9-10 years
Option 3 142 desk spaces	North Wing - Ground Floor, First Floor, Second Floor East Wing - None	£1.6m - £1.9m Payback 7-8 years
Option 4 164 desk spaces	North Wing – None East Wing - Ground Floor, First Floor, Second Floor	£1.6m - £2.0m Payback 7-8 years
Option 5 192 desk spaces	North Wing – Ground Floor East Wing - Ground Floor, First Floor (some previously refurbished areas removed from scope)	£1.6m - £2.0m Payback 7-8 years
Option 5a* 181 desk spaces	North Wing – None East Wing - Ground Floor, First Floor, Second Floor (all previously refurbished areas removed from scope)	£1.4m - £1.8m Payback 6-7 years

- 4.2 Option 5a is the preferred option, with the recommendation of this report requesting a budget of up to £1.75m to see through the works associated with this option.
- 4.3 The estimated cost for option 5a includes £170,000 of required fees and additional works as follows;

Item	Est. total cost
Feasibility	£30,000
RIBA design fees; pre and post tender	£144,000
Fees contingency at 9%	£14,000
Toilet and Common Areas refurb	£20,000
Minor repair works	£15,000
ICT alterations	£12,000
Access control alterations	£15,000
Power and heating sub-metering	£20,000
TOTAL	£270,000
Approved Feasibility Budget	(£100,000)
Fees and Additional Works	£170,000

5. South Wing – Income/savings opportunities

- 5.1 ATC South Wing comprises three floors of just over 3,000 sq.ft a floor which combine to provide a total space of 9,666 sq.ft of modern office space.
- 5.2 As part of a market assessment, we engaged with a firm of regional office agents and asked them to advise us on the level of market demand for the space and the levels of rent that could be achieved on a furnished and unfurnished basis.
- 5.3 Their report (in February 2024) stated that “the office areas are perfectly acceptable and would be considered good quality in the local market.” Most interest is expected to be from occupiers that are currently located in the New Forest area seeking expansion or seeking to “Right Size” into better quality accommodation.
- 5.4 We have also received direct approaches from other public sector bodies. It would be our intention to start a hard test on the marketing, once the proposal to let the South Wing has received approval at Cabinet.
- 5.5 In terms of rental advice, they advised that this could range from £15.50 per sq.ft for unfurnished space to £18.50 per sq.ft for furnished space. This assumed that the south wing could be separated from the rest of the ATC building in order that tenants could have their own access and defined office areas either over single floors or as a combination. The costs for this split works have been identified in 4.2 above.
- 5.6 The total expected rental income from the space could therefore be in the order of £180k for all 3 floors on a “furnished basis” which would be the basis of our marketing strategy. We would then need to add the expected savings in terms of our rating

liability for the space at £80,000 per annum – so a combined total of £260,000 per annum.

Floor	Area sq.ft	Rent per annum (furnished)	Est. Business Rates liability per annum (£90p/sqm)	Total per annum based on furnished
Ground	3,003	£55,558	£25,110	£80,668
First	3,358	£62,130	£28,080	£90,210
Second	3,305	£61,134	£27,630	£88,764
TOTAL	9,666	£178,822	£80,820	£259,642

- 5.7 In addition, there is likely to be quantifiable savings through the service charge which could deliver between £10,000-£40,000 in further savings but will be subject to further investigation. A target figure of £300,000 across rental income and savings opportunities is therefore the figure being used in the supporting business case.

6. SWOT Analysis

Strengths:	Weaknesses:
<p>Aligns to transformation strategy and delivers against the Assets and Accommodation theme.</p> <p>Addresses the ongoing under-utilisation without disposing of a critical asset.</p> <p>Allows stronger networking within the District with an opportunity for third party tenants, of NFDC choosing.</p> <p>Opportunity for long-term income generation.</p>	<p>The original project brief was holistic in its approach and offered a significant impact. Due to the cost, the scheme has been scaled back with several compromises.</p> <p>Project no longer encompasses the North Wing Ground Floor, which would have directly addressed staff comments around a lack of suitable meeting space.</p> <p>There are negligible environmental improvements (within the building) due to the scaled back approach to cost savings. The project therefore does little to deliver against NFDC's approved Climate Action Plan.</p> <p>The introduction of third-party tenants creates an additional administrative task (preparing Heads of Terms, leases, management function etc).</p>

Opportunities:	Threats:
<p>The scheme allows NFDC to promote an enhanced offer to staff, to aid attraction and retention.</p> <p>A planned installation (24/25) of Electric Vehicle Charging Points (EVCPs) will further boost our staff and visitor benefits.</p> <p>The project has already highlighted the 'Phase 2' potential of the North Wing Ground Floor as a mixed-use break out hub.</p> <p>Common areas will require refurbishment to balance the location of toilet facilities, i.e. make all toilets gender neutral cubicles.</p> <p>A "Do Nothing" or minimal intervention approach will reinforce current habits and not encourage change or release a financial contribution in support of the MTFP.</p>	<p>If approved, the project will need to be appropriately resourced, as delivering to time and budget will be imperative.</p> <p>Due to the scale of the work, staff will need to be temporarily relocated to alternative workplaces (or home).</p> <p>Critical services in the in-scope areas, e.g. ICT Server Rooms, must have minimal disruption.</p> <p>Interest in the South Wing has not yet been fully canvassed with preferred third parties.</p> <p>Some teams have specialist requirements that will need to be relocated appropriately (e.g. Revs and Bens 'glass box').</p>

