TORBAY COUNCIL

Planning, Housing and Climate Emergency - Service of the Future
Project Initiation Document (PID)

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Senior Responsible Owner:	Anne-Marie Bond, Chief Executive
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Version Control

Version	Date	Brief description of amendments / changes	Officer
1.01	01/03/22	Approved	Anne-Marie Bond
1.02	02/03/22	Updated with workstream details	Stuart Loly
1.03	24/03/22	Section 5. Project Performance & Deliverables/Products updated KPIs	Eve Bates, Stuart Loly
1.04	04/04/22	Section 5, Project Performance & Deliverables/Products updated with KPIs linked to staff retention and staff morale	Stuart Loly
1.05	09/08/22	Section 5, Project Performance & Deliverables/Products updated with KPIs.	Stuart Loly

1. Purpose

The purpose of the Project Initiation Document (PID) is to define the project, to form the basis for its management and to help with the assessment of the project's overall success.

The two primary uses of the PID are:
* To ensure the project has a sound basis before asking the Project Board to make any major commitment to the project;
* To provide a baseline document against which the Project Authority (Project Board) and Project Manager can assess progress, change management (Project Issues) and on-going viability.

This document has been produced to capture and record the basic information needed to correctly direct and manage the project. The PID addresses the following fundamental aspects of the project:

* What is the project aiming to achieve;
* Why it is important to achieve the stated aims;
* Who will be involved in managing the project and what are their roles and responsibilities.

When approved by the Project Board, this PID will provide the 'Baseline' for the project and will become 'frozen'. It will be used at the conclusion of the project to measure whether the project was managed successfully and delivered an acceptable outcome for the sponsor / user / customer.

2. Background

Over a relatively short period the Council has had a number of leaders of the Planning, Housing and Climate Emergency Services, each of whom have worked hard to support the development of the service. Concerns however remain, with challenging performance statistics and high numbers of complaints in respect of development management.

Against this background the Chief Executive requested the Planning Advisory Service (PAS), part of the Local Government Association (LGA), to undertake a review looking at three distinct aspects of the Development Management Service (DMS), namely:

* Registration and validation;
* Staff structures;
* Customer Service training.

As well as delivering against the PAS recommendations, it is recognised that there is a need to look at the entire service and how the different elements of the service interlink.

As a consequence, the Chief Executive has requested the creation of a formal project in order to implement the PAS recommendations whilst also ensuring that a review of the whole service is undertaken, including how the different elements interlink.

As such this PID has been created to define the scope of the 'Planning, Housing and Climate Emergency - Service of the Future' project for sign off by the Chief Executive and Director of Place.

3. Objectives

The main objective of the Project will be to strengthen and build the effectiveness of the service, ensuring that each element of the service can unite behind a common purpose of becoming fit for the future, through the delivery of efficient and effective services.

Other key objectives of the Project are as follows:
a) Continue to implement the Planning Service Action Plan, which are not business as usual activities (see Appendix A);
b) Implementation, where appropriate, of the PAS recommendations;
c) Consider structure/resources within the Spatial Planning Team;
d) To improve business resilience and productivity;
e) To have efficient and effective management structures;
f) To support, develop and retain staff;
g) Create a positive and inclusive working environment;
h) Good delivery of key performance indicators (KPIs) across all elements of the Service.

The critical success factors (CSFs) of the Project can be categorised into the following areas, and include re-design of the services to achieve a fundamental change of the future:

- Registration and validation – written guidance/instructions manuals produced,

- Team Structures and Responsibilities – review of all posts to ensure officers have the right skill set and to reduce single points of failure.

- Team Succession Planning – creation of a training programme to raise skills of officers (e.g. Heritage, Urban Design, Ecology, Landscape and Trees) and improve career progression.

- Website – additional self–help information, updated Local Validation List and improved invalid letter.
- Systems and technology:
    i. Implementation of Enterprise module in Uniform Idox or a similar project management tool;
    ii. Implementation of Idox Total Land Charges System;
    iii. Implementation of Exacom System for CiL/Section106 (already purchased);
    iv. Purchase and implementation of the Exacom public facing module.

