

Cabinet – 6 August 2025

Revised Transformation Strategy and Business Case

Purpose	For Decision
Classification	Public
Executive Summary	<p>Local Government Reorganisation (LGR) has fundamentally changed the context in which the council approaches transformation.</p> <p>Although the originally anticipated financial benefits of transformation may not be realised ahead of reorganisation, the core drivers for change remain strong. The transformation programme continues to deliver significant value, ensuring the council is well positioned and adequately prepared for a smooth and effective transition to the new authority.</p> <p>This paper considers the impact on the approved Business Case and provides clarity over our strategic objectives in this new context through a revised transformation strategy.</p>
Recommendation(s)	<p>That Cabinet recommend to Council:</p> <ol style="list-style-type: none"> 1. The noting of the revised business case position and 2. The approval of the revised transformation strategy
Reasons for recommendation(s)	<p>A key element of the corporate plan is the underpinning theme of the transformation strategy, Future New Forest.</p> <p>This now needs to be considered through the new lens of Local Government Reorganisation to ensure delivery is focussed on activities and investment that will provide the greatest benefits to enable the organisation to transition to the new authority. The recommendations support this revised position.</p>

Ward(s)	All
Portfolio Holder(s)	Councillor Jill Cleary – Leader
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Introduction and background

1. The Future New Forest Transformation Strategy was approved by Cabinet in December 2023 and set the scene for a transformed council to meet customer needs, protect our finances, be an employer of choice and embed sustainability to meet the aims and objectives of the Corporate Plan 2024-2028, in the context of significant challenges facing local government.
2. These objectives, whilst still relevant, now need to be considered through a new lens of Local Government Reorganisation (LGR). This will ensure that what we are delivering not only positions the organisation and its employees well for future arrangements, it will also have lasting benefits for our residents in improving how they interact with their local council, providing a consistent and easy experience that meets their needs.
3. There remains a clear responsibility to continue delivering high-quality services to our residents in the medium term. The Corporate Plan continues to shape and guide our ambitions, reflecting our commitment to serving communities both now and into the future. Modernisation plays a crucial role in this ongoing legacy, ensuring we are not only meeting current needs but also laying the groundwork for a new organisation that must provide efficient, effective services centred around the needs of the people who rely on them.
4. This is highlighted by the Secretary of State’s guidance for proposals for unitary local government which clearly sets out an expectation of efficiency savings and planning for future service transformation opportunities.

“Efficiencies should be identified to help improve councils’ finances and make sure that council taxpayers are getting the best possible value for their money.” and

“Proposals should set out how an area will seek to manage transition costs, including planning for future service transformation opportunities from existing budgets, including from the flexible use of capital receipts that can support authorities in taking forward transformation and invest-to-save projects.”

5. To ensure a successful transition to new arrangements under LGR, additional preparation and coordination will be essential. There is an opportunity to deliver this through the current programme management approach and align with Future New Forest, using both existing and emerging skills within the transformation team and across the wider organisation. Establishing a programme management office (PMO) will be key to coordinating this effort, enabling the delivery of priority projects and activities in alignment with both transformation goals and the strategic priorities of LGR, while supporting the governance arrangements now being established.
6. It is appropriate in this new context that we revise the original strategic objectives, provide clarity around what is now in scope for delivery and what is no longer feasible. The revised strategy at Appendix 1 sets out this future approach.
7. It is also appropriate within this report to revisit the August 2024 Business Case, given that the financial benefits assumed will no longer be deliverable.

Revised transformation strategy

8. The revised *Transformation Strategy (2025 Update)*, presented in Appendix 1, evaluates the original transformation drivers in light of the implications of LGR. It subsequently updates the strategic objectives to reflect this new context.
9. The strategy also redefines the scope of transformation activities, identifying those that remain within scope and excluding those no longer feasible or practical under the LGR framework. While not an exhaustive list, this provides a high-level overview of the revised programme scope. Correspondingly, the delivery roadmap outlines the principal activities to be undertaken within this updated scope.

