

Programme Title: Education Services Alternative Delivery Model
Local Partnerships Review Number: LP479GHC2

Local Partnerships Health Check 2

Version number: Final

Date of issue to PO: 12/2/2016

PO: Val White/Chris Munday

Authority: London Borough of Barnet

Local Partnerships Health Check Review dates:

11/02/2016 and 12/02/2016

Review Team:

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Local Partnerships Health Check Conclusion

The conclusion of the previous review was:

‘This is a well-run and resourced project that is making good use of the skills and experience of the members of the project team. There is a very clear and shared view of the objectives of the project and the benefits that it will bring to all the stakeholders in Barnet if it can be brought to a satisfactory conclusion. There is a shared optimism among the project team that the bidder with whom the council is currently in dialogue is the right partner to deliver the services that will fall within the scope of this contract, if the right commercial arrangements can be agreed. At this stage in the process, we can see no reason why the procurement should not proceed’.

The view of this health check is that this conclusion is still valid and that the momentum from procurement to transition and mobilisation has been sustained. This is a credit to the core team that has driven this project to date. It is evident that the team has well-defined roles and responsibilities that are cohesive and has a shared passion for the project. As the pre-planning stages conclude and project implementation commences, we are aware there will be changes in key personnel and sustaining the momentum may be a challenge. This will, however, be critical to ensure successful delivery for the benefit of children in Barnet in schools.

Throughout the process, the three core objectives of LBB that underpin everything the council is trying to achieve have been at the forefront of how the delivery model has been structured and will be delivered. This has been a key driver of all activity and decision making.

The review concluded that there are no significant obstacles to successful implementation. Any recommendations are made to support the further successful transition, implementation and embedding of the new delivery model.

Summary of Report Recommendations

The Review Team makes the following recommendations, which are prioritised using the definitions below.

Ref. No.	Recommendation	Critical/ Essential/ Recommended
1.	Scope and allocate adequate time and resources to the closedown processes for this stage of the project so that those involved in the next stage have access to all the information they need to ensure a smooth transition through to the implementation of the new arrangements.	Essential
2.	The terms of reference for all operational partnership boards should include a responsibility for contract monitoring. The overall governance structure should be subject to ongoing review to ensure that it continues to be fit for purpose.	Essential
3.	A contingency plan should be developed that will identify and resolve all outstanding risks in a timely manner, and in advance of key individuals leaving the project/organisation.	Critical
4.	A staff succession plan should be developed that recognises the interpersonal skills that are required, in addition to technical competencies, to continue the well established culture of collaborative working necessary for effective partnership working.	Essential

Critical (Do Now) – To increase the likelihood of a successful outcome it is of the greatest importance that the programme/project should take action immediately

Essential (Do By) – To increase the likelihood of a successful outcome the programme/project should take action in the near future.

Recommended – The programme/project should benefit from the uptake of this recommendation.

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Background

The aims and objectives of the programme:

Barnet Council (the council) is seeking to deliver a range of education services using an Alternative Delivery Model (ADM). There are three specific objectives underpinning this model:

1. Maintaining education excellence
2. Keeping partnerships with all schools
3. Delivering financial savings in line with the Council's medium term financial strategy

The procurement/delivery status:

Cambridge Education has been selected as the council's partner and formal contract signature is planned for 9 March 2016, with an implementation date of 1 April 2016.

Purposes of this Local Partnerships Health Check:

This review is a health check and focuses on the areas identified by Barnet Council and set out in appendix A.

Conduct of the Local Partnerships Health Check:

This stage review was carried out on 11 and 12 February 2016 at Barnet Council offices, North Business Park, Oakleigh Rd South, London N11 1NP. The team members are listed on the front cover.

The people interviewed are listed in Appendix B.

The Review Team would like to thank the council and the interviewees for their support and openness, which contributed to the Review Team's understanding of the Project and the outcome of this review. We were particularly grateful for the openness with which all interviewees engaged with us. We would particularly like to thank Cara Elkins for her excellent organisation and support.

