



the compelling alternative

2021 Business Plan

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Orbis 2021 sets out what we will do during the next stage of our partnership journey. Building on what we have achieved together so far, we will continue to strive to be the “compelling alternative” for our partners and deliver high quality, customer focused support services. Our public sector ethos will drive our service transformation to be as efficient and effective as we can be to deliver value to the public purse.

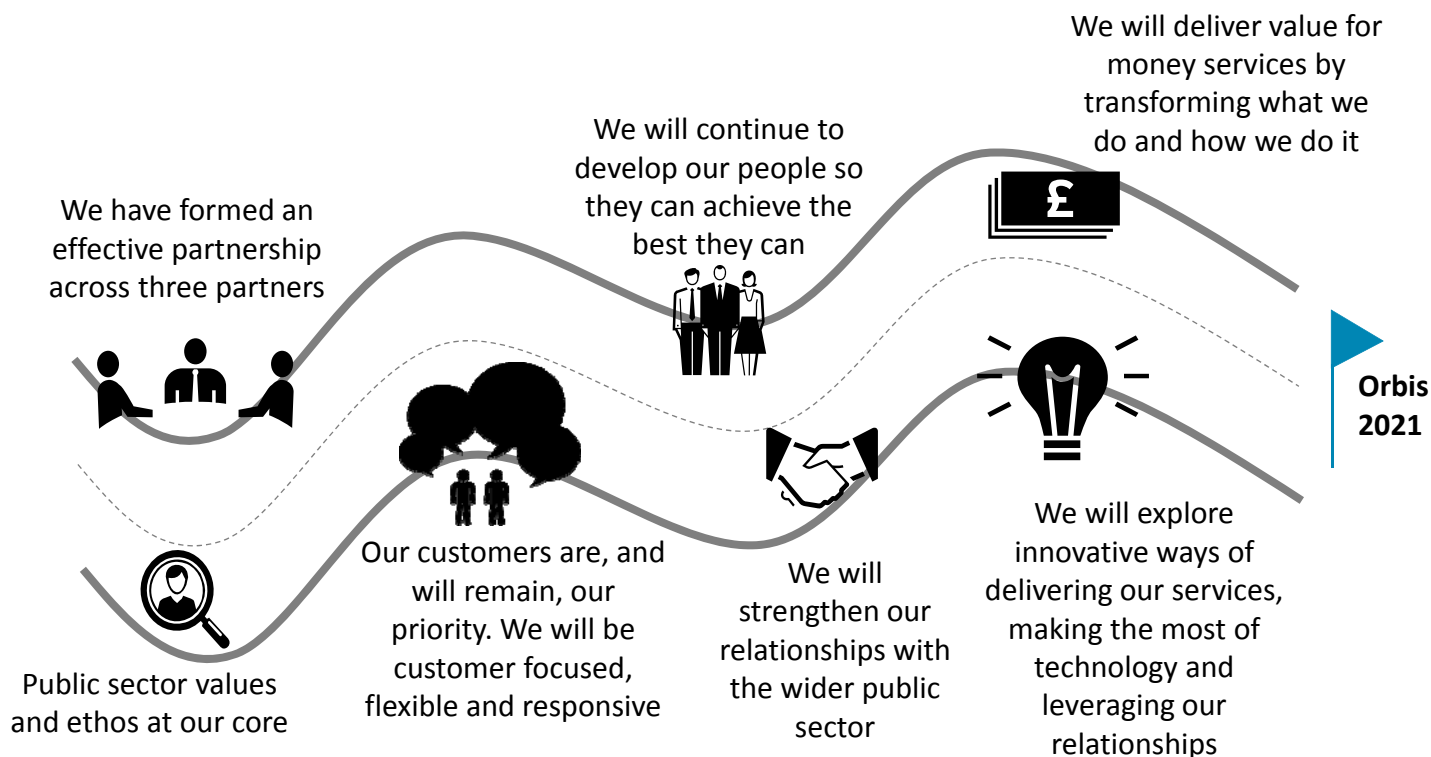
What do we want to achieve by 2021?

Our strong public sector ethos continues to be at our core.

What matters most to us is providing a high quality service to our customers and one that offers value for money. Our public sector ethos and desire to be the “compelling alternative” will differentiate us from other back office services.

We want to add value to our sovereign partners and continue to serve our customers effectively. We will be customer focused, flexible and responsive on this journey. Our services will be as effective as possible to meet the needs of our customers and we will strengthen our relationships with our wider public sector partners in order to do so.

We will invest most energy into serving our customers, developing our people and creating the conditions to succeed. To enable this we will get better at knowing our business, make more use of digital solutions, manage our risks and work as efficiently and effectively as we can.



How will we do this?

Develop our people

We will invest in our people to build skills, expertise and knowledge. Our people will be empowered to make decisions and shape the future delivery of our services

Cement and grow our service offer

Strengthening what we do, we will look to grow our business to generate income. The extent of our growth ambition and the nature of this will vary for each service

Transform the way we work together

We will instil a more commercial mind-set in how we work, maximise opportunities to use digital technologies and explore different models of delivery to be as efficient as we can

Structure ourselves to succeed

We will ensure we have the tools and frameworks in place to deliver what we have set out to do and monitor the progress we are making along the way

1. Where are we now?



1.1 Purpose of this document

A

Background

In 2015, East Sussex and Surrey County Council's Cabinets approved the Orbis Business Plan for 2015 – 2018. This outlined the vision for the partnership and provided strategic direction to the transformation of services. Following the addition of Brighton and Hove to the partnership the business plan has been reviewed, to set the direction to 2021.

B

Purpose of this document

The Orbis 2021 Business Plan reflects on the achievements we have made as a partnership so far and the context in which we operate, outlines our vision and priorities for the future and how we will work together to realise this ambition. This business plan will provide a strategic framework under which we will operate and provide visibility to our sovereign partners, staff and customers regarding how we will develop our partnership further up to 2021.