4. Project Scope & Exclusions

The initial scope of the Project includes:

a) How we deliver services, which may include reconfiguration and changes in some cases (including how we use people, processes and technology);
b) How we provide training and development opportunities across all of the Service;
c) How we communicate as a Service.

The scope includes considering the PAS recommendations, as detailed below:

Registration and validation
R1   Supplement the current practice of one-to-one instruction of registration procedures with simple guidance notes using annotated screen shorts from the relevant sections of the IDOX system. Use best practice from other LPAs to reduce the burden of work.
R2   Review the allocation of responsibilities for validation so that either more responsibility is given to the Planning Support Team to carry out the more procedural aspects of validation or validation is clearly identified as a responsibility for specific officers as part of their work programme. There should be a clear allocation of responsibility to avoid uncertainty and duplication. These responsibilities should be appropriate for the grade and clearly and consistently implemented.
R3   Implement the Enterprise module in Uniform IDOX or a similar project management tool to reduce double handling, excessive use of emails and increase the speed of the decision making process throughout the lifetime of a planning application.
R4   Review the current Local Validation List in line with NPPF (para.44) requirements and to improve its access for non Planning specialists. Review the Council website to ensure that older versions of the Local Validation List are removed from view.
R5   Review the content of the invalid letter to enable it to be more informative and customer friendly for the applicant and enable greater flexibility for self help through website links.

Team structures and responsibilities
R6   Review the existing team structure so that the existing Principal Planners have formal line management responsibilities for the Planning Officers, emerging Planning Enforcement Officer post and Assistant Planning Officer posts. To compensate for this additional responsibility it will be important that the Planning Officers have the necessary skills and career progression to manage a more complex caseload.
R7   Review the Assistant Planning Officer role so that it can be used more effectively as a career platform for entry level Planners and can make best use of the RTPI apprentice route to professional Planning qualifications.
R8   Review the role of Principal Planner (Delivery) to better align the post to the strategic priorities in the Local Plan and to support the promotion of PPAs to fund proactive partnerships with key developers in Torbay.
R9   Review all the role profiles in the Customer Service and Planning Support Team to better reflect the actual work that the team undertakes and also resolve the current confused roles and responsibilities.
R10   Complete the creation of a new Planning Enforcement Officer using one of the existing Planning Officer posts to fund the post. In addition add Planning

Enforcement work either as a second Planning Enforcement Officer post or as part of the Planning Officer job description to create a more flexible workforce.

R11   Increase the existing heritage expertise within Development Management by either increasing the skills of existing Planning Officers or employing a separate heritage specialist who can advise on more complex matters and act as the case officer for such applications when appropriate.

R12   Consider the direct employment of specialist officers such as Heritage, Urban Design, Ecology, Landscape or Trees based on the basis of a value for money exercise using the current costs of procuring these skills as a reference point. As an alternative give consideration to shared arrangements with neighbouring authorities.

R13   If as a consequence of recommendation R12 specialist officers are employed directly either create a line management structure through an existing Principal Planner post or create a separate team within the Planning service.

Customer service

R14   Undertake a follow up reflective session following the customer services training held on 8th December 2021 and agree a plan of action that will follow the learning points from the training. Communicate the learning points and actions to key consultative forums such as the Neighbourhood Plans forum and Local Agents' Forum.

Exclusions

The exclusions for the project include:

- The implementation of the Carbon Neutral Torbay Initial Action Plan for tackling climate change. This is excluded as it is already covered by existing activities. However, the resource requirements within the Climate Emergency Service is in scope as part of 'How we deliver services (4a).'
- Business as usual (BAU) activity identified in the current Action Plan for the Planning Service (see appendix A).

