

Classification	Item No.
Open	

Meeting:	Cabinet
Meeting date:	1 September 2021
Title of report:	Establishing the Business and Executive Support Service
Report by:	Councillor Tahir Rafiq, Cabinet Member for Corporate Affairs & HR
Decision Type:	Key Decision
Ward(s) to which report relates	None

Executive Summary:

This report details proposals to establish a single Business and Executive Support Service as part of the Corporate Core Department. This will be a fundamental change to how administrative services are provided in Bury, seeking to achieve consistency and improved performance, through a review of resources across the Council and a modernisation of processes and ways of working. This change has been informed by external advice and enabled through a reduction in demand due to agile working and the introduction of improved technology. These changes and the creation of a clear service offer will also be supported by the cession of some areas of current activity. The detailed proposals have been informed by engagement with both Business Support staff and Council managers.

As well as delivering savings and improved performance these proposals seek to support staff through the creation of clear career pathways, increased resilience, reduced siloed working and a new service with a positive culture which aligns with the Let's Do It principles. This work forms part of the overarching Council Transformation Strategy agreed by Cabinet in July and the 'Let's Do It Well' Programme within it. A savings target of 20% was recommended by Amey to be achievable, equating to c£900K and will ultimately be delivered through these changes. Savings will, on the whole, be delivered through the deletion of funded vacancies, cessation of fixed term contracts and a substantial reduction in the reliance on Casual and Agency workers. The impact on substantively employed staff will be minimised. Whilst there will be changes in grades, job descriptions and ways of working the proposal as drafted are not envisaged to result in any redundancies for permanent employees. – Inclusive of Casuals, Agency and Fixed Term, a total of 140FTE posts are currently in place undertaking Business Support activities. The proposals set out will see the establishment of a function including 106FTE roles.

Recommendations

The Cabinet is asked to :

1. Note the advice from external strategic partners, Ameo .
2. Agree the establishment of a central Business and Executive Support function within the Corporate Core Department and under the leadership of the Director of People and Inclusion.
3. Agree the overall proposed structure set out in Appendix A as a basis for consultation with staff.

1 Introduction

- 1.1 As part of the *Let's do it!* Strategy, launched in 2020, there was a commitment to improving public services within reducing resources and to become more efficient and effective in connecting residents to the right services and support. Business and executive support is at the heart of providing support to frontline and back-office services in order to enable them in delivering on this commitment.
- 1.2 The Council's transformation strategy, agreed by Cabinet on 21 July 2021, approved a range of activities over the next two years with the dual aims of achieving savings and driving improvements. This paper brings forward a proposal relating to business and executive support, as part of the Let's Do It Well Programme, to support the Council in achieving its vision to be a high performing organisation. The management of business and executive support as a single corporate service will be a significant change and opportunity for fundamental improvements in ways of working.

2 Outline Business Case

- 2.1 The existing administration, business and executive support model is based on each department, service area and / or team having its own establishment of administration and support staff providing services to the specific unit. This results in duplicated effort, inconsistent processes and creates single points of failure leading to a lack of resilience. It also results in a lack of clear career pathways for staff and the potential for a lack of focus on the development of administrative processes and individual engagement in the context of operationally focused services. The current model is also heavily reliant on ad hoc agency, casual and fixed term workers which impedes the ability to plan and deliver a sustainable quality service.
- 2.2 Initial analysis and planning commenced at the start of the calendar year to understand in detail of current operations to inform the future model. This began as part of the externally commissioned work by Ameo who undertook a deep dive analysis of the current model including detailed analysis of current service activities, posts and ways of working.