This document includes three sections:

1.

Where are we now?



Outlines our current operating context and reflects on what we have achieved so far and what we could do better

2.

Where do we want to be by 2021?



Sets out our vision for 2021 and what we will prioritise to get there

3.

How will we get there?



Summarises how we will progress the next stage of our partnership journey

C

How we intend to use this document

It is important that our staff, customers and partners understand what we want to achieve and how we intend to do this. However, we recognise that our diverse stakeholders will be interested in different elements of our business plan and have varying levels of background about what we do. We have therefore developed a Communication and Engagement plan that will support us to disseminate the key messages from our business plan, which will take a number of different forms such as 'staff cards', videos that share stories about what it is like to be part of Orbis and opportunities for focused discussions in team meetings.

1.2 Introduction

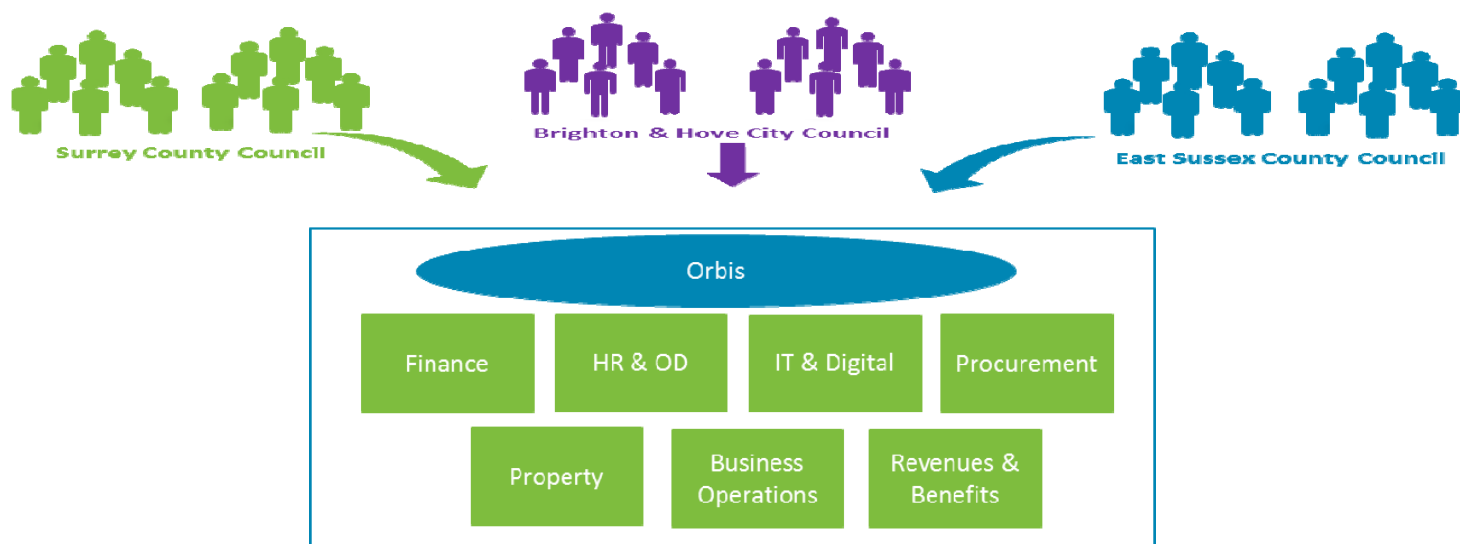
Orbis is a Public Sector Partnership between Surrey County Council, East Sussex County Council and Brighton and Hove City Council. We formed Orbis to provide high quality services to our customers and retain public sector money and expertise within the partnership.

Why Orbis?

Orbis was created to:

- Drive efficiencies by standardising the way we work and removing duplication
- Share resources, expertise and knowledge to identify best practice approaches that best meet the need of our customers
- Create greater operational resilience
- Deliver greater value for money, placing customers at the heart of everything that we do
- Improve customer service and enable customers to access services more easily

What does Orbis include?



Where are we today?



Orbis has....

2000
employees

Working
across
3 councils

£61.5m
joint
operating
budget

30+
external
organisations

360
schools

40
academies

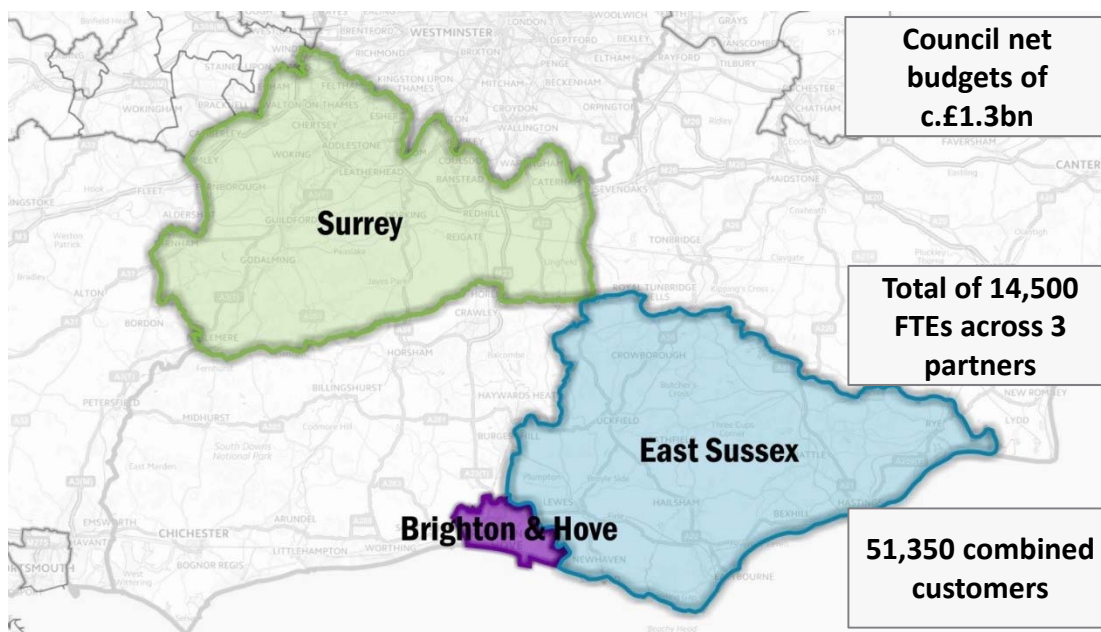
51,350
customers

1.3 Our partner context

We have three unique sovereign partners. Orbis needs to be equipped to understand what they need from their back office services and how priorities may need to adapt over the next three years to respond.

