

Executive Cabinet

Thursday, 16th September 2021, 6.30 pm

Council Chamber, Town Hall, Chorley and YouTube

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Agenda

Apologies for absence

1 **Minutes of meeting Thursday, 17 June 2021 of Executive Cabinet**

(Pages 5 - 18)

2 **Declarations of Any Interests**

Members are reminded of their responsibility to declare any pecuniary interest in respect of matters contained in this agenda.

If you have a pecuniary interest you must withdraw from the meeting. Normally you should leave the room before the business starts to be discussed. You do, however, have the same right to speak as a member of the public and may remain in the room to enable you to exercise that right and then leave immediately. In either case you must not seek to improperly influence a decision on the matter.

3 **Public Questions**

Members of the public who have requested the opportunity to ask a question(s) on an item(s) on the agenda will have three minutes to put their question(s) to the respective Executive Member(s). Each member of the public will be allowed to ask one short supplementary question.

Items of Deputy Executive Leader and Executive Member (Resources) (Introduced by Councillor Peter Wilson)

4 **Revenue and Capital Budget Monitoring Report 1**

(Pages 19 - 48)

To receive and consider the report of the Director of Finance (enclosed).

5 **Quarter 1 Performance Monitoring Report 2021-22**

(Pages 49 - 66)

To receive and consider the report of the Deputy Chief Executive (enclosed).

6 **Shared Consultation Framework**

(Pages 67 - 84)

To receive and consider the report of the Deputy Chief Executive (enclosed).

7 **Workplace Strategy**

(Pages 85 -
112)

To receive and consider the report of the Deputy Chief Executive (enclosed).

8 **Exclusion of the Public and Press**

To consider the exclusion of the press and public for the following items of business on the ground that it involves the likely disclosure of exempt information as defined in Paragraph 3 of Part 1 of Schedule 12A to the Local Government Act 1972.

By Virtue of Paragraph 3: Information relating to the financial or business affairs of any particular person (including the authority holding that information)

Condition:

Information is not exempt if it is required to be registered under-

The Companies Act 1985

The Friendly Societies Act 1974

The Friendly Societies Act 1992

The Industrial and Provident Societies Acts 1965 to 1978

The Building Societies Act 1986 (recorded in the public file of any building society, within the meaning of the Act)

The Charities Act 1993

Information is exempt to the extent that, in all the circumstances of the case, the public interest in maintaining the exemption outweighs the public interest in disclosing the information.

Information is not exempt if it relates to proposed development for which the local planning authority may grant itself planning permission pursuant to Regulation 3 of the Town & Country Planning General Regulations 1992(a).

**Item of Deputy Executive Leader and Executive Member (Resources)
(Introduced by Councillor Peter Wilson)**

9 **Museum, Culture and Tourism Team Review**

(Pages 113 -
136)

To receive and consider the report of the Deputy Chief Executive (enclosed).

**Item of Executive Member (Homes and Housing) (Introduced by
Councillor Peter Gabbott)**

10 **Procurement of Handyperson & Affordable Warmth Assistance
service**

(Pages 137 -
142)

To receive and consider the report of the Director of Communities (enclosed).

11 **Any urgent business previously agreed with the Chair**

Gary Hall
Chief Executive

Electronic agendas sent to Members of the Executive Cabinet Councillor Alistair Bradley (Chair), Councillor Peter Wilson (Vice-Chair) and Councillors Beverley Murray, Peter Gabbott, Alistair Morwood and Adrian Lowe.

If you need this information in a different format, such as larger print or translation, please get in touch on 515151 or chorley.gov.uk

[To view the procedure for public questions/ speaking click here and scroll to page 119](#)

[To view the procedure for “call-in” of Executive Decisions click here](#)

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84 organisations including developers, RPs and agents operating in the Borough were consulted. In total only 6 responses were received but a number of issues/objections were raised in these responses that needed to be considered before finalising the Framework. Legal advice was sought and as a result several changes were made to the Framework which were outlined in the report as well as the next steps to implement the Framework.

Following queries, Members were advised that the Council as a housing provider would also have to adhere to the Framework. Members supported the proposals and commended the work undertaken.

Decision:

To approve the amended version of the Framework for implementation.

Reason for recommendation(s):

To enable the Council to have direct control of the allocation of affordable units secured through S106 agreements.

Alternative options considered and rejected:

None

21.EC.29 Executive Cabinet Response to the Overview and Scrutiny Task Group – Sustainable Public Transport

Councillor Alistair Bradley, Executive Member (Economic Development and Public Service Reform), presented the report of the Director of Planning and Development which outlines the response to the recommendations of the Task Group for Sustainable Public Transport. Members noted that all 22 of the recommendations were being agreed.

Following queries on whether personal vehicles such as electric cars, and cycling and walking strategies should be considered separately from the Sustainable Public Transport report, it was proposed that they remain in the report but separate reviews could be undertaken.

Decision:

That the recommendations of the Overview and Scrutiny Task Group be received, and recommendations accepted.

Reasons for recommendation(s):

Sustainable public transport is an important element of a comprehensive approach to tackling climate change and the emergency the earth faces with regards carbon emissions, loss of nature and biodiversity and the obesity crisis. Delivery will contribute to achieving net zero carbon emissions.

Alternative options considered and rejected:

None

21.EC.29a Alker Lane Scheme Name

Councillor Alistair Bradley, Executive Member (Economic Development and Public Service Reform), presented the report of the Director of Commercial Services which advises as to the proposed name for the Alker Lane development.

The Alker Lane scheme commenced on site on the 1st June 2021 and officers have already received numerous expressions of interest in the availability of the units. As part of the marketing strategy, a strong and appropriate identity is required to promote the development and therefore the name 'Strawberry Meadows Business Park' is proposed.

Decision:

That the proposed name, Strawberry Meadows Business Park, be approved.

Reasons for recommendation(s):

1. To establish a strong, clear identity for the development as part of the wider marketing strategy.
2. To allow the marketing strategy to be implemented.
3. To demonstrate synergy with the adjacent Strawberry Fields Digital Hub.
4. To encourage potential tenants to engage with the scheme.

Alternative options considered and rejected:

1. Delay the naming of the site. Rejected as this prevents the marketing having full impact with the site having no identity.
2. Consider naming the site 'Alker Lane Business Park'. Rejected due to the lack of synergy with the adjacent Strawberry Fields Digital Hub.

21.EC.30 Revenue and Capital Budget Monitoring 20-21 Outturn

Councillor Peter Wilson, Executive Member (Resources), presented the report of the Director of Finance which sets out the provisional revenue and capital outturn figures for the Council as compared against the budgets and efficiency savings targets set for the financial year 2020/21. The accounts are provisional at this stage and are also subject to final checking and scrutiny by the Council's external auditor. Should there be any significant changes to the general fund as a result of this process, a further report will be submitted to Executive Cabinet.

In summary, there is a provisional underspend against the budget at year-end of £57k after taking account of requests for slippage of committed items of £256k that have been approved by the Chief Finance Officer. Members noted that the capital outturn expenditure for 2020/21 is £9.087m. The Council's Medium-Term Financial Strategy reported that working balances are currently maintained at £4.0m due to the financial risks facing the Council. The forecast level of general fund balances as at 31 March 2021 will be £4.057m.

Following queries on the forecasted reduction of bad debt provision for Market Walk in 2021/22 as money is repaid, Members considered what would be a bad result for the council and recognised that based on the unprecedented circumstances any result that will bring in income will be considered positive for the council.

Decision:

1. To note the full year position for the 2020/21 revenue budget and capital investment programme.
2. To note the slippage requests outlined in Appendix 2 of the report to finance expenditure on specific items or projects in 2021/22.
3. To note the 2020/21 outturn position on the Council's reserves outlined in Appendix 3.

4. To approve the capital programme to be delivered in 2020/21 to 2023/24 as outlined in Appendix 4.
5. To approve the changes within the capital programme as detailed in paragraph 84 and 89.

Reasons for recommendation(s):

To ensure the Council's budgetary targets are achieved.

Alternative options considered and rejected:

None

21.EC.31 Quarter Four Performance Report 2020/21

Councillor Peter Wilson, Executive Member (Resources), presented the report of the Deputy Chief Executive which sets out the performance against the delivery of the Corporate Strategy and key performance indicators during the fourth quarter of 2020/21, covering the 1 January to 31 March 2021.

The overall performance of key projects is good, with 84% of the projects rated as green, 8% rated as not started, and 8% rated as amber; there are action plans in place for those projects rated as amber.

Performance of the Corporate Strategy indicators and key service delivery measures continues to be closely monitored, with 50% of Corporate Strategy measures and 75% of key service delivery measures performing on or above target, or within the 5% threshold. Given the current challenges and environment the Council is operating in, performance against the agreed measures remains positive, with the Council continuing to work proactively to improve the position for local residents and communities. Where indicators are performing below target, action plans are in place to improve performance. The performance is reflective of national performance trends.

Decision:

That the report be noted.

Reasons for recommendation(s):

To facilitate the on-going analysis and management of the Council's performance in delivering the Corporate Strategy.

Alternative options considered and rejected:

None

21.EC.32 HR and Payroll System

Councillor Peter Wilson, Executive Member (Resources), presented the report of the Deputy Chief Executive which seeks approval to enter into a ten-year agreement with Blackpool Council to provide a managed payroll service with integrated HR service and all associated implementation, support and maintenance services.

Chorley has a service contract with Blackpool council to deliver a managed payroll service which has been in place for over 15 years and due to expire 31 March 2021. A number of suppliers were invited to provide system demonstrations and the council's current payroll providers were also invited to discuss how they could meet the shared

requirements of the councils. Continuing to use the current providers was considered the best option going forward.

The initial contract term will be 10 years following successful implementation and roll out (April 2022 for core HR and Payroll) with the potential to extend for a further 5 years (renewal term). The advantages of this model are outlined in the report.

Decision:

1. To approve the appointment of Blackpool Council for the provision of a managed payroll service with integrated HR system and all associated implementation, support, and maintenance services
2. To delegate the finalisation of the agreement with Blackpool Council to the Director of Governance.

Reasons for recommendation(s):

The council has determined that a ten-year partnership arrangement with Blackpool Council via a section 101 Local Government Act 1972 agreement provides the most effective and best value way to secure a fully managed payroll service with integrated HR system.

Alternative options considered and rejected:

1. The current HR and Payroll systems contract expires March 2022 and there is no compliant ability to extend this.
2. Procurement via either open tender or a framework requires specialist input to specify, document and evaluate tenders which would be resource intensive and potentially expensive. The market has been explored and found that it is very limited in terms of suppliers that would meet our specification and that the prices that could be achieved are unlikely to be more economical than the partnership approach, particularly as direct contract award to a supplier would incur high implementation costs. A partnership arrangement gives additional resilience to the project and ongoing payroll service unlike a direct award.

21.EC.33 Insurance Portfolio Procurement Proposals

Councillor Peter Wilson, Executive Member (Resources), presented the report of the Director of Governance which seeks Member approval to engage in a joint procurement with South Ribble Council to procure all insurance policies within the council's portfolio. The joint insurance tender for the renewal of the insurance covers in place at both Councils is a key project in the Shared Audit and Risk business plan for 2021/22.

Whilst the Insurance Broker contract is shared across South Ribble and Chorley Council's, members are advised that each council maintains its own insurance policy portfolio. The various insurance policies contained within each council's insurance portfolio are contracted under Long-Term Agreements (LTAs) of which expire on the 31 December 2021. It is proposed to tender for the insurance policies using a procurement dynamic purchasing system, similar to a procurement framework.

Decision:

1. That Members agree to the procurement being collaborative with South Ribble Council.
2. That Members agree to the use of the YPO Insurance Placement Dynamic Purchasing System 978.

3. That Members agree the approach to be taken for Evaluation Criteria and Weightings.

Reasons for recommendation(s):

1. The procurement will be a separate tender for each council's individual insurance portfolio however, running the tender process together will create efficiencies in the officer and broker time.
2. A Dynamic Purchasing System (DPS) agreement was used successfully last time the insurance policies were procured.
3. A YPO product was used recently in 2020 to tender for the Insurance Broker and Associated Services Contract, in doing so a working relationship with the YPO team has developed which will support delivery of the insurance procurement.
4. Subject to broker advice a similar approach to Evaluation Criteria and Weightings will be considered.

Alternative options considered and rejected:

The Audit and Risk service has not considered tendering for this procurement via the more traditional route of OJEU as this approach would lead to a longer timeframe to complete and additional officer resource to deliver a more complex tender, for the same or less competitive results.

21.EC.34 Neighbourhood Working

Councillor Bev Murray, Executive Member (Early Intervention), presented the report of the Director of Communities which provides details of the Neighbourhood Working Review and the proposed way forward to revise the delivery of neighbourhood working in Chorley which will ensure the model continues to develop and meets the needs of members and the communities they serve. It also presents the preferred option for new Neighbourhood Area footprint due to the impact of ward boundary changes which came into effect in May 2021.

Following the boundary review changes which came into effect in May 2021, a range of new area model options have been created and the preferred option proposed is to adopt the six Neighbourhood Area Model, which would split the 14 new wards into six areas as detailed in the report. The annual budget of £50k will give each neighbourhood area £8,000 and the opportunity to fund either one large project or allocate to several different projects, although it is proposed that no more than a maximum of four projects are chosen to be delivered. This approach will be piloted and the reviewed.

Following a Member request, it was agreed that the 'Chorley Town North' neighbourhood area be amended to 'Chorley North' based on the geographical nature of the area.

Decision:

1. That the actions and timescales detailed are approved to progress Neighbourhood Working over the next 18 months and then review accordingly to measure the success and make appropriate changes where applicable.
2. To agree the preferred option for New Neighbourhood Area Footprint Model, subject to amending the 'Chorley Town North' neighbourhood area to 'Chorley North'.

3. That Neighbourhood Priority projects proposed by each area group and budget spend will be approved by Executive Member (Early Intervention) via Executive Member decision.

Reasons for recommendation(s):

Neighbourhood working and its associated projects are a key priority within the council's corporate strategy and encourages the improvement of environmental, health, and social features within the identified neighbourhoods of Chorley.

Alternative options considered and rejected:

To not support the continuation and development of neighbourhood working across the borough.

21.EC.35 LCC Holiday Activity and Food Programme (HAF)

Councillor Bev Murray, Executive Member (Early Intervention), presented the report of the Director of Communities which provides details in relation to Lancashire County Council's (LCC) Holiday Activity and Food (HAF) programme and gives details on the proposed delivery model.

LCC have developed a desired model of delivery of the national HAF programme with expectation on local districts to play a key role to deliver locally, help achieve best outcomes, and meet the needs of our local families. Chorley has 2591 children aged 4-16 receiving free school meals. The programme will help address child food poverty during the school holidays and help support many families who struggle during this time. A budget of £242,505 has been allocated to deliver the programme in Chorley. It is proposed that Chorley Inspire Youth Zone and Chorley School Sports Partnership would be the most suitable partners to be able to deliver this service having all necessary experience and capacity to be able to deliver the programme.

Members queried how it would be ensured that all children who receive free school meals in Chorley can access the support based on the figures in the report. Members were advised that 30% provision indicates the amount of places the programme needs to make available per day based on the national delivery format funding from the Department of Education. This will be covered by the LCC funding and the shortfall will be met by the council working with partners to also help support those in hard to reach areas. For the outlying districts that are covered by a rural premium, there may be local provisions available that the council can buy into to ensure the need in rural areas is also met.

Based on the importance of this work, Members requested that a report be brought back to members on how the programme goes. It was agreed that local level data could be fed back to Members and advised that a full report would likely undertaken by LCC too.

Decision:

1. It is recommended that Chorley Inspire Youth Zone and Chorley School Sports Partnership will deliver the HAF programme on behalf of Chorley Council.
2. That the total funding from LCC of £242,505 is allocated accordingly to Chorley Inspire Youth Zone and Chorley School Sports Partnership to be able to deliver the programme.

Reasons for recommendation(s):

To ensure the successful delivery of the HAF programme for children between the ages of 4 and 16 who are eligible for free school meals. The programme will help address child food poverty during the school holidays and help support many families who struggle during this time. Chorley Inspire Youth Zone and Chorley School Sports Partnership are Chorley most experienced organisations working with children and young people providing high quality services. They have the infrastructure, knowledge, and partnerships to deliver the programme.

Alternative options considered and rejected:

To not support the delivery of the programme in Chorley and not to use Chorley Inspire Youth Zone and Chorley School Sports Partnership to deliver the programme.

21.EC.36 Housing Enforcement Policy 2021

Councillor Peter Gabbott, Executive Member (Homes and Housing), presented the report of the Director of Communities which consults on the proposed Housing Enforcement Policy 2021.

The Policy sets out the council's compliance and enforcement approach to housing standards activities to support improved housing conditions across the borough. This is in addition to the existing Private Sector Housing Assistance Policy which aims to provide information, advice and enable activities relating to adaptations and supported improvements.

Decision:

To approve the proposed policy.

Reason for recommendation(s):

The principal aims of the Housing Enforcement Policy are:

- To protect public health and safety from housing related standards issues
- To support homeowners in meeting the required housing standards in accordance with the principle legislation
- To improve the overall standards of the housing stock across the borough
- To ensure a consistent a balanced approach when making enforcement decisions

Alternative options considered and rejected:

No known alternatives.

21.EC.37 Exclusion of the Public and Press

Decision: To exclude the press and public for the following items of business on the grounds that it involves the likely disclosure of exempt information as defined in Paragraph 3 of Part 1 of Schedule 12A to the Local Government Act 1972.

21.EC.38 Allocation of CIL - Chorley Health Centre

Councillor Alistair Bradley, Executive Member (Economic Development and Public Service Reform), presented the confidential report of the Director of Planning and Development which seeks approval to amend the Infrastructure Funding Statement

and the allocation of main Community Infrastructure Levy monies to infrastructure projects.

Decision:

To approve the Infrastructure Funding Statement (June 2021) and approve the allocation of Community Infrastructure Levy monies for £250,000 subject to conditions for spend on the reconfiguration and modernisation of Chorley Health Centre, Collison Avenue, Chorley.

Reasons for recommendation(s):

To allocate the CIL Infrastructure Fund in the way it is intended and ensure the methodology of how it is allocated is transparent

Alternative options considered and rejected:

An alternative option of funding £500,000 was considered but rejected on the basis of £500k being significant; CIL funding has been used for health on other projects e.g. allocation of CIL funds to the Clayton-Le-Woods GP Surgery project and Eaves Lane GP Surgery relocation and that the strategic CIL fund has limited resources.

21.EC.39 Viability of the Local Plan and Review of CIL Procurement

Councillor Alistair Bradley, Executive Member (Economic Development and Public Service Reform), presented the confidential report of the Director of Planning and Development which seeks authorisation to undertake a procurement process to commission consultants on behalf of the three Central Lancashire Councils to deliver a two-part study on a) Viability of the new Central Lancashire Local Plan and b) A Review of the Central Lancashire Community Infrastructure Levy (CIL).

Decision:

1. Approval to allocate £90,000 of the shared Central Lancashire Local Plan Budget allocated to this piece of work, essentially meaning a cost of £30,000 to each Council.
2. That Chorley Council procures this work on behalf of the three Councils of Chorley, Preston and South Ribble and recoups the contributions of Preston and South Ribble Council following the receipt of final invoice from the contractor.
3. To approve the proposed evaluation criteria as set out in the tender document (see Appendix one, section 17).
4. Approval be given to commence the tender exercise with the decision to award the contract delegated to the Executive Member for Economic Development and Public Sector Reform.

Reasons for recommendation(s):

1. The viability assessment of a proposed Local plan is a requirement as set out in NPPF paragraph 34.
2. It is best practice to review the CIL as part of a new local plan preparation as they are inextricably linked. The CIL was implemented in 2013 and therefore needs to be reviewed and updated.

Alternative options considered and rejected:

To not commission this study would mean the preparation of the new Local Plan is

incomplete and would never meet the requirements of the tests of soundness as applied by the Planning Inspectorate. To have no new Local Plan would place the three councils at risk of speculative development.

21.EC.40 Pod Development Site Pall Mall Chorley

Councillor Alistair Bradley, Executive Member (Economic Development and Public Service Reform), presented the confidential report of the Director of Commercial Services which seeks approval for the terms reported for the disposal of the Pod Development site.

Decision:

That the terms reported in the report be approved.

Reasons for recommendation(s):

1. To secure development of the site and a capital receipt
2. The site will deliver an attractive development on the edge of the town centre and in doing so link Market Street to the nearby ASDA superstore.

Alternative options considered and rejected:

1. Joint venture considered but rejected on the basis of too greater risk to the Council for the rental return.
2. Leave the site as an area of open space or possible wildflower meadow.

21.EC.41 Market Walk Rents Position

Councillor Alistair Bradley, Executive Member (Economic Development and Public Service Reform), presented the confidential report of the Director of Commercial Services which seeks approval granting a new lease for Bodycare at units 14/15 Market Walk, approval for the application of Covid Terms in the Sports Direct lease, and seeks delegated authority to conclude a number of outstanding Covid rent relief claims for tenants who are mid-lease.