- 2.3 Ameo identified a number of inefficiencies within the current arrangements including:
- High levels of agency staff – the current model is very much localised and during peak periods the Council needs to engage agency staff or increase capacity through the use of casual workers, which adds to the cost of service provision.
 - Localised service – under the current model, administrative staff work within specific teams which restricts their being viewed and utilised as a shared resource across all service areas and all departments.
 - Unable to meet peak load – the current model does not allow the re-assigning of resources across teams to cater for increases in demand.
 - Lack of standardisation – due to the localised nature of administrative service provision, there is no standard operating process across the Council resulting in duplication and inefficient utilisation of administrative staff.
 - A number of systems and processes require modernising, utilising technology to release efficiencies.
- 2.4 Ameo endorsed the Council's objective to achieve a focussed business and executive support service which achieves savings through adopting best practice models of reduced demand (digitally supported) whilst also offering an improved career structure and enriched role design for staff and increased resilience through management within a single service structure.
- 2.5 Ameo's proposed strategy to address the situation described above, consistent with an agile delivery model and greater digital-first ways of working, included the following recommendations which are built into the proposed approach set out below:
- Define a future service offer which is based on self-service, with appropriate technology and user training.
 - Establish a paperless/"working light" workstream.
 - Create a single "Hub and Spoke" structure (i.e. corporately managed; departmentally delivered through a business partner model) with a Head of Service and defined career pathways.
 - Implement on a phased basis: bring all teams together; restructure and evolve.
- 2.6 Ameo forecast a saving of 20% cost reduction (c£900k) to be achievable, which was endorsed by the Cabinet in July 2021. In addition, further potential savings were highlighted from reduced postage, printing, paper-based document storage and the greater resilience of a single corporate team.
- 2.7 It is proposed that administrative staff in NHS Bury Clinical Commissioning Group (CCG) are not in scope of the initial phase of the review, in light of the establishment of the Integrated Care System from April 2022.

3 Informal engagement

- 3.1 During July 2021, informal engagement with staff and managers has taken place to further understand the practicalities of working in and being supported by business support in Bury. This activity has fed into the proposed service design and will be used to inform the subsequent areas for

improvement in systems, processes and ways of working within the new service.

3.2 Three interactive sessions were held with staff, at which over 60 staff attended. Staff were asked what they could stop, start and continue to inform the design of the new service. The main themes from this were:

- Staff welcomed the proposal to provide clear career pathways in the service.
- There was concern about staff losing their identity within the existing teams they supported.
- The idea of buddies was supported, so that there is cover during periods of absence.
- It is important to ensure we equip staff with the appropriate training and skills to deliver the right services.
- There should be consideration of the knowledge staff have gained working in specific teams, with concern that the new service would dilute this.
- Provision of up to date IT kit would contribute to efficient ways of working.
- Overwhelming support to simplify and streamline processes, to allow better ways of working. A number of ideas were proposed by staff including financial management processes, mail handling and printing.
- There should be opportunities for greater involvement in project based work.
- The new service should provide greater consistency with job descriptions and grades for similar administrative roles.
- There should be a review of the approach to meetings management as there is an over-reliance on administrative support, with too many meetings.
- There should be increased ownership from managers to undertake managerial tasks and not push down to administrative staff.
- Champions should be created to support others on particular subjects/specialisms and shadowing opportunities should be offered in different departments.

3.3 Alongside the staff sessions a survey was issued to over 300 managers, with 73 responses received. A summary of the key themes is detailed below.

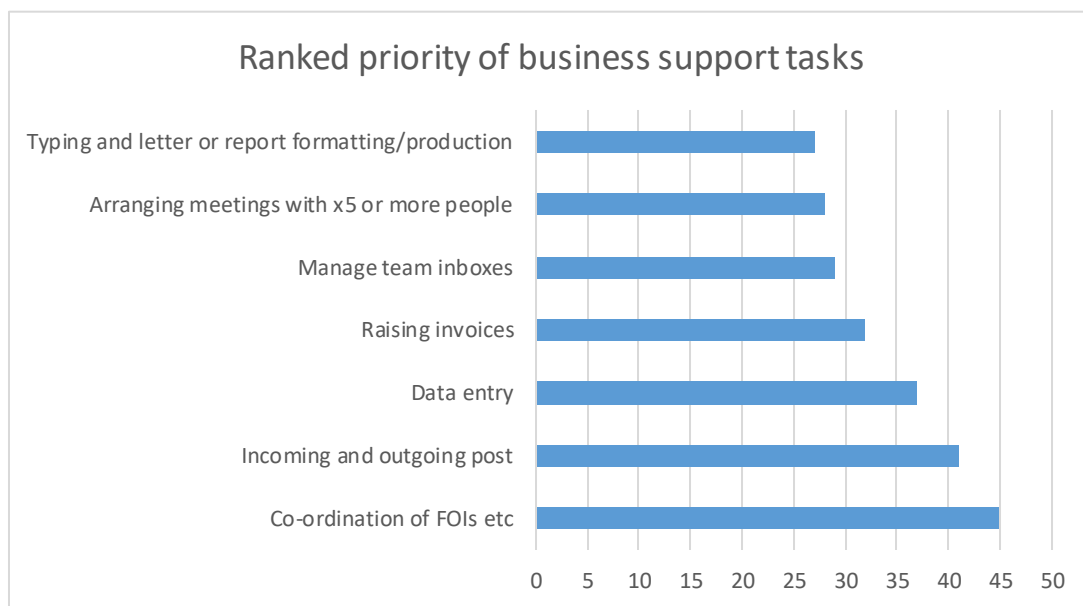
- Access to egress email account would reduce reliance on business support.
- Ability for business support staff to be able to use bespoke systems within a service to create capacity and avoid single points of failure.
- Knowledge of relevant service is important to enable administration staff to carry out the work.
- There should be a named contact who understands service/customers.
- There was overwhelming support for central co-ordination of member casework, complaints, enquiries, MP enquiries, Freedom of Information and Subject Access requests.