The aim of Orbis is to drive value and efficiency for our councils, customers and residents. Our sovereign councils are under pressure to achieve significant financial savings and Orbis can play a key role in helping to transform how services are delivered. Every £1 saved or made by Orbis is £1 our councils don't have to save. This means more funding can be diverted to where it is needed most – adult social care, children's schools and families services, libraries, highways and other frontline services.

Who are the Orbis partners?



What are the key areas of focus for our sovereign councils?

Financial austerity



We have delivered significant savings in recent years but financial pressures are set to continue. Our councils will have to balance competing priorities and transform services even further

Delivering services differently

To manage a reducing budget and greater demand for services, our sovereign councils will need to explore how services can be delivered differently to continue to meet outcomes



Digitalisation

To better connect with our residents we need to develop our digital channels and explore how we can use technology to underpin our core services



Integration

Breaking down organisational boundaries, for example across health and social care, is becoming more important. Services need to be holistic across the public sector



1.4 The Orbis way of working

Providing excellent customer focused services and delivering public value are at the core of our ambition. When we formed Orbis we developed Orbis ways of working focused on EPIC, to help us become the “compelling alternative” to truly differentiate ourselves from others in the market.

In the next stage of our partnership journey we want to continue to build and embed the EPIC way to working, combining our expertise, innovation and passion.



We are working in partnership to achieve results

We are founded on strong partnership working in the South East typified by the South East 7 partnership of all the Tier 1 Councils in the region. Surrey and East Sussex County Councils built on this with partnership working in business services initiated in 2012. Brighton and Hove City Council committed to engaging with this partnership working and in 2016 confirmed their intent to take up founding partner status in Orbis which was formalised in May 2017. This is a testament to the strength of partnership working and the compelling opportunities in Orbis



We deliver with passion for our customer

Working in the public sector we understand the needs of our customers and are passionate about making a difference in our local communities.



We think differently

We want to challenge the status quo and provide a better level of service to our partners and customers. We will do this by working in collaboration, using our expertise, skills and extensive experience to come up with innovative solutions to enhance the services we currently provide.



We have EPIC people

Our people are our unique differentiator. Together we bring the knowledge and expertise of our employees, committed to delivering high quality services for our residents.



We will provide value for money

Working together we can transform services to improve quality whilst driving efficiencies to deliver better value for money services.