Decision:

1. To approve the terms agreed in the Heads of Terms (Appendix 1) for Bodycare.
2. To approve the application of Covid Terms contained within the Sports Direct lease resulting in:
 - a) a rent commencement date of 5 June 2022 (subject to any further lockdown periods)
 - b) rent reverting to 5% of turnover for a maximum period of 12 months.
3. To request delegated authority, to Director Commercial Services in consultation with Exec Member for Resource, to negotiate outstanding claims for Covid relief with tenants outside of lease negotiations, but to note that this will be applied by way of credit notes where the tenant is in arrears, a significant amount of which is already accounted for within the bad debt provision for 2020/21.

Reasons for recommendation(s):

1. The Council will receive a rental income for the occupation of the premises.
2. The Council will avoid having void units and costs associated with managing/reletting them.

Alternative options considered and rejected:

1. The Premises would remain empty until such time as a new tenant might be found.
2. In the current economic climate it is likely that it would take some time to agree a new letting of the premises.
3. The Council would bear the costs of running and maintaining the empty premises.
4. Any incoming tenant would likely demand similar terms or worse in order to fit out a new store.

21.EC.42 Grant of a lease - Unit 3, Flat Iron Parade, Market Walk

Councillor Peter Wilson, Executive Member (Resources), presented the confidential report of the Director of Commercial Services which seeks authorisation for the surrender of the existing lease and grant of a new lease of the premises which have been provisionally agreed recently.

Decision:

That the terms provisionally agreed are approved and the Director of Governance be authorised to complete the legal formalities.

Reasons for recommendation(s):

1. The current occupier is a longstanding tenant of the Council and have indicated their intention to continue the operation of their business in this location in the long term and have agreed to a number of additional terms to the Council's benefit.
2. This is a rent increase contra to many of the Centre's other tenants seeking reduction of rent and provides useful evidence in other negotiations

Alternative options considered and rejected:

1. Not to offer terms for renewal and to seek repossession at the expiry of the Lease and advertise.
2. In this instance costs would be incurred and a void whilst the letting is advertised, and the legal matters completed
3. Current policy in the management of the Centre is avoid vacancies wherever possible and maintain a strong income stream

21.EC.43 Approval of Tender Evaluation Criteria for Security/Concierge Services

Councillor Peter Wilson, Executive Member (Resources), presented the confidential report of the Director of Commercial Services which seeks members' approval for the temporary extension to existing concierge contracts exceeding £100,000, whilst a full-service review is undertaken as well as formalising the initial contract award to Exclusec for concierge service at the Strawberry Fields as the cumulative value exceeds £100,000.

Decision:

1. To approve the extension of the Sector concierge contract for Primrose Gardens and Cotswold House for a maximum of 12 months (with options to terminate at 6 or 9 months should the review be concluded early).
2. To approve the award and extension of the Exclusec concierge contract for Strawberry Fields for a maximum of 12 months (with options to terminate at 6 or 9 months should the review be concluded early).

3. To approve the award and extension of the New Concept security contract for Market Walk for a maximum of 12 months (with options to terminate at 6 or 9 months should the review be concluded early).

Reasons for recommendation(s):

1. The concierge and security service across all council assets is currently under a full collective review, rather than as individual contracts, and the existing contracts need formally extending until the results of the review can determine the shape of future 3rd party service requirements.
2. The Covid pandemic has highlighted new ways of flexible working that can be considered as part of a full security (reception) service review to the benefit of the council.
3. The new digital CCTV and radio network allows the CCTV control room to be relocated more easily and for option to be evaluated to integrate that service into a holistic asset security team.
4. 24-hour secure access is listed within the tenants' Lease agreements for all sites and tenants make contributions to cover the cost of service as part of their service charges contributions so savings in contracts may not create direct savings for the council.
5. Sites are advertised as 24-hour access buildings with on-site security/concierge and any changes to this commitment requires advance notice and consultation to assess the impact.
6. A waiver of procurement procedures for all three contracts has been signed by the Chief Executive.

Alternative options considered and rejected:

1. To continue with existing contracts tendered individually. This would not achieve any economies of scale or service improvements.
2. To combine all existing contracts into one tendering process and award to a single provider. This would achieve economies of scale but not allow for the review of ways of working across the organisation to achieve service improvements.

21.EC.44 Procurement of Electrical Contractor to Undertake Planned and Reactive Maintenance

Councillor Peter Wilson, Executive Member (Resources), presented the confidential report of the Director of Commercial Services which seeks approval for the procurement approach including the award procedure, evaluation methodology and criteria for the engagement of electrical contractors to undertake reactive and planned maintenance on council property assets. As well as seeking approval for the award of the contract to be delegated to the Executive Member (Resources) by means of Executive Member Decision.

Decision:

1. To approve the recommendation for the Council to tender for the appointment of a contractors to undertake electrical works for both reactive and planned maintenance. Contract to commence on 1 September 2021 for an initial one-year period, with an option to extend for a further one year to 31 August 2023.
2. To approve the recommendation for the contract to be awarded by the Executive Member (Resources) by means of an Executive Member Decision.

Reasons for recommendation(s):

1. The Council has statutory obligations to provide quarterly, bi-annual and annual service and testing requirements to comply with health and safety and statutory requirements.
2. The Council has a contractual obligation with its tenants to provide reactive and planned maintenance in a timely manner, providing emergency repairs as necessary.
3. This proposed tender exercise ensures that these services will enable the Council to fulfil its obligations.
4. The Councils Contract Procurement Rules stipulate that Executive Cabinet approval is required for all contracts over £100,000.
5. Tendering the services separately is likely to encourage smaller local enterprises to submit tenders, the prospects of which would reduce if the services were tendered as a combined package.

Alternative options considered and rejected:

1. The option of seeking a waiver to extend the existing delivery arrangements for the Reactive and Planned Maintenance services was explored but rejected on the basis that there was no reasonable justification for doing this any longer.
2. The option of bringing the services in-house was considered but ruled out due to lack of capacity within the present staffing structure to deliver the service. In addition, there are concerns that insufficient skilled trade's persons could be recruited to provide adequate 24 hour cover. Also it was deemed that overhead cost would significantly inflate the delivery cost.
3. The option of tendering the services in a combined tender with general and heating works was also considered but rejected. The Council's research and past experience in tendering repairs and maintenance services has shown that a limited number of contractors would express an interest. Usually larger contractors are attracted which have the diverse skill base to cover all work categories. This would therefore, likely to deter local companies from expressing an interest in these tender opportunities.

21.EC.45 Handyperson and Affordable Warmth Assistance Service

Councillor Peter Gabbott, Executive Member (Homes and Housing), presented the report of the Director of Communities which seeks approval to re-appoint Preston Care and Repair as the service provider to deliver a Handyperson and Affordable Warmth Assistance service in 2021/22. Member approval is also sought in respect of the proposed financial and procurement arrangements for the delivery of the Handyperson and Affordable Warmth Assistance services from 1st April 2022 to 31st March 2025.

Decision:

1. That the existing service provider (Preston Care and Repair) is to be retained as the Council's appointed sub-contractor to deliver Handyperson and Affordable Warmth services during 2021/22, at a contract value of £18,750 for Handyperson services for the period 1 July 2021 to 31 March 2022, with an additional maximum £15,000 to be set aside for the Affordable Warmth Assistance service.
2. That Executive Cabinet approves the recommendation to allow a sum of up to £45,000 funded via the Better Care Fund (using the Disabled Facilities Grant budget) to be set aside annually for Handyperson and Affordable Warmth Services for the period 2022/23 to 2024/25 inclusive, providing that present allocation levels of Disabled Facilities Grant are maintained.

3. That Executive Cabinet gives in-principle approval to permit a procurement exercise during the current financial year in order to appoint a contractor to deliver the Handyperson and Affordable Warmth Assistance services with effect from 1 April 2022, with a contract duration of two years with an option to extend for a further year.
4. The proposed tendering arrangements would qualify as a high value procurement and it is proposed that a further report, outlining the procurement approach evaluation criteria and weightings, shall be considered at a future Executive Cabinet meeting.

Reasons for recommendation(s):

1. The Council's Home Improvement Agency (HIA) facilitates a range of services to cater for customers with varying levels of need. These range from Disabled Facilities Grant (DFG) for major adaptations; Minor Adaptations for items costing less than £1,000, and Handyperson services for small scale "DIY-type" jobs within the home.
2. The retention of Handyperson and Affordable Warmth Services will enable the Council to continue to offer this broad range of appropriate assistance to Chorley residents.
3. Longer term funding commitment will enable consistency in terms of service planning and service delivery as well as being a more attractive proposition for potential contractors, thereby making it more likely to create competition in the market.

Alternative options considered and rejected:

1. The ending of the Handyperson service was considered, but it is widely recognised that the service is valuable to the customers who use it and that it also acts as a method of preventing vulnerable customers from sustaining injuries through falls which could result in urgent admissions to hospital for lengthy out-patient stays.
2. An option of carrying out a procurement exercise during 2021/22 to tender the Handyperson and Affordable Warmth services was considered but rejected due to the concerns that this would inevitably cause an interruption to vital service (in the case of the Handyperson service) and also because the duration of any contract cannot be confirmed until and unless Members approve any such proposals.

Chair

Date

Report of	Meeting	Date
Director (Finance) (Introduced by Executive Member (Resources))	Executive Cabinet	16 th September 2021

Is this report confidential?	No
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Is this decision key?	Yes
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Savings or expenditure amounting to greater than £100,000	Significant impact on 2 or more council wards
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2021/22 Corporate Revenue Budget Monitoring Report and Reserves for the four months to 31st July 2021

Purpose of the Report

1. This report sets out the revenue and reserves forecast for 2021/22 for the Council, based on the position as at 31st July 2021.

Recommendations to Cabinet

2. To note the forecast outturn for revenue and the level of reserves based on the position as at 31st July 2021
3. To note the virements to the revenue budget made during the period, as detailed in **Appendix 2** of the report.

Reasons for recommendations

4. To ensure the Council's budgetary targets are achieved.

Other options considered and rejected

5. None

Executive summary

- 6. Based on the position as at the end of 31st July 2021, there is a forecast underspend against the budget for 2021/22 of £126k, as detailed in **Appendix 1**.

- 7. The Council's Medium-Term Financial Strategy reported that the minimum level of general fund reserves should be maintained at £4.0m to cushion against any potential, future financial risks that may face the Council. The forecast level of general fund balances as at 31st March 2022 will be £4.183m.

Corporate priorities

- 8. The report relates to the following corporate priorities: (please bold all those applicable):

Involving residents in improving their local area and equality of access for all	✓	A strong local economy	✓
Clean, safe and healthy communities	✓	An ambitious council that does more to meet the needs of residents and the local area	✓

Background to the report

- 9. A short summary of the issues that have led to this report; any previous decisions or history which are relevant and help members understand the issues.

- 10. The net revenue budget for 2021/22 is £14.496m, which includes a savings target comprising of £150k in respect of staffing turnover and £40k from the expansion of Shared Services.

- 11. **Appendix 3** provides further information about the specific earmarked reserves that the Council holds at 31st July 2021.

Current Forecast Position – Revenue

- 12. The forecast outturn, based on the position at 31st July 2021, shows a provisional underspend against the Council's budgets of £126k. A breakdown of this by department within the various directorates is detailed in **Appendix 1**, and the movement on reserves, and reserve balances, are outlined in **Appendix 3**. The main variances by directorate are detailed below:

Variations from Budget

Directorate	Budget 2021/22 £'000	Forecast 2021/22 at 31st July 21 £'000	Variance (Under)/Overspend 2021/22 £'000
Commercial and Property	956	1,041	85
Communities	1,885	1,857	(28)
Customer and Digital	5,865	5,842	(23)
Planning and Development	709	794	85
Policy and Governance	4,503	4,476	(26)
Major Projects	(3,171)	(3,011)	159
Financing and Other Budgets	3,749	3,478	(271)
Covid-19	0	(107)	(107)
Total Net Expenditure	14,496	14,370	(126)
Funding	Budget	Forecast Q1	Variance
Council Tax	(7,336)	(7,336)	0
Business Rates	(5,007)	(5,007)	0
New Homes Bonus	(1,490)	(1,490)	0
Government Grants	(519)	(519)	0
Reserves	(139)	(139)	0
Other	(5)	(5)	0
Total Funding	(14,496)	(14,496)	0

Explanation of key variances by Directorate are as follows:

13. Commercial and Property – forecast - £85k overspend

- £33k forecast saving on staffing costs predominantly from vacant posts in the Business Development team.
- £45k reduced income from market rents following the decision to cancel the first quarterly rental charges for 2021/22 for market traders in the Covered Market and Street Markets due to Covid-19 restrictions.
- £45k forecast reduced income from car parking fees and excess charges based on a lower than budgeted level of income for April to July.
- £13k forecast reduced income from hire of Community Centres based on actual levels of income received to date.

- The loss of income on car parking fees and hire of community centres will be partially offset for the first quarter of the year by the Covid-19 Fees & Charges Compensation scheme outlined below.

14. Communities – forecast - £28k underspend

- £25k forecast saving on staffing costs predominantly from vacant posts in the Housing Options and Communities teams.

15. Customer and Digital – forecast - £23k underspend

- £40k forecast saving on staffing costs predominantly from vacant posts in the Customer Services team due to delayed recruitment to a number of positions pending the implementation of the Shared Services review with South Ribble Council.
- £30k saving on the waste and recycling contract with FCC Environment Services (UK) due to a lower than budgeted CPI inflation rate.
- £95k shortfall in income from Council Tax Summons/Committal Costs as no costs were recovered for April through to June. However, normal recovery action has now slowly restarted and the monthly issuing of council tax summonses have been scheduled with the Magistrates Court for the remainder of the year. Losses for the first quarter of the year will be partially offset by the Covid-19 Fees & Charges Compensation scheme outlined below.
- £51k additional income received for Housing Benefit and Council Tax Support Admin Subsidy grants.

16. Planning and Development – forecast - £85k overspend

- £51k forecast overspend on staffing costs in Planning Services, predominantly from agency staff costs and market supplements to aid with staff retention.
- £50k forecast for additional income from Planning Application fees based on actual levels of income received for April to July.
- £65k forecast reduction in Building Control income based on income received to date in 2021/22. This position may improve as staff are recruited to current vacant posts throughout the coming months.

17. Policy and Governance – forecast - £26k underspend

- £13k forecast saving on staffing costs predominantly from vacant posts in the Transformation and Partnerships team.

- £14k forecast saving on running costs for the Council's Civic Offices which have remained predominantly unoccupied during the first few months of the year.

18. Major Projects – forecast - £159k overspend

Further details of the major projects, Market Walk and Digital Office Park, are outlined in **Appendix 4**.

The key points to note are:

- £272k current forecast overspend for 2021/22 Market Walk – this is largely due to the Council supporting local businesses with lease incentives to help manage recovery from Covid. Despite this progress at Market Walk Extension is going well with new agreed tenancies in units 4a MWE and 8, and we are in advanced negotiations for a tenant to take on units 4b&5 MWE combined, which demonstrates good demand for Market Walk as we come out of the Covid pandemic. This will lead to a full occupation of the extension leaving two adjoining voids (units 12&13) which are currently being marketed. Several tenancies are in lease negotiations and we are seeking to resolve rent reviews and settlement of arrears with them now that the post-Covid path to recovery is becoming clearer for their businesses and they are keen to remain in Market Walk. As a result, no adjustment has been made to the bad debts provision.
- £103k forecast surplus against 21/22 budget on Strawberry Fields as office occupation has increased significantly following the end of the Covid lockdown. However, it must be noted that this position is against a reduced target for income reflecting the impact of Covid.
- Leisure Services are currently forecast to deliver in line with budget of £600k, although there has been significant income and expenditure variances from the original modelling. Income has reduced by £800k and correspondingly costs have reduced by the same amount. This is largely due to a freeze on staffing recruitment while the staffing structure was under review and as such, corresponding income generated at the leisure centres has reduced. It is anticipated income will rise steadily over the rest of the financial year alongside costs as membership begins to be restored to normal levels. Chorley Leisure Ltd was established on 1st August 2021 and as such, while the figures included in this report are based on a full year forecast, in the next Corporate Revenue Monitoring Report we will confirm the final financial position for the four months of direct Council service delivery.

19. Financing and Other Budgets – forecast - £271k underspend

- £271k forecast underspend on Net Financing arising from a reduction in interest payments in 2021/22 reflecting a reduction in anticipated borrowing in the year
- The Council's budget for 2021/22 included a savings target of £150k from management of the staffing establishment. The full savings of £150k have

already been achieved and these have been deducted from directorate staffing budgets as follows; Communities £25k, Customer and Digital £75k and Policy and Governance £50k The staffing savings outlined above are additional to the £150k savings already achieved. The £40k savings target in respect of Shared Services will be identified following the reviews currently in process and development.

20. Covid-19 – forecast - £107k underspend

- £107k additional income is anticipated from the governments Covid-19 Fees & Charges Compensation Scheme to offset income losses incurred by the Council in the first quarter of 2021/22.

21. Funding

- There are currently no variances forecast against the budget in this area.

Other supporting information

22. Further information in respect of the variations noted above can be found as follows:

Appendix 4 – Commercial Services - Major Projects

General Fund Resources and Balances

23. As detailed at **Appendix 3**, the Council holds £4.057m in General Fund reserves to manage budget risks not covered by earmarked reserves or provisions within the budget. The forecast outturn for 2021/22 identifies that the General Fund closing balance will be £4.183m as detailed below.

Movement in General Fund Reserve

Summary of Movement in General Reserves	£'m
General Fund Reserves at 1 st April 2021	(4.057)
Transfers (to)/from General Reserves	
Forecast revenue budget underspend	(0.126)
Forecast General Fund Reserve Closing Balance 2021/22	(4.183)

Movement in Earmarked Reserves

24. Taking account of the adjustments highlighted at **Appendix 3**, the level of Earmarked reserves held for discretionary use by the Council forecast to be available at 31st March 2022 is £6.047m compared with a balance of £12.556m at 31st March 2021.

Summary of Movement in Earmarked Reserves	£'m
Earmarked Reserves at 1 st April 2021	(12.556)
Transfers (to)/from Earmarked Reserves	
Release of S31 grant received in 2020/21 (and held in reserves) in respect of Business Rates reliefs stipulated by the government during – this offsets the resulting deficit brought forward on the Collection Fund	4.383
Use of revenue reserves for Capital Financing as per approvals	1.232
Forecast use of other specific Earmarked Reserves	0.894
Forecast Earmarked Reserves Closing Balance 2021/22	(6.047)

25. The £894k forecast use of other specific earmarked reserves shown in the table above includes the following items:

- £261k utilisation of approved budgets brought forward from previous years.
- £191k committed use of Business & Retail Grant investment reserves.
- £124k forecast use of Local Plan reserve.

26. The use of earmarked reserves shown in the table above are reflected in the forecast revenue budget monitoring position detailed in this report.

Climate change and air quality

27. The work noted in this report does not impact the climate change and sustainability targets of the Councils Green Agenda and all environmental considerations are in place.

Equality and diversity

28. N/A

Risk

29. As detailed in the report

Comments of the Statutory Finance Officer

30. The financial implications are contained within this report.

Comments of the Monitoring Officer

31. None

Background documents

There are no background papers to this report.