7. Preferred Option

- 7.1 The preferred option, based on the extensive data and advice that the Project Team have received, is to take Option 5a through to detailed design, at an estimated total project cost of £1.4m to £1.8m.
- 7.2 This option meets the original spatial brief and offers an enhancement of existing facilities to staff. It will create a cohesive look and feel, that can in turn be aligned to the objectives of the wider transformation agenda.
- 7.3 Further added value could be achieved later with a standalone refurbishment of the North Wing Ground Floor. Early concept designs indicate that the area can be significantly opened, to create modular and flexible spaces. This area would lend itself to a mixed-use hub, with a training suite, enhanced interview rooms, collaboration spaces and touch-down zones. Large internal meetings (that are currently held in the Council Chamber due to lack of appropriate space) could be relocated into this area.
- 7.4 Should option 5a be approved as a concept, Officers estimate that it will take up to 26 weeks for the design team to prepare a package of works for the tender of construction. In tandem with this, a robust stakeholder engagement strategy will ensure that Staff and Cllrs are involved in the journey, through interactive feedback sessions, user groups and appropriate communication.

8. Success Factors

- 8.1 The effective implementation of this new way of working would require mapping of a staff engagement strategy to the on-site activity, from pre-construction through to operational handover.
- 8.2 In particular, it should be noted that the most common 'team day' is currently a Thursday. All directorates will need to work together to agree appropriate team days, taking into account non-working days. This will help to ensure that the correct balance of collaboration and utilisation is achieved.
- 8.3 Careful consideration must be given when onboarding the existing users of the South Wing. Messaging needs to reflect that the project is a significant change for those teams, and a top-down approach will help to promote the benefits and opportunities that will be delivered.
- 8.4 Due to the scale of the works and the potential disruption, it is recommended that the East Wing is refurbished in successive phases. This allows for a soft launch of the new working arrangements and ensures that troubleshooting can be managed effectively through each stage as a step-change.
- 8.5 To support team adjacencies and promote impactful working, it is proposed that each floor of the East Wing accommodates a directorate. Layout planning will be a critical element of the design stage, to ensure this works in practise.

Resources and Transformation Overview and Scrutiny Panel

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Commercial and
Residential Report July
2023/24

July 2024



New Forest
DISTRICT COUNCIL

Summary areas

- Commercial Property report 2023/24
 - Aims and Objectives
 - Governance
 - Overview of 2023/24
 - Investment and Income Summary
- Residential Property Company report 2023/24
 - Aims and Objectives
 - Structure and Governance
 - Overview of 2023/24
 - Investment and Income Summary
- Summary and Panel Recommendation



Commercial Property – aims and objectives

- To acquire commercial property within the District
- To develop commercial property within the District
- To promote the local economy and secure broader economic development benefits and to make a return
- Original portfolio fund of £30M financed from internal cash and reserves
- Council approved (12 Dec 2022) a revised and updated asset investment strategy with a further £20M available financed from internal cash and reserves and supplemental borrowing (Public Works Loan Board) when required



Commercial Property – governance

- The Commercial Property Panel (CPP) comprises the Chief Executive, Strategic Director Corporate Resource and Transformation (Chief Finance Officer), Monitoring Officer, Portfolio Holder - Finance & Corporate and Chairman of the Resources & Transformation Overview & Scrutiny Panel.
 - CPP meet regularly. Its terms of reference are to receive reports, provide governance and decision making in respect of real estate assets made under the Council's Asset Investment Strategy and the commercial property portfolio held by the Council more broadly.
 - The CPP's remit also includes an overview of operational real estate development



Overview of 2023/24



Platinum Jubilee Business Park

- To the end of March 23, we have secured 9 new tenants, employing in the region of 80 people. The occupiers are a diverse range of businesses ranging from an individual commercial artist to an ICT infrastructure supplier.
- Since Practical Completion of the development in May 23, we have been working with our tenants and contractor to progress the snagging, which is now close to completion.
- Agreed the final contract sum with our contractor Amiri.
- Annual Income generation currently £488,000 per annum.

Salisbury Road Arcade - £150k refurb

- Appointed a professional team and progressed a redesign of the arcade.
- Planning application was submitted in March and secured in June 24
- Currently out to tender. Refurb expect to complete by end of 2024

Queensway

- Tender process completed for undertaking the dilapidation works. Contractor due to start imminently and conclude by early 2025.