10. Most critically, these revisions recalibrate the strategic direction of the transformation programme, ensuring closer alignment with LGR preparedness. This provides the organisation with greater clarity regarding its priorities and areas of focus over the next two to three years.
11. While the strategy places less emphasis on the immediate realisation of financial benefits, it remains firmly focused on delivering a range of substantial non-financial outcomes that are critical to the long-term success and resilience of services provided to New Forest residents. These include:
 - Enhancing customer outcomes - by designing services that are more responsive, accessible, and tailored to the needs of our communities.
 - Increasing organisational capacity - through smarter ways of working, streamlined processes and better use of data and technology.
 - Fostering a high-performance culture - that empowers teams, drives continuous improvement, and encourages accountability at all levels.
 - Developing staff skills and capabilities - to build a confident, agile workforce ready to meet current and future challenges.
 - Promoting environmental sustainability - by rethinking how services are delivered to reduce carbon emissions and minimise environmental impact.
 - Strengthening cross-organisational collaboration - by breaking down silos and encouraging integrated working across services and with partners.
 - Improving adaptability and readiness for change - ensuring the organisation can respond effectively to future challenges, including the transition to the new authority.
 - Positioning the council - as a modern, agile organisation, equipped to thrive in a rapidly changing public sector landscape and deliver lasting benefits for residents.
12. These non-financial benefits are essential to achieve over the coming years, as they will play a critical role in modernising the organisation and positioning it to capitalise on future opportunities. The transition to LGR will necessitate substantial transformation plans for the new unitary authority, and the foundations established through this strategy will be instrumental in supporting their successful implementation.

Revised Business Case

13. The original Business Cases were approved by Cabinet on 7 August 2024 and comprised two separate elements; Customer & Digital Services (including organisational design) and the ATC accommodation works.
14. The Customer & Digital Services (including Organisational Design) Business Case was developed following the adoption of the original Transformation Strategy. It enabled 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 were structured to improve customer experience and the

efficiency and effectiveness of the organisation. Organisational design is the structures, processes and roles needed to achieve the organisation's objectives.

15. The ATC Business Case considered options to exploit the commercial opportunities of Appletree Court and make better use of the currently underutilised office accommodation.
16. The ATC Business Case and associated works are not now being progressed considering the uncertainties of LGR (Cabinet 5 February 2025, Asset Maintenance and Replacement Programme and General Fund Capital Programme 2025/26) however, it is appropriate to revisit the Business Case for Customer & Digital Services (including organisational design).

Original proposal (Organisational design model BV2)

17. The agreed organisation design model (BV2) intended to move the organisation from a service led position with services adopting their own technology and processes, largely in isolation, to a more cross cutting enterprise approach with similar technology and processes used across the entire organisation, bringing about standardisation and maximising efficiencies. The existing service led model resulted in inconsistency in customer experience and technology depending on which service was being used, with phone and email being the main communication channels and multiple email addresses and phone numbers available to customers.
18. In brief the preferred option B(v2) for the target future organisational design included:
 - 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.
19. Significant changes to roles have been deliberately excluded from the current strategy, as the anticipated long-term benefits are unlikely to be realised within the timeframe of the LGR. In addition, maintaining workforce stability is a key priority in the lead-up to reorganisation. To this end, efforts are being made to minimise disruption by avoiding structural changes to teams, roles, or job descriptions. It is also recognised that the successful delivery of LGR will require additional capacity, and existing resources may be redeployed as necessary to meet emerging demands. Furthermore, dedicated resources will be required to support the increased workload and capacity pressures associated with LGR implementation.

20. A new approach is advocated, supported by the revised strategic direction, that continues to invest in modern technology that will give us a leading edge in a new organisation and support our employees to better transition with the skills and customer focussed approach that will be sought after. This will not be defined by a specific organisation design model but we will continue to adopt the principle of applying enterprise technology capabilities across all services to enable a single view of the customer through one 'front door' enabled by a CRM (Customer Relationship Management) and customer portal, customer contact management and master data management.
21. Additionally legacy systems will require replacing irrespective of transformation to ensure continued service delivery and manage risk. This includes the current procurement of a Housing Maintenance system and replacement of the Planning and Regulatory Services software. In terms of the latter, procurement has been paused to allow time to align the solution with neighbouring authorities. However, a replacement system will be necessary ahead of any new arrangements being established.