Appendices

Appendix 1

Appendix 2

Appendix 3

Appendix 4

Report Author:	Email:	Telephone:	Date:
David Bond / Neil Halton	Neil.Halton@chorley.gov.uk, David.Bond@chorley.gov.uk	n/a	3/9/21

APPENDIX 1

Revenue 2021/22 - position as at the end of Period 1 - 31st July 2021

Directorate	Department / Section	Original Budget £'000	Budget at 31st July 2021 £'000	Forecast Outturn based on position at 31st July 2021 £'000	Variance (Under)/ Overspend £'000
Commercial & Property	Director - Commercial Services	99	53	55	1
	Employment, Skills & Business Support	336	336	321	(15)
	Income Generation	47	47	-	(47)
	Markets & Town Centre	2	2	95	94
	Property Services	379	370	409	39
	Facilities Management	182	182	194	13
	Housing Accommodation	(33)	(33)	(33)	1
Commercial & Property Total		1,011	956	1,041	85
Communities	Communities	706	706	695	(11)
	Housing & Public Protection	1,035	978	965	(13)
	Director - Communities	252	201	198	(3)
Communities Total		1,994	1,885	1,857	(28)
Customer & Digital	Customer Transformation	969	894	897	2
	Director of Customer & Digital Services	106	52	59	7
	ICT Services	1,123	1,123	1,129	6
	Waste & Streetscene Services	3,796	3,796	3,757	(38)
Customer & Digital Total		5,994	5,865	5,842	(24)
Planning & Development	Enforcement Services	253	253	326	73
	Planning Services	(76)	(76)	(64)	12
	Spatial Planning	483	483	484	1
	Director of Planning & Development	-	49	49	-
Planning & Development Total		660	709	794	85
Policy and Governance	Chief Executives Office	63	163	151	(12)
	Communications & Events	699	699	706	7
	Performance & Partnerships	755	715	708	(7)
	Shared Financial Services	637	637	643	6
	Transformation Management	250	250	250	(0)
	Director - Governance	83	83	81	(2)
	Legal and Governance	1,955	1,957	1,938	(18)

Policy and Governance Total		4,441	4,503	4,476	(26)
Major Projects	Market Walk	(1,889)	(1,889)	(1,618)	272
	Primrose Gardens Retirement Living	(259)	(227)	(237)	(10)
	Digital Office Park	54	54	(49)	(103)
	TVS Logistics House	(1,647)	(1,647)	(1,647)	-
	Investment Properties	(67)	(67)	(67)	-
	Leisure	606	606	606	-
Major Projects Total		(3,203)	(3,171)	(3,012)	159
Financing and Other Budgets	Pensions Account	218	218	218	-
	Pensions Deficit Recovery	433	433	433	-
	Benefit Payments	(136)	(136)	(136)	-
	Revenue Contribution to Capital	-	-	-	-
	Transition Fund	190	190	190	-
	Savings	(150)	-	-	-
	Financing	3,044	3,044	2,773	(271)
Financing and Other Budgets Total		3,599	3,749	3,478	(271)
Covid-19	Covid-19	-	-	(107)	(107)
Covid-19 Total		-	-	(107)	(107)
Funding	Reserves	(139)	(139)	(139)	-
	Collection Fund	(12,348)	(12,348)	(12,348)	-
	New Homes Bonus	(1,490)	(1,490)	(1,490)	-
	Other Funding	(519)	(519)	(519)	-
Funding Total		(14,496)	(14,496)	(14,496)	-
Net (Surplus) / Deficit		-	-	(126)	(126)

APPENDIX 2

Revenue 2021/22 - position as at the end of Period 1 - 31st July 2021

Directorate	Commercial & Property £'000	Communities £'000	Customer and Digital £'000	Planning and Development £'000	Policy and Governance £'000	Major Projects £'000	Financing/Other Budgets £'000	Funding £'000	TOTAL £'000
Budget approved by Council 23rd Feb 2021	1,011	1,994	5,994	660	4,441	(3,203)	3,599	(14,496)	0
<i>Transfers between directorates</i>									
Impact of Council restructures including shared services	(55)	(84)	(54)	49	112	32			0 0 0
<i>Transfers (to)/from contingency</i>									
									0 0 0
<i>Carry forward of grants and other budgets to 2021/22</i>									
									0 0 0
<i>Transfers (to)/from Earmarked reserves</i>									
									0 0 0
<i>Transfers (to)/from General Fund reserves</i>									
									0 0 0
<i>Other budget adjustments</i>									
Management of the Establishment Target Savings		(25)	(75)		(50)		150		0 0 0
Revised Budget as at 31st July 2021	956	1,885	5,865	709	4,503	(3,171)	3,749	(14,496)	0

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APPENDIX 3

2021/22 Reserves Programme position as at the end of Period 1 - 31st July 2021

Reserves	Opening Balance 1st April 2021 £000s	Movement			Forecast Balance 31st March 2022 £000s
		Movement between Reserves £000s	Transfers to Reserves £000s	Transfers from Reserves £000s	
General Fund Balance	(4,057)	-	(126)	-	(4,183)
Change Management Reserve	(250)				(250)
VAT Shelter Income - Capital/revenue financing	(9)				(9)
Non-Recurring Expenditure - Revenue resources for capital financing	(630)			346	(284)
Market Walk - Income Equalisation Reserve	(468)	(68)	(50)	100	(486)
Market Walk - Asset Management	(104)		(50)		(154)
Market Walk - Project Work	(68)	68	-		0
Section 31 Grant - Empty property/small business rate relief	(29)				(29)
Section 31 Grant - EU Exit Preparation Grant	(35)				(35)
Business Rates Exceptional Payments Reserve	(4,548)			4,383	(165)
Business Rates Retention - Surplus on levy payment	(1,415)				(1,415)
Income Generation Reserve	(438)			47	(391)
LCC Transition Fund	(50)				(50)
Develop Unit Above Iceland	(485)			200	(285)
Green Agenda	(463)		(20)	384	(99)
Logistics House Income Equalisation Reserve	(450)				(450)
Covid Ongoing Commitments Reserve	(497)				(497)
Covid Recovery Reserve	(300)				(300)
Covid additional grant funding	(104)				(104)
Non-Directorate Reserves	(10,345)	-	(120)	5,460	(5,004)
Policy & Governance					
Astley Hall Grant Funding	(18)			18	-
Astley Hall Works of Art	(2)			2	-
Slippage Items and other transfers to reserves	(49)			49	-
National Graduate Scheme	(21)			21	-
Mayflower 400 Celebrations	(21)			21	-
Communications & Events	(111)	-	-	111	-
Transformation Challenge funding	(36)				(36)
Public Service Reform funding	(11)				(11)
Digital Access & Inclusion	(10)			10	-
Shared Services Implementation Reserve	(32)			32	-

2021/22 Reserves Programme position as at the end of Period 1 - 31st July 2021

		Movement			
Performance & Partnerships	(89)	-	-	41	(48)
Slippage Items and other transfers to reserves	(3)			3	-
Elections	(101)			31	(70)
Boundary Commission Electoral Review	(12)				(12)
Legal, Democratic & H.R.	(116)	-	-	34	(82)
Slippage Items and other transfers to reserves	(64)			64	-
Shared Financial Services	(64)	-	-	64	-
Policy & Governance	(380)	-	-	250	(130)
Commercial & Property					
Investment Projects	(224)			132	(92)
Retail Grants Programme	(129)			59	(70)
Digital Office Park	(68)			68	-
Employment Skills & Business Support	(421)	-	-	259	(161)
Slippage Items and other transfers to reserves	(20)			20	-
Future High Street Fund	(41)			41	-
Markets & Town Centre	(61)	-	-	61	-
Asset Maintenance Fund	(222)				(222)
IDOX Migration	(78)				(78)
Property Services	(300)	-	-	-	(300)
Commercial & Property	(781)	-	-	320	(461)
Customer & Digital Services					
Slippage Items and other transfers to reserves - capital financing	(123)			123	-
ICT Projects	(43)				(43)
ICT/Streetscene Modernisation Reserve	(82)			27	(55)
ICT Services	(248)	-	-	150	(98)
Maintenance of Grounds	(44)		(10)		(54)
Government & other Grant Funding	(30)				(30)
Slippage Items and other transfers to reserves	(96)				(96)
Waste & Streetscene Services	(171)	-	(10)	-	(181)

2021/22 Reserves Programme position as at the end of Period 1 - 31st July 2021

		Movement			
Customer & Digital Services	(419)	-	(10)	150	(279)
Planning & Development					
Planning Appeal Costs	(151)			28	(123)
Planning Services	(151)	-	-	28	(123)
Community Infrastructure Levy (CIL Admin)	-		(50)	50	-
Local Plan Reserve	(137)			124	(13)
Slippage Items and other transfers to reserves	(5)			5	-
Spatial Planning	(142)	-	(50)	179	(13)
Planning & Development	(293)	-	(50)	207	(136)
Communities					
Home Improvements - Housing Affordable Warmth Grant	(14)			14	(0)
Buckshaw Youth Development Grants	(1)				(1)
Slippage Items and other transfers to reserves	(121)			121	-
Communities	(136)	-	-	134	(1)
Neighbourhood Working (pump priming)	(105)			105	-
Investment Budgets	(35)				(35)
Police & Crime Commissioner Funding	(10)			10	-
Syrian Refugee Funding	(52)			52	-
Housing & Public Protection	(202)	-	-	167	(35)
Communities	(338)	-	-	302	(36)
Directorate Reserves	(2,211)	-	(60)	1,229	(1,042)
Earmarked Reserves (Directorate and Non-Directorate)	(12,556)	-	(180)	6,689	(6,047)
Total Reserves - General and Earmarked	(16,613)	-	(306)	6,689	(10,230)
Provisions					
Insurance Provision - Potential MMI clawback	(14)				(14)
Total Provisions	(14)	0	0	0	(14)

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APPENDIX 4

Major Projects 2021/22 - position as at the end of Period 1 - 31st July 2021

Market Walk

	2021/22 Budget £000s	2021/22 Forecast £000s	2021/22 Variance £000s
Rental Income	(1,831)	(1,688)	143
Service Charge Operational budget	442	450	8
Service Charge Income	(501)	(379)	122
Net Income (excluding financing)	(1,889)	(1,618)	272
Financing Costs	915	915	-
Net Income (including financing)	(975)	(703)	272
Income Equalisation Reserve (Annual Contribution)	(50)	(50)	-
Asset Management Reserve (Market Walk)	50	50	-
Net Income	(975)	(703)	272
Provision for Bad Debts	-	-	-
Revised Net Income	(975)	(703)	272

Leisure

	2021/22 Budget £000s	2021/22 Forecast £000s	2021/22 Variance £000s
Income	(1,704)	(897)	807
Operational Costs	2,310	1,503	(807)
Net Budget	606	606	-

Digital Office Park

	2021/22 Budget £000s	2021/22 Forecast £000s	2021/22 Variance £000s
Rental Income	(435)	(532)	(97)
Operational Costs (excluding financing)	489	483	(6)
Net Budget/Income (excluding financing)	54	(49)	(103)
Financing Costs	168	168	-
Net Budget (including financing)	222	119	(103)

Primrose

	2021/22 Budget £000s	2021/22 Forecast £000s	2021/22 Variance £000s
Rental Income	(630)	(630)	-
Operational Costs (excluding financing)	403	394	(10)
Net Income (excluding financing)	(227)	(237)	(10)
Financing Costs	168	168	-
Net Income (including financing)	(59)	(68)	(10)

TVS

	2021/22 Budget £000s	2021/22 Forecast £000s	2021/22 Variance £000s
Rental Income	(1,661)	(1,661)	-
Operational Costs (excluding financing)	15	15	-
Net Income (excluding financing)	(1,647)	(1,647)	-
Financing Costs	1,211	1,211	-
Net Income (including financing)	(436)	(436)	-

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Report of	Meeting	Date
Director (Finance) (Introduced by Executive Member (Resources))	Executive Cabinet	16 th September 2021

Is this report confidential?	No
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Is this decision key?	Yes
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Savings or expenditure amounting to greater than £100,000	Significant impact on 2 or more council wards
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2021/22 Corporate Capital Programme and Balance Sheet Monitoring Report position as at 31st July 2021

Purpose of the Report

1. To report the overall financial position of the Council in respect of the capital programme as at 31st July 2021, highlighting key issues and explaining key variances over the first four months of the year, and to provide an overview of various elements of the Council's Balance Sheet as at 31st July 2021

Recommendations to Cabinet

2. To approve the revised capital programme as attached at **Appendix A**, which reflects all approved amendments to the programme over the four months to 31st July 2021 as detailed in section 11 of this report.
3. To approve the following variations to the programme (which have been included in **Appendix B**)
 - a. £150,000 budget to be funded from reserves for capital works to upgrade and unify the network to include access points for improved Wi-Fi coverage
 - b. £100,000 increase to the Whittle GP Surgery programme due to telecommunications and car parking work to be funded from an increase in borrowing.

All other approvals are within existing delegated limits as detailed in section 11.

4. To note the position in the Balance Sheet monitoring section of the report in respect of cash, investment and loan balances and debtors, as at 31st July 2021.

Reasons for recommendations

- 5. To ensure the Council’s Capital Programme is monitored effectively.

Other options considered and rejected

- 6. None

Executive summary

- 7. Based on the position as at 31st July 2021, there is a forecast change to the Capital Programme of £350k in terms of slippage across years and £699k increase in programme budgets as detailed in **Appendix B**.

Corporate priorities

- 8. The report relates to the following corporate priorities: (please bold all those applicable):

Involving residents in improving their local area and equality of access for all	✓	A strong local economy	✓
Clean, safe and healthy communities	✓	An ambitious council that does more to meet the needs of residents and the local area	✓

Background to the report

- 9. The capital budget for 2021/22 was set at £38.1m at Council in February 2021. This was increased following approval of the outturn to £46.2m and following the changes detailed in this report now stands at £46.6m the detail of which is shown in **Appendix B**.

Capital programme

Key issues

- 10. The total cost of the Council’s capital investment programme for 2020/21 has increased over the quarter from **£46.2 million**, as approved by Cabinet in the 2020/21 Outturn Report on 17th June 2021, **to £46.6 million** at 31st July 2021; this includes the variations approved over the last 4 months and those contained within this report. A summary of the total costs of the programme, and the funding of this, is detailed at **Appendix A**.
- 11. The net increase in the programme of £0.349 million is detailed in **Appendix B**.
- 12. Variations made in respect of schemes that have been approved over the four months to 31st July have resulted in an increase of £0.699 million to the capital programme as follows:

Scheme	Increase (Reduction) 2021/22 £'000	Increase (Reduction) 2022/23 and future years £'000		Approved by	Date approved
Planning and Development					
Yarrow Meadows / The Willows / Various Play and Open Space Minor adjustments	(12)			Chief Executive/ Director of Finance	25 th August 2021
West Way	75 (note – of which 25 is a movement from below*)			Chief Executive/ Director of Finance	25 th August 2021
Customer and Digital					
ICT Modernisation	150			Executive Cabinet / Council	This report
Commercial and Property					
Asset Improvements	(25*)			Chief Executive/ Director of Finance	25 th August 2021
Tatton Gardens	410			Council	20 th July 2021
Whittle GP Surgery	100			Executive Cabinet	This Report

13. Slippage and re-profiling of budgets during the first four months of the year from 2021/22 to 2022/23 of £0.350 million.

14. As at 31st July 2021 the actual capital expenditure across the programme was £7.89 million, which represents 17% of the current, revised projected capital spend for the year.

Major variations in the 2021/22 Capital Programme in the four months to 31st July 2021

Major variations to note during the period are;

Planning and Development

15. There have been some minor changes to remove schemes that have now been completed and to apply S.106 receipts, where possible, on Play and Open Space projects.

16. On the West Way scheme, £25k has been vired from the Asset Improvements budgets to cover CCTV costs. A further £50k has been approved to bring the project to completion including signage and final landscaping.
17. The Chorley Health Centre - this is a scheme fully funded by CIL to be paid by way of grant and has been slipped from the 2021/22 programme to 2022/23 when payment is anticipated on completion of the scheme.
18. £100k of the Green Agenda programme budget has been slipped into 2021/22. Work is currently being undertaken on the allocation of this budget.

Customer and Digital

19. Approval is requested in this report for a scheme budget of £150k, funded from revenue reserves, for capital works to upgrade and unify the IT network, to include access points for improved Wi-Fi coverage. The total cost of this work is £300k which is to be split between the Chorley and South Ribble councils as this forms part of the wider strategy to develop and improve the joint infrastructure.

Commercial and Property

20. A report to full Council in July authorised an increase of £410k to the Tatton programme. Within the schemes in the directorate, a capital budget virement has also been approved from the Asset Improvements programme budget to the West Way scheme, as detailed above.
21. An increase of £100k is requested within this report to the Whittle GP scheme. As the scheme approaches completion costs have been identified in addition to existing budget to be funded from an increase in borrowing.

Balance Sheet Monitoring

Overview

22. Strong balance sheet management assists in the effective use and control over the Council's asset and liabilities. Key assets comprise of the Council's tangible fixed assets, debtors, investments and bank balances, and key liabilities include long and short-term borrowing, creditors and reserves.

Non-current Assets

23. Tangible, non-current assets include property, plant and equipment held by the Council for use in the production or supply of goods and services, for rental to others or for administrative purposes. One fifth of all assets are re-valued every year, and annual reviews are undertaken to establish whether any impairment or other adjustments need to be applied. New assets and enhancements to existing assets are managed through the Capital Programme as reported in **Appendices A and B**.

Borrowing and Investments

24. Long-term borrowing requirements flow from the capital programme. Regular dialogue and meetings take place between the Director of Finance, her staff and the Council's independent Treasury Consultants, Link Treasury Services, and options for optimising treasury management activities are actively reviewed.
25. Both short and long-term borrowing interest rates were at very low levels at the end of the period, having remained stable over the course of the first four months of the year. Interest rates on investments have remained negligible throughout the period. To date, it is projected that debt interest payable will be £405k lower than the 2021/22 Budget, as there has been no need to borrow as yet, due to the timing of cashflows within the capital programme and the level of cash balances held. This is partially offset by an overspend on the MRP budget of £133k due to the mix of funding used to fund the capital programme at outturn for 20/21.

	Original Budget 2021/22 £000s	Forecast as at 31 st July 2021/22 £000s
Interest and Investment Income	3	3
Debt Interest Payable	1,795	1,390
Minimum Revenue Provision (MRP)	1,252	1,385
TOTAL	3,050	2,778

26. The current borrowing and investment position, compared to the position at the same point last year, is as follows;

	As at 31 st July 2021	As at 31 st July 2020
Short term borrowing	£1.904m	£1.875m
Long term borrowing	£59.758m	£61.662m
Total Borrowing	£61.662m	£63.537m
Investments made by the Council	Zero	Zero
Cash Balances Held	£11.351m	£9.053m

Debtors

27. The Council has a corporate debt policy as well as other specific policies for the management of debt in the key areas of council tax, business rates and housing benefit overpayments. The table below summarises the collection performance of the various debts and the total outstanding debt in the respective areas as at 31st July 2021. The table also shows the corresponding level of debt at the same point in the last financial year.

	Position as at 31 st July 2021 £000s	Position as at 31 st July 2020 £000s
Council Tax		
Expected Council Tax 21/22	75,455	71,725
Current year balance outstanding	44,949	43,499
Previous years balance outstanding	4,110	2,888
Total Council Tax balance outstanding	49,059	46,387
Collection Rates	37.10%	36.20%
Business Rates		
Expected Business Rates 21/22	21,615	15,643
Current year balance outstanding	14,927	10,224
Previous years balance outstanding	1,290	922
Total Business Rates balance outstanding	16,217	11,146
Collection Rates	30.94%	34.68%
Housing Benefit		
Overpayment balances outstanding	1,107	1,224
Sundry Debtors	31st July 2021	31st March 2021
Balance Outstanding - General	422	242
Balance Outstanding - Commercial	2,072	1,333

28. Business rates collection can fluctuate month on month but collection is currently broadly in line with expectations. Expected Business Rates for 2021/22 are much higher compared to those for last year due to the Covid reliefs applied in 2020/21 which are no longer applicable in 2021/22.
29. In respect of the figures above the Council's share represents 9.7% of Council Tax income and 23% of Business Rates income.
30. The Sundry Debtors figure reflects the position compared to outturn. It is common for debts to be higher at this point in the financial year, as annual bills are issued, then reduce as the year progresses as customers make payment. However, given the economic climate the Council continues to temporarily support its tenants with debt repayments. In addition there are also limitations on how we are able to chase and enforce debt recovery as a landlord. Increased levels of monitoring will be undertaken throughout this financial year

Climate change and air quality

22. The work noted in this report does not impact the climate change and sustainability targets of the Councils Green Agenda and all environmental considerations are in place.

Equality and diversity

23. N/A

Risk

24. As detailed in the report

Comments of the Statutory Finance Officer

25. The financial implications are contained within this report.

Comments of the Monitoring Officer

26. No Comment.

Background documents

There are no background papers to this report.

Appendices

Appendix A

Appendix B

Report Author:	Email:	Telephone:	Date:
Neil Halton	Neil.Halton@chorley.gov.uk	n/a	3/9/21

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Capital Programme 2021/22 - position as at the end of Period 1 - 31st July 2021

Scheme Name	Capital Programme 2021/22 Approved at Finance Council Feb 2021	Capital Programme 2021/22 Approved by Cabinet at June 2021	Slippage and reprofiling of budget (to)/from future years	Period 1 2021/22 Variations	Revised Capital Programme as at Period 1 2021/22
	£000s	£000s	£000s	£000s	£000s

COSTS

Planning and Development	2,675	4,750	(350)	64	4,464
Communities	1,375	1,245	-	-	1,245
Policy and Governance	550	1,346	-	-	1,346
Customer and Digital	-	-	-	150	150
Commercial and Property	33,516	38,889	-	485	39,374
Total Forecast Expenditure	38,116	46,230	(350)	699	46,579

RESOURCES

Disabled Facilities Grants	925	795			795
Homes England Grants	3,720	1,682			1,682
LEP Grants	5,200	7,450			7,450
Football Foundation Grants	-	299			299
Other Grants	150	234		(10)	224
Grants	9,995	10,461	-	(10)	10,451
S.106	3,064	2,822		0	2,823
Community Infrastructure Levy	2,531	2,946	(250)		2,696
Capital Receipts	5,166	9,184		(2)	9,183
New Homes Bonus	240	279			279
Reserves and Revenue	885	1,131	(100)	201	1,232
Unsupported Borrowing	16,235	19,405		510	19,915
Total Forecast Resources	38,116	46,230	(350)	699	46,579

Note: Some projects have moved departmental classifications so budgets reflect where projects are currently managed.