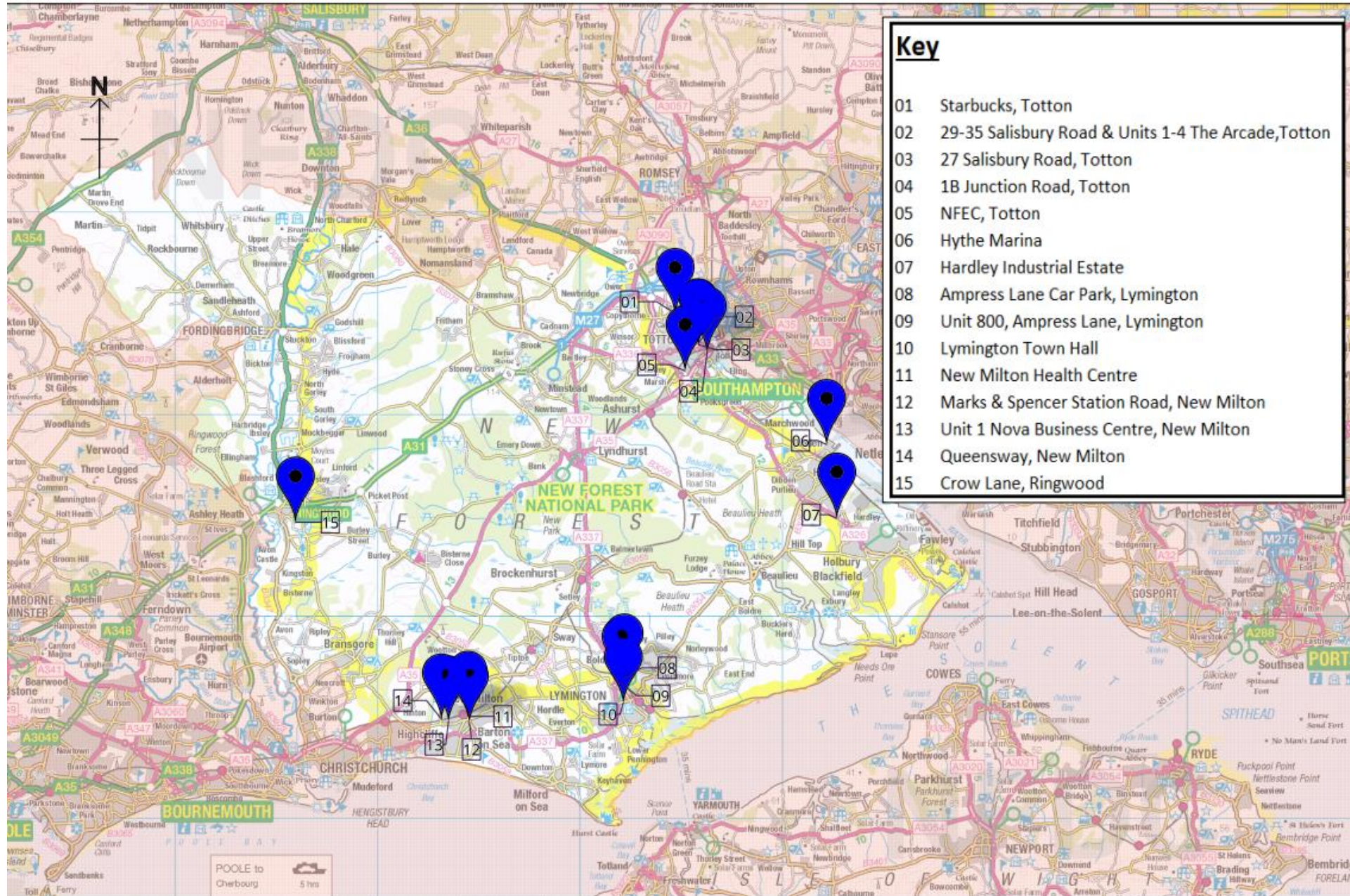
1B Junction Road – new letting secured to a local tenant at a rent of £12,500 per annum.

Commercial Property – investment summary



	Existing Employment Site £M's	Development Site (Platinum Jubilee) £M's	Total £M's
2017/18	2.20	-	2.20
2018/19	0.25	-	0.25
2019/20	2.53	2.25	4.78
2020/21	3.26	0.17	3.43
2021/22	3.27	2.53	5.80
2022/23	7.75	5.01	12.76
2023/24	0	0.11	0
Total	19.26	10.07	29.23

Commercial Property - locations



Commercial Property – net income summary



The Medium Term Financial Plan allows for the net income (after costs and MRP) from investments made to date, and a target based on additional net income to be achieved over the next 2 financial years.