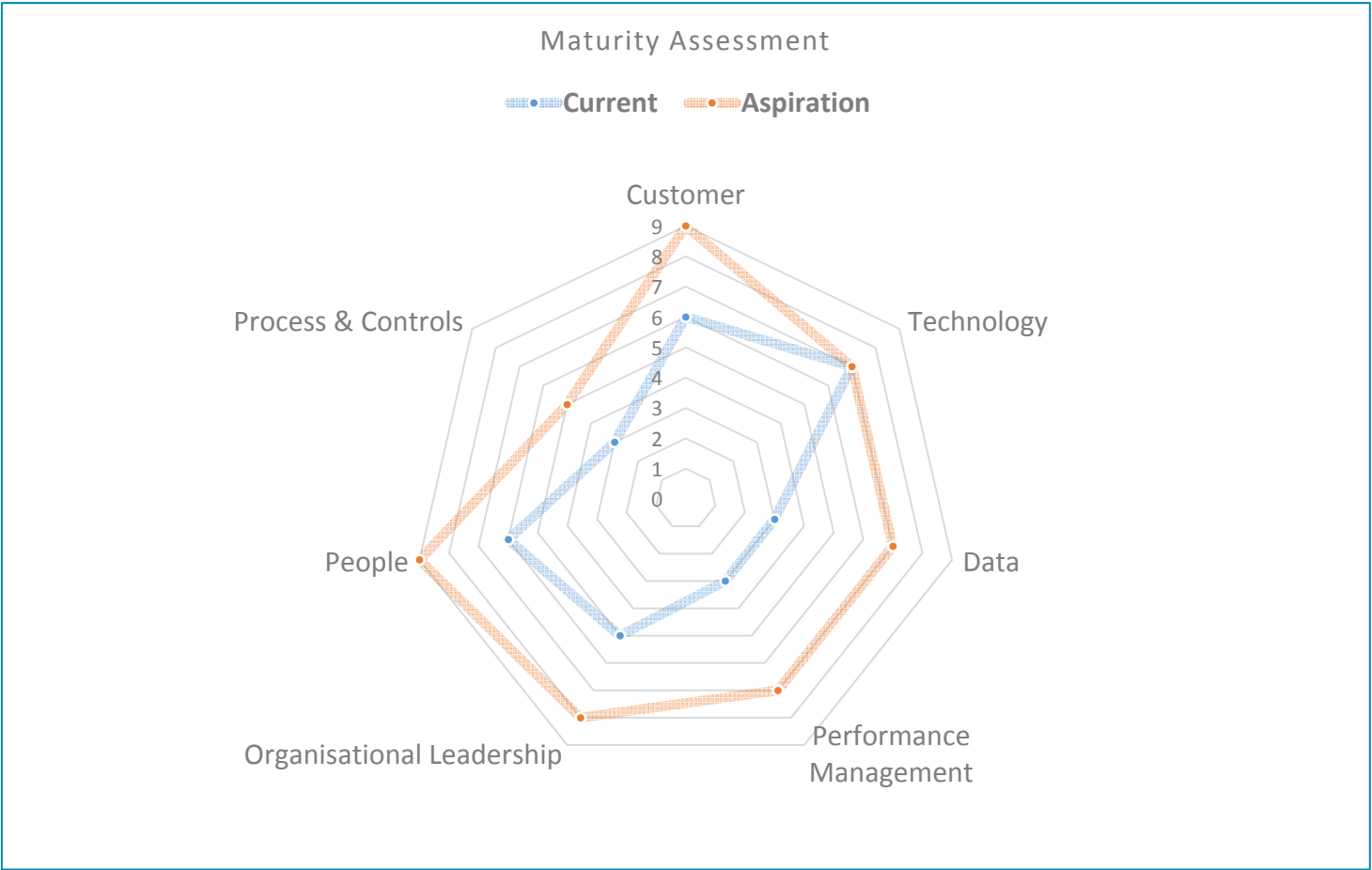
1.5 Our journey to date

Since forming Orbis in 2015 and incorporating Brighton and Hove in 2017, we have made good progress in establishing a public sector shared service across three authorities. We can be proud of what we have achieved together but we want to continue to integrate and transform our services, to ensure we remain the public sector provider of choice for our partners and offer value for money for local residents.

Knowing what we are doing well and what we need to improve is important to us, so we can continue to provide a high quality service to our customers. We have undertaken a ‘maturity assessment’ and considered how we are performing against some key characteristics of successful shared services, comparing ourselves against ‘leading edge’ organisations.

This marks an informed and subjective assessment of our organisational maturity and we have used this to develop our thinking about future priorities and where we need to invest most effort going forwards. In doing so we have taken a partnership wide view; it is therefore acknowledged that individual services may be at a different stage in the journey.

The diagram below summarises our informed and subjective assessment of where we are today (“current”) against where we want to be by 2021 (“aspiration”) when compared to leading organisations.



1.5 Our journey to date

Component	What are we doing well?	What do we need to improve?
Customer	<p>Our public sector ethos remains strong, with a commitment across all levels of the partnership to provide good customer service.</p> <p>We can respond flexibly to our customers' needs and regularly seek to improve the customer experience.</p> <p>We have a clear value proposition built on becoming the 'compelling alternative' which has proven to be a differentiator in the market</p>	<p>We don't always ask our customers for feedback as much as we should.</p> <p>We want to involve our customers more in developing and planning our services, so we can ensure what we do is meeting their needs, now and in the future.</p> <p>Currently we do not have a consolidated customer database to track interactions and opportunities, particularly with external customers. This makes it difficult to know what our pipeline of activity looks like and who we hold relationships with across the partnership.</p>
Processes and Controls	<p>We have started to review our processes across our sites so we can work more efficiently together and avoid doing things twice.</p> <p>We have considered the policies and procedures we have and adapted these to the partnership as far as possible.</p>	<p>We can still make processes more efficient across the partnership, with greater consistency between services.</p> <p>Opportunities to automate processes can be explored further.</p> <p>The extent to which sovereign policies and processes can be amended further to provide clarity across the partnership needs to be reviewed.</p>
People	<p>Orbis specific communication channels have been established, for example, an Orbis newsletter, service specific newsletters and intranet pages.</p> <p>We have invested in developing our staff through access to secondments, the Ingenium talent programme and the development of EPIC behaviours.</p> <p>A partnership performance and development approach is being rolled out across Orbis to establish a consistent approach.</p>	<p>Build on the initiatives we have developed but ensure they are embedded across the whole partnership at every level.</p> <p>Develop a People Strategy to guide how we invest in our people and recruit and retain the best talent.</p>

1.5 Our journey to date

Component	What are we doing well?	What do we need to improve?
Organisation and Leadership	<p>The first years of our partnership were guided by a robust business plan with five key design principles.</p> <p>We have kept a strong focus on our vision and Orbis principles to integrate our services.</p> <p>Our leadership team engage proactively with staff from across the partnership, for example via focused lunch topics.</p>	<p>There isn't a yet a consistent level of understanding about Orbis; we want every single person in Orbis to understand what we are about and what we want to achieve.</p> <p>There remains a high level of decision making by the Orbis Leadership Team. We want to empower our staff to make more decisions. Decision making needs to support a more agile and fast paced approach.</p>
Technology	<p>We have an established process in place to prioritise our investment in the things that will make the biggest difference to our business.</p> <p>We make decisions objectively against our agreed criteria.</p>	<p>We need to be clearer on what technology we have and what it can help us achieve.</p> <p>Where possible we need to increase the pace of decision making so technology solutions align to business needs.</p>
Data	<p>We have begun to explore how we improve our data quality through the use of analytics and automation.</p>	<p>Multiple data systems exist with variable levels of data quality and a high reliance upon manual recording.</p> <p>We need to rationalise the number of systems we use and improve the consistency of how we record and manage data, exploring the role automation could play.</p>
Performance Management	<p>Our services respond well to the needs of our customers and each service regularly monitors how they are performing.</p> <p>Service budgets and efficiency targets are agreed with customers prior to each financial year commencing, which helps support effective planning.</p>	<p>We need to define the scope of our services more clearly to help manage demand.</p> <p>Orbis wide metrics to guide delivery against the new business plan need to be developed.</p>

1.6 Celebrating our achievements

Working collaboratively together we have built some strong foundations for the future. Orbis is the largest local government shared service partnership nationally and we have been recognised externally for the high quality services we provide and the investment we have made in our people.