Capital Programme 2022/23 and Future Years Approved by Finance Council Feb 2021	Capital Programme 2022/23 and Future Years Approved by Cabinet at June 2021	Slippage and reprofiling of budgets (to)/from 2021/22	Period 1 2021/22 Variations	Revised Capital Programme 2022/23 and Future Years as at Period 1 2021/22
£000s	£000s	£000s	£000s	£000s

-	-	-	350	-	350
-	1,550	1,549	-	-	1,549
-	-	-	-	-	-
-	-	-	-	-	-
-	2,800	2,800	-	-	2,800
4,350	4,349	350	-	4,699	

	1,550	1,550			1,550
	-	-			-
	-	-			-
	-	-			-
	-	-			-
	1,550	1,550	-	-	1,550
	-	-			-
	-	-	250		250
	-	-			-
	-	-	100		100
	2,800	2,799			2,799
4,350	4,349	350	-	4,699	

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APPENDIX B

2021/22 Capital Programme - Scheme Variations - position as at the end of Period 1 - 31st July 2021

Scheme Name	Capital Programme 2021/22 Approved at Finance Council Feb 2021	Capital Programme 2021/22 Approved by Cabinet at June 2021	Slippage and reprofiling of budget (to)/from future years	Period 1 2021/22 Variations	Revised Capital Programme as at Period 1 2021/22
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Communities

Chorley Adaptation Grant (Formerly DFG)	925	795			795
Duxburry Park Site	450	450			450
Communities	1,375	1,245	-	-	1,245

Policy and Governance

Astley	550	1,346			1,346
Policy and Governance	550	1,346	-	-	1,346

Planning and Development

Chorley Health Centre		250	(250)		-
Yarrow Meadows		12		(12)	-
The Willows		4		(4)	-
Play, Recreation and Open Space Projects	2,222	2,809		4	2,813
Bank Hall Restoration		112			112
Delivering Green Agenda	453	496	(100)		396
Westway Playing Fields Sports Campus		1,068		76	1,144
Planning and Development	2,675	4,750	(350)	64	4,464

Customer and Digital

ICT Modernisation				150	150
Customer and Digital	-	-	-	150	150

Commercial and Property

Asset Improvements	674	669		(25)	644
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Capital Programme 2022/23 and Future Years Approved by Finance Council Feb 2021	Capital Programme 2022/23 and Future Years Approved by Cabinet at Sept 2021	Slippage and reprofiling of budgets (to)/from 2021/22	Period 1 2021/22 Variations	Revised Capital Programme 2022/23 and Future Years as at Period 1 2021/22
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1,550	1,549			1,549
-				-
1,550	1,549	-	-	1,549

-				-
-	-	-	-	-

-		250		250
-				-
-				-
-				-
-				-
-		100		100
-				-
-	-	350	-	350

-				-
-	-	-	-	-

600	600			600
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2021/22 Capital Programme - Scheme Variations - position as at the end of Period 1 - 31st July 2021

Scheme Name	Capital Programme 2021/22 Approved at Finance Council Feb 2021	Capital Programme 2021/22 Approved by Cabinet at June 2021	Slippage and reprofiling of budget (to)/from future years	Period 1 2021/22 Variations	Revised Capital Programme as at Period 1 2021/22
Leisure Centres Improvements	100	100			100
Leisure Centres Improvements - New Contract	2,000	2,000			2,000
Leisure Centre Transfer	150	244			244
Health Hub - Whittle Surgery	2,044	2,209		100	2,309
Market Walk Extension & Public Realm Works	-	252			252
Buckshaw Village Rail Station	696	696			696
Digital Office Park	-	222			222
Park Rd Car Parking	-	9			9
Works to Union Street	1,000	1,000			1,000
Town Hall Mezzanine	300	300			300
Unit Above Iceland	485	200			200
Public Realm Town Centre	1,500	1,803			1,803
Works to Existing Markets	-	494			494
Chapel St and Surrounding Public Realm	2,800	2,800			2,800
Purchase of Affordable Housing	-	878			878
Chorley Borough Service Centres	500	500			500
Alker Lane Development	7,268	10,810			10,810
Tatton	13,999	13,702		410	14,112
					-
Commercial and Property	33,516	38,889	-	485	39,374
Total	38,116	46,230	(350)	699	46,579

Capital Programme 2022/23 and Future Years Approved by Finance Council Feb 2021	Capital Programme 2022/23 and Future Years Approved by Cabinet at Sept 2021	Slippage and reprofiling of budgets (to)/from 2021/22	Period 1 2021/22 Variations	Revised Capital Programme 2022/23 and Future Years as at Period 1 2021/22
200	200			200
-				-
-				-
-				-
-				-
-				-
-				-
-				-
-				-
2,000	2,000			2,000
-				-
-				-
-				-
-				-
-				-
-				-
2,800	2,800	-	-	2,800
4,350	4,349	350	-	4,699

Report of	Meeting	Date
Deputy Chief Executive (Introduced by Councillor Peter Wilson)	Executive Cabinet	16 th September 2021

Is this report confidential?	No
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Is this decision key?	No
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Quarter 1 Performance Monitoring Report 2021-22

Purpose of the Report

1. This monitoring report sets out the performance against the delivery of the Corporate Strategy and key performance indicators during the first quarter of 2021/22, covering the 1st April to the 30th June 2021.

Recommendations to Cabinet

2. That the report be noted.

Reasons for recommendations

3. The Council's performance framework sets out the process for reporting progress against the objectives of the Corporate Strategy. Robust monitoring ensures that the council continues to deliver its priorities and achieves the best outcomes for residents.

Other options considered and rejected

4. None

Executive summary

5. This report sets out performance against the Corporate Strategy and key service delivery measures for the first quarter of 2021/22. Performance is assessed based on the delivery of key projects and measures outlined within the 2020 Corporate Strategy, along with key service delivery measures for individual services.
6. The overall performance of key projects is good, with 92% of projects rated green and 8% rated amber. Action plans for those projects rated amber are contained within this report.

- 7. Performance of the Corporate Strategy indicators and key service delivery measures continue to be closely monitored, with 70% of Corporate Strategy measures and 67% of key service delivery measures performing on or above target, or within the 5% threshold.
- 8. Performance against the agreed measures remains positive, with the Council continuing to work proactively to support local residents and communities. Where indicators are performing below target, action plans are in place to improve performance.

Corporate priorities

- 9. The report relates to the following corporate priorities:

Involving residents in improving their local area and equality of access for all	X	A strong local economy	X
Clean, safe and healthy communities	X	An ambitious council that does more to meet the needs of residents and the local area	X

Background to the report

- 10. The Corporate Strategy is the key strategic document for the authority and includes performance indicators and projects which focus on delivering the Council’s four priorities.
- 11. The Corporate Strategy was approved by Council in November 2020 and identifies thirteen corporate projects. The projects have a focus on delivering some of the large scale, ambitious schemes that will have a significant impact on local outcomes.
- 12. Key performance measures for each service have been set so that targets remain challenging and reflective of the Council’s ambitions.

Involving residents in improving their local area and equality of access for all



The long-term outcomes for this priority are:

- Residents who take pride in where they live and their achievements,
- Residents who are all able to take an active part in their local and wider community,
- Easy access to high quality public services, both face to face and online.

ACHIEVING THE LONG-TERM OUTCOMES IN QUARTER ONE

13. Work to implement the community resilience locality action plans has progressed well over quarter one, with key elements of the action plans commencing delivery. These plans seek to build confidence so that residents can support themselves and know where to access help if they need it. A number of schemes have progressed this quarter including support for volunteering, digital inclusion, wellbeing initiatives and Holiday Hunger provision. The Volunteering Policy was reviewed and updated to align it with the community resilience locality action plans. Approval was secured to commence the Digital Device Scheme, which is now in the development and procurement stage aiming to support residents in enhancing their digital skills and access to digital tools by providing digital devices. Delivery of the 'Better Health Better Self' programme was commenced, which is providing residents with a 10-week programme of group sessions offering information, advice and support on how to live a healthier lifestyle. Sixteen people have completed the programme so far. The Holiday Hunger programme also started, with partnerships with the Inspire Youth Zone and the School Sports Partnership to help deliver the scheme to ensure that vulnerable families are supported throughout the school holiday period.
14. Renovation works to Astley Hall have continued to be delivered over the quarter. This project seeks to increase residents' pride in where they live and to build a strong local economy by providing a high-quality leisure and tourist facility. In quarter one, after major restoration work, the front door and windows were installed, and the seventeenth century brickwork was cleaned and repaired. Following this, some of the scaffolding was removed to reveal the restored façade of the Hall as the centre piece of the Chorley Flower Show 2021, further promoting Chorley as a great place to visit. A contractor was appointed to provide lighting, which will be installed throughout the park to enhance the visitor experience and improve safety. An installation date has been agreed for September 2021.
15. The project to implement year 1 of the Shared Digital Strategy started this quarter and will further develop our use of digital, technology, and data to improve our services and deliver better outcomes for our customers. Over quarter one, a significant number of work streams commenced, including reviews of inbound and outbound post to automate and improve the efficiency of the process; review of data for digitization to ensure that data can be accessed easily and stored securely; review of Freedom of Information, Environmental Regulation, and Subject of Access requests to identify areas to improve as well as of Planning and Building Control processes as part of the shared services alignment process. Additionally, a new document management system was implemented for Planning, which will improve how service requests are processed, managed and stored. The roll out of Share Point was commenced, which will allow shared services to operate more effectively and work collaboratively via a new shared storage solution.

Performance of Key Projects



16. There are three key projects included in the 2020 Corporate Strategy under this priority.

17. Two projects are rated as green, meaning they are progressing according to timescale and plan:

- Deliver a programme of community resilience building work,
- Undertake renovation works at Astley Hall.

18. One project is rated amber:

- Implement year 1 of the Shared Digital Strategy.

Project Title		Project Status
Implement year 1 of the Shared Digital Strategy		AMBER
Explanation	<p>The Digital Strategy is a complex project requiring significant resource both financially and in terms of skills to deliver our future ambitions.</p> <p>The principle reason for an amber rating is due to existing gaps within the ICT team. There are several vacancies with the ICT service resulting in a deficit in skills and knowledge essential to supporting delivery of the strategy.</p> <p>Whilst 69% of actions for delivery under this project are either in progress or complete, the financial implications of some of the future workstreams are yet to be fully costed and scoped. Therefore, there is a risk to the existing budget and potential for a need to increase the overall financial allocation to the programme. The budget is currently being closely tracked to identify and address new revenue and capital budget requirements.</p>	
Action Required	<p>As part of the ICT shared services restructure, recruitment to the vacant posts will be conducted in September 2021 (quarter two). This will resolve the capacity issues that have affected the delivery of the project.</p> <p>A full cost exercise is taking place to identify hardware as well as additional capacity costs. This will be reported in quarter two.</p>	

Performance of Corporate Strategy Measures



19. At the end of quarter one, one indicator can be reported under this priority. The full outturn information for the performance indicators is included at Appendix A.

20. One indicator is performing below target, and outside the 5% threshold:

	Performance Indicator	Target	Performance
	The number of people who have successfully completed basic digital skills training	100	42
Reason below target	<p>Due to Covid-19 restrictions and the social distancing measures in place it has not been possible to undertake face to face digital skills training throughout 2020/21 and into 2021/22.</p> <p>Therefore, the focus of this measure was adjusted in the 2020 Corporate Strategy refresh to reflect the new priorities around digital skills in light of the Covid-19 pandemic, expanding the indicator to include online digital skills training in addition to in-person sessions to better capture the activity being delivered to enhance digital skills throughout the borough.</p>		
Action required	<p>Performance has seen an improvement during quarter one with 42 more residents engaged in digital skills support.</p> <p>The Community Recovery Plan for digital inclusion will continue to deliver targeted activity to support low income families, older residents and those in rural areas. A scheme has also been set up to help with access to digital devices.</p> <p>Officers will seek to resume courses delivered by Lancashire Adult Learning, exploring opportunities to increase the number of sessions and increase participation rates with the aim of getting back on track towards the target. Feedback is being gathered from key cohorts to help inform what might encourage higher rates of participation and take up.</p>		
Trend:	Performance is better than the figure recorded in Quarter One 2020/21 (0) but worse than Quarter One 2019/20 (114).		

Clean, safe and healthy homes and communities



The long-term outcomes for this priority are:

- Clean and safe streets,
- Reduced health inequalities,
- A wide range of quality recreational activities,
- High quality, affordable and suitable housing,
- High quality play areas, parks and open spaces in both urban and rural locations.

ACHIEVING THE LONG-TERM OUTCOMES IN QUARTER ONE

21. Work to implement the Homelessness and Rough Sleeping Strategy action continued to achieve progress over the quarter. This project aims to improve support around mental health, substance abuse, and budgeting as well as address housing stock imbalances and strengthen support for those in the private rental sector. During quarter one, there has been a focus on building relationships with housing providers through multi-agency meetings. This has resulted a new pathway of supported accommodation for those with mental health and substance issues, with a new facility made available. The new facility offers bespoke three-tiered support, which includes fully supported, semi-independent, and dispersed accommodation. This will ensure that those residents with substance issues are provided with support needed and prevented from homelessness, reducing rough sleeping. In addition, the information on our website on tenant rights for those in the private rental sector has been reviewed and updated as part of a wider communications plan to be finalised in quarter two. This plan will coordinate information for those at risk of homelessness going forward, including publishing information through our social media channels.

22. The project to improve play and community spaces across the borough has progressed well this quarter, with delivery outlined below. Together, all of these improvements promote clean, safe and healthy communities in both rural and urban locations, where residents can access high quality park, play areas and open spaces:

- Westway Sports Campus: the sports pavilion and artificial grass pitch was formally handed over following construction in the previous quarter. The new venue will facilitate a wide range of recreational activities, which will support our residents to live active and healthy lives,
- Wigan Lane Playing Fields: A design team was appointed and development options prepared for improvements to Wigan Lane Playing Fields,
- Jubilee Way and Middlewood Close Play Areas: contracts were awarded and works commenced to enhance the facilities at the sites. This will include improvements to the existing play areas, with new play equipment and safety surfacing,
- King George V Playing Fields: A planning application was submitted for works at King George V Playing Fields and the tender process for the contractor has commenced. If approved, the improvements will include a changing facility, kiosk space, and a foyer with works expected to commence in late 2021,
- Longfield Avenue: Upgrade works at Longfield Avenue have now been completed. Negotiations were satisfactorily concluded with Lancashire County Council to improve the crossing point to the site. The play area now includes new play equipment, safety surfacing, orchard trees, and fruit bushes.

23. The project to deliver an extra care scheme and community facilities at Tatton has moved forward with the designs for the pipework distribution across the site completed and plans for the incoming services reviewed and revised. This will enable progress for the installation of utilities. Additionally, floor plans for the building were revised and the schedule for the installation of the furniture, fixtures, and equipment updated. The signage schedule and highway alteration works commenced to put in place suitable access routes to the facility.

Performance of Key Projects



24. There are three key projects included in the 2020 Corporate Strategy under this priority.

25. Three projects are rated as green, meaning they are progressing according to timescale and plan:

- Implement the Homelessness and Rough Sleeping Strategy action plan,
- Improve play and community spaces across the borough,
- Progress improvements to Tatton recreation ground and surrounding area.

Performance of Corporate Strategy Measures



Performance is better than target



Worse than target but within threshold



Worse than target, outside threshold

26. At the end of the first quarter, it is possible to report on four of the nine corporate performance indicators under this priority. The full outturn information for the performance indicators is included at Appendix A

27. Three indicators are performing better than target:

- Number of volunteer community groups supported to improve by the Council,
- % of household waste sent for reuse, recycling or composting (Q4 confirmed data),
- The number of affordable homes delivered.

28. One indicator is performing below target, and outside the 5% threshold:

	Performance Indicator	Target	Performance
	The number of long-term empty properties in the borough	150	160
Reason below target	The number of long-term empty properties has been reported as off track for a number of quarters. The main reason for this, is due to two sites that are divided into a number of individual units (flats). Of the 160 empty properties, 24 of these are contained within the two sites. Bringing empty properties back into use has been impacted by national restrictions related to Covid which did affect some building work.		
Action required	Work is currently being progressed relating to one of the two properties already identified, and this property has 17 flats contained within it, this would in turn result in a 10.6% improvement in current performance. Since the end of quarter one, the property has come back into use and as a result has reduced the empty property figure to within the target threshold. In addition, work continues with the second property.		
Trend:	Performance is worse than the figure recorded in quarter one 2020/21(150).		

A strong local economy



The long-term outcomes for this priority are:

- A vibrant town centre and villages,
- A strong and expanding business sector across the whole of the borough,
- Access to high quality employment and education opportunities across the borough.

ACHIEVING THE LONG-TERM OUTCOMES IN QUARTER ONE

29. The project to bring forward employment land at Alker Lane has continued this quarter with the commencement of works on site. This includes the initial site preparations, culvert installation, road access creation, and earthworks operations, which will allow construction to progress going forward. The designs for the new statutory services have also progressed over the quarter, which cover the supply of electricity, gas, water, and sewerage disposal to the site. Officers continue dialogue with parties regarding the acquisition of the land adjacent to the development site. This acquisition would bring forward the proposed construction of pedestrian and cycle connection between Buckshaw Village and Euxton Lane. Once complete, the development will provide essential commercial buildings to accommodate the ambitions of the business sector, supporting economic growth in the borough by promoting inward investment.
30. Progress has been achieved over quarter one with the project to deliver improvements to the town centre. Works to the covered market have continued, with the completion of the base steelwork for the new market entrance as well as the installation of the new awnings, valences, and trader signage. Temporary toilets were installed at the market to allow for the demolition of the existing toilet provision ahead of their refurbishment. The designs for the proposed indoor seating area has progressed following a public consultation, which supported the proposals and overwhelming support for the vision. The demolition works in preparation for the Civic Square have progressed, with scaffolding erected in the auditorium of the former bingo hall site to facilitate asbestos removal and the appointment of engineers to develop options for the temporary use of the site post demolition. The work delivered as part of this project will ensure that the town centre remains a vibrant commercial hub that can accommodate the businesses of today and tomorrow by transforming the visitor experience and facilities, supporting a strong local economy.
31. The project to bring forward the site at Bengal Street has progressed well. This project seeks to produce plans to transform the site into mixed-use and develop residential, community, and light industrial facilities, which will accommodate the ambitions of the local economy and provide additional employment opportunities. Over quarter one a review was undertaken of the scheme masterplan to include a leisure facility as part of the wider development of the site, with architects commissioned to update the plan.

Performance of Key Projects



32. There are three key projects included in the 2020 Corporate Strategy under this priority.

33. Three projects are rated as green, meaning they are progressing according to timescale and plan:

- Deliver improvements to the town centre,
- Bring forward site at Bengal Street,
- Bring forward employment land at Alker Lane.

Performance of Corporate Strategy Measures



34. At the end of the first quarter, it is possible to report on two of the seven corporate performance indicators under this priority. The full outturn information for the performance indicators is included at Appendix A.

35. One indicator is performing below target but within threshold:

- The % of 16-17 year olds who are not in education, employment or training (NEET).

36. One indicator is performing worse than target and outside the 5% threshold:

	Performance Indicator	Target	Performance
	Number of projected jobs created through Chorley Council support or intervention (CS)	50	25
Reason below target	<p>Fewer new jobs are being created due to current trading conditions as a result of the pandemic. Many businesses are currently safeguarding jobs or creating fewer positions as conditions impact on operations and growth plans, however this is not the case for all businesses.</p> <p>In addition, the Digital Creative programme, which accounts for a significant number of the projected jobs within this indicator has been running at limited capacity whilst Covid-19 business grant delivery has been undertaken. It is anticipated that further job projection numbers will be collected and reported in the next quarter.</p>		

Performance Indicator		Target	Performance
	Number of projected jobs created through Chorley Council support or intervention (CS)	50	25
Action required	<p>Growth enquiries to the team have been reduced as a result of the pandemic, and this may impact on the cumulative target this year, however non-pandemic related enquiries are now starting to pick up.</p> <p>Further jobs information is due to be collected as part of the Digital Creative programme over the next quarter.</p> <p>Further Covid-19 support funds are due to be administered by the team over the summer which may impact on business-as-usual activities and as a result affect the performance of this indicator, however the team will continue working with enquiries related to projected jobs and report these in due course.</p>		
Trend:	Performance is worse than the figure recorded in quarter one 2020/21 (222), and quarter one 2019/20 (54).		

An ambitious council that does more to meet the needs of residents and the local area



The long-term outcomes for this priority are:

- A council that consults and engages with residents,
- An ambitious council that continually strives to improve,
- Cohesive communities in and around our rural and urban areas.

ACHIEVING THE LONG-TERM OUTCOMES IN QUARTER ONE

37. Over quarter one the project to deliver Shared Services Phase 2 has progressed well, with key project milestones met. Phase 2 will involve the sharing of customer and ICT services with South Ribble Borough Council, which will improve resilience, capacity, and efficiency across each authority. In quarter one, approval for the shared management structure proposals for both ICT and Customer Services was secured following consideration by Shared Services Joint Committee. This has now been implemented in the ICT Service with a shared service lead and manager appointed to lead the service across Chorley and South Ribble. For Customer Services, job descriptions for the shared management roles have been developed. These roles will go out for recruitment in quarter two. Development discussions were conducted with customer services staff in order to identify training and development needs within the shared service to further enhance their skills. The first monitoring report for shared services was presented to the Shared Services Joint Committee, providing an update on progress and performance across key service areas to ensure that performance is being monitored effectively across each organisation and that knowledge can be shared.
38. The project to extend the borough wide programme of improvements to Streetscene services has made good progress over quarter one. This project aims to implement key changes to technology to support an intelligence led and efficient Streetscene service that can deliver environmental improvements across the borough. This quarter, the scoping of the refreshed Streetscene Strategy was commenced, with the main principles behind the strategy agreed by the Executive Member. Additionally, street sweeping, tree plotting, grass cutting, and car park inspections as well as bin collections were conducted using new software which will improve efficiency through the utilisation of smart technology. Efficiency will also be improved with the commencement of the phased replacement of devices used by officers, ensuring they are equipped with the tools needed to accommodate the future ambitions of the service. Litter bins have also been tagged with QR codes to improve how emptying schedules are tracked and monitored. Furthermore, the mini-meadows programme was further progressed over the quarter, with 46 meadows prepared and sowed in addition to wildlife corridors created through the borough.
39. Over quarter one the project to deliver sustainable public services has continued to make progress. This project seeks to ensure that our partnership working model remains fit for purpose by increasing collaboration with the South Ribble Partnership, aligning the two to achieve greater scale, influence, and efficiencies. In the quarter, one to one meetings were held with partners to understand priorities and future challenges to inform the development of a shared strategy. The high-level strategy and outline governance structure was tested at a joint workshop which received broad agreement and support from all partners and will now be finalised for approval at the first meeting of the joint partnership in September 2021. Key priorities include data and intelligence, economic

reform and working towards a locality model that organises support and services in a way that makes sense for residents and achieves longer term sustainability.