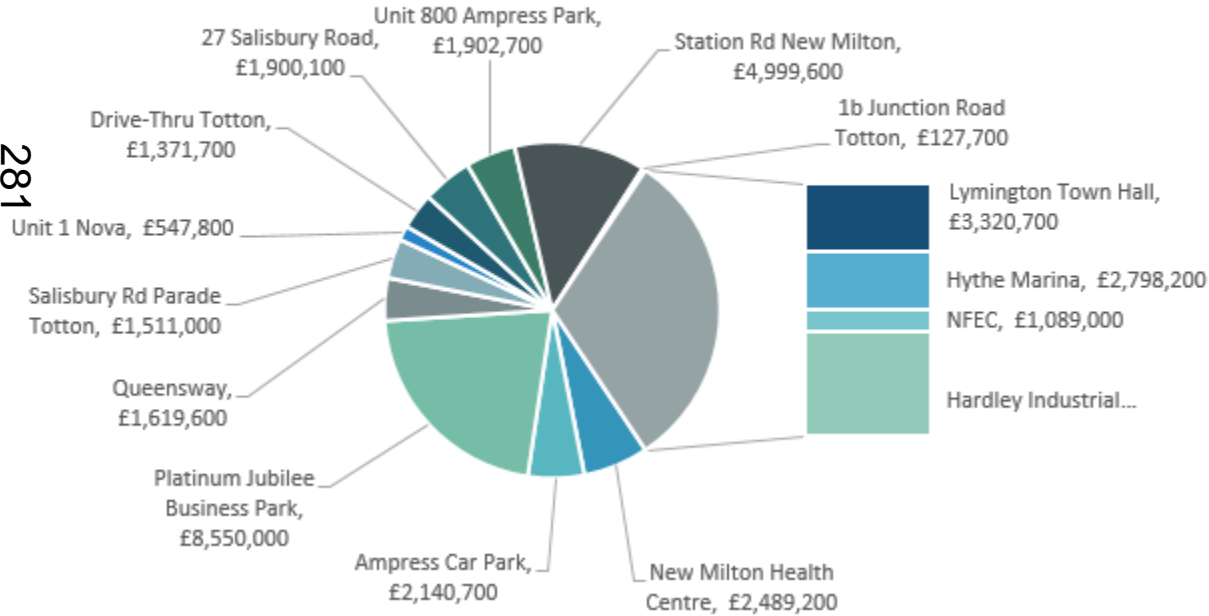
280

Annual Budget	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26
	£'000's	£'000's	£'000's	£'000's	£'000's	£'000's	£'000's
Within General Fund Budget	-100	-62	-166	-165	-470	-375	
Forecast Assumption in MTFP							-200
TOTAL CUMULATIVE	-100	-162	-328	-493	-963	-1,338	-1,538

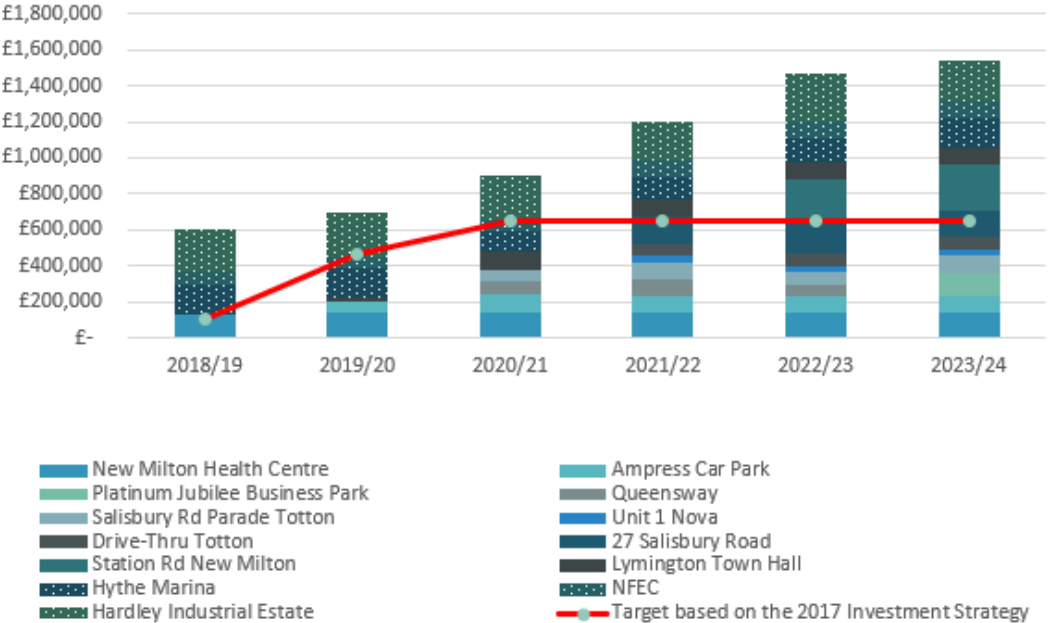
Commercial Financial Dashboard – balance sheet value and operating income – March 2024



**Balance Sheet Value at 31 March 2024
(All Investment Properties)**



**Operating Income
(All Investment Properties)**



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Financial Dashboard – annual rate of return



Property	Purchase price	Balance Sheet Value at 31/03/24	Net Income 2023/24	Annual Rate of Return at 31/03/24
Hythe Marina		2,798,200	164,963	5.90%
New Forest Enterprise Centre		1,089,000	89,260	8.20%
Hardley Industrial Estate		5,137,800	227,291	4.42%
Lymington Town Hall		3,320,700	96,590	2.91%
		12,345,700	578,103	4.68%
<u>2017 Investment Strategy</u>				
New Milton Health Centre	2,100,000	2,489,200	137,200	5.51%
Ampress Car Park, Lymington	2,100,000	2,140,700	96,752	4.52%
The Parade, Salisbury Road, Totton	1,450,000	1,511,000	95,806	6.34%
Unit 1 Nova Business Park, New Milton	530,000	547,800	34,949	6.38%
Drive-Thru, Salisbury Rd, Totton	1,245,429	1,371,700	66,310	4.83%
27 Salisbury Road, Totton	1,850,000	1,900,100	152,463	8.02%
85 Station Road, New Milton	5,100,000	4,999,600	249,752	5.00%
Unit 800 Ampress Park, Lymington	1,971,000	1,902,700	94,650	4.97%
	16,346,429	16,862,800	927,882	5.50%
Platinum Jubilee Business Park *	10,073,622	8,550,000	488,000	5.71%
Queensway, New Milton (vacant in 23/24)	1,100,000	1,619,600	-	
1b Junction Road, Totton (vacant in 23/24)	235,000	127,700	-	
	11,408,622	10,297,300	488,000	