By working together we have:



Continued to **provide back office services** to the three sovereign partners in challenging times, making better use of resources through collaboration and sharing expertise



Built and maintained a **strong relationship with our customers** who are at the heart of what we do



Incorporated Brighton & Hove as the third and final founding partner in May 2017 to further strengthen the partnership – a great testament to our achievements so far



Integrated leadership across three authorities



Developed **EPIC behaviours** and created an EPIC champion network to help us to improve the way we work together



Launched a **new performance and development framework** to support our staff



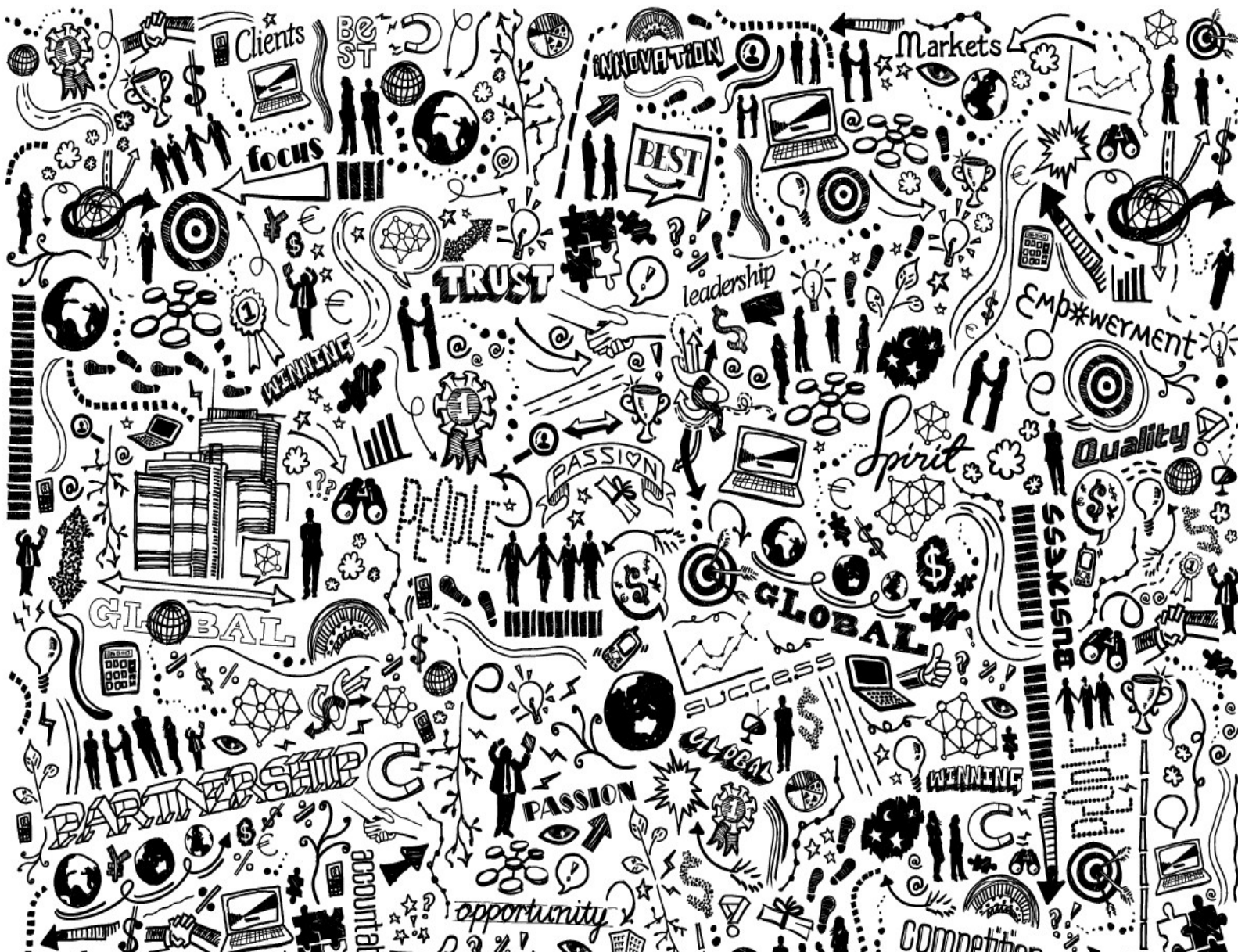
Received **external recognition for our achievements** – we have won numerous awards for culture, innovation, social value and efficiency



Made our services more efficient and delivered £4.5m savings in Year 1 – including the early delivery of £2.9m of savings. Planned savings for Year 2 and 3 are in delivery