40. The project to deliver initial decarbonisation efforts and community engagement has made further progress in quarter one. This project aims to improve the Council's performance in relation to the environment and climate change whilst engaging with local communities. Key elements of the action plan delivered include the creation of a calculation formula for the Council fleet and commuter communication, which has been approved by the North West Energy Hub. This will support the quantification of our green performance going forward. Additionally, preparations were finalised for a stall at the annual Chorley Flower Show, which will share information on green issues and promote community engagement with the project. The stall will also facilitate the tree giveaway to residents, supporting decarbonisation efforts. In addition, community steering groups have been hosted between local schools and church groups regarding community climate change events to further enhance the profile of green issues.

Performance of Key Projects



41. There are four key projects included in the 2020 Corporate Strategy under this priority, and at the end of quarter one overall performance is very good.
42. Four of the projects are rated as green, meaning they are progressing according to timescale and plan:

- Deliver phase 2 of Shared Services,
- Extend the borough wide programme of improvements to street services,
- Work with our partners to deliver sustainable public services,
- Deliver a project to support Chorley Council's commitment to the green agenda.

Performance of Corporate Strategy Measures



43. At the end of the third quarter, it is possible to report on three of the five corporate performance indicators under this priority. The full outturn information for the performance indicators is included at Appendix A.

44. All three indicators are performing better than target:

- % of households living in fuel poverty
- % of service requests received online
- % customers dissatisfied with the service they have received from the council

PERFORMANCE OF KEY SERVICE DELIVERY MEASURES

45. There are some important indicators that are not included within the Corporate Strategy but are measured locally as indicators of service performance. There are seven indicators that can be reported at the end of the first quarter. The full outturn information for this is included at Appendix B: Key Service Delivery Measures.



46. Six of the Key Service delivery measures are performing on or above target:

- Time taken to process all new claims and change events for Housing Benefit and Council Tax Benefit
- Council Tax Collected
- Processing of minor planning applications,
- Average working days per employee (FTE) per year lost through sickness absence.

47. Two indicators are performing below target at the end of quarter one and the reasons for areas of underperformance are listed in the tables below:

Performance Indicator		Target	Performance
	Town Centre vacancy rate	8%	11.9%
Reason below target	Whilst a number of new small businesses have recently opened in the Town Centre, a number of businesses have also had to close due to the Covid pandemic. Other reasons for closing include retirement, businesses relocating out of the town centre, and a closure of a bank branch. Overall, on the week ending 02/07/2021, 293 businesses were open, 16 businesses closed, and 39 remain void.		
Action required	<p>Work continues to promote Chorley as a good place to do business and investing in the Market and Market Walk to keep a vibrant town centre.</p> <p>A vacancy monitoring report is being populated with ownership and agent details of voids to enable officers to make approaches and see if any barriers exist where the council can intervene. This could be to either assist existing private bids, if there is a financial gap preventing exchanges to go through, or through identifying properties the council may consider as investments to bring back in to use itself where they have vacant for a considerable amount of time.</p> <p>The marketplace is still settling down after rules around Covid have been relaxed but there has been more activity with some voids coming back in to use. This includes offers on our own estate and planning requests for changes in use from retail to hospitality or residential conversions elsewhere.</p>		
Trend:	Performance is worse than the figure recorded in quarter one 2020/21 (8.4%).		

Performance Indicator		Target	Performance
	Processing of major planning applications	80%	56%
Reason below target	This indicator is performing below target in quarter one due to one planning application, where the applicant was not willing to agree to a further extension of time after it was considered at a specially convened meeting of the Planning Committee. This one application has therefore impacted the overall performance of the indicator and is not reflective of the overall processing rate. As the issue relates to a particular planning case, it is anticipated that performance will get back on track in quarter two.		
Action required	The indicator performance below target was due to an anomaly in quarter one and is therefore expected to be on track in quarter two as the anomaly has now been resolved, with no further action required.		
Trend:	Performance is worse than the figure recorded in quarter one 2020/21 (100%).		

Climate change and air quality

48. The work noted in this report does not impact the climate change and sustainability targets of the Councils Green Agenda and all environmental considerations are in place.

Equality and diversity

49. Equality and Diversity is embedded within the corporate strategy and how the council acts. An equality impact assessment was undertaken as part of the corporate plan refresh and each individual project will have its own equality impact assessment which are being revised and reassessed during quarter three.

Risk

50. Risk registers are completed for each project which will inform the wider risk assessment on an ongoing basis for the corporate strategy.

51. In considering the risk to the overall corporate strategy programme, the number of green rated projects provides a positive outlook and confidence in delivery. Proactive management of risks around budgets and the impact of Covid recovery remain a focus of the programme board when reviewing progress each quarter.

Comments of the Statutory Finance Officer

52. The delivery of Corporate Priority Projects are supported by budgets included within the Medium Term Financial Strategy.

Comments of the Monitoring Officer

53. Achievement of targets in the Corporate Strategy and key performance indicators is a self-imposed standard and there are no statutory duties directly engaged except the best value duty in, for example, performance of waste collection services.

Background documents

Corporate Strategy 2020/21

Appendices

Appendix A: Performance of Corporate Strategy Key Measures

Appendix B: Performance of Key Service Delivery Measures

Report Author:	Email:	Telephone:	Date:
Howard Anthony, Jon-James Martin	howard.anthony@chorley.gov.uk, Jon-James.Martin@chorley.gov.uk	- -	23/08/2021

Appendix A: Performance of Corporate Strategy Key Measures

★ Performance is better than target
 ● Worse than target but within threshold
 ▲ Worse than target, outside threshold

Indicator Name	Polarity	Target	Performance Quarter 1	Symbol	Trend ¹
% of households living in fuel poverty	Smaller is better	14.5%	11.9%	★	Worse than Q1 20/21
% customers dissatisfied with the service they have received from the council	Smaller is better	20%	7.14%	★	Better than Q1 20/21
% of service requests received online	Bigger is better	40%	58%	★	Better than Q1 20/21
Number of volunteer community groups supported to improve by the Council	Bigger is better	19	28	★	Worse than Q1 20/21
Number of affordable homes delivered	Bigger is better	25	28	★	Better than Q1 20/21
Number of long term empty properties in the borough	Smaller is better	150	160	▲	Worse than Q1 20/21
% of household waste sent for reuse, recycling or composting	Bigger is better	39.6%	40.9% ²	★	Better than Q4 19/20
Number of people who have successfully completed basic digital skills training	Bigger is better	100	42	▲	Better than Q1 20/21
Number of projected jobs created through Chorley Council support or intervention	Bigger is better	50	25	▲	Worse than Q1 20/21
The % of 16-17 year olds who are not in education, employment or training (NEET)	Smaller is better	3%	3.1%	●	Same as Q1 20/21

² This is the confirmed quarter four 2020/21 data as there is always a delay in the reporting of this indicator due to receipt of third-party information. Therefore, due to the timescales for this report a provisional figure for quarter one is not available at this time.

Appendix B: Performance of Key Service Delivery Measures

★ Performance is better than target

● Worse than target but within threshold

▲ Worse than target, outside threshold

Indicator Name	Polarity	Target	Performance Quarter 1	Symbol	Trend ¹
Time taken to process all new claims and change events for Housing Benefit and Council Tax Benefit	Smaller is better	3.9days	3.6 days	★	Better than Q1 20/21
% Council Tax collected	Bigger is better	27.31%	28.28%	★	Better than Q1 20/21
Processing of planning applications as measured against targets for 'major' application types	Bigger is better	80%	56%	▲	Worse than Q1 20/21
Processing of planning applications as measured against targets for 'minor' application types	Bigger is better	85%	99%	★	Better than Q1 20/21
Average working days per employee (FTE) per year lost through sickness absence	Smaller is better	1.66	1.27	★	Better than Q1 20/21
Town Centre Vacancy Rate	Smaller is better	8%	11.9%	▲	Worse than Q1 20/21

Report of	Meeting	Date
Deputy Chief Executive (Introduced by Councillor Peter Wilson)	Executive Cabinet	16 th September 2021

Is this report confidential?	No
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Is this decision key?	No
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Shared Consultation Framework

Purpose of the Report

1. To present the consultation framework for approval.

Recommendations to Cabinet

2. Cabinet are asked to approve the Consultation Framework in Appendix A.

Reasons for recommendations

3. The Consultation Framework sets out how Chorley Council undertakes consultations.
4. Without a framework, consultations may not be consistently planned and undertaken in the proper way across the council. This can lead to poor consultations and consequently poor decision making. This framework is a shared approach across Chorley and South Ribble Councils which will provide a consistent approach for staff to work too.
5. Consultation is also a way for communities, residents and businesses to engage with the Council and shape their local area. Without a framework key features that promote inclusivity and accessibility may not be routinely applied, inadvertently leaving some voices unheard.
6. The framework provides officers across Chorley Council with the guidance and tools to undertake high quality consultations as and when needed.

Other options considered and rejected

7. To not have a framework. As shared services continues to develop consultations could continue to be undertaken unilaterally by services, however the quality may be inconsistent. Further to this, different processes across shared teams could lead to confusion or misapplication, whereas a single shared framework will provide consistency.

Corporate priorities

8. The report relates to the following corporate priorities: (please bold all those applicable):

Involving residents in improving their local area and equality of access for all	✓	A strong local economy	
Clean, safe and healthy communities		An ambitious council that does more to meet the needs of residents and the local area	

Background to the report

9. In November 2020, a review was launched to produce a shared consultation policy with South Ribble Borough Council, seeking to harmonise and strengthen the approach to consulting across Chorley Council. This forms part of the wider implementation of shared services Phase 1.
10. This resulted in the creation of the Consultation Framework, which is shared between Chorley and South Ribble Councils. The purpose of the framework is to ensure that the council has a clear statement of the approach it will take to consultation, supporting all officers to apply a consistent approach.
11. The framework also provides staff with a straightforward guide on how to conduct consultations, outlining the overall approach and presenting a step-by-step toolkit on how to conduct consultation activities.
12. The drafted Consultation Framework is presented in **Appendix A**.

Overview of the framework

13. Consultations are part of a range of methods that the Council can seek feedback from communities and stakeholders. It is distinct to community engagement, where that is an ongoing process of developing relationships and partnerships with local people. A consultation may be one of the ways that we engage. The framework is part of the overall toolkit to reinforce and support engagement, setting out clearly when and how we consult.
14. The framework sets out a consistent approach across the council so that every consultation undertaken is of high quality. The framework includes:
 - Defining what a consultation is and when they are necessary.
 - The council’s approach to consultations.
 - A six-step toolkit on how to conduct a consultation. This includes guidance on the types of questions to ask, how to determine an audience, as well as how to store and manage data correctly.
 - Consultation Initiation Documentation (CID).
 - Equality monitoring questions.
 - The range of consultation methods.

15. It should be noted that the framework does not replace or supersede guidelines or consultation methodologies set down by external bodies or central government. For example, local planning consultations are managed through nationally agreed frameworks and statutory guidelines.
16. The framework has been developed by researching current best practise from other local authorities and considering well known consultation methods and principles such as the 'Gunning Principles' which set out guidance on fair consultation processes.
17. The key improvements brought forward by the framework are:
 - Introduction of mandatory equality monitoring questions.
 - Creation of a step-by-step toolkit to guide staff through the consultation design, implementation, and analysis process.
 - Introduction of a Consultation Initiation Document to provide an additional guide to staff on how to conduct and evaluate consultations.

Climate change and air quality

18. The work noted in this report does not impact the climate change and sustainability targets of the Councils Green Agenda and all environmental considerations are in place.

Equality and diversity

19. The framework places an obligation on officers to ensure that any consultation that is developed and undertaken is inclusive and accessible to everyone in our community by considering and addressing potential barriers to participation.
20. Within the framework officers will be required to undertake an equality impact assessment as part of every consultation they do, which will serve to highlight any barriers and provide an action plan on removing or mitigating areas that could prevent fair access and not enable peoples voices to be heard.

Risk

21. The framework acts to mitigate risks to the Council resulting from poor consultation. It provides the tools and guidance to ensure officers undertake high quality consultations that meet required and expected standards from stakeholders.
22. The key risk to the framework is poor implementation, whereby officers are not aware of the requirements placed on them as well as not being provided sufficient or adequate training. To mitigate this risk a communications and training plan will be implemented following the approval of the framework by cabinet.

Comments of the Statutory Finance Officer

23. There are no financial implications of this report.

Comments of the Monitoring Officer

24. There are no concerns to raise from a Monitoring Officer perspective. Carrying out sound and robust consultation exercises can help to improve the quality of decisions being

made – further it can also help to reduce the chances of the council being subject to a judicial review challenge.

Background documents

There are no background papers to this report

Appendices

Appendix A: Shared Consultation Framework

Report Author:	Email:	Telephone:	Date:
Howard Anthony, Jon-James Martin	howard.anthony@chorley.gov.uk, Jon- James.Martin@chorley.gov.uk		23/08/2021

Consultation Framework

2021



WORKING TOGETHER

Introduction

Purpose of the framework

The Consultation Framework sets out how Chorley and South Ribble Councils undertake consultations. It provides step by step instructions and guidance on how to design, deliver, and evaluate consultation activities using best practice.

This framework will apply in general, however where there are statutory or external requirements for undertaking consultations in a prescribed manner, those requirements take precedence.

Key principles

This framework sets out the key principles, or our 'commitment to consultation', that are to be applied when undertaking consultation exercises. These are to ensure that:

- Consultation is planned effectively, undertaken in a timely manner at the appropriate stage in the decision-making process, and that results are used effectively to inform policy development and service delivery,
- We make it clear the purpose of an exercise and how it feeds into the decision-making process,
- Sufficient information is provided and accessible to participants to inform their response,
- Everyone has the opportunity to contribute and have their views heard,
- We consult using the most appropriate methods (both electronic and more traditional) to ensure that all groups can participate fully,
- Sufficient time is provided to respond, and for consideration of key findings,
- The results are used to inform the decision-making process,
- Key findings are fed back to participants,
- All consultations are registered and disseminated through our Consultation Portal (www.yoursay.citizenspace.com).

What we mean by consultation

Defining a consultation

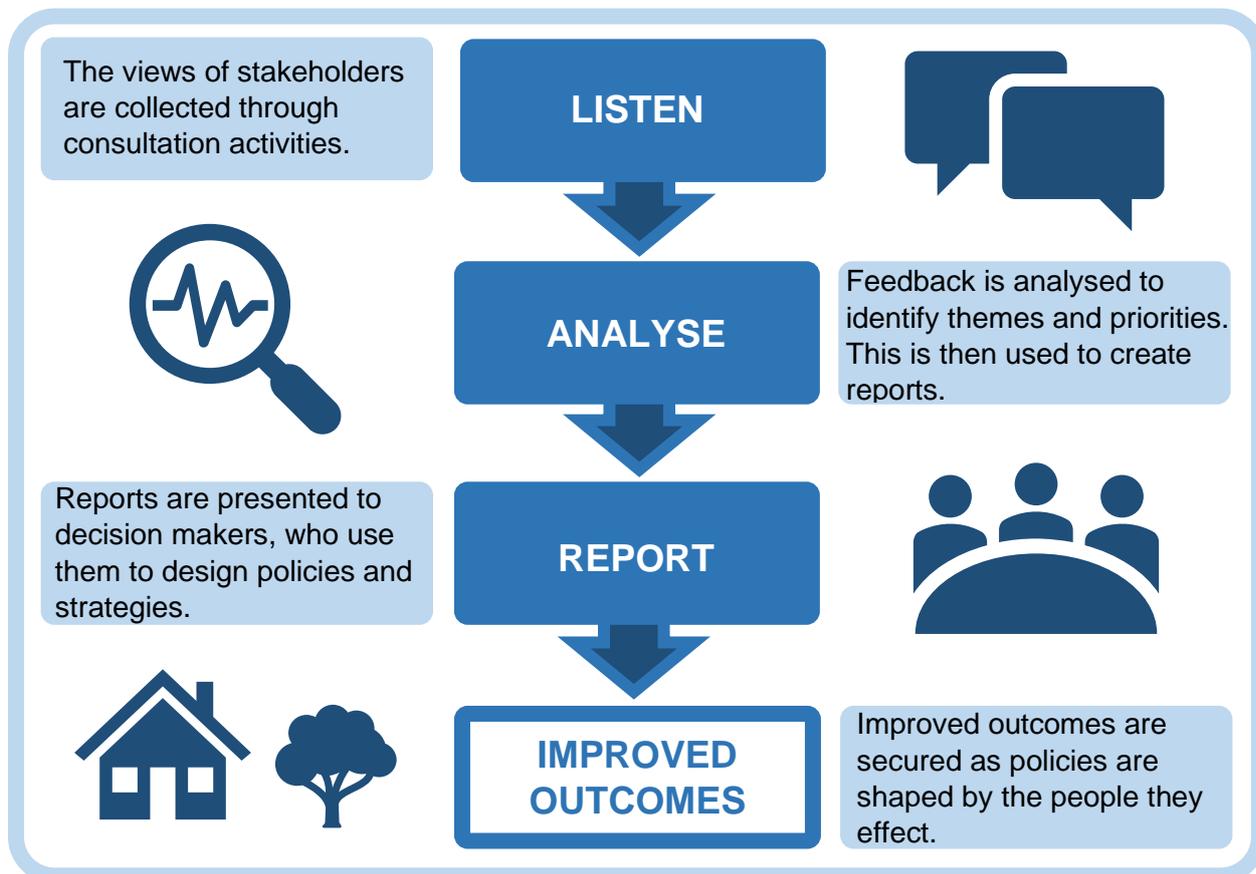
A consultation is a one-off process to enable resident or partner feedback to shape a policy, process, or decision. A formal consultation is carried out if the proposal or plan is likely to have a substantial impact on access to services, a change in provision of service or the wider community such as economic impact, or regeneration.

Consultations are one of a range of ways that we can seek feedback from our community. It is different to community engagement, which is an ongoing process of developing relationships and partnerships with local people. Engagement is about having continuous conversations and gathering intelligence on the changing needs of our communities through neighbourhood working and our community hubs.



Our process

To be clear, there are no general rules as to the kind or amount of consultation required. By the nature of each proposal or issue, the appropriate approach to eliciting feedback will vary depending upon the circumstances that call for it. Therefore, it is neither feasible, nor possible to lay out prescriptively a one size fits all approach. However, we believe that our consultations should reflect the process below:



When we consult

Under the current statutory guidance, we are required to hold a consultation when:

- Creating or changing a service,
- Allocating funding,
- Planning decisions.

In addition to this, we seek to go beyond our statutory duties by creating extra opportunities to inform and listen to our communities, partners, and service users. This includes when:

- Designing policies,
- Identifying priorities,
- Developing strategies.

The role of councillors

As decision-makers, elected members will use consultation to inform the decisions they make. This may involve balancing competing priorities, or balancing consultation findings with other factors (i.e. resources available).

Portfolio holders will have a special interest in any consultations affecting their specific remit and should be involved in the scoping of the consultation exercise and kept informed of its progress.

Individual ward members should be consulted on proposals that will affect the area they represent.

Portfolio holders and ward members will also have an active role in disseminating and communicating the findings of the consultation and how this has been used to inform any subsequent decisions and policies.

Officers' roles and responsibilities

Managers are responsible for ensuring that all council employees understand and apply the consultation process outlined in this framework and that there is sufficient time and resource allocated to undertake the exercise effectively and meaningfully.

All consultation exercises should have a lead officer identified and responsible for planning, designing and undertaking the exercise and disseminating the findings. This will include ensuring the principles and commitments to consult in this framework are adhered to.

The Performance and Partnerships team in Transformation and Partnerships provides an oversight and advisory role. In doing so, the team can:

- Provide training and support for using our Consultation Portal,
- Publishing any consultations via the Consultation Portal,
- Managing the Consultation Portal,
- Promoting consultation best practice throughout the council,
- Updating the Consultation Policy and resources on consultation.

APPENDIX A - Consultation Toolkit

Starting your consultation

The six steps below provide staff with instructions on how to conduct consultation activities. To ensure the quality and consistency of our engagement activities, all consultations must be approved by Performance and Partnerships before publication.

STEP ONE: Scoping out your consultation

When scoping out your consultation there are some key things to consider and note:

- Make sure the consultation is necessary.
- Be clear about what you are trying to achieve and set clear objectives. What do you want to find out?
- Avoid duplication and over-lapping activities with other services by ensuring the information isn't being collected elsewhere.
- Every consultation needs to be approved by a Service Lead or Director.
- Allow adequate time for consultees to respond and for their views to be fully considered before any action or decision is made.
- Consider how much capacity is needed and the resources needed to implement any changes following the outcomes of the exercise.
- The Consultation Initiation Document can be found at **Appendix B** as an additional tool to help plan a consultation.