*projected annualised income for let units

Purchase price excludes fees

Appletree Property – aims and objectives



- To operate as a commercial enterprise, offering market rental properties in the District to people with a local connection.
- Aim to be a “landlord of choice” in this market
- £10M in the pot, financed by NFDC through equity (up to 40%) and loans at a commercial rate of interest
- Loans made by NFDC to Appletree Property are secured by legal charges
- At present a £8M funding tranche has been made available
- A General Fund, not a Housing Revenue Account, project

Selecting Properties and Tenants

- Seeking modern lettable properties in the District
- 2- and 3-bedroom houses in good condition and in areas of high demand
- The tenants are credit checked for affordability and there is a preference for those with a local connection
- Company offers tenancies typically 7-12 months.

Appletree Property – structure and governance



- Appletree Property Holdings Limited is a private limited holding company whose sole shareholder is NFDC.
- The company has 2 subsidiaries, Appletree Property Lettings Limited and Appletree Residential Developments Limited.
- The Board comprises 4 Directors - 2 Officers and 2 Members, the Chairman being Cllr Alan O’Sullivan.
- Board meetings are held about every 3 months, considering in particular the Property Manager’s business update report to the Board.
- the Annual General Meeting is held in October each year, including the annual presentation to the shareholder.
- The Company’s annual accounts are prepared by external accountants.
- The Company has no employees, The Council’s Property Manager is the day to day manager of the lettings business, supported by the Council’s Property Management Officer, all reporting to the Service Manager, Estates & Valuation and through to the Board.

Appletree Property Holdings Limited

What we did in 23/24

Acquisitions

- Acquisitions programme paused since June 2023 due to interest rate rises

Lettings

- 6 re-lets, providing good quality homes for 14 people with a local connection
- Void times for re-lets averaged 57 days (increased from previous year's average of 26 days due to defects work required at a new build property before re-let)

Finance

- Rental income increased to £240,108pa (as at 31/03/24). Rents increased by £6,300pa from re-lets
- Board of Directors agreed for rental increase of 5% to be applied to existing tenants in 2024



Appletree Property Holdings Limited

Investment Activity and Steady State Annual Rent 19/20 to 23/24

Year of purchase	Acquisitions	Total Cost £	Monthly Rent £'s	Steady State Annual Rent £
19/20	2	505,975	2,290	27,480
20/21	5	1,566,354	6,130	73,560
21/22	5	1,521,885	5,854	70,248
22/23	4	1,481,654	5,735	68,820
TOTAL	16	5,075,869	20,009	240,108



Appletree Property Holdings Limited

Return to NFDC 19/20 to 23/24



Year	Equity £	Debt £	Interest Return £ (full year)	Mgmt Fee (@6%) £	Return on overall investment %
19/20	201,700	304,275	16,735	1,577	3.62
20/21	342,600	1,223,754	59,352	4,414	4.07
21/22	376,600	1,145,285	57,763	4,079	4.06
22/23	441,800	1,039,855	61,101	4,129	4.40
TOTAL	1,362,700	3,713,169	194,951	14,000	4.12

No new acquisitions during 23/24 so no additional 23/24 row

Appletree Property Holdings Limited Vacancy Periods



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Acquisitions		
Year	No of Properties acquired	Average Void Periods (days) per year
19/20	2	68
20/21	5	82
21/22	5	85
22/23	4	125
23/24	0	n/a

Re Lettings		
Year	No of Properties relet	Average Void Periods (days)
21/22	2	47
22/23	6	26
23/24	6	57

No new acquisitions during 23/24

Summary and Recommendations



Commercial Property

- £29.22m commercial property spent to acquire or construct in line with strategy
- Properties acquired all within the District helping to sustain local employment viability and vitality
- Income yield is tracking expectations, with net income ahead of strategy due to being fully internally funded to date
- Platinum Jubilee Business Park has been completed with estimated 150-200 direct jobs being supported once fully let
- Further commercial property investments presently “on pause” save for exceptional opportunities
- **RECOMMENDATION – Note the annual update and provide any feedback**

Appletree Property Holdings

- Presently approval has been given for £8 million of the £10 million pot to be invested in the project
- Opportunities are being considered but still unlikely to meet required returns
- Expenditure to date is £5,075,869.
- Income yield in line with strategy forecast
- **RECOMMENDATION – Note the annual update and provide any feedback**

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ICT Work Programme 2024/25

Summary for Resources and Transformation Overview Scrutiny Panel



Agenda

- Background to the ICT work programme
- Programme summary
- How will the programme be delivered