Findings and recommendations

1. Succession Planning and Transition

Further to the recommendation of the previous review, there is a need to undertake a lessons learned exercise and ensure knowledge transfer from key personnel, some of whom may be leaving the project and/or the organisation. This remains critical to implementing and embedding this delivery model. The success of the project to date will subsequently be judged by the experience of schools following implementation.

It is acknowledged that there is a commitment to ensuring a robust pre-implementation phase closedown process that will include the production of a detailed contract manual. Consideration should also be given to developing a benefits realisation plan and an associated implementation risk and issues register. These documents will then be available as a resource for any future ADM proposals.

Much of the success of this project to date has been the result of having a number of key individuals involved from its inception. There is a risk that as the project moves to the next phase and the implementation commences, some of these individuals will leave. This will create a knowledge and relationship gap that may be hard to fill. Adequate time and planning need to be allocated to ensure that this gap is managed.

Recommendation:

Scope and allocate adequate time and resources to the closedown processes for this stage of the project so that those involved in the next stage have access to all the information they need to ensure a smooth transition through to the implementation of the new arrangements.

2. Post-implementation Governance Arrangements

The team noted that the terms of reference are in development and have yet to be completed for the majority of the boards. We believe that there should be a direct reference and explicit link to the Contract Monitoring Board, so that this function becomes a distributed responsibility integrated into the day-to-day business of the operational partnership boards.

The draft governance model will require significant time and resource for attendance, much of it at a senior level, with administrative support. The governance model should be jointly reviewed by stakeholders at a senior level on an ongoing basis as the project embeds. As it develops, this will ensure that it continues to be appropriate and effective and may identify

opportunities to rationalise governance and make the thin client function leaner.

Recommendation:

The terms of reference for all operational partnership boards should include a responsibility for contract monitoring. The overall governance structure should be subject to ongoing review to ensure that it continues to be fit for purpose.

3. Transfer of Assets, data and Information

We noted that there are number of outstanding issues specifically relating to:

- HR and Payroll
- Leasing and Licensing
- Joint Employment Contracts

HR and Payroll are seen as the most business critical to effective implementation on 1 April, but all have the potential to significantly impact on the successful delivery and embedding of the new arrangements. Appropriate measures should be put in place to ensure that any outstanding issues post 1 April 2016, are addressed in a timely fashion in advance of the potential departure of key individuals from the project.

Recommendation:

A contingency plan should be developed that will identify and resolve all outstanding risks in a timely manner, and in advance of key individuals leaving the project/organisation.

4. Interface Issues

It has been clearly evidenced and recognised that there are strong relationships between all stakeholders and the wider project team. The successful implementation of this new delivery model will be dependent on maintaining and developing these relationships as the project matures. The need to balance the three key objectives of the council with the achievement of the financial targets will create significant challenges to all stakeholders.

All stakeholders will need to ensure that any future appointments take account of the criticality of the relationships between LBB, CE, Capita/CSG and ISS to protect the established culture of partnership working.

Recommendation:

A staff succession plan should be developed that recognises the interpersonal skills that are required, in addition to technical competencies, to continue the well established culture of collaborative working necessary for effective partnership working.

APPENDIX A

Focus of Health Check requested by Barnet Council

The council asked that this review look at:

The preferred bidder mobilisation and business transition plans
Client contract management arrangements
Realism of programme to go live
Staff issues

Local Partnerships considered that it also needed to consider:-

Thin client
Robustness of monitoring of new contract – interfaces between Capita and new Education supplier.

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APPENDIX B

Interviewees

NAME	ROLE
Val White	Project Sponsor
Deborah Hinde	Project Lead
Jon Nash	Procurement Lead
Jason Walton	Commercial Advisor
Ian Harrison	Education and Skills Director
Jason Walton	Commercial Advisor - iMPOWER
Julie Huggins	Transition Programme Manager – Cambridge Education
Max Pullen	Project Manager – Cambridge Education
Phillip Hamberger	Commercial Lead
Liz Hammond	HR Lead
John Hooton	Chief Operating Officer
Isabella Galka	Project Officer