3.4 Managers also put forward a range of tasks/functions that they considered should be the role of business support, including:

- Co-ordination of team mailboxes.
- Support for scanning, particularly in children's services.
- Administrative staff alleviate pressures on caseloads.
- Collation of information relating to national returns.

- Raising invoices.
- Incoming and outgoing post.
- Mail merges.
- Printing.
- Transcribing of meetings.
- Organising events.
- Progress chasing.
- Data inputting and running of reports.
- Freedom of Information/Subject Access Requests co-ordination
- Ensuring leave/absences recorded. Several managers also ask their administrative support to monitor leave/absences.
- Recruitment including new staff set-up and getting IT equipment/induction in place.
- Minuting meetings.
- Taking phone calls.
- Co-ordinating and logging timesheets on behalf of manager – in some instances monitoring and checking on behalf of manager.
- Making bookings/appointments.
- Formatting of documents.

3.5 To test the potential scope of the new service, managers were asked to prioritise the importance of a range of administration tasks and the chart below shows the highest priorities that were identified:



4 Proposal

4.1 Following on from the work of Ameo and the informal engagement with staff and managers as well as a detailed analysis of current structures, roles and ways of working, the intention is to create a new service in the Corporate Core reporting to the Director of People and Inclusion. Locating the service within the Corporate Core reflects the intention to position the service as a key professional function at the heart of driving the delivery of the Corporate Plan and leadership by the Director of People and Inclusion will support a focus on culture, ways of working and strong and inclusive customer service as central to the ethos of the new function. The new service will be implemented in early 2022, subject to a period of formal consultation with staff and implementation.

4.2 The service will comprise three core elements which are:

1. Executive Support (PA support to Cabinet Members, Executive Team and Senior Leadership Group).
2. Children's and One Commissioning Organisation Business Support.
3. Core, Operations and Business Growth and Infrastructure Business Support.

4.3 The business and executive support service has been designed with a set of principles at the core which ensure that it remains, irrespective of service or recipient, as follows:

- Customer-centric through the creation of teams performing similar tasks as a whole rather than in 'silo' business areas.
- Accountable and transparent, with measures of service delivery and service performance indicators to be implemented.
- Adaptive and agile allowing resources to be reallocated to respond to changes in business and service requirements.
- Informed through best practice and local feedback to support continuous improvement with processes and service delivery reviewed and agreed through collaboration on a regular basis.

4.4 The new structure set out in Appendix A proposes the establishment of a total of 106 posts, at various grades across the service to provide flexibility of response and career paths, with clear job descriptions and potential for progression, which staff have indicated is important to them. Where Grade 3 roles are available, both initially and going forward, appointments will be looked to be made alongside an apprenticeship qualification with recruitment ringfenced to Bury residents. Apprenticeships will be used elsewhere in the structure where possible to support development. The proposed structure below provides consistency of roles and structures:

- x1 Head of Business and Executive Support – Grade SM2
- x2 Business Support Partners – Grade 13
- x1 Executive Officer – Grade 13
- x1 Executive Support Manager – Grade 13
- x1 Executive Policy and Research Advisor (existing role, no change) – Grade 12
- x3 Executive PAs – Grade 10
- x4 PAs – Grade 8
- x12 Business Support Team Leaders – Grade 8
- x26 Business Support Officers – Grade 7
- x46 Business Support Administrators – Grade 5
- x9 Business Support Assistants – Grade 3

The above grades have been evaluated and moderated in-line with Council process.