The Process

1. Understanding the requirements and service needs
2. Research, Consulting with colleagues and in Partnership with Transformation
3. Prioritising projects and resources
4. Align with the Transformation Business Case and Corporate Plan
5. Finalise and Approve



The ICT work programme comprises of 3 workstreams:

1. **Projects** – introducing digital change and enhancements through formal project management activities and governance.
2. **Digital Service Improvements** – digital enhancements and ideas submitted throughout the year by service areas. These requests are reviewed by ICT Leadership, the Service Improvement Assessment Group (SIAG) and the Capital Change Board (CCB) for suitability to proceed.
3. **Operational BAU** – to maintain existing services, a rolling schedule of planned activities is required including medium to large sized upgrades that require technical resource and, in some cases, light project management.

Work Programme 2024/25



*Detailed planning part of programme startup

	2024/25												2025/26																																																											
2024/2025	Jan-24	Feb-24	Mar-24	Apr-24	May-24	Jun-24	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25	Jul-25	Aug-25	Sep-25	Oct-25	Nov-25	Dec-25	Jan-26	Feb-26	Mar-26	Apr-26																																												
Complete Finish	Intranet				Learning Management System				Azure Migration				Direct Debits Automation																																																											
Technical Architecture Foundations						Future Technical Design																																																																		
Priority Digital Transformation Enablers													Project Regulatory Services																																																											
	Operations Project - Bartec System																																																																							
							Startup						CRM / Digital Platform						Startup						Contact Centre Software																																															
							Startup						Digital Data Platform												Locata Data Warehouse																																															
							Startup						Housing Maintenance System												Revs and Bens Customer Portal																																															
ICT Projects	Hardley Depot for ICT												Replacement of Firewalls												Digital Skills for staff												Software Upgrade Activity inc M365 Adoption												Corporate Asset Management System												IT Management Platform											
Ongoing BAU																																																																								
Ongoing Digital Service Improvements																																																																								
Strategic Reviews									Strategic Review												Strategic Review												Strategic Review																																							
Continuous Digital Delivery Pipeline													New Programme 2025/26 developed																																																											

Project Summary

ICT Work Programme 2024/25



Name	Description
Replacement of firewalls *NEW*	Replacement of our network firewalls to keep our data safe and secure.
Operations Project – Bartec System	Continuing the introduction of a new digital platform provided by Bartec in our Waste, Grounds and Streetscene services to support our waste strategy and delivery of frontline services.
Hardley Depot for ICT	Continuing the delivery of ICT services to support the build and commissioning of the new Hardley depot.
Digital Skills for staff (Induction, Foundation, Front Line) *NEW*	<p>Supporting employer of choice and digital skills training objectives, a project to work with a partner and deliver a dedicated programme of training for staff focused on core tools such as M365. There is also scope to expand the current M365 champions group.</p> <p>Possible training:</p> <p>Induction Level: reusable, startup style training content targeted at new starters to learn the basics of working with NFDC digital tools including Laptop, Phone and basic M365 software.</p> <p>Foundation Level: used daily, core digital skills in M365 suite including Teams, SharePoint, OneDrive, Web Apps, OneNote, Lists, Planner / ToDo</p> <p>Digital for Front Line Workers: used daily, core digital skills in M365 suite focused on our Front Line workers using mobile devices including Teams, SharePoint, OneDrive, Mobile Apps.</p>
Software Upgrades inc M365 Adoption *NEW*	To maintain existing services, a rolling schedule of planned upgrades is required including medium to large sized upgrades that require technical resource and, in some cases, light project management.
IT Management Platform *NEW*	Project to introduce a new IT Service Management Platform aimed at managing support tickets, assets, changes, self-help resources, knowledgebase and more as part of a ITSM suite. This will replace the ageing and limiting current platform and support ICT in delivering its Operational and Delivery work programmes.

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Project Summary

Transformation 2024/25 – 2025/26



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Name	Description
Customer Relationship Management (CRM) *NEW*	Introduce a modern CRM and digital platform for managing the customer record and potentially expanding into a 'my account' portal for residents, e-forms, telephony and case management platform.
Digital Data Platform and Reporting *NEW*	Introduction of modern data storage platform and data warehouse for NFDC data sets and reporting to support data led decision making.
Contact Centre Software *NEW*	Introduce modern digital platform for engaging and supporting residents over multiple channels including online, telephone.
Housing Data Warehouse Reporting *NEW*	Introduce data warehouse capabilities to the Housing Management system including export and link to the new Digital Data Platform for reporting capabilities.
Revs and Bens NEC Customer Portal *NEW*	Expansion of the current revenues and benefits system to include a suite of customer portals and self-service capabilities.
Digital Housing Maintenance System *NEW*	Digital system for housing maintenance teams to replace current maintenance and scheduling systems and possible supportive modules like gas certificates.
Regulatory Services Project *NEW*	Introduce new digital system to digitise Place / Regulatory Services based processes and replace legacy system.

