Orbis Joint Committee Business Plan Update

16 October 2017

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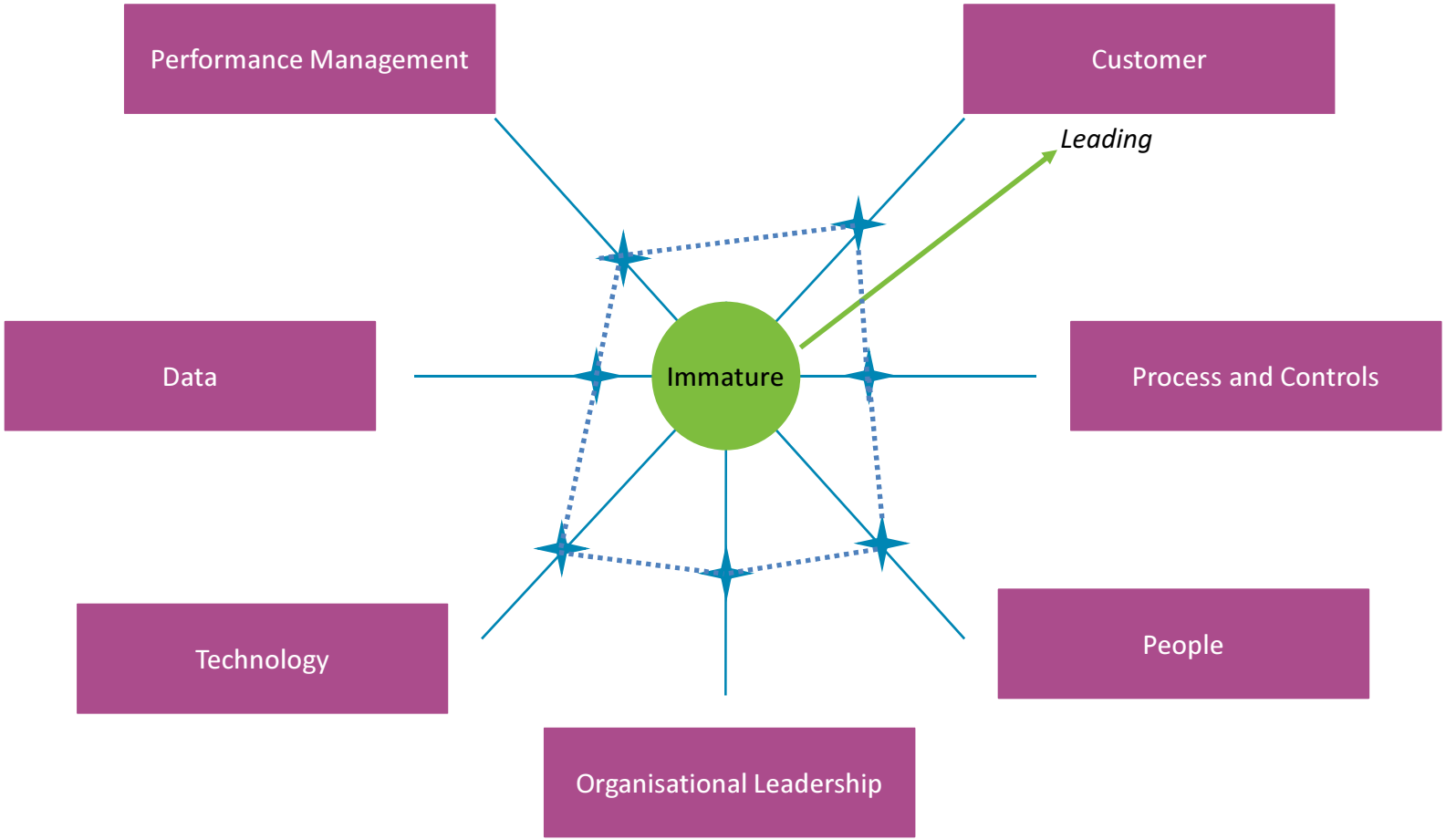
Current & Future Maturity Assessment