5. Project Performance & Deliverables/Products

The overall successful delivery of the project, and performance, will be measured by the service producing evidence to show:

a) National and locally agreed performance indicators in Corporate Plan Performance Report:
   1. % of Major planning applications determined: (statutory timeframe 13 weeks) − including within extension of time
   2. % of Major planning applications determined: (statutory timeframe 13 weeks) − ignoring extension of time
   3. % of Minor planning applications determined: (statutory timeframe 8 weeks) − including within extension of time
   4. % of Minor planning applications determined: (statutory timeframe 8 weeks) − ignoring extension of time
   5. % of Other planning applications determined: (statutory timeframe: 8 weeks) − including within extension of time

6. % of Other planning applications determined: (statutory timeframe: 8 weeks) − ignoring extension of time
7. Number of planning decisions for major (for context only)
8. Number of planning decisions for minor (for context only)
9. Number of planning decisions for other applications (for context only)
10. Number of planning appeals for major applications
11. Number of planning appeals for minor applications
12. Number of planning appeals for other applications
13. % of decisions overturned at appeal for major applications (for context only)
14. % of decisions overturned at appeal for minor applications (for context only)
15. % of decisions overturned at appeal for other applications (for context only)
16. % of appeals upheld in the applicants favour - major applications (for context only)
17. % of appeals upheld in the applicants favour - minor applications (for context only)
18. % of appeals upheld in the applicants favour - other applications (for context only)
19. % of appeals with split decisions - major (part upheld) (for context only)
20. % of appeals with split decisions - minor (part upheld) (for context only)
21. % of appeals with split decisions - other (part upheld) (for context only)

b) Local performance indicators:
1. % of total applications validated within 5 working days, from when required information is received.
2. Average number of days taken to validate all applications, from when required information is received.
3. Average number of days taken to validate: major, minor and other (separately), from when required information is received.
4. Number of enforcement cases received (for context only)
5. Number of enforcement notices issued
6. % of enforcement contacts that resulted in successful prosecution
7. % of staff turnover (posts left and recruited to in a given period: either month or year)
8. % of applications dealt with within the agreed target time (by each planning officer)
9. Cost per population of the planning services (to include the benchmarking groups that will be used throughout the whole organisation: Chartered Institute of Public Finance and Accountancy [CIPFA] neighbours; statistical comparator neighbours; and Devon authorities by Revenue Outturn [RO] line)
10. Total £s of income received for planning applications
11. Total £s paid back to the customer for returned planning fees
12. Total amount of £s spent on planning appeals
13. Total amount of £s recuperated from overturned planning appeals
14. Customer satisfaction on the received planning service (post decision notice customer satisfaction survey sent to each customer)
15. % of undetermined applications outside extension of time (in excess of 20 weeks)
16. Total spend (£) of refunded application fees where applications were not determined within the statutory time period/or with extension of time and have requested the fee back under the Planning Guarantee, by quarter (accumulative quarter total)

c) Service performance indicators:
1. Number of applications determined (by month)
2. Number of applications valid (by month)
3. Average number of days taken to inform a customer application is invalid. (by month)
4. Number of applications received (by month)
5. Planning approvals (by month)
6. Planning refusals (by month)
7. Planning split decisions (by month)
8. Planning other decisions (by month)
9. Planning officer workload total (identifying the numbers within and over determination due date)
10. Planning officer workload – number of outstanding applications past the target date (identifying what type of application they are)
11. Number of preliminary enquiries received (by month)
12. Number of enforcement cases open (by month)
13. Number of enforcement cases closed (by month) does not include notice issued
14. Total complaints received by month
15. Total complaints responded to within 20 working days or 30 working days with extension, by month (where a response was due in the month)
16. Total number of overdue complaints by month

d) HR performance indicators:
1. Staff turnover in the 12 months leading up to the project beginning %
2. Staff turnover in the 12 months following project completion %
3. Absence monitoring e.g. staff days lost to sickness absence
4. Number of grievances/disciplinaries/investigations/capability procedures across the teams during a prescribed timescale for comparison.

e) Staff satisfaction performance indicators:
1. How staff are coping emotionally
2. Perceptions of managerial support, how they are supported and any suggested improvements
3. 1 to 1s with manager
4. Frequency of 1 to 1 meetings
5. Knowledge of the organisational support available
6. Work related physical health
7. Work related mental health
8. Perceptions of connectivity with their teams

We would expect data for performance indicators to be shared at project meetings, to review and monitor the performance progress.