Project Delivery & Governance



- Project good practice
 - Detailed plans, assessments, workshops
 - Benefits Realisation Policy and Reporting
 - Capacity and Resource Planning
 - Lessons Learned Policy and Reporting
 - Reporting with SharePoint + Power BI + Corporate KPI's
- Governance: Project Review Group, Project Boards and Technical Design Authority
- Governance: Transformation Programme
- Strategic Review Points with EMT and Resources and Transformation Overview and Scrutiny Panel

Financial & Resources Summary



- The ICT work programme budget for 2024/25 is £625,000. This is an assumed annual sum in the Council's Medium Term Financial Plan. It is anticipated that this work programme budget will make a contribution of circa £1 million towards the cost of the Transformation Projects over the financial years 2024/25 – 2026/27.
- Transformation project costs were derived in consultation with ICT. The budget required to deliver the Transformation programme is covered by a separate report and approval process.
- Additional resources to deliver the ICT programme have been identified and form part of the Transformation business case.

Key Considerations



RISK	MITIGATION
Projects not aligned to strategic priorities	Work programme consulted on and informed by Corporate Plan, Transformation Strategy and Customer Strategy
Project objectives not met with sufficient quality	Full governance toolkit, detailed scope stage, detailed plans, lessons learned, effective procurement, benefits realisation process.
209 Demand Management	Governance in place to manage new demands. Referrals and guidance available from Capital Change Board (CCB)
Resources insufficient to deliver	The Transformation business case includes additional resources. Future demand will be captured in project business cases.
Timelines slip beyond tolerance	Detailed planning within early stages of projects. Governance will plan, monitor and prioritise.
Technology fails to deliver benefits	Sufficient research of options in early stages of projects. Technical reviews ensure compatibility and integration with other systems. Process optimisation to be included as part of technology delivery.

Recommendations



- The Resources and Transformation Overview and Scrutiny Panel are asked to note the contents of this update.

“Customer First, Digital by Design”



New Forest
DISTRICT COUNCIL

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PORTFOLIO: FINANCE AND CORPORATE

RESOURCES AND TRANSFORMATION OVERVIEW AND SCRUTINY PANEL

25 JUNE 2024

FINANCIAL STRATEGY TASK AND FINISH GROUP – ARRANGEMENTS FOR 2024

1. RECOMMENDATION

- 1.1 That the arrangements for operation of the Financial Strategy Task and Finish Group for 2024 be endorsed as set out in the report.

2. INTRODUCTION

- 2.1 The purpose of this report is to seek the Panel's agreement to the proposed arrangements for meetings of the Financial Strategy Task and Finish Group in 2024. The role of the Financial Strategy Task & Finish Group is to review the Council's financial strategy and understand how the plans and assumptions made by the Portfolio Holders marry up with the overarching financial planning of the Council.
- 2.2 It is proposed that a Group of 7 members be convened after seeking volunteers, and the final membership be agreed by the Charman of the Panel.

3. TERMS OF REFERENCE

- 3.1 The proposed Terms of Reference are as follows:

'To gather an understanding of how the Council's overall financial strategy brings together various financial workstreams. This includes income maximisation and prioritisation of resources to ensure the delivery of the Council's priorities, and to challenge how the plans and assumptions made by the Portfolio Holders fit with the overall strategy.'

4. PROPOSED TIMESCALE

- 4.1 Subject to confirmation with key participants, the approximate timescale is expected to be as follows:

w/c	2 September - First Meeting (Background Info/call for further info)
w/c	9 September - Second Meeting (Review of info / start devising questions)
w/c	16 September - Third Meeting (Finalise Questions)
by	20 September - Release Questions to Cabinet Members
w/c	14 October - Cabinet Interviews over 2 full days
w/c	21 October - Fourth Meeting to identify key points arising from interviews.
w/c	4 November - Fifth Meeting (Review draft and agree final Report)
	13 November - Publish report for RAT Panel

21 November – Resources and Transformation O&S Panel

5. THE WORK OF THE GROUP

5.1 The Group will receive an overview of the Council's budget, including the latest forecast Medium term Financial Position and Corporate Plan. Generic and tailored questions will be asked of each Portfolio Holder, designed to probe the Portfolio Holders on factors such as;

- plans relating to the alignment of NFDC financial resources to their Corporate Plan priorities;
- the opportunities and threats to sustainability in service delivery;
- understanding plans for income maximisation and new generation; and
- key learning since May 2023 and how this can shape service delivery going forward

5.2 It is envisaged that the Task & Finish Group will meet mainly via teams, but this will be at the discretion of the Chairman taking due consideration of availability of members, and supporting officers.