- Subjective, but honest assessment in Year 2 of the Partnership's operation and what has been achieved against 7 key criteria:
  - Performance Management
  - Customer
  - Data
  - Process & Controls
  - People
  - Organisational Leadership
  - Technology

- The assessment is intended to be used as a high level guide to inform future priorities

- Future aspirations also determined against the criteria to be achieved by 2021

Summary of the initial assessment of shared service maturity



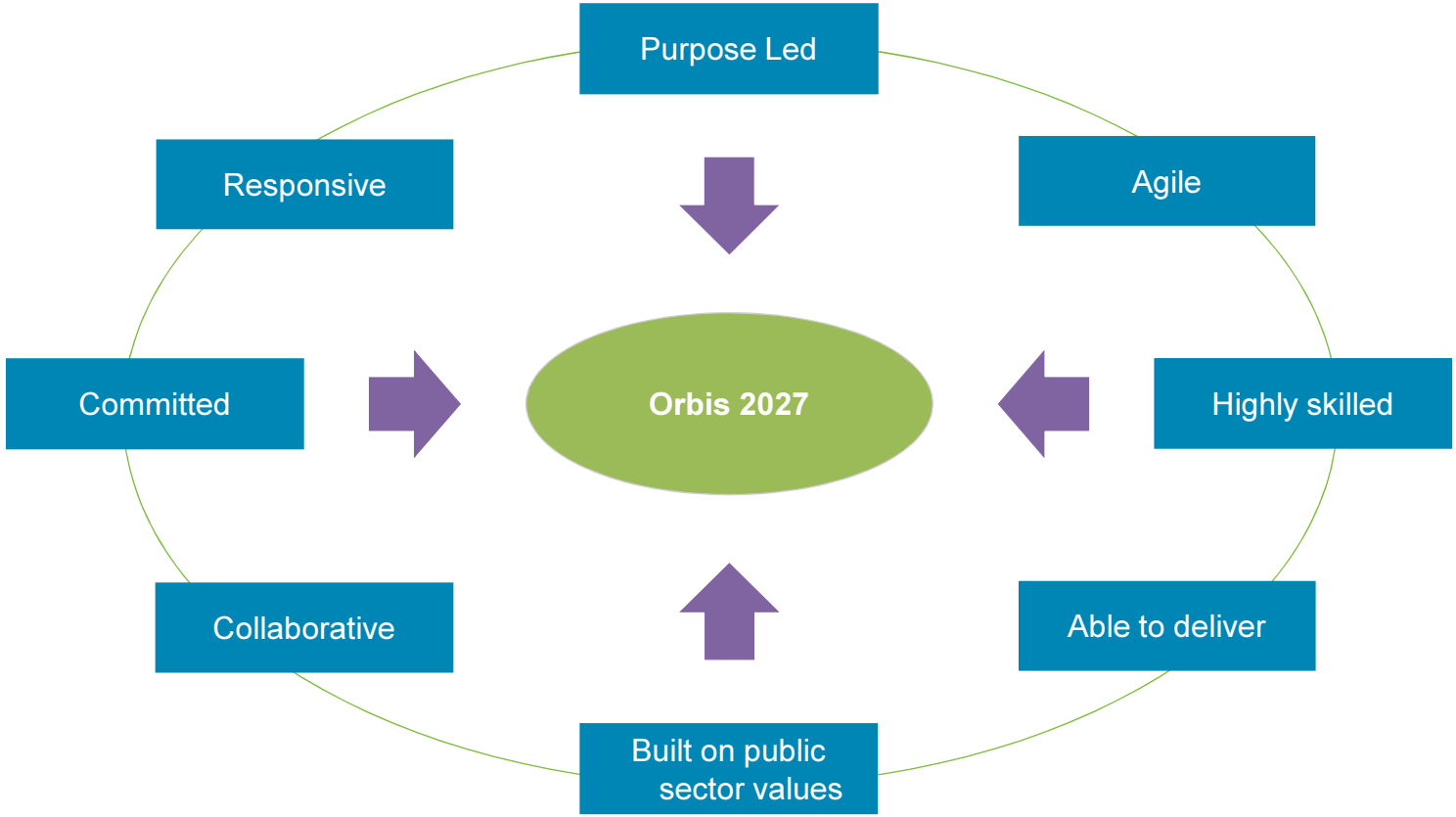
Vision

- Description of the Orbis vision up to 2027
- Outline of how the Partnership will respond and adapt to the challenges that it faces
- Vision determines the characteristics and areas to focus on that underpin how the Partnership will operate

What are our key strengths?