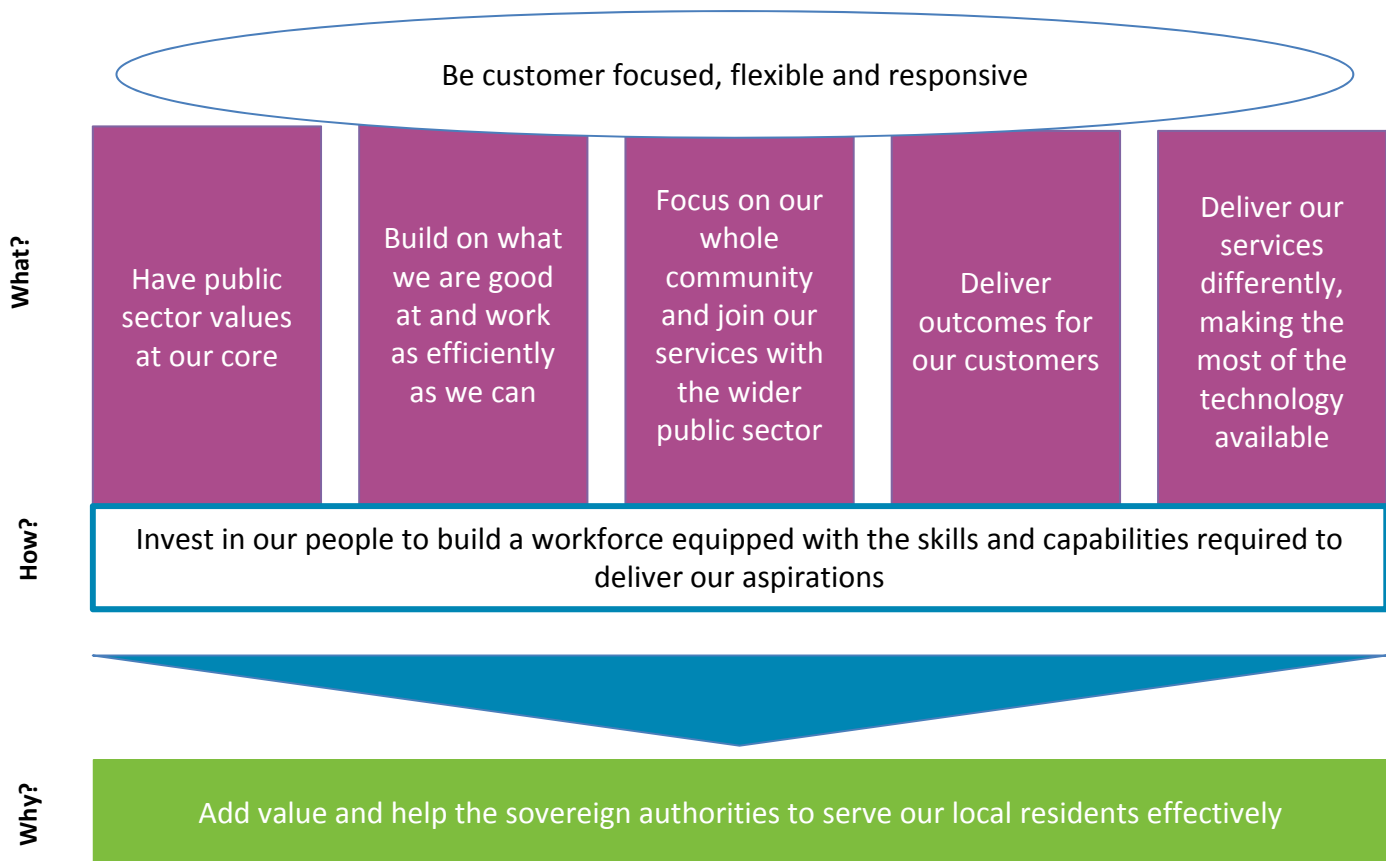
2. Where do we want to be by 2021?



2.1 Our vision

As Orbis we will strive to be the best we can. We have an ambitious vision for the partnership we want to become by 2027 to ensure we continue to be the “compelling alternative”. Our 2021 Business Plan is focused on progressing the next stage in our journey towards this.

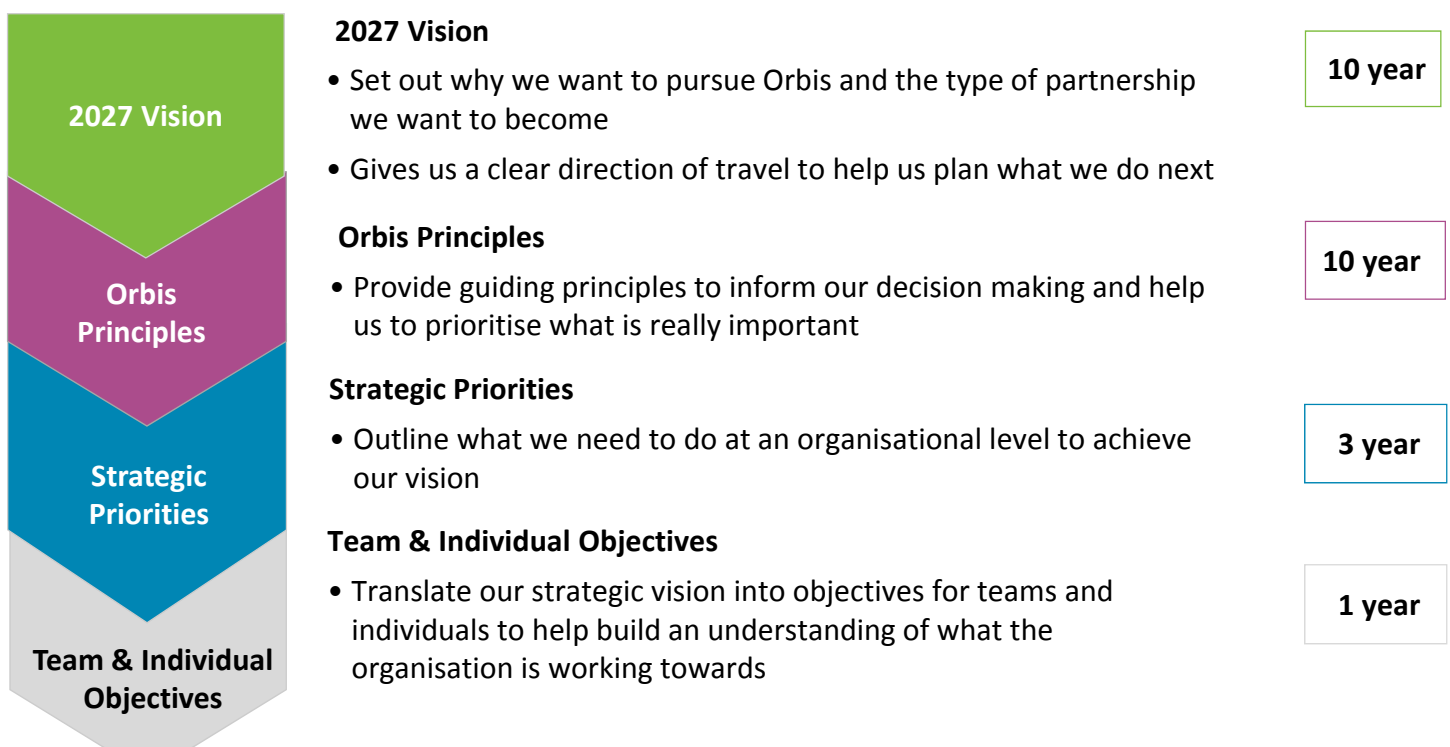
By 2027 we want to:



How will our 2027 vision drive how we operate?