4.5 As noted above, this represents a circa. 20% reduction in current resourcing levels, in line with the Ameo recommendation and supported by the Council's own internal analysis and engagement. It should be noted though that it will take time to realise the full potential benefits through improved processes and ways of working. There are specific, short term, requirements within the Children and Young People Department to support delivery of the Children's improvement programme and provide business support capacity to support

statutory activities in line with the recommendations of the recent LGA Peer Review. Recommendations in relation to this will be brought forward separately and progressed in line with the new service operating model.

- 4.6 In implementing the detailed operating model for the new service the proposal is to engage departmental management teams in the allocation of resource to ensure that the available resources align to corporate priorities; however, it is expected that staff will support current teams wherever possible in the first instance so that knowledge and skills are retained. However, there will be changes for all staff including those assimilated in the new structure and this is reflected within the revised job descriptions which have been developed. There will be a clear expectation of multi-skilled working, as staff will be expected to provide cover in different departments depending on priorities and to learn about other services and teams so that capacity is increased and opportunities are afforded to staff to develop new skills. There will also be a strong focus on culture and behaviours within the new service reflective of the principles within the Let's Do It Strategy.
- 4.7 The core offer of the service has been informed by the advice from Ameo and listening to staff and managers during the informal engagement in July and will be further revised alongside the formal consultation process with staff. The core offer provides an opportunity to reset responsibilities of managers, ensuring they are held accountable for undertaking specific management tasks such as monitoring sickness absence, and creating the right culture for positive behaviours and ways of working, for example open calendars.
- 4.8 The proposal is predicated on key tasks and functions that will cease or diminish including:
- Onboarding and recruitment support for new Senior Leadership Group members only.
 - Inputting sickness absence onto i-Trent.
 - Arranging ad-hoc meetings with one other person.
 - Screening internal phone calls.
 - Filing (paper based).
 - Small-scale printing (expectation will be to work paperless).
 - Minute taking (move to action logs, greater use of recording equipment, use of Microsoft Teams actions).
 - Provision of refreshments.
 - Meeting own visitors.
 - Provision of templates for greater self-serve e.g. agendas, notes.
 - PA support to be available for Band C Chief Officers and above.
- 4.9 The above changes will be supported by improved systems and processes, changing expectations in relation to managers and all staff (e.g. open calendars), investment in digital skills within the new function, planned improvements to the Council's core HR system iTrent and a programme of Organisational Development support to embed the new service structure.
- 4.10 Specifically in relation to executive PA support, the key elements of the new model include:
- Consistent level and volume of support at different levels

- 1:1 support for the Chief Executive
- 1:2 support for Executive Directors
- 1:4/5 support for Directors / ADs Band C and above
- Resilience and ability to provide cover through integration into a single team structure, supported by clear processes and ways of working.

Support to Cabinet will be included in the new service offer.

- 4.11 The new service will assume responsibility for the co-ordination of information governance requests and will act as a single point of contact, working with departments to collate responses to freedom of information requests, subject access requests and environmental information regulations requests supporting the Council's Data Protection Officer. The coordination of activity in relation to complaints and Member casework is being reviewed separately as part of the Let's Do It Once Transformation programme.
- 4.12 There are 4 key processes which will ensure these ways of working are understood and firmly embedded day to day, as outlined below:
- **Commissioning process:** The level and standard of support will be agreed between the new service and the departments through the service offer and ongoing customer engagement and agreement. There needs to be a clear process by which services can request work on a day to day basis. Work will be prioritised according to corporate priorities.
 - **Resource management process:** will be undertaken by the Team Leaders and where appropriate the Business Support Partners, with the Head of Business and Executive Support having overall responsibility for the new service.
 - **Performance management process:** individual performance management processes will be put in place alongside a clear career development route map.
 - **Performance measurement process:** will monitor customer management and satisfaction as well as volume and cost of outputs.

5 People impact

- 5.1 A total of 149 individuals are in scope for the new service together with a further 15 vacant positions. This comprises 93.84 FTE permanent staff, 10.2 FTE engaged on fixed term contracts, 15.91 FTE casual and 6 agency workers as well as 14 FTE funded vacancies. An overview of these roles is attached at Appendix B. The intention is to move to the new service model as far as is possible through the deletion of funded vacancies and cessation of fixed term, casual and agency engagements. Implementation will be approached on the basis of protecting contracts of employment for permanent staff as far as is possible, prioritising the alignment of substantively employed colleagues to roles within the new structure. Implementation will include a competitive assessment process where required in-line with Council policy. Whilst there will be changes in grades, job descriptions and ways of working the proposal as drafted are not envisaged to result in any redundancies for permanent employees. There will also potentially be opportunities for staff engaged on a casual or fixed term basis to apply for substantive vacancies within the service.