At the OLT Away Day on 29th June we started to consider our key strengths as a partnership and what we want to achieve together by 2027.

We think Orbis is…..



How might our strengths need to evolve?

To ensure we are sustainable in the future we need to consider:

Our risk appetite

Flexibility and agility

Orbis 2027

Recognising our success

Focusing on what are good at and being true to our service offer

What do we want to achieve by 2027?

- By 2027 the external environment may look very different
- Orbis will need to be responsive and able to adapt to the challenges ahead to remain sustainable
- We therefore want to build a vision on a set of characteristics that will underpin how our partnership will operate
- Our emerging thoughts for Orbis 2027 are…..

Customer focused, flexible and responsive

Remain a **purpose led** organisation; we are proud of our public sector values	Continue to strive to deliver **best value**; build on what we are good at and work as efficiently as we can	Take a **place based approach** to add value to our sovereign areas broader than local authority services	Focus on **outcomes for our customers**, not inputs and functions	Explore and actively encourage **digital innovations** in ways of working to deliver our aspirations and add value

Invest in our people to build a workforce equipped with the skills and capabilities required to deliver our aspirations

Adding value and enabling successful service delivery in 3 sovereign authorities

Current & Future Maturity Assessment

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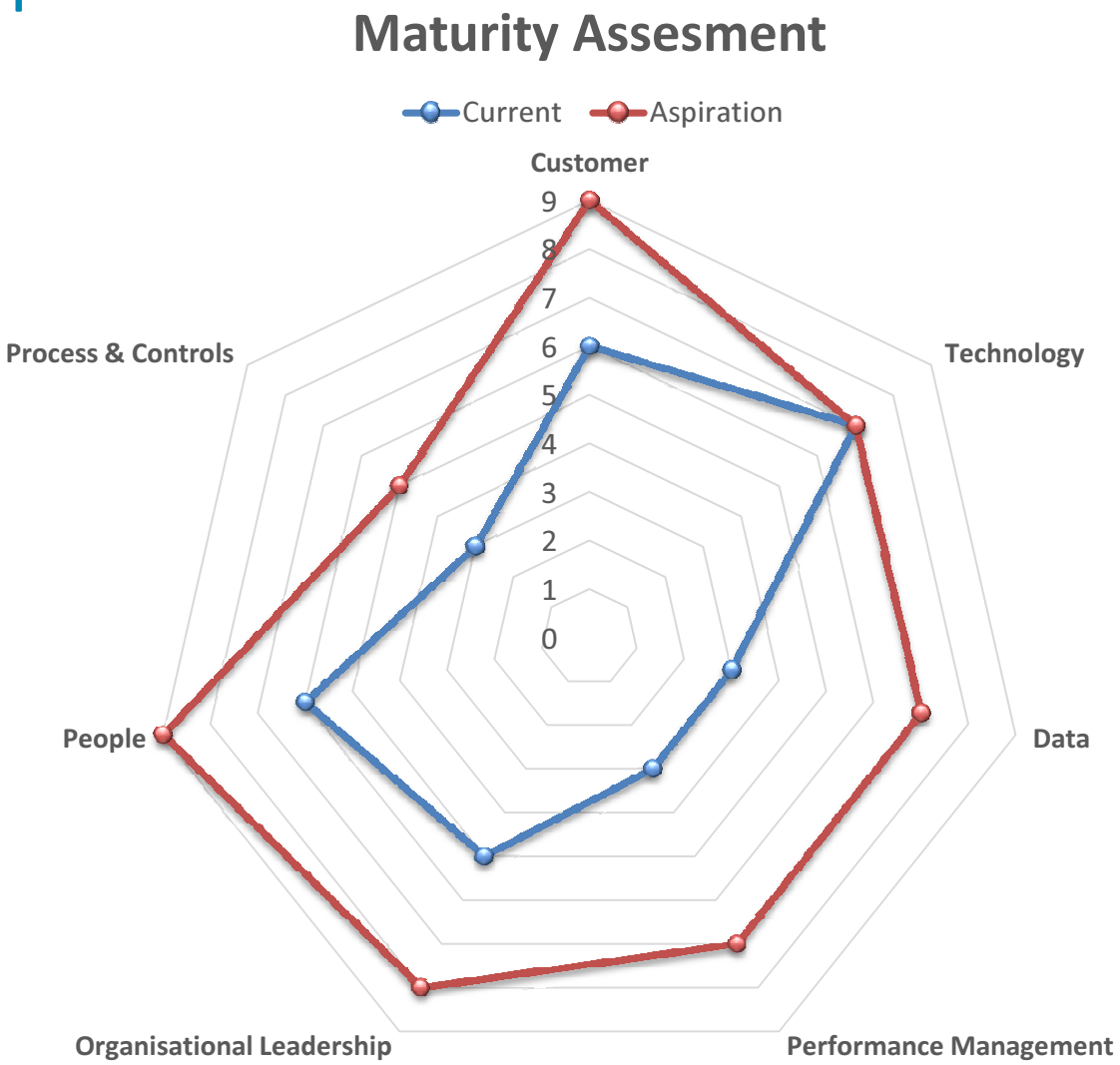
Our assessment to date and 2021 aspiration