What will be in place? What will this do?

Timeframe



2.2 Orbis principles

Orbis aims to:

Principle	How we deliver	How we measure
1 Place the customer at the heart of everything we do	<ul style="list-style-type: none">• “Customers” are those we serve• Build customer insight through data analysis and analytics• Develop a customer framework to support performance monitoring• Embed customer focused behaviours in all we do	<ul style="list-style-type: none">• Customer satisfaction surveys• Customer feedback• Performance against each metric
2 Have a workforce who are proud and passionate and are given the opportunity to succeed and flourish.	<ul style="list-style-type: none">• Invest in staff development (e.g. learning and development, talent programmes)• Provide opportunities to gain different experience (e.g. secondments)• Provide a clear direction of travel• Manage performance	<ul style="list-style-type: none">• Recruitment and retention statistics• Staff survey feedback• Staff performance• Engagement in learning and development and talent programmes• Absence monitoring
3 Embed a partnership culture, empowering our people to make decisions based on the right thing for our business and our customers.	<ul style="list-style-type: none">• Continue to embed the Orbis culture and way of working• Role model the Orbis behaviours• Engage with our staff and involve them in decision making• Provide clarity of roles and responsibilities	<ul style="list-style-type: none">• Staff survey feedback• Individual and team performance against agreed objectives• Customer satisfaction
4 Be the public services supplier of choice, allowing our existing and future partners to benefit from our increased standardisation, insight and reduced duplication.	<ul style="list-style-type: none">• Develop a clear strategy that is aligned to our longer term vision, to guide the collective efforts of our staff• Identify opportunities and risks from the external environment and develop strategies to respond/accept• Explore new market offers e.g. analytical capabilities	<ul style="list-style-type: none">• Performance against key metrics• Benchmarking• Customer feedback• External awards• Customer demand (from existing and potential customers)
5 Have a thriving business which is sustainable now and in the future.	<ul style="list-style-type: none">• Identify changes in the external environment and proactively respond to opportunities and challenges• Implement a programme of continuous improvement• Provide the framework for innovation and creativity Seek to grow our customer base as per the specific service aspirations	<ul style="list-style-type: none">• Income and expenditure monitoring• Growth of customer base (where appropriate)• Strength of relationship with sovereign authorities

2.3 Our priorities

Our Primary Priorities – what we will invest most energy into

Relevant Orbis
Principle

1

Serve our Customers

Place the customer at the heart of everything we do

- 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

2

Develop our People

Have a workforce who are proud and passionate and given the opportunity to succeed and flourish

- 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

3

Create Conditions for Success

Embed a partnership culture, empowering our people to make decisions based on the right thing for our business and our customers

- Embed the Orbis culture across all layers of the organisation and all partners
- Empower staff to make 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

2.3 Our priorities

Our Secondary Priorities – what will underpin how we work

Relevant Orbis
Principle

4

Know our Business

5

Utilise Digital Solutions

6

Perform to our
Highest

7

Standardise

- 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

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

- 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

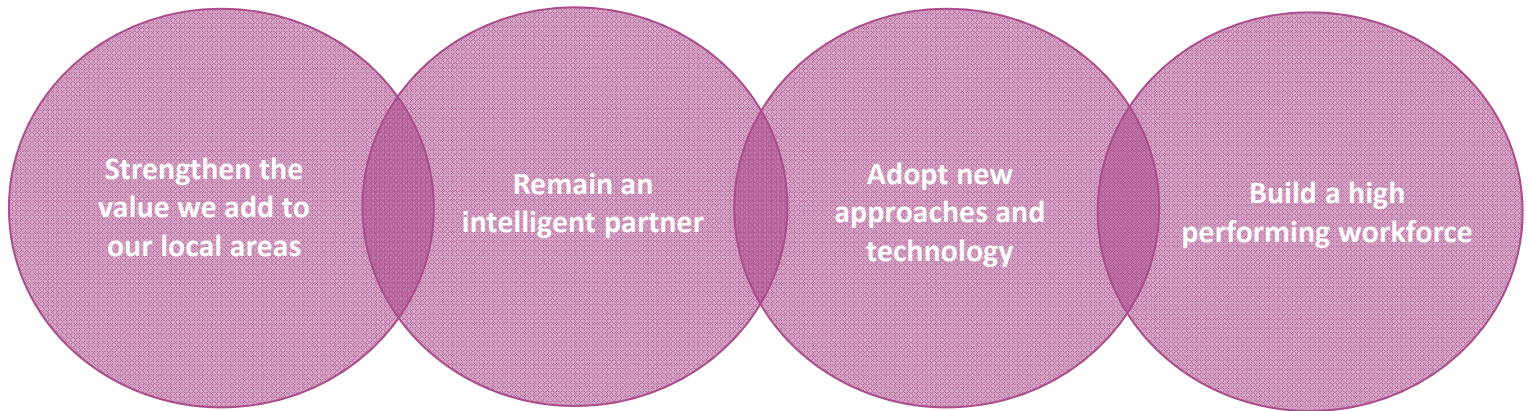
- Undertake scenario planning regarding existing and emerging risks to sustainability
- Develop an action plan for high risk areas e.g. potential loss of customer base from schools and social care
- Explore opportunities to reduce delivery costs further e.g. use of robotics to automate processes
- Remain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

- 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

2.4 The opportunities ahead

The context in which we operate is changing. This presents a number of exciting opportunities for Orbis to really transform our services for the benefit of our customers across Surrey, East Sussex and Brighton & Hove.

What are the key opportunities ahead?