The following products will be delivered from the Project, for sign off by the Senior Responsible Owner:

f) Re-design and implementation of existing team structure roles, including a training review and training plan as well as a recruitment and retention strategy for staff (R2, R6-R11, R13).

g) Written guidance/instruction manuals for registration and validation (R1).
h) Implementation of systems:
    i. the Enterprise module in Uniform Idox or a similar project management tool (R3);
    ii. Implementation of Idox Total Land Charges System;
    iii. Implementation of Exacom System for CiL/Section106 (already purchased);
    iv. Purchase and implementation of the Exacom public facing module.
i) Additional self-help information on the website and updated Local Validation List (R4).
j) Production of a more informative and customer friendly invalid letter (R5).
k) A value for money report on the direct employment of specialist officers (e.g. Heritage, Urban Design, Ecology, Landscape and Trees) or shared arrangements with neighbouring authorities (R12).
l) A lessons learnt report, from customer services training, including actions for circulation to consultative forums (R14).
m) A set of defined service deliverables/ key performance indicators, and improving performance against the same.

6. RACI Matrix

RACI (pronounced as "ray see") is an acronym for Responsible (R), Accountable (A), Consulted (C), Informed (I). A RACI matrix is a common project management tool for clarifying and communicating roles and responsibilities for project tasks and deliverables. It is used for projects where people may have specific roles and responsibilities, there may be many different stakeholders, and the project may cross multiple teams.

Deliverables	Senior Responsible Owner	Project Manager	Support	Senior User	Senior Supplier	Workstream Lead	Subject Matter Expert
	Anne-Marie Bond	Stuart Loly	Emma Sandford / Lorraine Stewart	Kevin Mowat / David Edmondson	Various	Various	Various
Project Deliverables							
Re-design of team	A	I	I	R	C	I	I
Written guidance/ instruction manuals	I	I	I	A	C	C	R
Systems and technology	I	I	I	A	R	R	C
Website and updated Local Validation List	I	I	I	A	C	C	R
Improved invalid letter	I	I	I	A	C	C	R
Specialist officers or shared arrangements	A	I	I	R	C	C	C
Lessons learnt from customer services training	I	I	I	A	I	C	R
KPIs	C	I	I	A	I	C	R
Project Management Deliverables							
Project RACI	A	R	I	A	I	I	I
Risk Log	A	R	I	A	C	C	C
Project Plan	A	R	I	A	C	C	C
Progress Report	I	I	I	I	C	R	I
Lesson Log	A	R	C	C	C	C	C

7. Interfaces and Dependencies

The Project will maintain an interface with the Council Redesign Programme and will report by exception to Directors Overview Meeting (DOM).

8. Constraints

The main constraints to the Project are as follows:
- Staff availability to contribute to the project, on top of existing business as usual commitments and activities;
- Any funding requirements outside of existing budgets;
- Project "buy in" from existing team due to number of previous reviews with staff and stakeholders that have not translated into significant change;
- Other Support Services priorities;
- Divisional Director of Planning, Housing and Climate Emergency (Senior User) not available at initiation of the project.

The project has been allocated a budget of £200k (revenue). The intention is to use £100k for the 'people' aspects of the project and £100k for the 'systems/technology' aspects.

9. Initial Project Plan

Deliverable	Further information	Date
Acceptance of the PID	To be approved by the Chief Executive and Director of Place	Early February 2022
Appointment of project team	This will include Senior Suppliers and Subject Matter Experts.	End February 2022
Review current action plan and recommendations	Review of the current Planning Service Action Plan and PAS recommendations	March 2022
Workstreams to be confirmed	Development of detailed workstreams	March 2022
Draft and approve project plan	Input gained from workstreams	End March 2022
Delivery of workstream products	Overseen by regular Project Board meetings	March to September (estimated at this stage)

10. Initial Business Case / Business Benefits

Benefits of the project will include:
a) improved delivery of services;
b) improved Key Performance Indicators;
c) improved clarity of roles and responsibilities;
d) improved support for staff and customers;

e) improved development and retention of staff;
f) improved delivery of other projects;
g) improved resilience of services.

The project will consider the structural and cultural changes that need to ensure that this is delivered.

As a consequence of the changes, it is anticipated that there will be improvements in the resilience of services.

11. Initial Risk Log

The Project Board will hold and manage its own Risk and Issue Log, and will report by exception to the DOM.