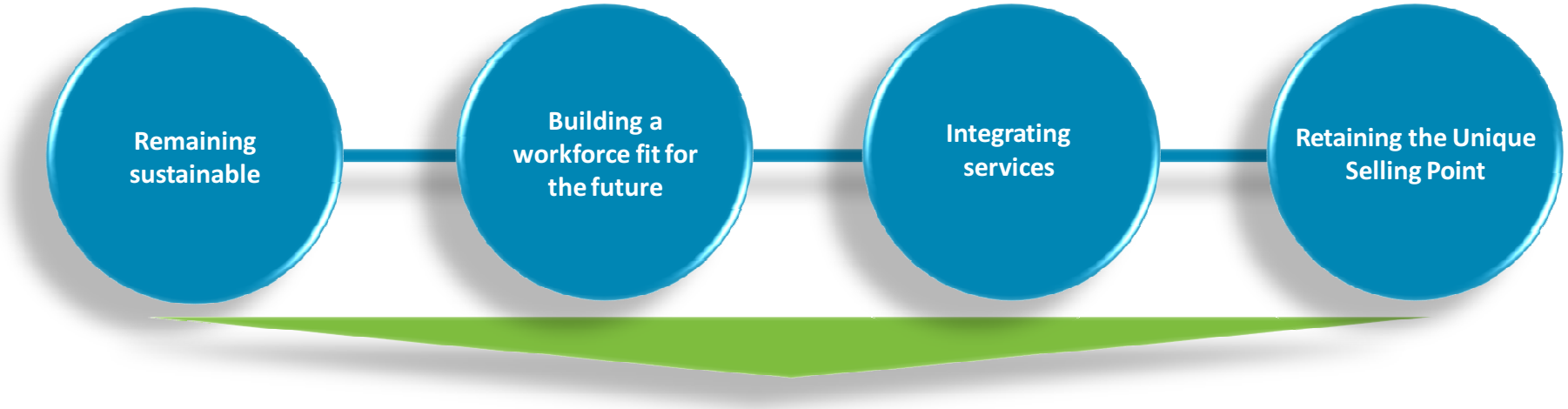


Challenges & Opportunities

- Identification of the key strategic challenges and opportunities facing Orbis up to 2021 to inform the revised business plan prioritisation

Challenges	Opportunities
Remaining sustainable	Strengthen place based approach
Building a workforce fit for the future	Remain an intelligent partner
Integrating services	Trail blaze new technologies and approaches
Retaining the Unique Selling Point	Build a high performing workforce

What are the key challenges facing Orbis up to 2021?