- 5.3 Through the initial engagement and analysis work 17 roles (net) have been removed from the scope of the review. These posts were identified as not substantively providing business support activities. However, in some cases there is a need to review job titles and descriptions to accurately reflect duties and this process will be undertaken by HR over the coming months.
- 5.4 Subject to agreement by Cabinet, Officers will work to commence consultation for a period of 90 days in-line with the employee and consultation toolkit and following a Section 188 meeting with Trade Union colleagues.
- 5.5 It will be important to engage staff throughout the consultation and to provide support during this time. There will be regular opportunities for engagement and personal support and individuals will also be reminded of the opportunity to access the Council's employee assistance programme.
- 5.6 It will also be key to work with managers throughout the consultation, as the service is predicated on new ways of working and reduced reliance on administrative support through the roll-out of Microsoft 365 and the continuation of agile working.

6 Financial Impact

- 6.1 The budgeted cost of the current arrangements outlined at 5.1 above are circa £3.958m.
- 6.2 The projected cost of the Business and Executive support proposal, when costed up on full-time-equivalent basis is circa £3.085m. A saving of £0.873m (full year) will therefore ultimately be delivered if the proposals set out above are implemented as described. There may, of course, be some variance as changes are made as a result of the consultation process and a small off-set in year one due to potential pay protection costs, estimated at £10-15k. This saving is slightly reduced from the original proposed estimate due to the number (and cost) of posts that have been identified to be 'out of scope' for this specific proposal. On the basis of the 20% projected savings target this led to an effective reduction of available savings by in the region of £60K. (In effect, therefore the £0.873M proposed savings are a slight (£33K) over achievement against the base proposal considering a 20% proportional reduction in capacity).
- 6.3 The savings will be delivered full-year in 2022/23. However, only a small element will be realised in this financial year. (circa. 2 months). Where possible this will be further supported by the early cessation of agency and fixed term engagements. However, there will be a need to build an element of one-off mitigation into the 2021/22 budget to cover the revised timeline and this will be considered within the revised Medium Term Financial Strategy.
- 6.4 During the consultation period, work will be undertaken to identify and bring together relevant non-workforce budgets and identify potential efficiencies from across these cost centres. The aim will be to identify the remaining £27k from this process to realise the full required £0.9M savings target.

- 6.5 The in-depth review of structures and budgets in respect to this proposal has also highlighted where further consideration to all staffing budgets may be undertaken for all staff by Occupation Type across the whole organisation. This review needs to be developed as a programme plan specifically to review how the budgets are determined for each staffing area, how they are financially coded (which may vary to codes held in i-Trent and require un-necessary recharges), where forecasts for monitoring purposes need to be more robust and accurate, to review how forecasts for externally employed staff need to be factored in, and ultimately to determine what savings may be identified in any areas that can contribute to 2021/22 and future savings targets. This work would form part of the Transformation Strategy's Finance Enabler programme.

7 Further opportunities

- 7.1 As described in section 2 of the report, it is proposed to implement the service on a phased basis bringing individuals and teams together and allocating resource to deliver corporate priorities. The advice from Ameo suggests that the service will evolve once it goes live, so that further improvements to processes can be achieved and additional efficiencies can be released. During the course of 2022/23 focused work will continue on processes and ways of working with a view to identifying further improvement and efficiency opportunities.

8 Conclusion

- 8.1 The proposals will be a fundamental change to how administrative services are provided in Bury, seeking to achieve consistency and improved performance, through a review of resources across the Council where demand has diminished due to agile working and introduction of technology, so that savings and efficiencies can be generated to contribute to the Council's budget savings.
- 8.2 Following the period of staff consultation a final report will be prepared setting out the response to comments and feedback received and a final (revised) proposal for implementation. Dependant on the extent of change this report will either be agreed by the Cabinet member under delegated authority or re-submitted to Cabinet for their approval.