Financial position

22. The nature of the Business Case was to focus on the costs and financial benefits of the programme due to the fact the programme had a significant financial target to deliver. The decision has since been taken to remove transformation savings from the budget (Cabinet 19 February, Medium Term Financial Plan and Annual Budget 2025/26) and the Medium-Term Financial Plan (MTFP) is not reliant on transformation savings at this point in time with a balanced budget produced for 2025/26 and predicted for 2026/27. Budgetary gaps arising thereafter are anticipated to be met through fees and charges growth and budget equalisation reserves.
23. Financial benefits of the Business Case included estimated process efficiency benefits and benefits associated with remodelling and leadership and management benefits achievable. 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 were likely to be realised through workforce reductions.
24. It also identified other strategies to meet the financial target including:
 - 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 to guide a conversation with members around strategic reductions of services, aligned with corporate priorities.

25. The timescales for LGR now mean that these strategies cannot now realistically be deployed although the programme remains ambitious to improve efficiencies, release capacity where appropriate and deliver the important non-financial benefits.

Costs

26. Original costs to deliver the Customer & Digital Business Case were based on estimated 'one-off costs' and 'recurring costs' and modelled over a two-year period with a number of assumptions on staffing, the use of cloud-based technology and dual running costs were appropriate to maintain old and new systems for a period of time if not avoidable.
27. The original costs for Option B(v2), excluding contingency, were:

Project	Total one off	Net recurring
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

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

28. The Business Case assumed that no cashable benefits would be realised until year three with Option B(v2) projected to break even mid-way through year five.
29. It is important to note 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. This can now be extended to the CRM replacement as the supplier has given notice that the existing system will no longer be supported.
30. A contingency sum of up to £600k was also agreed to cover potential outplacement costs and any unplanned programme costs for example support from a transformation partner to support specific capacity needs and expertise and outplacement support.
31. The original total one-off funding requirement (including contingency) was £2,709,000 with a resultant estimated net annual financial benefit (saving) of £854,000.

Revised costs

32. The approved Business Case related budget for 2025/26 and forecast budget for 2026/27, including one-off and recurring costs is set out below:

One off Project Costs	2025/26 Budget	2026/27 Budget	TOTAL		
Contact Centre	24,000	0	24,000		
CRM*	207,000	107,000	314,000		
Digital Data Platform	75,000	75,000	150,000		
Digital Housing Maintenance System*	165,000	65,000	230,000		
Locata Data Warehouse	5,000	0	5,000		
Planning and Regulatory Services System*	293,000	293,000	586,000		
Programme Delivery Resources	390,000	390,000	780,000		
Revenues and Benefits	20,000	0	20,000		
One Off Total Costs	1,179,000	930,000	2,109,000		

Year 1 Recurring Costs (Allocated across financial years)	2025/26 Budget	2026/27 Budget	TOTAL	Projected Savings	Net Recurring Costs
Contact Centre	32,000	32,000	64,000	-30,000	34,000
CRM*	183,000	183,000	366,000	-133,000	233,000
Digital Data Platform	15,000	15,000	30,000	0	30,000
Digital Housing Maintenance System*	30,000	30,000	60,000	-33,000	27,000
Locata Data Warehouse	1,000	1,000	2,000	0	2,000
Planning and Regulatory Services System*	40,000	40,000	80,000	-55,000	25,000
Programme Delivery Resources	0	0	0	0	0
Revenues and Benefits	27,000	27,000	54,000	0	54,000
Recurring Total Costs	328,000	328,000	656,000	-251,000	405,000
TOTAL	1,507,000	1,258,000	2,765,000		

33. As outlined in this report and the accompanying revised strategy, there remains a strong and well-substantiated rationale for continuing the current investment in digital transformation. It is appropriate that this is supported by dedicated organisational development resources to effectively guide the organisation through a period of significant change. Additionally, appropriate service backfill is essential to ensure that the benefits of technological advancements are fully realised and operational capacity is maintained.

34. The three principal digital transformation projects currently underway include:

- the implementation of a new Customer Relationship Management (CRM) and Customer Platform,
- the replacement of the Housing Maintenance system, and
- the replacement of the existing Regulatory Services software.

While there is an option to defer or forgo the replacement of one or more of these systems in light of LGR, this would carry considerable risk. The legacy nature of the current systems poses a threat to the continuity and quality of service delivery. Moreover, failure to modernise these systems would leave the organisation in a transitional state, inadequately preparing both the organisation and its workforce for integration into a new future structure.

35. The ICT work programme provides for an annual investment of £625,000, amounting to £1.25 million over two years and is being utilised to partially offset the overall funding requirement for the transformation programme.