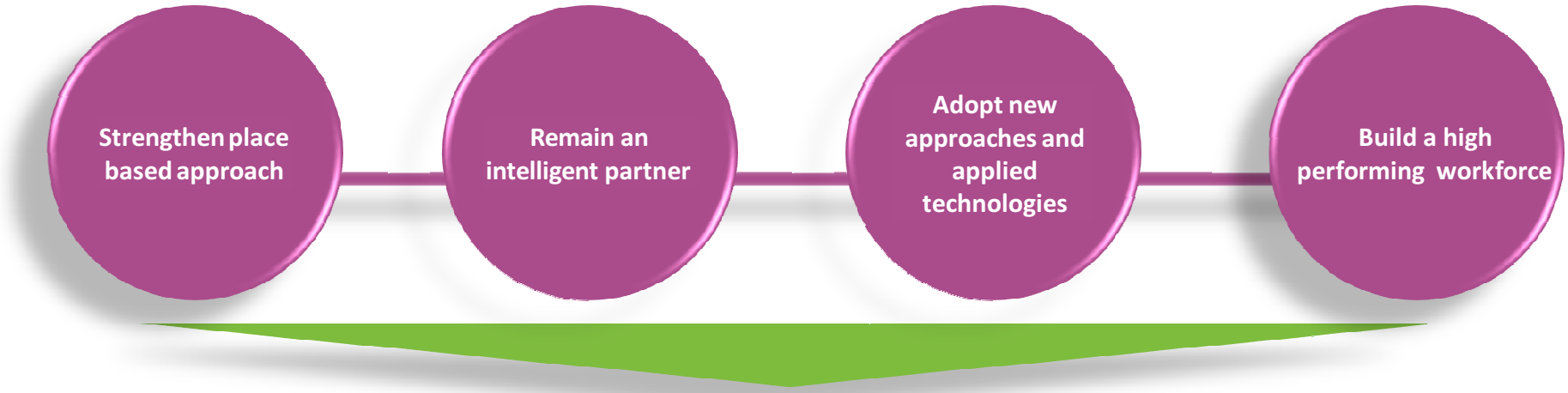
- Managing increasing **demand** and customer expectations
- Delivering additional **budget reductions** whilst continuing to deliver good quality services
- **Retaining the customer base** in a rapidly changing external context (schools and social care in particular)
- Responding to the unique **political direction** of the three sovereign authorities
- Understand cost and value

- Embedding the **Orbis culture** and way of working at all levels of the organisation
- Building an **agile workforce** that can respond to change (technological, service, organisational)
- Equipping the workforce with the **skills they need** for the future when these are not yet known
- Attract and retain staff with the skills required for future roles (i.e. Gen Z)

- Maintaining a focus on the **integration of services** across three authorities whilst sustaining business as usual
- Balancing a requirement for **simplification** and **standardisation** to drive efficiencies whilst retaining scope to **tailor services** to sovereign priorities
- Common processes and practices across the partnership to help rationalise and consolidate systems

- **Strengthening sovereign relationships** and maintaining a strong understanding of customers in a context of reduced visibility and time pressures
- Navigating a complex array of metrics to **demonstrate a clear value proposition** for Orbis services
- Delivering **customer focused services** at a partnership level, not in individuals silos
- Relevant & sustainable

What are the key opportunities for Orbis up to 2021?