STEP TWO: Who are you consulting?

Being clear about who you are going to consult ensures that decisions and policies are being informed by the people they affect and allows us to consider those who may have barriers to participation. This ensures that consultations are inclusive and are representative of our communities.

Equality and Inclusion

An inclusive consultation is one that is accessible to everyone in our community by considering and addressing potential barriers to participation. This ensures all our residents are empowered to have their say irrespective of their background and that consultations are representative.

This includes barriers faced by protected groups, which are age, ethnicity, gender, gender reassignment, pregnancy and maternity, marriage and civil partnership, sexual orientation, and rurality.

To understand more about equality and inclusion as well as protected groups, see our **Equality Framework**. There are also **Neighbourhood Intelligence Profiles** available that present key statistics on our communities.



Key questions to consider:

- Who are the key stakeholders?
- Is there any background data on the stakeholders?
- What obstacles to participation may there be including for protected groups?

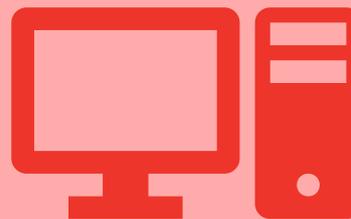
STEP THREE: What methods are you using for consultation?

There are a range of tools and techniques available for undertaking consultations. The method used will depend on the sample size, audience, and purpose of the consultation. For instance, different groups respond more successfully to different engagement methods. When designing a consultation, accessibility must be considered. This ensures that all our residents are able to participate. For examples of methods, including their advantages and disadvantages, see **Appendix E**.

It is essential that all our participants are given sufficient resources and time in order to make an informed response. Consider how the consultation will be promoted and what materials will be presented to participants. Internally, consider the time and resources needed in order to conduct the consultation and analyse the results.

Citizen Space

A key resource available for conducting consultations is CitizenSpace. This is our digital consultation platform that allows us to design and publish consultations as well as store and analyse results from participants digitally. All consultations on the platform must be approved by Performance and Partnerships before they can be published.



Any consultations not done on CitizenSpace must subsequently be recorded on the platform. This ensures that the data from the consultation can inform wider decision making and that duplication can be avoided. For information on how to access and use CitizenSpace, contact Performance and Partnerships.



Key questions to consider:

- What method would the target participants respond best to?
- How much time and resources will be needed?
- Has accessibility been considered?
- How will the consultation be promoted?
- Have the participants been given sufficient time and resources to make an informed decision?
- Has corporate branding been used?

STEP FOUR: What question are you going to ask?

It is important to consider the type of question you ask participants, which will depend on what you are looking to find out and the type of information you wish to collect. Questions should be well structured and easy to understand, with language suitable for non-specialist audiences. This is an important part of accessibility as it ensures that everyone in our community can easily understand and therefore participate in decisions that affect them.

Open questions are good for yielding lots of detailed qualitative information. These are questions that allow participants to leave their feedback. For example, ‘What is your opinion on the proposed policy?’.

Closed questions can be used to get decisive answers on a particular issue or policy. These are questions that present several options for participants to select in their response. These include multiple choice, which present several options, as well as binary questions, which present two options. For example, ‘Do you agree on the proposed policy changes? Yes/No’.

Equality Monitoring Questions

Every engagement activity is required to ask equality monitoring questions unless there is a clear predetermined reason otherwise that is agreed with Performance and Partnerships. The questions cover each of the protected characteristics under the Equality Act 2010 and are optional for participants to complete.

These give a useful indication of whether council activities are representative of the local population and can inform measures

The equality monitoring questions are available at **Appendix C** and **Appendix D** for each Council (different versions include a different link to privacy policy for each council). The equality monitoring questions are also available on CitizenSpace under saved questions.



Key questions to consider:

- Do the questions meet the objectives of the consultation?
- What type of data are you looking to collect? Qualitative (more descriptive) or quantitative (more numerical)?
- Have Equality Monitoring Questions been used?
- Are the questions easy to understand?

STEP FIVE: How are you storing the data?

Consultations often involve collecting personal information. Therefore, it is important to consider how information is stored and who can access it in order to be compliant with General Data Protection Regulation (GDPR). As Data Controllers, we have a duty to ensure that informed is stored and used correctly and that we are transparent in how we use data.

See our **Data Protection Policy** as well as **Special Data Processing Policy** for guidance.

General Data Protection Regulation

GDPR is designed to ensure personal information is handled correctly, stored securely, and used appropriately. There are key principles to the regulation that we must follow:

- Purpose limitation: data must be collected for a specified, explicit, and legitimate purpose.
- Data minimisation: data should not be held or further used unless essential for reasons in the original scope.
- Storage limitation: personal information must be deleted when no longer necessary. **How is the data being data stored and for how long?**
- Integrity and confidentiality: data must be processed and stored securely. **Who has access to the data?**



With all our consultation activities, a **Privacy Notice** must be presented to participants, which can found on each councils' website. This ensures that we are transparent with the information we collect and that people are aware of how we use data. **Have participants been presented with the Privacy Notice?**

STEP SIX: How will you evaluate and use the results?

To ensure that consultations have real outcomes that shape the final outcome, it is critical that results from engagement exercises are analysed so that they can inform decisions effectively. Consider how the information collected through the consultation will be evaluated and how that analysis will be presented to ensure it can easily be interpreted by decision makers. For consultations conducted on CitizenSpace, the digital platform provides analysis tools that can interpret respondent information.

When the survey is complete, it is important to record any lessons learned to improve future consultations including what worked well and what you might change next time to improve the process.

Once data from a consultation activity is analysed, consider how and when the information will be reviewed by decision makers, such as what committee the results will be presented to, to ensure participant feedback is considered effectively as part of decision making.

It is also critical that feedback is given to participants after the consultation is completed so that they understand how their feedback influenced decisions and it can encourage future participation. This can include updating the consultation webpage on the Councils' websites with the results from the consultation and any relevant reports.



Key questions to consider:

- Have the results been reported to decision makers and participants?
- Has the consultation achieved its aims?
- Have the results been reported in an easily accessible way?
- Has the consultation been recorded on

Appendix B – Consultation Initiation Document (CID)

Service area:		Responsible officer:		Corporate Priority being addressed:	
Consultation type:				One off or ongoing activity (including frequency):	

The table below outlines the key elements that should be considered when planning a consultation activity. The evaluation column will enable you to review how well you did against the original brief and deliberate on potential improvements for future consultations.

Action	Brief	Evaluation
What are your aims and objectives? <i>(Please consider whether these have been achieved when evaluating)</i>		
Who is your consultation aimed at? <i>(Please consider 'hard to reach' groups and the number of participants)</i>		
What information/research has been done previously? <i>(Please consider any information that may support the consultation)</i>		
Has an Equality Impact Assessment (EIA) been completed? <i>(Please consider the impact on protected groups under Equality Act 2010)</i>		

<p>What is the engagement timeline? <i>(Please account for preparation, conducting the engagement, and analysing results)</i></p>			
<p>What resources are needed to conduct the engagement?</p>	Money		
	Venue		
	Staff		
	Volunteers		
	Materials		
	Other		
<p>What type of report will be produced at the end? <i>(Please consider how the results will be analysed and where they will be reported)</i></p>			
<p>How will the results be fed back to participants?</p>			

Appendix C – South Ribble Equality Monitoring Questions

These monitoring questions are optional and enable us to increase our knowledge and understanding of our diverse communities and gather information about who uses our services. The information you provide in our consultations will be used to make sure that our services are being accessed equally.

Although these optional questions do not ask for your name, we still handle any information provided with data protection in mind, and therefore it is only kept as long as necessary and then deleted securely. For more information please see our Privacy Policy [here](#).

Q1 Can you please confirm your full postcode? (PLEASE WRITE FULL POSTCODE BELOW e.g. PR7 1DP)

Q2 Which of the following best describes your gender?

Male

Female

Prefer not to say

If you describe your gender with another term, please provide here _____

Q3 Does your gender identity match your assigned sex at birth?

Yes

No

Prefer not to say

Q4 What was your age at your last birthday? (PLEASE WRITE IN THE BOX)

Years

Prefer not to say

Q5 Do you consider yourself disabled? (As defined by the Equality Act 2010 as having a long-standing illness, disability, or infirmity)

Yes

No

Prefer not to say

Q6 To which of these groups do you consider you belong?

White

British

Irish

Asian/Asian British

Indian

Pakistani

Chinese

Any other White background _____

Any other Asian background _____

Black/Black British African

Caribbean

Mixed White & Black Caribbean

White & Black African

Any other Black/Black British background _____

White & Asian

Any other mixed background _____

Prefer not to say

Q7 Do you identify with any religion or belief?

Yes

If yes, please specify here _____

No

Prefer not to say

Q8 Do you consider yourself to be...?

Bisexual

Heterosexual/straight

Gay man

Gay woman or lesbian

Other

Prefer not to say

Q9 Are you currently pregnant or have you given birth in the last 26 weeks?

Yes

No

Prefer not to say

Q10 Are you currently...?

Married

In a civil partnership

Divorced or civil partnership dissolved

Cohabiting

Single

Separated

Prefer not to say

Appendix D – Chorley Equality Monitoring Questions

These monitoring questions are optional and enable us to increase our knowledge and understanding of our diverse communities and gather information about who uses our services. The information you provide in our consultations will be used to make sure that our services are being accessed equally.

Although these optional questions do not ask for your name, we still handle any information provided with data protection in mind, and therefore it is only kept as long as necessary and then deleted securely. For more information please see our Privacy Policy [here](#).

Q1 Can you please confirm your full postcode? (PLEASE WRITE FULL POSTCODE BELOW e.g. PR7 1DP)

Q2 Which of the following best describes your gender?

Male

Female

Prefer not to say

If you describe your gender with another term, please provide here _____

Q3 Does your gender identity match your assigned sex at birth?

Yes

No

Prefer not to say

Q4 What was your age at your last birthday? (PLEASE WRITE IN THE BOX)

Years

Prefer not to say

Q5 Do you consider yourself disabled? (As defined by the Equality Act 2010 as having a long-standing illness, disability, or infirmity)

Yes

No

Prefer not to say

Q6 To which of these groups do you consider you belong?

White

British

Irish

Asian/Asian British

Indian

Pakistani

Chinese

Any other White background _____

Any other Asian background _____

Black/Black British

African

Caribbean

Mixed White & Black Caribbean

White & Black African

Any other Black/Black British background _____

White & Asian Any other mixed background _____

Prefer not to say

Q7 Do you identify with any religion or belief?

Yes

If yes, please specify here _____

No

Prefer not to say

Q8 Do you consider yourself to be...?

Bisexual

Heterosexual/straight

Gay man

Gay woman or lesbian

Other

Prefer not to say

Q9 Are you currently pregnant or have you given birth in the last 26 weeks?

Yes

No

Prefer not to say

Q10 Are you currently...?

Married

In a civil partnership

Divorced or civil partnership dissolved

Cohabiting

Single

Separated

Prefer not to say

Appendix E – Method Examples

The table below presents some of the methods that can be used to conduct consultation activities:

Method	Description	Advantages	Disadvantages
Focus Group	An organised group discussion that explore issues in depth and seeks to gain views of particular interest groups.	<ul style="list-style-type: none"> • Facilitates interaction and brainstorming between participants. • Can be targeted at ‘hard to reach’ groups. • Can explore complex issues in depth. • Typically for an 8 to 10 group. 	<ul style="list-style-type: none"> • Can be time consuming and costly. • Requires a trained facilitator to conduct session. • Lack of confidentiality. • May need several groups to gain different perspectives.
Survey	<p>An investigation into people’s views on issues by presenting a set of questions. Can be conducting virtually, manually, or over the telephone.</p> <p>This can be conducted digitally via our digital consultation platform CitizenSpace.</p>	<ul style="list-style-type: none"> • Usually receives a good response rate due to convenience. • Can be conducted in confidence to explore sensitive issues. • Responses can be disaggregated by characteristics. • Can be cost effective if done virtually. 	<ul style="list-style-type: none"> • Interviewer cannot respond to any of the respondent’s questions. • Can be difficult to analyse when there is a small sample size. • Can be time consuming waiting for a response.
Consultation Document	Providing information and inviting public submissions and comments on specific proposals, which are published via reports and documents. This can be conducted digitally via our digital consultation platform CitizenSpace.	<ul style="list-style-type: none"> • Provides detailed information to stakeholders. • Elicits informed responses. 	<ul style="list-style-type: none"> • Can have a poor response rate. • Difficult to target hard to reach groups. • Can be costly (i.e. publication resources). • Requires writing skills to formulate documentation.

<p>Forum / Citizen Panel</p>	<p>A structured and regular meeting with an interest group. Used to provide information, seek views and, develop/endorse local plans and strategies. Composed of a dedicated set of participants. Can be conducted digitally.</p>	<ul style="list-style-type: none"> • Facilitates committed engagement and participation. • Can form strong links between services, partners, and local people. • Can be aimed at hard to reach groups. 	<ul style="list-style-type: none"> • Attendees are unlikely to represent all views. • Can be dominated by the most vocal. • The agenda can be taken over. • Can be poorly attended.
<p>Workshop</p>	<p>A formally organised discussion group to exchange and gather information. Usually in the format of presentations that are followed by small group discussions, ending in a large group discussion of key issues.</p> <p>This can be conducted remotely.</p>	<ul style="list-style-type: none"> • Large numbers of people can participate. • Encourages participants to network and share experiences, facilitating dialogue between stakeholders. • Participants can ask questions. • Opportunity to share large amounts of information. 	<ul style="list-style-type: none"> • Requires a large amount of preparation. • Can be costly and time consuming. • Attendees are unlikely to represent all views
<p>Public Meeting</p>	<p>A formal one off meeting with scheduled agendas. Used to provide information, seek views, and develop/ endorse local plans and strategies.</p> <p>This can be conducted remotely.</p>	<ul style="list-style-type: none"> • Cheap to host. • Opportunity to provide information and receive feedback. • Builds relationships with local community 	<ul style="list-style-type: none"> • Attendees are unlikely to represent all views • Large group may be a barrier. • Can be dominated by the most vocal. • Difficult to differentiate between individual and general views.
<p>Social media</p>	<p>Uploading a post on social media in order to facilitate discussion via the platform through comments and sharing.</p>	<ul style="list-style-type: none"> • Accessible to a large audience. • Cheap to conduct. 	<ul style="list-style-type: none"> • No equality monitoring. • Comments can be resource intensive to analyse. • Not accessible to those who do not have social media.

Report of	Meeting	Date
Deputy Chief Executive (Introduced by Executive Member (Resources))	Executive Cabinet	16/09/2021

Is this report confidential?	No
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Is this decision key?	No
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Workplace Strategy 2021-2024

Purpose of the Report

1. To present the Workplace Strategy 2021-2024 to Executive Cabinet for consideration and approval.
2. To seek agreement to progress the Workplace Strategy.

Recommendations to Cabinet

3. That the Workplace Strategy is approved and progressed to support the future efficient operation of the organisation.

Reasons for recommendations

4. To realise the social, economic, and environmental benefits of new ways of working in line with the changing operating context and workforce expectations.

Other options considered and rejected

5. To revert back to pre-Covid-19 working practices. This option has been rejected based on the opportunities presented to modernise our approach and in line with feedback from staff.

Executive summary

6. The Workplace Strategy is the beginning of an ambitious plan and programme of works to transform where and how the council will work over the next three years. The aim and vision of the Workplace Strategy is to “To provide a high quality, modern, fit for purpose workplace for all staff that enables mobility, flexibility, productivity, and collaboration across the council whilst supporting behavioural and cultural change to adopt new ways of working’.

- 7. The strategy has been developed based on the experience of working through the Covid-19 pandemic, best practice, and feedback from staff. It aims to achieve flexibility and efficiency while maintaining productivity and performance. It sets out the vision, priorities, objectives, principles, and approach to developing our working places and practices for the future. Alongside the strategy is an action plan with key workstreams and success measures to guide implementation and achieve the strategic objectives.
- 8. The Workplace Strategy will support the delivery of the Corporate Strategy and interact with other key strategies and plans including the Digital Strategy and Organisational Development programme as key elements to ensuring the technology is in place and the workforce are enabled to operate successfully.
- 9. The Workplace Strategy can be seen at Appendix One

Corporate priorities

- 10. The report relates to the following corporate priorities:

Involving residents in improving their local area and equality of access for all		A strong local economy	
Clean, safe and healthy communities		An ambitious council that does more to meet the needs of residents and the local area	✓

Background to the report

- 11. The global pandemic and associated restrictions prompted a major change in public behaviour with more people than ever using technology to work, socialise, shop and access services. Our staff and customers now have different expectations and it's important that we change our approach to keep pace and take advantage of emerging opportunities to modernise and improve.
- 12. The strategy has been developed based on research and best practice to maximise the social, environmental, technological and economic benefits. Extensive consultation has also taken place with staff through surveys and briefing sessions to gather feedback and shape the strategy, indicating strong support for the proposed approach.

Summary of the strategy

- 13. The purpose of the Workplace Strategy is to support the Council to deliver a working environment and working model that will best meet the needs of the organisation and our employees. It will make the most of technology and assets as well as driving a positive organisational culture to ensure the Councils continue to provide high quality services to the residents of Chorley and South Ribble. It will be a shared strategy that will be implemented across Chorley and South Ribble to achieve a consistent approach, with the implementation tailored to the needs and identities of each Council.

Vision and principles

- 14. The vision for the Workplace Strategy is to “To provide a high quality, modern, fit for purpose workplace for all staff that enables mobility, flexibility, productivity, and

collaboration across the council whilst supporting behavioural and cultural change to adopt new ways of working’.

15. A number of principles have been identified to ensure the success of the strategy and to ensure we maintain the delivery of excellent services to our customers including:

- 50% of our office-based workforce will be accommodated for at any one time within a more flexible and agile office setting, with home, mobile and hybrid working increased and encouraged based on business need.
- Staff will be available to work and respond in line with service need, whether they are working from the office or at home. This means answering the phone and responding to emails, attending meetings and appointments.
- Staff will maintain expected levels of individual performance, productivity and positive working relationships with their team, service and line manager.
- Staff will be enabled to work seamlessly with the right technology and standardised equipment.
- All services will have a minimum workplace presence on normal working days to be managed locally.
- We will have four future working states (office/onsite worker, mobile worker, hybrid worker and home worker) to identify different types of staff, how they will work and the different support they may need.
- SMT will be accountable for ensuring that working practices are effective and managers will be responsible for maintaining oversight of their teams and services.

How we will deliver the vision

16. There are 4 key elements to the delivery of the strategy: People, Assets, Technology and Processes

17. Each element will have its own objectives, programme of works and sub projects. Together these elements will form the Workplace Strategy.

18. Each council will have their own separate implementation programme that reflects the position of each organisation and progresses activity to deliver the future way of working vision by 2024. The objectives of each element of the Workplace Strategy will be met by the delivery of the projects as shown in in Appendix Three – Delivery and Implementation.

Outcomes and benefits

19. The strategy will deliver extensive benefits including greater efficiency, improved customer experience, increased staff morale, better user of assets with potential for income generation as well as environmental benefits. The outcomes framework and approach to evaluation is included at the end of the strategy document.

Climate change and air quality

20. The work noted in this report impacts on the following areas of climate change and sustainability targets of the Councils Green Agenda: net carbon zero by 2030, reducing waste production, limiting non sustainable forms of transport, limiting, or improving air quality.

Risk

21. It is important that staff are supported through the changes to obtain staff buy in and achieve the desired cultural change. Organisational development and training will be aligned to support with the change in how we work.

22. Technology is critical to ensuring the success of the strategy and future ways of working. The Digital Strategy and ICT plan will be closely aligned to the delivery of the Workplace Strategy to ensure a coordinated approach to implementation.

23. There will be costs associated with transforming our office sites and consolidating buildings for commercial or regeneration opportunities

Comments of the Statutory Finance Officer

24. Chorley Council has included within its capital programme £1.3m for investment in its workplace assets. This budget will be reviewed as part of the implementation of the strategy across the 4 key elements to delivery.

Comments of the Monitoring Officer

25. There are no concerns from a Monitoring Officer perspective. Many public and private sector organisations will be similarly looking at how best they deal with the post Covid world. Extensive consultation with employees has already taken place about this strategy. Clearly is important that such an inclusive approach should continue as ideas and proposals develop further.

Appendices

Appendix One – Workplace Strategy

Appendix Two – Additional Personas

Appendix Three – Delivery and Implementation

Report Author:	Email:	Telephone:	Date:
Simon Charnock ()	simon.charnock@chorley.gov.uk	01257 515035	25/08/2021

Workplace Strategy

2021 to 2024

“To provide a high quality, modern, fit for purpose workplace for all staff that enables mobility, flexibility, productivity, and collaboration across the councils whilst supporting behavioural and cultural change to adopt new ways of working’



Introduction

The purpose of the Workplace Strategy is to support the Councils to deliver change to effectively provide a working environment and a working model that is designed to best meet the needs of the organisations and our employees, makes the most out of available technology and assets as well as ensuring a positive organisational culture to ensure the Councils continue to provide high quality services to the residents of Chorley and South Ribble.