Corporate plan priorities

36. Future New Forest underpins the delivery of the corporate plan priorities, influencing how we operate and enabling us to support our strategic objectives through efficient and effective working practices centred around our customers, being an employer of choice and being financially responsible. This continues to be the case through the revised Transformation Strategy presented at Appendix 1.

Options appraisal

37. The following table considers alternative options with a recommendation for Option 1 to proceed with the programme as set out in the revised strategy and within this report.

Option	Description	Strategic Impact	Risks & Limitations	Overall Assessment
Option 1: Proceed with the revised transformation programme as recommended	Deliver the revised programme, including key system replacements, organisational development support, and transformation team capacity.	- Positions the council to transition smoothly into LGR- Improves customer outcomes, staff capability, and service resilience- Aligns with corporate plan and digital investment roadmap	- Requires sustained investment and leadership focus- Ongoing change demands on staff and teams	Recommended – This option supports critical improvements while securing organisational readiness for reorganisation and beyond. The only option that delivers long-term value and stability.
Option 2: Continue with original strategy and business case	Deliver the programme as originally designed, including key system replacements, structure and role changes and transformation/ OD team capacity	- Improves customer outcomes, staff capability, and service resilience- Aligns with corporate plan and digital investment roadmap. Return on investment not possible given timescales	- Requires sustained investment and leadership focus- Ongoing change demands on staff and teams – Structure and role changes require significant resource, create uncertainty and have potential to destabilise teams	High risk - This option supports critical improvements but places additional uncertainty on staff and directs resources at short term activities that will not generate longer term benefits. Creates significant risk to LGR preparedness and delivery of priorities.

Option 3: Deliver only the minimum system upgrades (CRM, housing, planning)	Replace systems reaching end-of-life but pause wider transformation activities including OD and service redesign.	- Addresses immediate technical risks- Some minimal service continuity protected	- No capacity to support staff through change- No preparation for LGR transition- Fails to realise organisational or customer benefits- Risk of service fragmentation and disengagement	Not viable – Addresses only the symptoms, not the root causes. Creates significant risk to LGR readiness and long-term service performance.
Option 4: Defer transformation until after LGR is complete	Halt all transformation activity and wait for the new authority to lead any future change.	- Reduces immediate expenditure- Shifts accountability to future structure	- Abandons current momentum and staff engagement- Delays essential improvements- Leaves legacy systems and processes vulnerable- Reputation risk for failing to prepare proactively	High risk – This passive approach would leave the council unprepared for the demands of LGR and risks major disruption during transition. Not a responsible course of action.
Option 5: Suspend the programme	Withdraw all transformation activity and reallocate remaining funds elsewhere.	- Frees up financial resources in the short term	- Fails to modernise services- Staff morale and engagement likely to fall- No preparation for LGR- Reputational damage- Long-term costs likely to increase due to inefficiency and failure demand	Strategically unsound – This option offers no sustainable path forward. It would leave the council ill-equipped to serve residents or adapt to forthcoming change.

Consultation undertaken

38. This paper has been informed by the review of priorities (Cabinet 2 April 2025, Corporate Peer Challenge Report and Action Plan, Appendix 3) and consultation with EMT, the Transformation Board, the Member Steering

Board and has been considered by the Resources and Transformation Panel.

Financial and resource implications

39. Although budget provision for the continued delivery of the programme has been approved the return on investment is no longer viable. Costs and financial considerations are considered within the report.

Legal implications

40. Not applicable.

Risk assessment

41. Risks associated with the options available are considered at point 37 within the options appraisal section of this report.

Environmental / Climate and nature implications

42. The revised Transformation Strategy continues to support the council's environmental ambitions and the national and local targets to reduce emissions are unchanged by LGR.

Equalities implications

43. There are no equalities implications arising directly from this report, however delivery of the revised strategy and modernisation of technology will impact our customers and employees. Changes to processes and service delivery will be subject to Equalities Impact Assessments and informed by user testing.

Crime and disorder implications

44. Not applicable.

Data protection / Information governance / ICT implications

45. 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.

New Forest National Park / Cranborne Chase National Landscape implications

46. Not applicable.

Conclusion

47. Analysis of the available options makes clear that continuing with the revised transformation programme is not only the most strategic course of action, but also essential. The programme represents a critical enabler for

delivering improved services, supporting our people through change, and preparing the council for LGR.