- Drive presence and value in the sovereign localities by **expanding the customer base** to include Health, Police, Education and Third Sector
- Deliver added value to sovereign authorities by utilising public sector relationships as a catalyst for **further joint working**

- Retain strong working relationships with the sovereign authorities to **maintain customer insight** and support future sustainability
- **Proactively offer solutions** to sovereign services to support future sustainability
- Continue to be **seen part of the sovereign business** not a provider to it

- Experiment with **new ways of working and technologies**, adopting or rejecting quickly to **improve efficiency** and offer solutions to sovereign services as appropriate
- Develop **insight** through effective use of data to deliver a **range of capabilities (i.e. analytics)** to drive value in the business and to the sovereign services

- **Recruit talent** through the diverse Orbis offer and strong public sector values
- **Retain talent** and develop **existing workforce** by offering flexible career paths across a diverse range of services
- Utilise **broad labour market** across the Orbis geography to attract and retail talent
- Maintain **organisational youth** and energy to build a **confident workforce**

Orbis Principles

- The guiding principles that have been defined to help inform and shape the future delivery of Orbis services

Orbis aims to:

1. Place the customer at the heart of everything we do.
2. Have a workforce who are proud and passionate and are given the opportunity to succeed and flourish.
3. Embed a partnership culture, empowering our people to make decisions based on the right thing for our business and our customers.
4. Be the public services supplier of choice, allowing our existing and future Partners to benefit from our increased standardisation, insight and reduced duplication.
5. Have a thriving business which is sustainable now and in the future.

Priorities

- Key priorities identified to enable the delivery of the 2021 Business Plan

1. Serve our Customers
2. Develop our People
3. Lead to Create Conditions for Success
4. Know our Business
5. Utilise Digital Solutions
6. Perform to our Highest
7. Standardise

Primary Priorities

Orbis

	1 Serve our Customers	2 Develop our People	3 Lead to Create Conditions for Success
Relevant Orbis Principle	*Place the customer at the heart of everything we do*	*Have a workforce who are proud and passionate and given the opportunity to succeed and flourish*	*Embed a partnership culture, empowering our people to make decisions based on the right thing for our business and our customers*
	• Develop Orbis wide customer metrics and a performance dashboard for senior customers • Establish mechanisms to seek regular customer feedback • Develop a customer access strategy to ensure service delivery is focused on the end user and not determined by function and structure • Strengthen relationships with sovereign bodies to remain an intelligent partner • Develop greater customer insight to enable proactive responses to customer needs	• Continue to embed the EPIC culture and behaviours to all levels of the organisation to build loyalty to Orbis • Embed the Orbis performance framework • Enable more staff to access opportunities across the partnership via secondments and training • Remain aware of the organisational mood and tailor communication and marketing of development programmes accordingly • Equip staff with skills and expertise to respond to changing environment and technology, building agility • Recruit and retain talent to help deliver our vision, including securing more flexible resources to meet fluctuating demand	• Embed the Orbis culture across all layers of the organisation and all partners • Empower staff to take more decisions and positively role model this • Continue to engage with staff regarding what it means to be part of Orbis • Communicate and engage with staff regularly and in an accessible form

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Secondary Priorities

orbis

Relevant Orbis Princple

- Be the public services supplier of choice, allowing our existing and future Partners to benefit from our increased standardisation, insight and reduced duplication.
- Have a thriving business which is sustainable now and in the future

4 Know our Business

- Develop our analytics offer to understand our customers
- Develop a data management strategy to improve data quality and reduce manual interventions

5 Utilise Digital Solutions

- Develop our technological capabilities to support the delivery of our services
- Develop an evaluation framework to assess the value added from technology and digital transformation
- Share and promote capabilities of existing systems to avoid reinventing the wheel
- Explore the use of robotic process automation to enhance our business offer and realise capacity

6 Perform to our Highest

- Undertake scenario planning regarding existing and emerging risks to sustainability
- Develop an action plan for high risk areas e.g. potential loss of customer base from schools and social care
- Explore opportunities to reduce delivery costs further e.g. use of robotics to automate processes
- Remain receptive to the impact budget reductions and further pressures will have on the organisational mood and culture