Initial risks have been identified as:

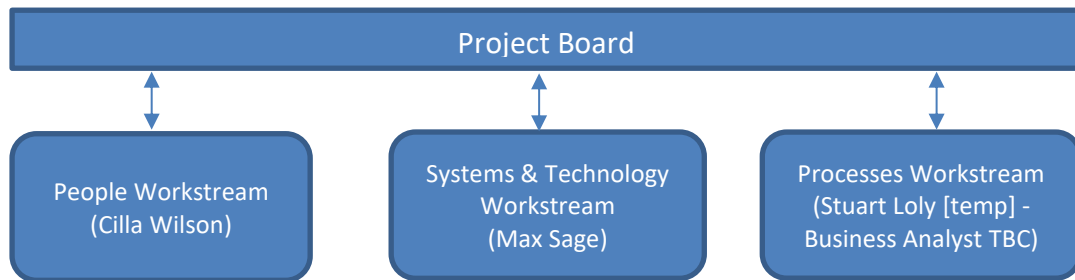|	Risk Description	Mitigation
1	Successful engagement of all sections within the Service to contribute to the project	• Identify Directorate representative to actively participate with activities, communication and engagement. • Clear communication and engagement plan.
2	Insufficient resources – i.e. staff and budget	• Review workloads to allow a focus on the project. • Accept and communicate that short term detriment is necessary for the long term benefit.
3	Benefits not being clearly defined, delivered or communicated.	• Comms plan to be updated monthly and fed back to managers to cascade to their team and put on intranet.
4	Reduction in staff morale	• Clear communication strategy to explain rational for project group and regular engagement and communications with service.
5	There is not significant change, to embed the objectives of the project, and achieve long term and sustainable change.	• Chief Executive (SRO) will provide ultimate authority and control for ensuring the project meets objectives and delivers the projected benefits.
6	Divisional Director of Planning, Housing and Climate Emergency (Senior User) may not be available at start of project.	• Liaison with SRO for mitigation to reduce risk.

12. Project Governance

A 'Planning, Housing and Climate Emergency - Service of the Future' Project Board will be created and will track and monitor progress, managing relevant resources and monitor any delivery risks and issues. This will include tracking of progress against key milestones and monitoring the delivery of benefits.

The project board will report directly to DOM. DOM will provide assurance of quality and objectives, track overall delivery and make strategic decisions in relation to scope, investment and risk management.

Role	Name	Responsibilities
Senior Responsible Owner	- Anne-Marie Bond, Chief Executive	Ultimate authority and control for ensuring the project meets objectives and delivers the projected benefits.
Senior User	- Kevin Mowat, Director of Place - David Edmondson, Divisional Director of Planning, Housing and Climate Emergency	Represents all areas within Planning, Housing and Climate Emergency.
Senior Suppliers	- Cilla Wilson, HR Manager - Gavin Dunphy, Head of IT - Tieneka Akers, Internal Engagement Officer - Max Sage, Project Leader, IT Services	Represents the supplier interests
Workstream Leads	Senior Suppliers to act as workstream leads for: - People (Cilla Wilson) - Systems & Technology (Max Sage) - Processes (Stuart Loly – temporarily - until Business Analyst is available from the Business Improvement & Change Team)	Delivers the project products
Subject Matter Experts	Directorate representatives - Wendy Ormsby, Development Management - Mark Irving, Planning Support - Adam Luscombe, Spatial Planning - Matt Hunt, Building Control - Justin Carpenter, Planning Support	Advises Workstream Leads

Role	Name	Responsibilities
Project Management / Support	- Stuart Loly, Project Manager, Business Improvement and Change - Emma Sandford, Chief Executive Personal Assistant - Lorraine Stewart, Personal Assistant to the Director of Place and Divisional Director of Corporate Services	Plans and delivers the project on a day to day basis.

Project Board

People Workstream
(Cilla Wilson)

Systems & Technology Workstream
(Max Sage)

Processes Workstream
(Stuart Loly [temp] -
Business Analyst TBC)

13. Communication Plan

A communication plan will be prepared for consideration by the Board with the draft project plan.