48. Alternative options may appear to reduce short-term costs but would expose the council to significant operational, financial, and reputational risks. Delaying or scaling back transformation would compromise the Council's ability to deliver on corporate priorities, undermine staff and resident confidence, and leave the council underprepared for the demands of transition to a new authority.
49. The recommended option delivers the strongest alignment with the council's strategic direction, offers the greatest long-term value, and ensures momentum is maintained at a time when readiness and resilience are more important than ever.

Appendices:

Appendix 1 – Transformation Strategy
(2025 update)

Background Papers:

Transformation Strategy – Cabinet 6
December 2023
Transformation Business Case
(Customer & Digital) – Cabinet 7
August 2024

NFDC Transformation Strategy (2025 Update)

1. Introduction

The Future New Forest Transformation Strategy was approved in December 2023 to cover a four-year period from April 2024 to March 2028, the same period as the NFDC Corporate Plan. The strategy established how the council would transform to meet changing customer needs, protect finances and embed sustainability.

In its introduction it was acknowledged that “Between 2024 and 2028 the economic, political, technological and environmental context is likely to change significantly, so the strategy and objectives set out within it will need to be flexible to respond to those changes.”

This has proved to be the case with the publication of the English Devolution White Paper on 16 December 2024 which signalled the government’s intention to abolish district and county councils and replace them with new unitary authorities by April 2028. This process is referred to as a local government reorganisation (LGR).

Given that the original strategy’s primary intent was to secure the long-term sustainability of NFDC, and that the implication of the White Paper is that NFDC will no longer exist after March 2028, the council must consider whether there is still value in pursuing the strategy.

This updated and revised strategy revisits the case for change and establishes the basis for continuing with the strategy and the delivery of the transformation programme.

2. Case for change

LGR has fundamentally changed the context in which NFDC approaches transformation. The projected financial benefits of transformation would not be fully, or even largely, realised ahead of the vesting day of the new unitary authority, ie the day the new authority becomes operational and the existing authorities dissolve. However, this does not wholly negate the original drivers and there is a new responsibility for the council to ensure the organisation is well-prepared for the transition to the new authority.

Cancellation of the transformation strategy and programme would mean that no meaningful progress would be made over the next three years (as a minimum) to improve the council’s use of data and technology, to improve the quality and adoption of online services or to develop the essential skills that staff will need to thrive as part of a new council. Our customers would see a decline rather than improvement in how they access our services.

The responsible course of action is to embrace the reality of change and to respond to the uncertainty surrounding LGR by ensuring the council’s staff, systems, data and processes are well-positioned to adapt to a range of future scenarios. This maximises the chances that New Forest residents will experience service improvements leading up to vesting day, rather than disruption and decline.

Appendix 1

Instead of undermining the case for transformation, LGR provides a new lens through which to view the original drivers for change, as Table 1 below shows.

Appendix 1

Original driver for transformation	Impact of LGR
<p>Modernising services</p> <p>Our systems and processes need to keep pace with the advance of digital technologies and the impact these are having on people’s lives and expectations.</p> <p>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, some of which are now outdated. Services across the public and not-for-profit sectors are often poorly signposted and integrated and we need to make it easier for customers to find the services they need.</p>	<p>Stronger case for change</p> <p>The advance of digital technologies continues. Some council systems are end of life and cannot continue for a minimum of another three years without action being taken. Whilst LGR should make it easier for customers to find services, because most council services will be delivered by a single unitary authority, there is still the need to work with the wider public and voluntary sectors.</p> <p>Furthermore, one of the key drivers for LGR is to put local government on a sustainable footing and deliver efficiencies. We want to demonstrate leadership in transformational design and technical delivery to cement NFDC’s position in the emerging LGR context. The new unitary authority will be better placed to realise efficiencies if NFDC has replaced out of date systems and improved the quality and connectedness of its data ahead of vesting day.</p>
<p>Financial constraints</p> <p>Rising costs and new burdens mean we face a significant and growing budget gap.</p> <p>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 prioritise and find ways to reduce the cost of delivery. We must embed financial responsibility into all that we do.</p>	<p>Adjusted case for change</p> <p>The financial challenge remains but LGR changes the context in which this is addressed.</p> <p>While we do not believe large scale structural change in advance of LGR is practical or advisable, given the structural changes to local government within Hampshire that are likely as a consequence of LGR, investing in technological enablement and process redesign can still deliver efficiencies that may be cashable over the next 2-3 years due to organic changes such as natural turnover. However, these savings are likely to be significantly smaller than those originally sought.</p>