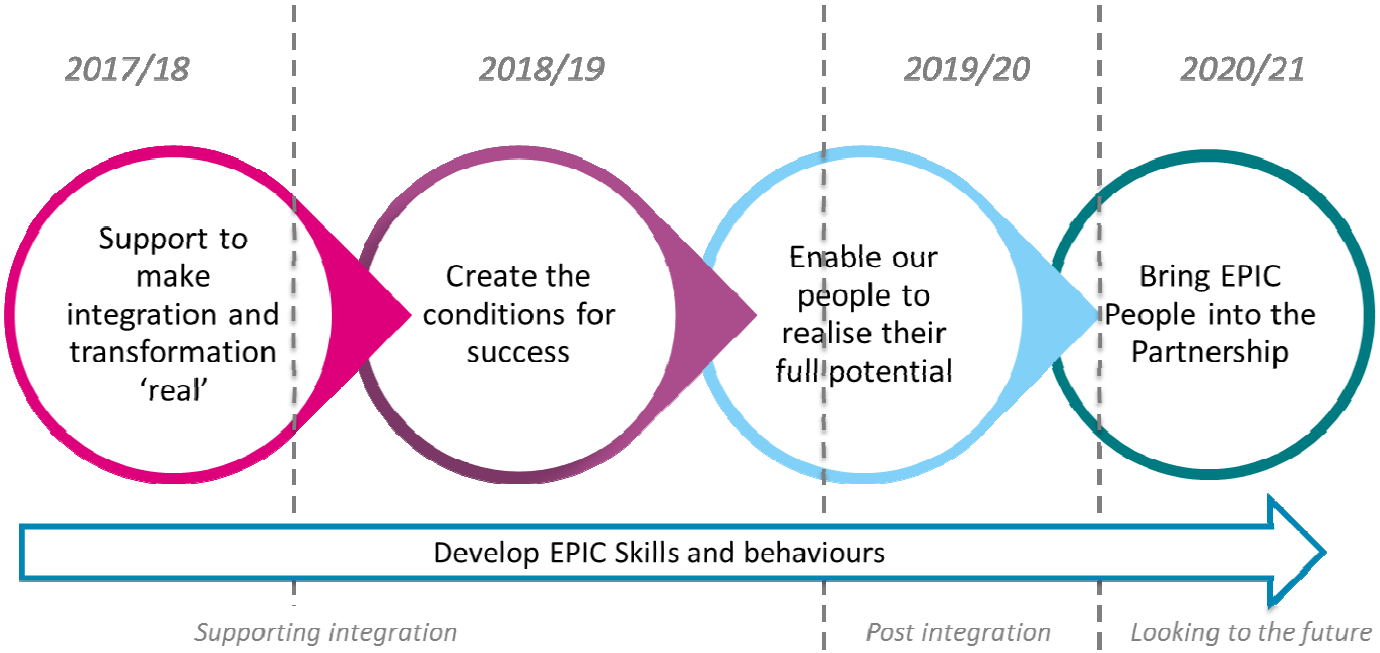
7 Standardise

- Continue to explore ways to improve standardisation and duplication within services
- Identify and exploit existing and emerging opportunities with other partners in the local area e.g. health and social care, to drive further service improvements
- Map existing processes and regularly review and challenge to improve and standardise

People Development Plan

- Overview of key interventions identified to develop the required skills and capabilities to deliver the Business Plan

Proposed areas of focus and prioritisation to support 2021 Business Plan



- Continue to embed the Orbis performance & development approach
- Populate the Orbis LMS to support the development of the epic behaviours
- Develop activity with the EPIC Champion group and wider population to encourage innovation, collaboration and development of the epic behaviours

- Develop collaboration behaviours at OLT
- Work OLC to create conditions for success
- Define the role of an Orbis leader and implement leadership development and support
- Create an Orbis management community (OMC) network to enable feedback; peer support and knowledge sharing

- Develop and implement a Talent and development strategy
- Launch revised talent development offer

- Orbis recruitment process
- Identify opportunities to engage 'Gen Z'
- Develop and implement an Orbis Intern or Graduate programme
- Further develop and embed the Orbis' induction programme

Governance structure

- Detail of the governance structure and processes required to deliver the Orbis 2021 Business Plan, both within Orbis and the relationship with sovereign authorities

Drivers for review

The future governance and organisational structure of Orbis is being reviewed, in part to ensure this is fit for purpose to deliver against the emerging 2021 Business Plan, and also in response to a request from OLT.