Appendix A
Current Action Plan for the Planning Service recently updated through the Cabinet &
Directors Sessions, 22 November 2021

Agreed vision for the Planning Service
The service will be efficient, engaging, proactive, and responsive. Officers will always
be firm but fair and will take an appropriate interventionist approach for the benefit of
the Bay.

Key:
Green   – completed and **excluded** from this project scope;
Blue   – business as usual activity, therefore **excluded** from project scope.
White   – **included** as part of project scope.

Original Actions, plus Next Steps and New Actions	By when	Update Nov 2021
1.0 Engagement		
1.1 Re-establish regular Agents Forums, customer feedback **Next steps/additional actions:** - Broaden attendance and hold additional combined Neighbourhood Forum and Agents Forums – David Edmondson; - Junior officers to attend to build relationships – Wendy Ormsby	April 2021 then ongoing By January 2022 then ongoing	2 Forums held, next is on January 26th .
1.2 Greater use of Planning Performance Agreements (PPA), including the payment for dedicated officers – see additional actions under Staff Matters. **Next steps/additional actions:** - Establish arrangement for TDA to fund PPA for TDA led projects – Kevin Mowat - Progress PPA for signing for HIP2 with ICO – Cllr Steve Darling/Anne-Marie Bond	Immediately on appropriate cases January 2022 January 2022	Achieved
1.3 Greater use of the Design Review Panel, to help improve the quality of larger schemes submitted to the Council **Next steps/additional actions:** Review existing Design Review Panel and develop/embed culture of stated approach – David Edmondson/Wendy Ormsby	Immediately on appropriate cases January 2022	Need to reemphasise to team, only been one recently
1.4 Engagement with Neighbourhood Forums in pre-application processes **Next steps/additional actions:** - Continue reinforce with officers and link to joint Agent and Neighbourhood Forum Sessions (see action above) – David Edmondson/Wendy Ormsby - Develop joint protocol for working approach with the Council, Neighbourhood Forums and Agents – David Edmondson/Wendy Ormsby	By June 2021 Ongoing January 2022	

Original Actions, plus Next Steps and New Actions	By when	Update Nov 2021
1.5 Continue close partnership working with Homes England, Historic England, registered providers, NHS Partnership Trust, South Devon College, etc.	Ongoing	Ongoing regular meetings. Interventions planned in several sites.
NEW: 1.6 Strengthen relationship with TDA and Planning for delivery and management of Council projects, including: - establish clear expectations required of project leads eg. PPA and how DRP will be conducted – Anne-Marie Bond/Kevin Mowat - hold monthly meetings with TDA – David Edmondson/Wendy Ormsby/Liam Montgomery	January 2022, then monthly meetings	
NEW: 1.7 Review Site Visits as opportunity for to develop member/officer relations: - Review ability for physical site visits for Planning Committee urgently with Public Health – June Gurry; - Officer sites visits required for applications unless very clear/straight forward application with no objections – Wendy Ormsby	Complete – Public Health advise against due to risk of Covid November 2021, ongoing	
NEW: 1.8 Review criteria and approach to Site Review Meetings to enable established criteria and trigger points for virtual meetings and where no resolution ability to escalate to physical visit or refer to Planning Committee. – David Edmondson/Wendy Ormsby for Cabinet members to consider	January 2022	
2.0 Members		
2.1 Member Training Programme - Including Chair's training programme **Next steps/additional actions:** - Evaluate Planning Committee training following receipt PAS feedback report; - Consider Planning Committee induction programme and ongoing annual training programme including specific training for Chairman of Planning Committee; - Revisit Member Job Descriptions in the Constitution to build in skills and expectations David Edmondson/Wendy Ormsby/Teresa Buckley	Beginning shortly Start January 2022	Started with Historic Environment (Sept) & Role of Councillors (Oct) Flooding & Drainage on 2nd December
3.0 Climate Change		
3.1 Sustainability Checklist for Validation purposes, enhancing the energy efficiency of proposed development.	By June 2021	Drafted by Jacqui Warren, Wendy