Appendix 1

<p>Capacity and capability We need new skills to deliver the changes we must make.</p> <p>The world is changing fast with the rapid growth of technology and artificial intelligence (AI). The council needs new skills to respond to the opportunities and challenges we face.</p> <p>However, most councils are facing recruitment and retention problems. We need to release capacity from parts of the organisation to enable increased focus on strategic priorities. We need to develop a more agile workforce to respond to a changing local government landscape and a digital world.</p>	<p>Stronger case for change The ambitious timescale laid out by the government for LGR means that it will be even more important to release staff capacity to support the changes.</p> <p>LGR will create significant challenges and opportunities for council staff. As NFDC, we have a responsibility to prepare our staff for this change to ensure they are best placed to thrive in the new unitary world. Change management, digital and customer skills will be even more valuable to both staff and the future unitary authority.</p>
<p>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.</p> <p>The council declared a Climate Change and Nature Emergency in 2021 and is committed to leading efforts to tackle the impacts of extreme weather and climate change in the New Forest, 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.</p> <p>These changes will affect all aspects of council operations, including service delivery, the health and wellbeing of staff, the suitability of our housing stock, the lifespan of our assets and the condition of our habitats.</p>	<p>Same case for change National and local targets to reduce emissions are unchanged by LGR and the case for change remains.</p>

Table 1: Impact of LGR on NFDC transformation drivers

3. Vision, objectives and scope

Vision

In the context of LGR and the future transition to a larger unitary authority providing the services currently provided by NFDC, we have revised our vision for Future New Forest. We have retained, and in some cases adapted, the four transformation themes from the 2024 strategy and continue to structure our objectives and workstreams around these.

“Future New Forest: Modernising and improving services to meet changing customer needs and ensure our people, technology, data and processes are ready for the significant changes local government reorganisation will bring.”

Objectives by theme

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.

Objective C1

Our customers will be at the heart of our digital-by-design approach.

Objective C2

We will review and catalogue our data, identify the data that is most valuable as we move towards LGR and ensure it is accurate and accessible to ensure a smooth transition to unitary status.

Objective C3

We will invest in the digital capabilities that are most likely to bring long term benefits for customers and staff during and after LGR. This means they will be scalable, adaptable, interoperable and reusable.

People and capabilities

This theme is about how we develop our people and culture, making sure roles, behaviours and skills evolve to meet new service designs and needs.

Objective P1

We will ensure our values, behaviours and culture are aligned, with a focus on prioritising customer needs through a period of rapid change.

Objective P2

We will invest in our people to ensure they have the skills they need to deliver, manage and adapt to the significant organisational changes ahead.

Assets and accommodation

This theme is about how we use and maintain our assets to improve sustainability and ensure they are in the best possible condition at the point of transfer to the new unitary authority.

Appendix 1

Objective A1

We will prioritise operational assets so they are in the best possible condition ahead of vesting day to the new unitary authority.

Objective A2

We will continue to challenge our asset portfolio to reduce environmental impact and enhance their financial contribution

Transformation delivery and LGR readiness

This theme is about how we ensure that our investment in transformation delivers tangible benefits, for customers and such that the council is well-prepared for LGR.

Objective D1

We will ensure that all transformation activity will deliver meaningful improvements for customers in the short term and/or will position the organisation to transition as smoothly as possible to the new unitary authority.

Objective D2

We will shift to a more empowered and accountable management culture.

Scope

Revised scope:

Customer and digital services

In scope	Out of scope
<ul style="list-style-type: none">• Any and all service processes may be reviewed to identify ways to improve customer experience, enhance performance and release capacity.• All current software applications supporting front- and back-office operations are in scope for standardisation, optimisation and integration.• Replacement of current CRM and housing maintenance systems.• Identifying, cataloguing, cleansing and connecting key datasets to support customer delivery and/or LGR preparation.• Implementing the Customer Strategy, including associated changes to channels, customer SLAs, KPIs and feedback mechanisms.• Partnership working across the public and not-for-profit sectors join up services and processes to make access to key services better for our residents, businesses and visitors.	<ul style="list-style-type: none">• Decisions about how capacity released through service design is realised.• Full structural reorganisation of customer services around the digital platform/CRM.• Investment in developing systems which are unlikely to be retained post-LGR.• Changes to formally documented policies that have been adopted by elected members.• Changes to service delivery, eg stopping services or reducing service levels.