9 Recommendations

The Cabinet is asked to:

1. Note the advice from external strategic partners, Ameo.
2. Agree the establishment of a central Business and Executive Support Function within the Corporate Core Department and under the leadership of the Director of People and Inclusion
3. Agree the overall proposed structure set out in Appendix A as a basis for consultation with staff.

Community impact / Contribution to the Bury 2030 Strategy

The business support service will develop the internal behaviours and service capabilities to support services to deliver the Let's do it! Strategy and plan.

Equality Impact and considerations:

Under section 149 of the Equality Act 2010, the 'general duty' on public authorities is set out as follows:

A public authority must, in the exercise of its functions, have due regard to the need to.

- (a) eliminate discrimination, harassment, victimisation and any other conduct that is prohibited by or under this Act.*
- (b) advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it;*
- (c) foster good relations between persons who share a relevant protected characteristic and persons who do not share it.*

The public sector equality duty (specific duty) requires us to consider how we can positively contribute to the advancement of equality and good relations and demonstrate that we are paying 'due regard' in our decision making in the design of policies and in the delivery of services.

An equality impact assessment has been undertaken and identified no areas of negative impact in relation to protected characteristics.

Assessment of Risk:

The following risks apply to the decision:

Risk / opportunity	Mitigation
<ul style="list-style-type: none">• The review needs to consider other restructures happening at the same time, to ensure clarity for staff and not double count savings.• The review is significant in scale and scope and will impact every area of the Council. It will be important that individual staff are supported when going through these changes and that managers work with the project team to ensure behaviours are supportive of proposals.	<ul style="list-style-type: none">• The programme is ambitious and will require certain mitigations at each stage, which will be managed through the internal project team overseeing consultation and implementation.• Any redesigns in services will not include administrative roles, or the creation of similar roles, which will require tight establishment controls.• Organisational development support will be provided to support embedding of the new service.• Staff will be encouraged to access the Council's employee assistance programme for confidential support.

Consultation:

Early informal engagement with staff in scope, managers and the Trade Union has been carried out to inform the work to date. Subject to Cabinet agreeing the

proposals, we will progress to formal consultation for a period of 90 days with staff and the Trade Union in line with Council policy.

Legal Implications:

The Council will ensure compliance with all legislative requirements in relation to this proposal. The review will ensure that all Council HR policies and procedures are complied with. As highlighted in the report a 90 day consultation will take place with affected staff. Legal advice and support will be provided throughout the process.

Financial Implications:

This programme of work is the major pillar of the year 1 savings within the Councils Transformation Strategy. The existing mode makes cost control very difficult due to its reliance on agency staff which are often at premium rates.

Projected savings are broadly in line with the target of £900k with any shortfall post consultation expected to be met from further no pay savings such as printing, stationery and postage which are also due in part to agile working.

There may also be a small element of protected pay in year one but this cannot be quantified until post consultation and until all staff have been assimilated into posts.

Whilst these proposals if unchanged post consultation will deliver the full year effect savings for 2022/23 there will only be a small part year effect saving in 2021/22

The original MTFS presented to Council anticipated full year transformation savings in 2021/22 of £1.5m. However, schemes are only being developed and implemented this financial year so will only have part year effects. A revised impact for this financial year in view of year one scheme implementation dates will be built into the MTFS refresh which will be brought to Cabinet in October and included in 2021/22 monitoring reports from quarter 2 onwards.