For further information contact:

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Alan Bethune
Strategic Director Corporate
Resources & Transformation
Section 151 Officer
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Background Papers:

Published documents

Leaders - Portfolio Performance Dashboard

Quarter 4: 1st January - 31st March 2024

Portfolio Holder - Cllr Jill Cleary

Key Performance Indicators

Quarterly KPIs	Unit	Freq.	Last Quarter	Target	This Quarter	Desired DOT	Actual DOT	Status
Portfolio indicators above or on target	%	Q	85.3%	Monitor	86.1%	Up	Up	
Subscribers to residents' email	% of residents	Q	9.6%	14%	9.7%	Up	Up	
Website optimisations resulting in an improved customer experience	Num	Q	2	4	1*	Up	Down	
Website accessibility (Target is government set benchmark)	%	Q	88.8%	87%	90.7%	Up	Up	
Annual KPIs	Unit	Freq.	2022/23	Target	2023/24	Desired DOT	Actual DOT	Status
Vacancies filled first time	%	Q	78%	85%	73.5%	Up	Down	
Average customer rating of residents' email (usefulness, ease of understanding, relevant information)	Score out of 10	Annual	9.2	9	9.2	Up	-	
Level of customer satisfaction with Council services	%	Two-yearly	Expected in the next resident survey	60%	Expected in the next resident survey	Up	-	

* The low outcome/number is due to the focus of resources (staff) being on the delivery of the intranet project.

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Finance and Corporate Services Portfolio Performance Dashboard

Quarter 4: 1st January - 31st March 2024

Cllr Jeremy Heron

Key Performance Indicators

Annual KPIs	Unit	Freq.	2022/23	Target	2023/24	Desired DOT	Actual DOT	Status
Achieved a balanced budget with reasonable council tax increases	% or £	Annual	2.99% / £5.63 (23/24 bud.)	Greater of 2% or £5*	2.99% / £5.80 (24/25 bud.)	-	-	
General Fund budget variations	%	Annual	-2.74%	+/- 3%	-8.1%**	-	-	
HRA Fund budget variations	%	Annual	3.89%	+/- 3%	-0.04%	-	-	
Value of Original Capital Programme Delivered	%	Annual	84%	80%	81%	Cumulative		
Increase in the value of residential investment	£m	Annual	£5.1m	£8m	£8m	Cumulative	-	
Increase in the value of commercial investment	£m	Annual	£29.3m	£30m	£30m***	Cumulative	-	
Maintain high level of council tax collected	%	Quarterly (Cumulative)	98.56%	98.5% (by Q4)	98.65%	Cumulative	Up	
Maintain high level of NNDR collected	%	Quarterly (Cumulative)	98.83%	98.5% (by Q4)	98.96%	Cumulative	Up	
Level of investment in the leisure centres by Freedom Leisure (cumulative)	£	Quarterly (Cumulative)	£2.408m	£3.544m	£3.700m	Cumulative	Up	
Quarterly KPIs	Unit	Freq.	Last Quarter	Target	This Quarter	Desired DOT	Actual DOT	Status
ICT incidents resolved within SLA	%	Quarterly	98.5%	95%	98.8%	Up	Up	
Benefit realisation from ICT investment	New KPI in live consideration for future dashboard reporting							
Maintain a Remote Access Solution (VPN)	%	Quarterly	N/A	99.5%	N/A****	Up	-	
Council Tax Support Fund payments made	%	Quarterly (Cumulative)	88.29%	100% (by Q4)	100%	Cumulative	Up	

* 22/23 performance represents setting of 23/24 budget. Target represents setting of 23/24 budget

** General Fund Requirement £-1.819m/£22.468m

***Reported figure includes a Cost Valuation of £9.552m for Platinum Jubilee Development plus additional asset at £1.9m (Unit 800 Ampress Park)

**** Data is not available during the transition to Azure

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RESOURCES AND TRANSFORMATION OVERVIEW AND SCRUTINY PANEL WORK PROGRAMME – 2024/25

19 SEPTEMBER 2024

Citizens Advice New Forest Update	To receive a presentation on the work of Citizens Advice New Forest	Presentation	Citizens Advice New Forest
Transformation Programme Update	To receive an update on progress with the Transformation programme.	Presentation	Rebecca Drummond / Ingrid Archer
Freeports Update	To receive an update on the latest position in respect of the Freeports Initiative	Presentation	Alan Bethune
Procurement Update	To receive an update on the review of Contract Standing Orders	Written Report	Josie West

21 NOVEMBER 2024

Annual Complaints Performance and Service Improvement Report and half yearly update	To receive an annual overview of complaints received and dealt with by the Information Governance and Complaints Team. The Housing and Communities O&S Panel members will be invited, given the related content.	Written Report	Amanda Wilson / Karen Grimes
Asset Investment Strategy	To receive the asset investment strategy and make any comments to Cabinet	Written Report	Alan Bethune
Council Tax Reduction Schemes Task and Finish Group Report	To receive the report of the Council Tax Reduction Schemes Task and Finish Group	Written Report	Ryan Stevens

Financial Strategy Task and Finish Group Report	To receive the report of the Financial Strategy Task and Finish Group	Written Report	Alan Bethune / Andy Rogers
Transformation Programme Update	To receive an update on progress with the Transformation programme.	Written Report	Rebecca Drummond / Ingrid Archer
23 JANUARY 2025			
Asset Maintenance and Replacement Programme	To receive details of the proposed programme and pass any comments to Cabinet.	Written Report	Alan Bethune
Capital Strategy	To receive details of the proposed strategy and pass any comments to Cabinet.	Written Report	Alan Bethune

20 MARCH 2025			
ICT Strategy Delivery Update	To receive the Annual Update on progress with delivery of the ICT strategy	Presentation	Kim Gray / Rich Bird