Our Workplace Strategy aims to create attractive and inspiring work environments to support new work styles including office/onsite, mobile, home and hybrid working, increase adaptability of space, increase business performance, and improve staff morale. We will be looking to maximise the benefits from our office accommodation assets through increasing space utilisation and consolidating facilities to utilise as commercial and regeneration opportunities.

This strategy, supported by the ICT, Joint Digital Strategy, Organisational Development and Transformation Strategy will help us to be fit for the future, and transform how both Chorley and South Ribble Councils operate, fulfilling our promise to modernise our Councils by transforming where and how we work in order to better serve our customers as well as improving the work and personal life balance of our employees.

Current ways of working

Smarter working principles have been adopted in recent years and continue to be developed further. These principles are the building blocks that were put in place to begin the transformation of how we work to be more efficient and flexible.

Smarter working principles include:

- Creating the right working environment, standardising offices
- Making sure employees have the right tools and technology to fulfil their role
- Employees encouraged and enabled to work in smarter and more efficient ways, seamlessly across locations
- Space based on activities rather than individuals and not based on seniority
- Information held centrally and electronically, digitising processes
- Reduced desk space
- The move towards paper light offices and streamlined digital processes.

The reasons for adopting smarter working principles include:

- Increasing flexibility for both employees and the organisations
- Create a more professional and standardised working environment
- Designed to improve health and wellbeing of employees
- To ensure technology is used to its fullest extent taking advantage of available progression in technology
- To enable staff to access information from any location
- To streamline and automate processes to improve how we deliver services to our customers
- To enable business continuity

Current ways of working statistics, including results from latest staff survey

99.9%
 of computer-based staff at both Councils main working location within an office setting. (pre COVID-19)



3 main office locations at Chorley Council
2 main office locations at South Ribble Borough Council




94%
 Staff engaged and motivated at work

£236k
 Net operational costs per annum for the Civic Centre, Leyland




£100k
 Net operational costs per annum for the Union Street building

£85k
 Annual income through lease of offices at Chorley Council
£63k
 Annual income through lease of offices at South Ribble




88.5%
 Staff feel they have influence over the way they work

91%
 Staff feel they have the correct tools and technology to efficiently fulfil their role



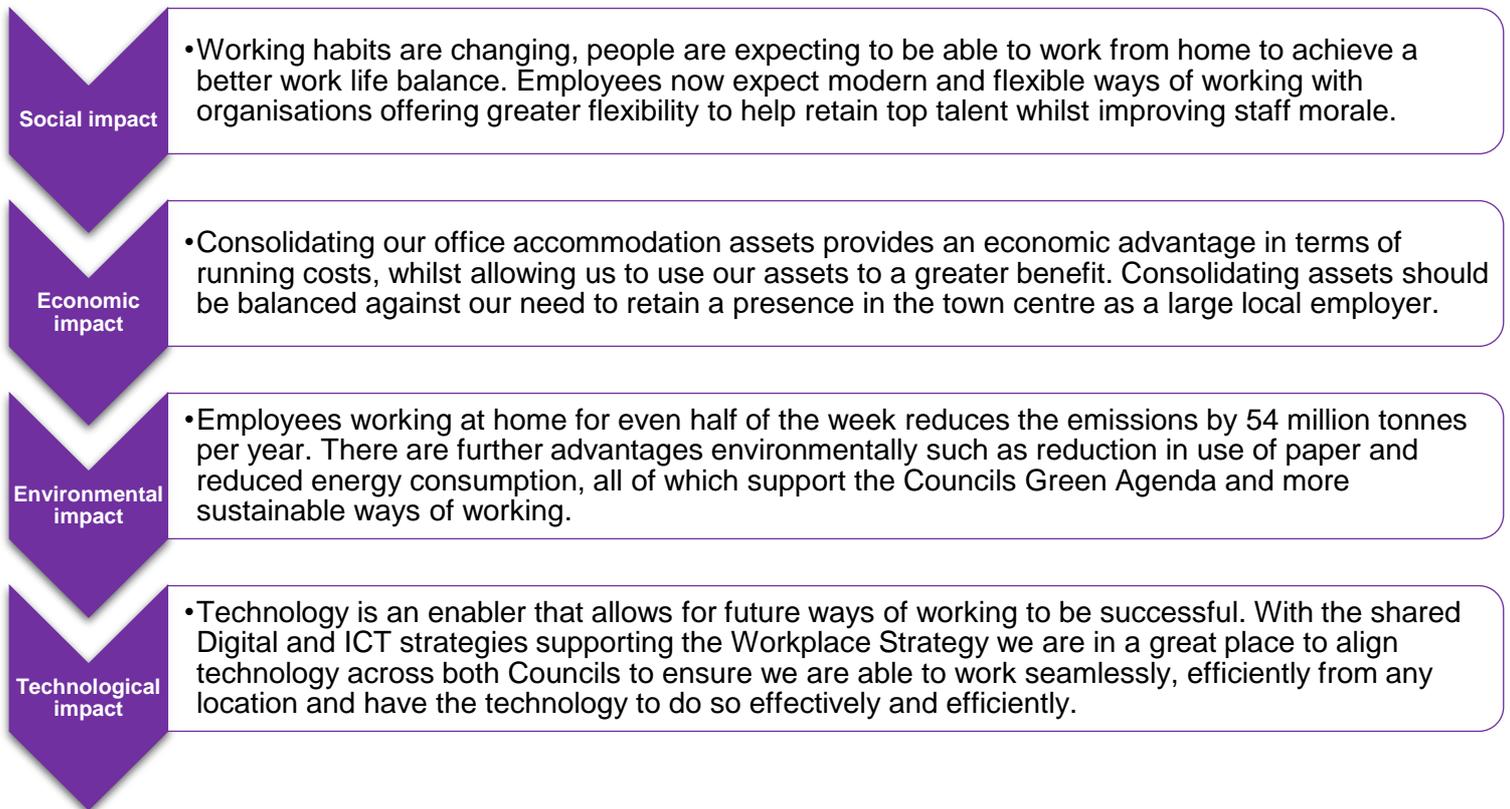
Future working - vision and models

The period of home working in response to COVID-19 restrictions has meant that we tested out the approach to home working and found it to be a success, with employees sustaining productivity and service delivery, as well as staff being able to reap the benefits that home and flexible working provides.

A pulse survey has been carried out to assess and understand employees' thoughts and feelings towards home working over the last 12 months.

- **93%** of employees state if there was the opportunity to work from home for some or all the time post COVID-19, this would be something they would consider
- **93%** of employees stated that their health and wellbeing whilst working from home was either fair, good or very good
- **89%** of employees stated their mental health whilst working from home was either fair, good or very good
- The main advantage of working from home was not having to commute at **58%**
- The main disadvantage from working from home was technology at **48%**, improving technology to support new working models forms part of the Workplace Strategy

The way we work is changing and has to change fast enough to keep pace with the current challenging climate. We need to review our current working spaces and workplace culture and define our requirements and needs over the next three years. There are multiple reasons for why a change in the way we work is the right thing to do both for the councils, for our people and for the residents we serve.



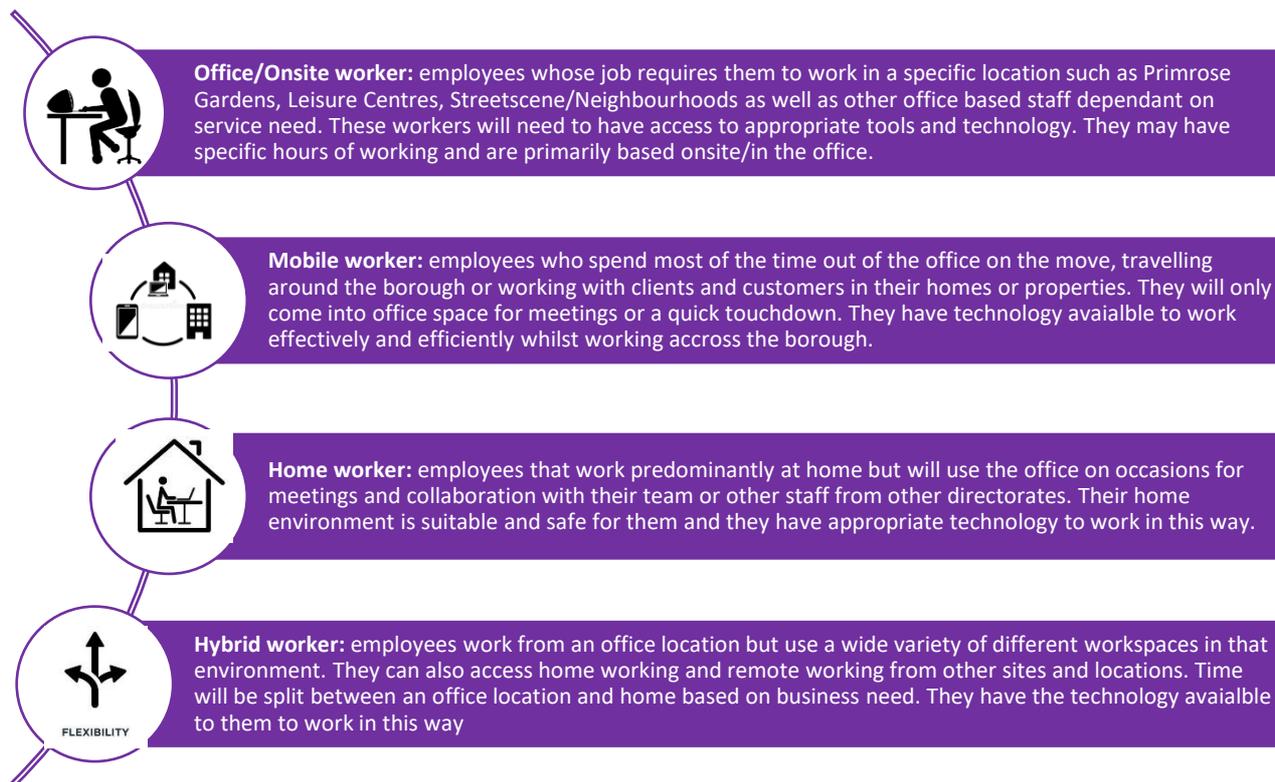
Work is now seen as a thing we do, rather than a place we go. We aim to empower employees, whenever and wherever they work. Enabling and encouraging our staff to enjoy their workspace wherever that may be. Change in the way we work will present opportunities for greater productivity, efficiency and improved morale and wellbeing of staff.

Our future working models will be based on the following principles and are supported by the Workplace Strategy:

- A quality, modern working environment that will support a range of working practices and encourage collaborative, integrated, and cross functional activity.

- 50% of our office-based workforce will be accommodated for at any one time within a more flexible and agile office setting, with home, mobile and hybrid working increased and encouraged based on business need.
- Staff will be available to work and respond in line with service need, whether they are working from the office or at home. This means answering the phone and responding to emails, attending meetings and appointments.
- Staff will maintain expected levels of individual performance, productivity and positive working relationships with their team, service and line manager.
- Staff will be enabled to work seamlessly with the right technology and standardised equipment.
- All services will have a minimum workplace presence on normal working days to be managed locally.
- Any variation to formal working patterns or arrangements (e.g. a non-working day, regular childcare or permanent home worker) would need to be requested in line with HR policies.
- SMT will be accountable for ensuring that working practices are effective and managers will be responsible for maintaining oversight of their teams and services.
- We will have four future working states to identify different types of staff, how they will work and the different support they may need.
- A mixture of different zones within the office environment; quiet zones, hotdesking (interactive and collaboration) zones, meeting zones and social zones, working with services to ensure all their needs are met, focusing on future working habits rather than previous or current working habits.
- Staff will be enabled to work seamlessly with the right technology and standardised equipment. as well as ensuring new modern offices have the technology to allow them to thrive.
- Ensure the environment for home workers is safe, suitable, and effective following the Health and Safety (Display Screen Equipment) Regulations and the Health and Safety (Workplace) Regulations
- Further digitise and streamline processes that currently rely on office-based locations for them to be completed.
- Transformation of the way we deliver services to our customers, improving the customer experience and making use of technology to encourage self-service and less reliance on the more expensive channels.
- Policies to support the transformation of the way we work, such as the home working policy and flexible working policy which form part of the work life balance policy family.
- Organisational development to support all staff throughout the changes, embedding the new ways of working into the Councils culture whilst supporting managers in effective ways to manage their teams within the new work settings.

We have looked at the type of work that people do in the councils and have identified four working states of the future.



A day in the life of....

We anticipate that these employees will be able to work in the following types of way:



Peter works in the **Transformation and Partnerships** service and is a **hybrid worker**.

Peter lives a 45-minute commute from Chorley and South Ribble. Peter splits his time working in the office and working at home based on the need of his service and job role, making him a **hybrid worker**.

At home he has access to a Council laptop and headset as well as all the Council systems he requires including an iPad to access Council meeting agendas and minutes.

Peter usually works at home 2 days a week saving time with him not needing to commute, as well as this being more cost effective for him, doing this also reduces his carbon footprint. Peter feels like this makes him more productive and less stressed not having to worry about a drive to and from work, his mornings and end of days are much more relaxed for him, allowing him to focus better on his work.

Peter does also work in the office at either Chorley Town Hall or South Ribble Civic Centre, usually in a set pattern. Peter has flexibility around where he works in order to best carry out his role.

Peter books out space in the office as and when he requires. He does not have a set desk within the office he finds suitable space to allow him to work as he needs.

Peter communicates with his team and other colleagues across both Councils using Microsoft Teams but does attend face to face team catch ups every 2 weeks.

Brian works in the **ICT** service and is a **hybrid worker**.

Brian splits his working week between both Chorley and South Ribble offices and at home. Cover is always required in the offices to support hardware issues and other tasks that cannot be done at home.

At home Brian is still able to support staff with ICT issues through Microsoft Teams and remote assistance in the same way he would if he were in the office. He is also able to carry out system upgrades and software installations from home as this is all carried out on a virtual system so there is no need to be in the office to do this. Brian prefers working at home when he needs to concentrate and focus on a piece of work without distraction. He finds it more beneficial to do this when working from home as there is more distraction for him when working in the office.

Brian can attend team meetings from wherever he is; at home, at South Ribble or at Chorley using Microsoft Teams and virtual meetings rooms. This saves Brian and the rest of the ICT team time not having to travel between locations for meetings. The team does however meet every 2 weeks for an in-person team catch up.

Within the office the ICT team have their own office space separate from other services as the nature of their work is often confidential and needs to be a secure space. They do not all have a set desk as they are not often all in the office at the same time, they do however have set workstations for certain tasks. Brian has a locker for personal belongings as well as work equipment, as well as storage facilities for the whole service, specifically hardware.

When in the office Brian uses the social zone during his breaks, he enjoys this time as he can catch up with colleagues across the council, it is a good vibe and a hub at lunch time



Steve works in the **Neighbourhood Services** team as a team leader. He is a mix between **hybrid** and a **mobile worker**

Steve has young children under the age of 3. Being able to log in from home early for an hour before the children wake up is a benefit to Steve. He can plan his day and complete admin tasks at home, clocking out to sort the children out and get them off to nursery before then going into the office, making Steve a **hybrid worker**.

Steve works in the office once the kids are at nursery where he completes admin tasks, however his role requires him to do site visits throughout the day. The way Steve works makes him both a **hybrid** and a **mobile worker**. He uses the office during the day as his base in between his sites visits.

The processes Steve follows are mainly paper free. He has access to a council smartphone to allow him to receive his jobs, respond to emails as well as accessing Microsoft Teams to communicate with his team wherever he is. He does occasionally need to print paper plans which he is able to do when he is in the office.

The flexibility Steve has, mainly being able to log in to work in the morning from home helps him manage his workload and improves his work life balance.

Other colleagues within ground maintenance teams are slightly different to Steve, their roles are always based out and about within the borough working on site and do have set hours. This makes them a mix between **mobile** and **onsite workers**.





Francesca works in the **Commercial Services** team between **Primrose Gardens** and **Cotswold Supported Housing** with **Tatton Gardens** due to go live in March 2022.

Francesca is an **office/onsite worker** due to the nature of her role which is providing a front facing service meaning she is unable to carry out duties at home.

Francesca works in the office everyday with her main base being at Primrose Gardens, however she does sometimes work at other sites when cover is required.

Francesca has a set desk where she works daily at Primrose Gardens, however when at other sites she uses hotdesking free space that is available to use whilst she is providing office cover.

She works core hours Monday to Friday 9am till 5pm, however does sometimes stay later and start earlier if needed and does also attend out of hours if there is an urgent need.

Francesca has dual screens in the office and uses Microsoft Teams to communicate with other colleagues as well as having access to a council mobile phone. Microsoft Teams is very useful for Francesca and the team as it means they can hold meetings virtually without having to travel to different sites to meet in person. This saves time and is much more efficient for them, whilst also allowing all members of the team to attend as nobody needs to stay on site for office cover.

Francesca also attends staff matters virtually meaning less time is spent travelling from Primrose Gardens to the Town Hall whilst still being able to provide input into the meeting.

Francesca accesses the information and data she needs online as all processes are digitised making access to information easy from a centralised place for the whole team.



Eileen works in the **Customer Services** team in the front office and in the contact centre.

Eileen is a **hybrid** worker. She works from the office on her assigned days which is based on a rota, on these days she sees customers face to face. Customers are occasionally seen in private areas to help maintain customer privacy.

Eileen and her colleagues also support members of the public to self-serve when in the office using the digital access points available for the quicker tasks that can be completed online, educating customers how to self-serve. This allows the team to spend more time on the more complex and vulnerable residents' cases.

On the days that Eileen is assigned to be within the contact centre, on the phones, Eileen takes this opportunity to work from home as there is no need for her to be in the office to fulfil her role on these days. When at home, Eileen uses a council laptop to access all the systems she needs.

Eileen has dual screens at home also which helps with efficiency, due to the nature of the role and all the different systems Eileen requires at once, dual screens really help but maybe not essential for everybody, however Eileen does know that not all members of the team have space at home for dual screens.

Eileen communicates with customers through emails, the website or over the phone, using the contact centre online solution, she can communicate effectively with customers wherever she is. The team have a Microsoft Teams chat group so everybody can keep in touch throughout the day and share information wherever they are to support each other which is a really important tool for the team.

Shannon works in the **Strategic Housing** team and is a **home worker** due to personal health needs.

Shannon has had a neurological spinal disability since she was 16 which affects her health, with her often needing to previously take time off work sick for long periods.

Working from home massively helps and reduces Shannon's absences. She finds it much better for her health working from home, she feels better mentally and physically and finds she can manage her day better which has a positive impact on her work and productivity.

Shannon often struggles with the morning routine, getting up and into the office for 8am due to her disability. Working at home helps as she can be flexible on the more difficult days, logging into work later and working later to ensure she fulfils her hours and completes everything she needs to do. Home comforts also help throughout the day as she has everything she needs at home.

Working from home has not only improved Shannon's health and wellbeing it also has had a positive impact on the whole family with the whole family life improved.

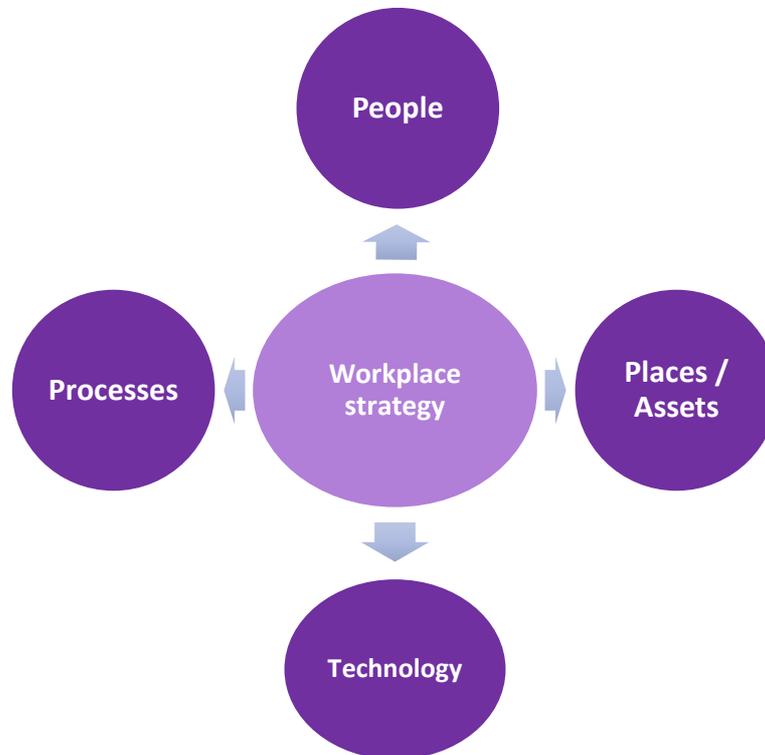
Previously Shannon did work in the office, however due to her disability she was based on the ground floor as she is unable to manage the stairs and the lift was often broken, so for safety she based herself on the ground floor. This was a separate space to colleagues in her team, with Shannon often feeling isolated. Working from home separate from her colleagues is no different, she communicates with her team in the same way, using Microsoft Teams, however at home she doesn't feel isolated as she is working in a space, she is comfortable with.



Additional personas for other services can be seen at Appendix One

How we will deliver the vision

Our future working vision and model should not only focus on the redevelopment and modernisation of office buildings; our people, processes and technology also need to be considered. Therefore, there are four key elements to the strategy and our future working model, each having their own individual objectives, projects and programme of work that together form the Workplace Strategy and support the Councils to adapt to new ways of working and to create an office environment and working practices for the future whilst supporting staff along the way.