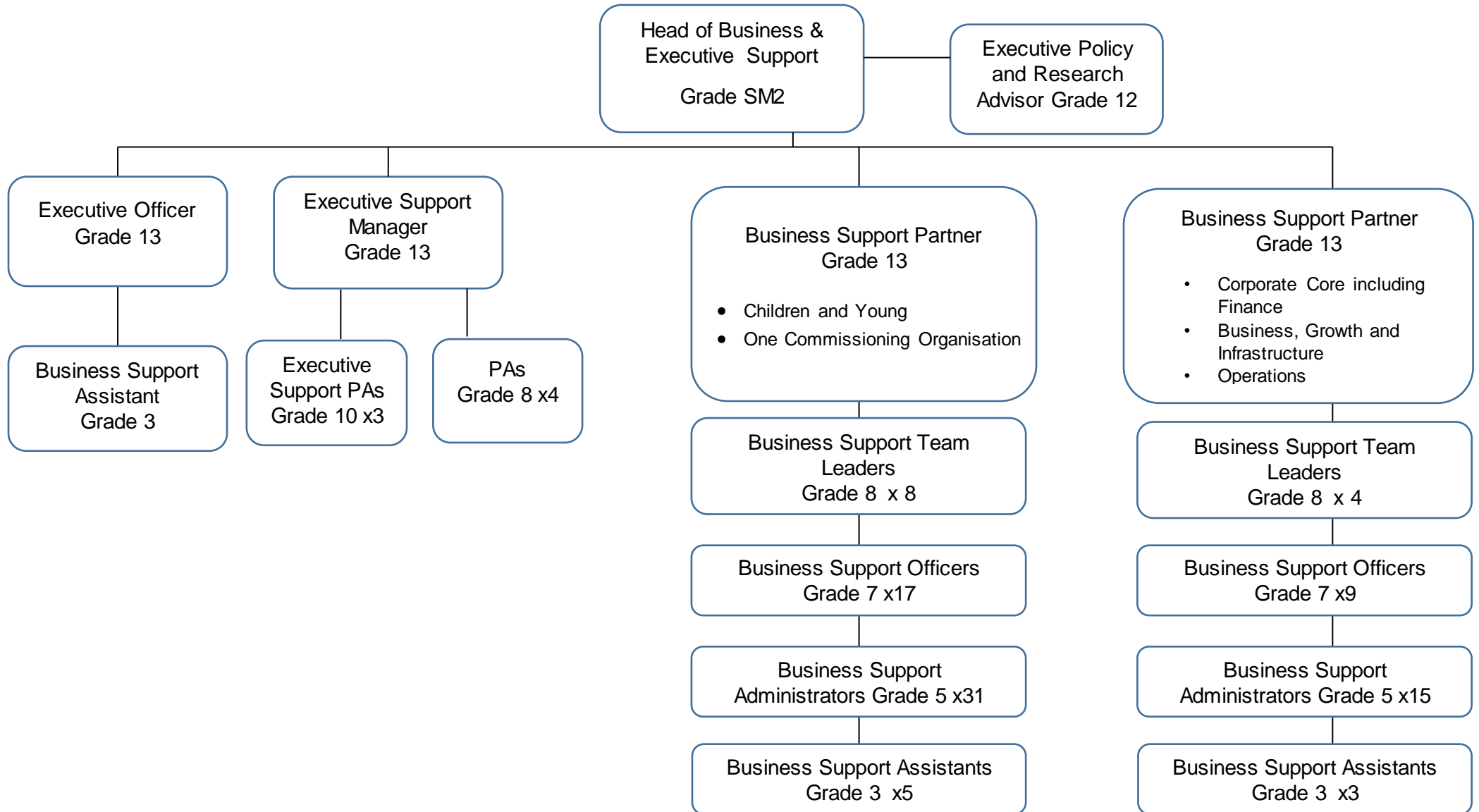
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Please include a glossary of terms, abbreviations and acronyms used in this report.

Term	Meaning
Ameo	The external consultancy who has provided short term advice

Appendix A: Proposed Structure for Business and Executive Support



Appendix B: List of roles in scope of the new service

Department	Type	Number of roles	FTE
Corporate Core including Finance	Permanent	20	16.4
	Fixed Term	1	1.0
	Casual	3	2.87
	Agency	0	0.0
	Vacancies	2	1.5
	TOTAL	26	21.77
Business, Growth and Infrastructure	Permanent	5	3.9
	Fixed Term	1	1.0
	Casual	4	2.49
	Agency	0	0.0
	Vacancies	3	3.0
	TOTAL	13	10.39
Children and Young People	Permanent	53	43.25
	Fixed Term	5	4.60
	Casual	1	0.62
	Agency	4	4.0
	Vacancies	4	3.5
	TOTAL	68	56.92
Operations	Permanent	11	10.2
	Fixed Term	3	2.60
	Casual	6	4.49
	Agency	1	1.0
	Vacancies	4	4.0
	TOTAL	24	21.28
One Commissioning Organisation (Council only)	Permanent	22	20.09
	Fixed Term	1	1.0
	Casual	7	5.44
	Agency	1	1.0
	Vacancies	2	2.0
	TOTAL	33	29.54
Total	Permanent	111	93.84
	Fixed Term	11	10.2
	Casual	21	15.91
	Agency	4	4.0
	Vacancies	15	14.0
	TOTAL	164	139.95