Appendix 1

<ul style="list-style-type: none"> Consolidation of customer service activity to simplify, integrate and consolidate existing roles. 	
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People and capabilities

In scope	Out of scope
<ul style="list-style-type: none"> People Strategy development and delivery across all services and teams, including developing organisational values, behaviours and staff skills. Changes to reward and recognition approaches Minor changes to organisational structures to better align capacity and capability 	<ul style="list-style-type: none"> Significant changes to staffing structures and job descriptions. Changes to pay and grading structures, terms and conditions or employment models. Significant changes to learning management systems or training providers

Assets and accommodation

In scope	Out of scope
<ul style="list-style-type: none"> All operational buildings eg offices, depots, stores Delivery of the Strategic Asset Management Plan (SAMP) 2025-onwards 	<ul style="list-style-type: none"> HRA assets, eg social housing properties, garages, and associated systems* Operational assets within Place and Sustainability directorate (plant and fleet) Redesign of customer, community or workforce facing spaces. Major investment in assets that would only deliver returns beyond the life of the current authority.

*ongoing investment via HRA business plan outside of scope of transformation scope

Transformation delivery and LGR readiness

In scope	Out of scope
<ul style="list-style-type: none"> Oversight of all projects and programmes relevant to organisation transformation and/or LGR Transformation programme governance Benefits management Service and financial planning processes Leadership, management and performance culture. LGR planning and preparation 	<ul style="list-style-type: none"> Delivery of long-term financial savings linked to workforce reductions. Leadership decisions on the method of realising benefits identified through the transformation programme.

4. Measuring our success

Customer and digital

- Customer experience (% rating Good or above)
- Number of fully digital services (definition and baseline to be confirmed)
- Customers choosing digital channels (% requests received via digital channels)

People and capabilities

- Long term vacancies (% vacancies filled first time)
- Staff retention (% of staff who leave within 12 months)
- Equipping staff to do their jobs (% who agree they have had the training and development needed to perform current duties)
- Staff development (% staff agree there are training and development opportunities to support them to achieve their ambitions / progress their career)
- Net promoter (% of staff recommend the council as a great place to work)

Assets and accommodation

- Assets have been identified, classified and had a condition survey undertaken as part of the asset strategy (% conditions surveys undertaken)
- Improvement in financial return of NFDC asset base (confirm method)
- Reduced emissions from operational council assets (% reduction against baseline)

Transformation delivery and LGR readiness

- Project objectives and benefits defined for all transformation initiatives, linked to transformation drivers and monitored by PMO.
- New service and financial planning processes implemented
- Managers agree they are empowered to manage resources to deliver their target outcomes (% agreement)

Appendix 1

5. Roadmap

LGR Readiness & Programme Delivery	2025				2026				2027				2028	
	Jan	Apr	Jul	Oct	Jan	Apr	Jul	Oct	Jan	Apr	Jul	Oct	Jan	Apr
Business Case/Transformation Strategy														
Agree revised Strategy & BC to ensure alignment with LGR impacts														
Agree priorities, objectives, outcomes & measures														
Review and revise programme planning to ensure alignment														
Agree and baseline revised KPIs/programme measures & high level benefits														
Agree transformation support/supplier contract														
Agree work packages for transformation support partners/supplier														
Mobilise transformation support														
Transformation Portfolio Governance & Oversight														
Agree purpose & scope for centralised PMO														
Establish organisational PMO (structures, systems, processes, people)														
Review governance structures to ensure alignment with PMO														
Programme Delivery- Programme benefits management														
Define benefits & agree detailed profiles (owners, measures, returns period)														
Establish benefits management system/process														
Organisational Data														
Conduct organisation data gap analysis & validate outcomes														
Create recommendations to address gaps														
Agree approach to organisation data & associated delivery plan														
Implement plans														
Customer & Digital														
Define digital architecture and capabilities														
Align customer and digital strategies														
Customer journeys and design patterns														