People

Objectives and projects to support the workforce through transformation of the way we work. Linked to behavioural and cultural change to support staff as well as policies to support new working models.

- Encourage senior leaders to lead by example and fully utilise new spaces and adopt new working practices.
- Work with staff to shape working environments and models, support managers and staff through the change and ensure benefits are documented and realised to aid cultural change. Establish change and engagement champions to explain and reinforce new behaviours and attitudes and utilise organisational development initiatives to do so.
- Improve job satisfaction and work/personal life balance by providing greater flexibility for our employees and ensure the models meet the workforces needs.
- Ensure working environments at home are safe and suitable for employees to work.
- Consult and engage with customers to help improve the customer experience and increase of self-service with Digital Champion staff supporting customers to self-serve, educating them on digital skills.



Place/Assets

Objectives and projects to ensure that our assets are suitable and meet the needs of our workforce and future working models.

- Develop working environments that promote and facilitate a collaborative culture, encourage integrated and cross functional activity and provide a consistent level of quality of workspaces.
- Develop the Town Hall into the main council working location at Chorley, with the creation of different working zones and a quality, modern, well designed space fit for the future.
- Review spaces within the Civic Centre, ensuring quality, modern, well designed space fit for the future
- Develop commercial and redevelopment opportunities through consolidation of Council office accommodation assets and reduce operating costs and increase income generation opportunities including The Lancastrian.
- Relocation of and transformation of customer services delivery at Chorley Council
- Collaborate with partners and local stakeholders to develop our spaces and other local environs into office space, meeting, and conferencing space both for council and other stakeholder use.
- Ensure remote locations within the borough are set up for staff to work if required, such as community centres etc.



Technology

We will need to ensure that technology is in place and fit for purpose to allow for new working models to thrive as well as ensuring staff have the correct technology to do their jobs whenever and wherever they are.

- Digitise and streamline additional services such as archiving, scanning, mail, and printing.
- Ensure meeting and conferencing space to have the technology to enable them to be utilised to their full potential and explore monitoring tools such as online booking, space utilisation and attendance recording.
- Ensure all employees have the technology and tools required to efficiently carry out their role without relying on a set location, enabling them to work anywhere with no reduction in productivity or service delivery.
- Develop self-service in the customer services area, improving the customer journey and reducing the reliance on face to face and telephone contact, increasing automation so we can focus more on the more complex cases and vulnerable residents.
- Refresh of information security framework to reflect new ways of working.
- Training for staff on technology to support and benefit home working



Processes

New working processes to allow staff more flexibility on where and when they work for an improved work life balance.

- Development of policies and principles to support the workplace changes and the Workplace Strategy
- Embed as part of the Council DNA new working models and work as a thing we do rather than a place we go.
- Further processes to be adopted to assist with the successful transformation of working models.
- Review processes both internally, such as managing working patterns, office capacity and automating processes, and externally such as the way front facing services are delivered.
- Ensure we embed and monitor workplace behaviours such as adhering to clear desk policies and reporting health and safety issues
- Work more sustainably, responsibly and reduce our carbon footprint supporting the Councils Green Agenda

Delivery and implementation

Each Council will have their own separate implementation programme that reflects the position of each organisation and progresses activity to deliver the future way of working vision by 2024. The objectives of each element of the Workplace Strategy will be met by the delivery of the projects as shown in in Appendix 2.

Appendix 2 shows a proposed programme of works for Chorley and South Ribble Councils as well as shared projects for both Councils.

Outcomes and monitoring

It will be important to monitor the progress of the Workplace Strategy to ensure that both councils are meeting the objectives and outcomes that we want to achieve from this strategy.

We will implement regular monitoring of outcomes and benefit realisation sessions to ensure that the future working models are meeting expectations, as well as ensuring the way of working is having a positive impact on the organisations, services and employees whilst maintaining the delivery of quality services to our residents.

Monitoring and evaluation measures will be developed for each council based on their individual programme of work.

Quarterly reports will be fed into the reporting processes for each council, which will provide an opportunity to recognise progress made, highlight key issues or risks, and ensure that both councils are on track for an aligned approach.

Outcome	Evaluation Monitoring
Enhanced employee and organisation productivity	Performance Management Data
Improved employee satisfaction, motivation morale and loyalty	Staff survey
Improved health and wellbeing of the workforce	Staff survey
Improved talent acquisition and retention	HR processes and data
Improved staff perception of the working environment within the office setting	Staff survey
Increase in staff feeling they have an influence on the way they work	Staff survey
Increase in staff feeling they have the correct tools and technology to fulfil their role	Staff survey
Reduction in the percentage of the workforce working within an office setting	Analysis of data from booking and attendance technology
Increase in staff working at home and in a more hybrid way	Staff survey Analysis of data from booking and attendance technology
Increase income stream from utilisation of assets for commercial purposes	Analysis of income stream from lease or redevelopment of office space
Reduced travel and commuting to work to reduce carbon footprint in support of the Green Agenda	Staff survey Data on travel and commute into an office environment
Further technological advances implemented to support new ways of working and modern office environment	Analysis of technological advances implemented and their benefits
Further digitisation and streamlining of processes and automation	Analysis of technological advances implemented and their benefits
More efficient, effective, and improved customer experience for front facing and customer service delivery	Customer Service performance monitoring Customer satisfaction survey

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Appendix One – Additional Personas



Maureen works in the **Property Services** team and is a mix of a **hybrid** and **mobile worker**.

Maureen and her team split their time between the office, at home and attending site visits.

She plans her week and uses the office as a base when she has site visits on certain days as she does not live local, so this is the best option for her. She uses hotdesking space within the office in between site visits as she does not have a set desk location, space is shared between the team. Maureen uses social zones for her lunch breaks. When in the office Maureen uses this time to access printer facilities to print letters, site notices and legal documents that require paper copies as well as carrying out tasks that is more efficient utilising dual screens as she doesn't have the space for dual screens at home.

On days when Maureen doesn't have any site visits, she works from home, taking advantage of the hybrid working model, saving time on the commute into the office as well as being able to focus better without distractions of an office environment.

Records are digitised which allows Maureen to access information wherever she is working without the need to go in the office, however, occasionally archived paper records are required which Maureen will plan to access during her days in the office.

Maureen and her team work together to ensure there is always cover daily in the office as they are a reactive service that often need to attend site visits urgently, however if staff are at home and need to mobilise they still do so if required based on business need.

Maureen and her team use Microsoft Teams to communicate with each other but do meet in person every 2 weeks for a team catch up. These catch ups take place in different locations either in the office, at Strawberry Fields or other Council sites. After the meeting they either continue working where the meeting took place, go home, or attend site visits to continue with their working day.



Anne works in the **Public Protection** team as part of the **Communities directorate**.

Anne is a mix between a **hybrid** and **mobile worker**, she generally spends half of the week at home and half of the week in the office but does also attend site visits, she bases her working location on business need. Most of her work can be done at home as she has dual screens available at home which makes it a lot easier for her. Anne does acknowledge that some of the team do not have the space for dual screens at home, so they may work in the office more often than she does if they require access to dual screens, some of the team work just fine on a laptop, its personal preference Anne believes.

Some of the team within the service work on a rota to meet business need providing office presence within the office for times when immediate site visits are required as the service is a reactive service, while for other roles this is not necessary. Some of the team do not live local so for urgent site visits it is more suitable for office cover to be provided rather than mobilising from home. If required to mobilise from home due to demand, then the team will still do so if required.

Anne does attend planned site visits weekly; she uses an iPad and has technology available to her for these visits. As Anne lives local, she uses either the office or home as her base on days she does have site visits. Anne's colleagues that do not live local but attend planned site visits, plan their week so they use the office as a base during days they have site visits to attend. If they do not have any visits, they take the opportunity to work from home to carry out admin and other tasks that are able to be carried out at home.

Anne books out space in the office as and when she requires. She does not have a set desk within the office, she finds suitable space to allow her to work as he needs. On occasions Anne needs quiet space to concentrate on a piece of work, she often does this at home, or she books out quiet space within the office for time to focus.

Anne and her team use Microsoft Teams and mobile phones to communicate with each other. In person meetings are not essential, however are useful to have occasionally. The team book out meeting space and collaboration space so they can meet and work together within the office at least once every 2 weeks.



Leanne works in the **Democratic Services** team and is a **hybrid worker**, spending 2 or 3 days a week in the office at either Chorley or South Ribble and the rest at home based on business need. Some weeks she works in the office more than others, no week is the same.

Leanne attends evening meetings, she plans her week, working in the office on the days that she has an evening meeting to attend. As these are member meetings, they take place in person at either Chorley or South Ribble offices. As Leanne does attend evening meetings her days are often more flexible and does work in the evenings occasionally. This improves Leanne's work life balance, allowing her to do the school drop off and pick up, working around the family lifestyle which includes often working in the evenings even when there is not a late meeting.

As the team supports members, there is always cover in the office with a minimum of 1 member of staff being in to support members. The team are in a specific location within the office to ensure members can find the team when required.

When working in the office Leanne works in the set team location, she has a locker for personal and work items. During lunch breaks Leanne uses the social zone to relax away from her workstation.

Leanne attends team meetings with staff across shared services with staff being in different locations using Microsoft Teams. However, every 2 weeks the team do get together for a meeting in person at either Chorley or South Ribble offices.



Colin works in the **Finance** team and is a **hybrid worker**.

Colin works from the office more than he works at home, this is because he does not have space at home for dual screens which are an integral piece of technology for him as he feels he works much more efficiently using dual screens than a single laptop screen. He works in the office when he knows his tasks will require dual screens, but he also works at home when he can complete tasks where dual screens are not essential. He enjoys being able to split time between both as and when needed.

Colin's colleagues are not in the office as much as he is, they are mainly based at home as they have space for dual screens at home and find there is less distraction in a home environment than there is in the office setting. They do however come into the office based on business need and for face to face meetings when required.

The finance team have their own office space due to the nature of the role, there is secure financial information and secure data that needs to be kept for audit purposes. Most records can be accessed electronically from anywhere, however on occasions paper files are required.

Within the office nobody in the team has their own set desk, the team hotdesk, finding available space when they are in the office. At the end of each day they clean their workstation for hygiene safety reasons.

Colin and the team catch up together at the office every few weeks in person using the meeting areas. Some staff stay in the office on these days, others go home depending how long their commute is.

Colin takes breaks in the social zone when he is in the office, he uses this space to switch off, he usually watches TV whilst on his breaks.



Charles works in the **Investment and Skills** team and is a **hybrid** worker

Charles splits his week between the office and at home, working at home 3 days a week. He works in the office when face to face meetings are needed and for collaboration and support /learning sessions with his team. He will go in the office as and when required but does spend most of the week at home in general.

Charles meets businesses on an appointment basis most of the time in a coffee shop as this is a more relaxed environment and feels the meetings are better this way. Sometimes he does meet at the business premises or virtually wherever he is.

When attending meetings virtually with businesses when he is in the office he uses private spaces within the meeting area as this allows him to ensure conversations with businesses are private and also prevents him from being disturbed by others or disturbing other colleagues within the office space.

Charles lives local but it often takes 40 minutes to get to work due to congestion on the roads. When he is working in the office, he logs into work from home in the morning first until 10am before going into the office. By doing this he avoids the congested times and it is more efficient and productive for him this way.

Charles has an iPad and laptop and can access all the information he needs electronically.

Charles finds working at home much more efficient, there are no distractions, he can concentrate and prioritise his schedule much better allowing him to manage his workload more effectively. His home environment feels more comfortable, he finds home comforts are better for his health and wellbeing and personal comfort. He goes for a walk before work or at lunch time, feels refreshed afterwards and adds clarity to his thought process, he would not do this when in the office setting.



Frank works in the **Communities** team; Frank's team are a mix of **hybrid** and **mobile workers**; the roles of the service differ so they work accordingly to suit their role.

The Community Development and Social Prescribing teams spend their weeks out and about across the borough, they either use the office or home as a base depending on their location making them a **mobile worker**. They have devices to allow them to access emails and calls wherever they are. They occasionally nip into the community centres to log in and work, depending on their schedule. They often work on their own so also have access to a solo protect device for safety.

The **hybrid workers** in the service book space in the office as and when they require, they do not have a set desk each, just space to share as a service. They do also spend some of the time working from home. They have access to the technology and tools to work and communicate wherever they are working.

The team do meet in the office occasionally and have 1-1's in the office where private meeting areas are utilised. These 1-1's do sometimes take place over MS Teams.

Some of the team do work in the office more often than others as they live alone and feel they are socially isolated so prefer to work from the office environment. As the team deal with vulnerable people and emotional work this sometimes has an impact on personal mental health, anxiety, and resilience, so they find it better to have support of colleagues available to them if needed, this is a benefit to them, so they do prefer the office location but can work from home if they need to do so.

The service have a contained space available within the office, due to emotional and private nature of phone calls, private space is needed, not only to maintain privacy of customers, but also so other colleagues in the office are not affected by any calls they may hear taking place.

Frank attends regular hospital appointments during the day which does take a couple of hours. When he needs to attend these appointments, he makes up for time working in the evening at home, which is a benefit to Frank as he is able to keep on top of his work around his appointments.



Gemma works in the **Council Tax** team in the **Customer Services** back-office.

Gemma spends most of the time working from home but does occasionally go into the office for training and support days as well as catch up with colleagues. Gemma is a **hybrid worker**.

Gemma finds working from home improves her work life balance, as well as being more productive and efficient when working. Gemma's commute to the office is 60 minutes which means she is rushing in the morning to get ready for work and into the office in time to deliver the service which is required during the hour's customers expect. Working from home allows Gemma to take a walk before work and be ready for the day ahead, this makes her more relaxed and more focused increasing her productivity and morale. Gemma's working day is also more flexible, rather than having to be out of the office for 5pm each day, she can work a little later if needed or log on in the evenings to finish off pieces of work to fit in with her day.

Working from home allows Gemma to concentrate much better than she can in a noisy office with lots of distractions so finds that she is able to focus much better.

Gemma communicates with customers using email and Microsoft Teams, the same way she would if she were in an office setting. Gemma also uses the same tools to communicate with her team. In addition, the team use Microsoft Team chat to arrange lunches and ensure there is cover to take phone calls while members of the team have a break.

Gemma occasionally does go into the office for training and to catch up with members of her team. When working in the office Gemma utilises the quiet zones as she finds it much easier without distraction to carry out her role.

Gemma has access to a council laptop, headset, and dual screens at home, as she would in the office, this helps Gemma as dual screens are an essential to allow her to carry out her role effectively. Gemma acknowledges that for some staff, space at home may not allow for this which may be a hindrance.



David works in works in the **Planning Team** and is a **hybrid worker**

David works some of the week at home and some of the week in the office based on business need and as his role requires. David finds working from home is more suitable for him when he needs quiet time to write reports or needs to really focus without any distractions. He does sometimes use quiet spaces in the office to do this but does prefer doing this at home.

David is aware that different colleagues may work slightly different to him and would be more office based as this is a better option for them and they feel more productive working in the office setting.

David and the team do work in the office as a minimum 2 days a week. This is important for them as it allows time to share ideas, experience, and recommendations to facilitate appropriate decision making on planning applications and new developments. There is a mix of experience in the team, so it is helpful for them to be in the office on a mentoring and learning capacity. Being in the office also allows time for training and transferring of skills to ensure there is a consistent approach to recommendations and decision making on planning cases. The team can do this over MS Teams, however, find there is more quality when in the office. The team is not fully paperless and often need to print large plans which they can do when in the office, however generally most processes are paperless.

David does site visits throughout the week, either using the office or home as a base on these days as he lives local, some of the team use the office as base on these days as they do not live local.

David has access to laptop at home and a large screen as space allows so he can easily view documents and plans he needs. He also has access to technology to allow him to carry out his site visits efficiently.

Desks within the office for the team are large enough to work on large plans. He uses the social zone for lunch and meeting spaces with space for planning documents to discuss with the team.



Margaret works in the **Planning Policy** team and is a **home** worker.

Margaret is able to fulfil her role completely from home; however, she does go in the office for meetings or to print documents when needed. Margaret enjoys working from home and finds there is less distractions.

Margaret does catch up with colleagues often in person, but this does not necessarily take place in an office setting. They often catch up in coffee shops, at the Park or other locations across the borough.

Margaret communicates with colleagues using Microsoft Teams and emails and has a WhatsApp group for the team for informal conversations. The team use their personal phones for this WhatsApp group as it is not really work related. They use Microsoft Teams for work related chats.

Margaret communicates with customers via email.

At home Margaret has a laptop and a large screen which helps to view maps. She also has a headset and an iPad for when carrying out site visits, but these are only occasionally.

Margaret has care needs for her child and partner due to disabilities. Flexibility of working from home allows her to better manage this whilst still being able to work effectively. Occasionally her child may be sent home from school meaning Margaret would need to leave the office, at home she can continue working, catching up in the evenings where needed. This makes Margaret less stressed and finds it improves her mental health and work life balance.



Ken works in the **Environmental Health** team and is a mix between a **hybrid** and **mobile** worker.

Ken splits his time between the office, at home and attending site visits based on business need.

Ken's commute into the office is stressful, busy, and often has many delays due to traffic. Ken is a single parent to 2 children who have lots of hobbies in the evenings.

Ken plans his week so that his site visits and face to face meetings are on the same days, on these days he uses the office as his base, when on-site visits he accesses his jobs using his council mobile and uses hotdesking space in the office in the morning and to complete admin tasks at the end of the day. He also uses the social zones for his lunch.

Hybrid working has many advantages for Ken. He is less stressed as he does not have a stressful commute every day. He can get his children ready and off to school and can log into start work earlier when at home than he would if he had to commute into the office after school drop off. He finds this helps his to focus and helps to be more productive, whilst also reducing the cost of childcare.

Working from home also allows Ken to work more flexibly. When in the office he would have to leave the office early to get back home to take his children to their hobby classes, however working from home allows Ken to continue working later as he can easily get the children to their classes without a long commute home first. This not only improves Ken's work life balance he also finds it has an added benefit to his children's lives also, it is especially difficult for Ken as a single parent.

Ken communicates with colleagues using Microsoft Teams. He also attends multi agency meetings with partners from the borough and from other boroughs. Being able to attend these meetings from anywhere is a huge benefit to not just Ken, but other members of staff from the council and other agencies. The meetings often take place in locations in other boroughs, being able to use Microsoft Teams to attend saves Ken and others travel time to and from the meeting. Ken does sometimes attend in person, however having the option to attend remotely helps massively saving up to an hour not having to travel.



Mike is a **Director** and is a **hybrid** worker. Mike spreads his time working at both Chorley and South Ribble Council offices as and when required based on the need of his role.

Mike does not have a set office at each Council location, he has a shared space with other Directors that he can use when in the office as well as a shared meeting space, this is due to the fact that not all Directors will be in the same location at any one time so a set office space for each director is not required.

Mike utilises the quiet zone within the office when he needs to be able to concentrate on a piece of work without distraction, alternatively he is able to do this at home should that be the best option for him, depending on his day. He may work into the evenings at home if required.

Mike occasionally sits within the interaction/hotdesking/collaboration zone within the offices to allow for interaction and collaboration with his service and to be more visible to his colleagues.

Mike attends meetings at both Councils either in person or utilising Microsoft Teams, joining the meeting from wherever he is, this saves Mike time travelling between Councils to attend meetings in person when it is not essential. Meeting spaces are set up for video conferencing so attendees can join the meeting from wherever they are, saving time again on them having to travel to the meeting location.

Mike has access to technology to allow him to work in a hybrid way including access to Council systems at home, a headset as well as an iPad to access agendas and minutes of meetings.

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Appendix Two

Delivery and implementation

Each Council will have their own separate implementation programme that reflects the position of each organisation and progresses activity to deliver the future way of working vision by 2024. The objectives of each element of the Workplace Strategy will be met by the delivery of the projects as shown below,

The table below shows a proposed programme of works for Chorley and South Ribble Council and shared projects for both Councils.

Project	Council	Element of strategy	Timescale
Transition period during COVID-19 recovery. Review of current state and plan for the transition post COVID-19.	Chorley and South Ribble Councils	People Place/Assets Processes Technology	March to July 2021
Redevelopment of the Town Hall offices	Chorley Council	Place/Assets	2023
Redevelopment of other local environs	Chorley Council	Place/Assets	2023
Consolidation of Union Street and transformation into commercial asset	Chorley Council	Place/Assets	2022
Consolidation of Bengal Street offices for use for regeneration projects.	Chorley Council	Place/Assets	2023
Relocation of customer services front facing location and transformation of the customer services delivery model	Chorley Council	Place/Assets Technology People Processes	2022
Development of policies to support the Workplace Strategy	Chorley and South Ribble Councils	Processes People	2022
Identify and implement technological requirements and further ICT advances as part of the Workplace strategy	Chorley and South Ribble Councils	Technology Processes	2022-2024
Organisational Development, culture, and behavioural change to support with the change in the way we work	Chorley and South Ribble Councils	People	2022
Implementation of new ways of working	Chorley and South Ribble Councils	People Processes	2022
Manager development	Chorley and South Ribble Councils	People	2022
Transformation of the office space at the Civic Centre, creating attractive, modern working spaces fit for the future	South Ribble Council	Place/Assets	2023

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