The key areas for review raised by OLT are:

Clarity	Provide clarify of roles and responsibilities, so there is a consistent understanding of where decisions can be made and by whom
Role modelling	Some concerns have been raised by staff regarding mixed messages relating to the importance of single leadership. Each service is working towards a structure of single leadership, yet this is not reflected at the top of the organisation
Value add	Service delivery across three sovereign partners and locations requires a significant time investment from the leadership teams. Governance forums, the scope, attendance and frequency of meetings therefore needs to be reviewed to ensure this is at the optimum level and is adding value
Visibility	Decisions are currently taken in a number of forums; greater visibility of the decisions made and the rationale behind these is required

The proposed areas for review

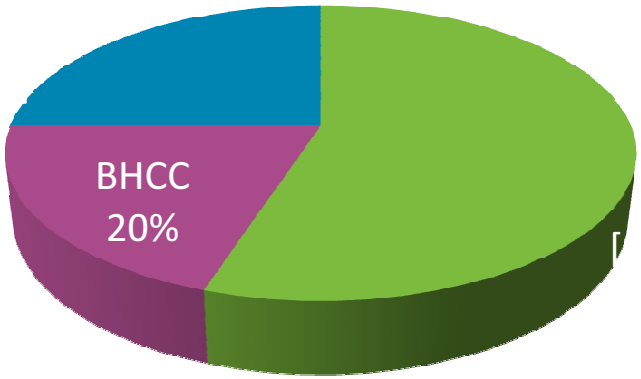
Theme	*Existing Arrangements*	*Proposed Review for Discussion*
Partnership Structure	Orbis currently operates under a Joint Committee structure	**No change** Sovereign direction to retain a Joint Committee structure re-affirmed formally in May 2017
Partnership Leadership	Orbis currently operates under the strategic direction of a lead from each sovereign authority (deputy arrangements in place for SCC). Operational lead responsibilities are not formalised	Potential options to be identified for discussion regarding roles and responsibilities to 2021
Partnership Direction	A weekly Joint Management Board and Orbis Programme Meeting take place with a Finance Board every three weeks	Governance required to provide partnership direction to be considered
Orbis Leadership Team	The Orbis Leadership Team meet on a weekly basis to discuss both strategic and operational matters	Frequency and scope of meetings to be reviewed to maximise value
Supporting Governance	There are five established sub groups plus service specific management meetings	Sub groups and supporting governance forums, their scope and frequency to be reviewed, alongside the inter-relationships between forums

Financial baseline & benefits

- Outline of the contribution ratios for each of the three Partners
- Definition of the financial and non-financial benefits delivered through the delivery of the 2021 Business Plan
- Exploration of 'Areas of Search' to identify potential additional benefits

Financial baseline & benefits

Work on the financial baseline is nearing completion, the revised contribution ratios are likely to be in the region of:



- Initial sessions held with each service to start discussions around “areas of search”.
- Areas of search (focused on a number of themes) are seeking to understand the viability and impact of delivering an additional 2-8% savings
- Follow up sessions are being arranged for early October with each service as this is seen as an iterative process.

Areas of Search Categories

Continuous Improvement	Benefits that can be realised through continuous improvement and the integration of services across three sovereign authorities (e.g. streamlining processes, removal of duplication, reduction)
Demand Management	Adjusting service level and provision to meet demand. For example if the service currently supports 100 staff and this reduces to 50, the level of service provision can be reduced accordingly
Reduce Capacity/ Service Level	The scope of service remains unchanged but the level of capacity to deliver this reduces e.g. the service will be reduced by 10%
Cease Delivery	Some aspects of service delivery cease
End to End Process Review	Potential efficiencies that could be realised from an end to end process review, which may involve moving functions or duties to other parts of Orbis to maximise the opportunity for standardisation
Transformation	The way in which the service is delivered is transformed
Growth	Potential for income generation

- ✓ **Service Catalogue & Benchmarking**
- ✓ **Cross functional opportunities**
- ✓ **Resource Plan**
- ✓ **Risks**