Original Actions, plus Next Steps and New Actions	By when	Update Nov 2021
		incorporating into revised Validation Checklist
NEW: 3.2 Prepare/combine Climate Change and Healthy Living in one Supplementary Planning Guidance document – David Edmondson/Adam Luscombe	By February 2022	
4.0 Staff Matters		
NEW: 4.1 To resource PPAs, identify HR Strategy for recruitment, backfill and ensuring sufficient resources to deliver PPAs quickly – David Edmondson/Wendy Ormsby/Sue Wiltshire	Dec 2021	
NEW: 4.2 Review strategy for specialist posts and purchase of services with sharing resources across neighbouring authorities to build resilience – David Edmondson/Wendy Ormsby	January 2022 and ongoing	
4.3 Establish new 'team within the team', dealing with design, public realm & historic environment issues	By June 2021	Successful
4.4 Improved Officer e-mail & telephone communication **Next steps/additional actions:** - PAS to deliver training on customer standards – all officers - Establish standards/criteria for response times and consider more use of phone calls/Teams meetings instead of emails – Wendy Ormsby - Introduce standard auto out of office response to manage expectations – Wendy Ormsby - Consider how to facilitate informal discussions between members and officers using Children's Practice Week or 'day in the life of' formats – David Edmondson/Wendy Ormsby/Teresa Buckley	By February 2022, ongoing	Ongoing, all officers on Customer Service training
4.5 Contact with Ward Councillors regarding local applications **Next steps/additional actions:** - As above	Immediately	Still needs re-emphasising
4.6 Staff development programme, avoid poaching from neighbouring authorities. **Next steps/additional actions:** - Introduce new training and development package for team to enable them to deliver an excellent service (meeting vision outlined above), including potential of setting up Planning Academy (similar to our Social Worker approach working with Plymouth	July 2021 Start January 2022, ongoing	Retained all staff to date. Opportunity being offered to one who nearly left

Original Actions, plus Next Steps and New Actions	By when	Update Nov 2021
University), to ensure staff feel valued – David Edmondson/Wendy Ormsby - Embed the new culture in the recently started new planning staff	Immediately	Achieve with June & Trenton, started with Carlo
NEW: 4.7 Undertake options appraisal for meeting conservation statutory functions, including training and development for wider team on conservation/heritage matters as well as dedicated officer – David Edmondson/Wendy Ormsby	By February 2022	
4.8 Embed the new culture in the recently started new planning staff. **Next steps/additional actions:** - Prepare specialist induction for new Planning Staff –links to training and development plan above.	Immediately	Achieved with June & Trenton, started with Carlo
5.0 Administrative support/ Validation/Digitalisation		
5.1 Filling Vacant Administrative post	April 2021	
5.2 Trial the outsourcing of the Validation process, following Business Process Mapping recommendations. **Next Steps/additional actions:** - Identify resource needs and solutions to resolve short term capacity issue, including looking at other councils' approach, to make changes within 6 months and to enable the service to progress – Martin Phillips/Kevin Mowat/David Edmondson/Wendy Ormsby - Review following PAS feedback report, to identify firm proposals for validation process, staff resource requirements and where this sits within the planning team's structure – David Edmondson/Wendy Ormsby	April 2021 December 2021 By February 2022	Pulled out of this, pending PAS work and changing Role Profiles building more flexibility
5.3 Temporary additional cover for Land Charges Team, to handle backlog and high demand due to Stamp Duty Holiday	Started	Cover worked incredibly well and supported the team
5.4 Installation of new Land Charges back office System	By June 2021	Govt finance coming our way which will help pay for it
5.5 Further digitalisation of information to allow for faster delivery of Land Charges Searches	Six months	Linked to the above
5.6 Establishment of the Exacom new back office Section 106/CiL system. **Next steps/additional actions:**	Started	Nearly in place

Original Actions, plus Next Steps and New Actions	By when	Update Nov 2021
- Set up project board (to include interface with wider Council teams) and prepare detailed project plan to ensure delivery. - Consider wider digitalisation across Planning service, prepare scope for project and link as sub-set of CRM Project Board. – David Edmondson/Wendy Ormsby	By February 2022	
6.0 Other		
NEW: 6.1 Prepare Section 215 action plan		

Key:

Green	– completed and **excluded** from this project scope;
Blue	– business as usual activity, therefore **excluded** from project scope.
White	– **included** as part of project scope.