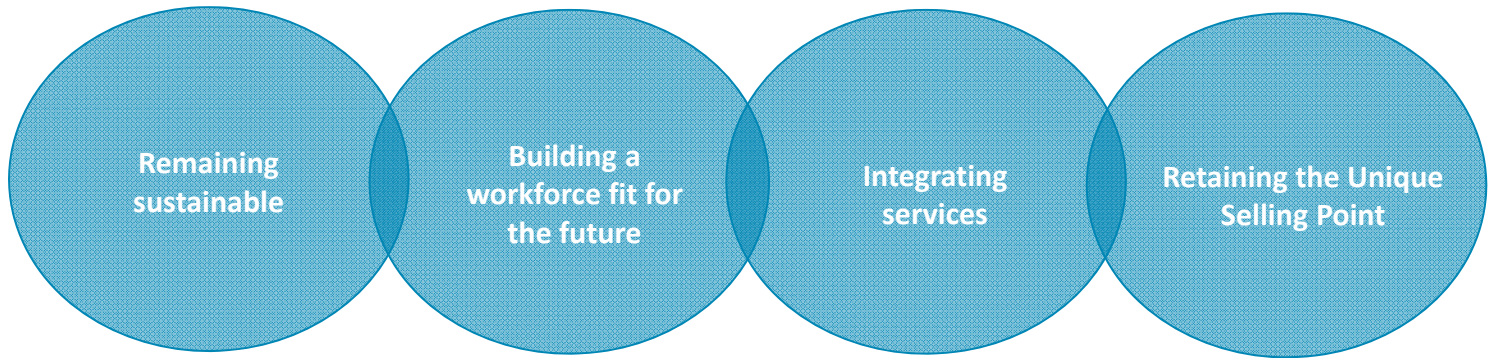


- Drive presence and value in the sovereign localities by **expanding the customer base** to include Health, Police, Education and Third Sector
- Deliver added value to sovereign authorities by utilising public sector relationships as a catalyst for **further joint working**
- Retain strong working relationships 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 regarded as 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 retain talent
- Maintain **organisational youth and energy** to build a confident workforce

2.5 The challenges ahead

Whilst there are a number of opportunities ahead, we are presented with some challenges which we will need to remain aware of and manage, so these do not compromise our ability to realise our ambitions.

What are the key challenges ahead?



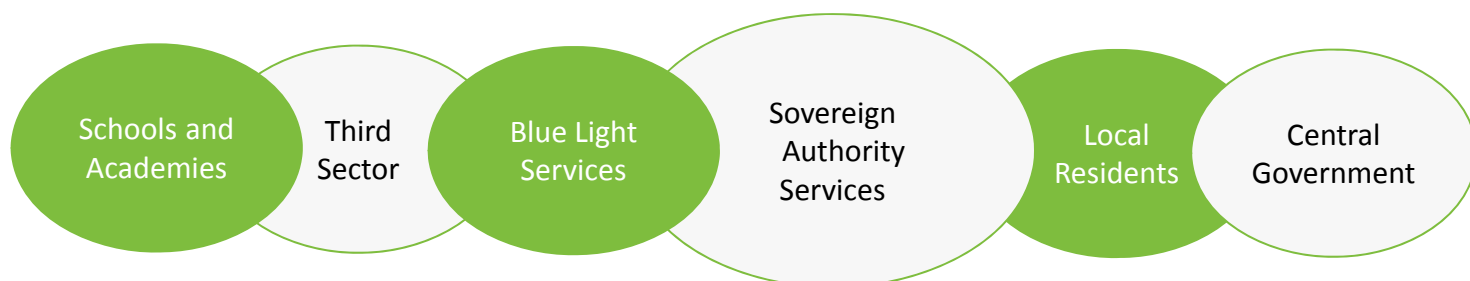
- Managing increasing **demand** and customer expectations
- Delivering additional **budget reductions** whilst continuing to deliver good quality services
- **Retaining the customer base** in a rapidly changing external context (schools and social care in particular)
- Responding to the unique **political direction** of the three sovereign authorities
- Understanding 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
- Attracting and retaining 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
- Establishing 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 the value** of Orbis services
- Delivering **customer focused services** at a partnership level, not in individuals silos
- Remaining relevant and sustainable

2.6 Customer focused services

Orbis is a customer focused service. We want to provide efficient, effective and insightful support and advice to enable our customers to deliver high quality services to our local residents.

Who are our customers?

We have a wide and diverse customer base, with our sovereign partners at the core. The number of external services varies per service based on the unique service offerings. Over the next few years we expect to grow our customer base further, both in terms of the volume and breath.



How does Orbis benefit customers?



Better access to services

The customer journey will be re-designed to make it as simple and easy to access services as possible. Customers will increasingly be able to access services at a time that suits them



Improved quality

Customers will benefit from access to a wider pool of skills, experience and expertise that will drive innovation and improvements in the services they receive



More efficient processes

By improving access to our services we will give our customers the outcomes they want more easily and quickly



Greater resilience

Working in partnership across three large authorities enables us to respond more easily to fluctuations in demand



Value for money

By combining our collective expertise and resources and changing the way we work, we will ensure the services we provide are efficient and effective to deliver value for money for our customers

What changes can customers expect to see up to 2021?



Growth

A larger customer base to strengthen our offer



Self service

New technology and delivery models will enable customers to help themselves



A recognised brand

We will continue to build awareness of Orbis across the public sector and beyond



Modern, digitally enabled services

We will utilise technology to improve our services

2.7 What will this mean for our staff?

It is a great time to be part of Orbis. We have achieved a lot already, working collaboratively together and we have outlined an ambitious vision for the future. At the core of our business is our people, so what does being a part of Orbis really mean for our staff?

Being part of something bigger

Our staff will work with colleagues from across three local authorities. The extent of interaction with colleagues from other sites will vary depending on your role – for some this will be daily and for others less frequently but for all it offers the chance to build networks and share ideas about how to improve services and solve some of the challenges we face

More opportunities to learn and develop

We will build on the learning and development programmes we have already established to make sure staff have access both to structured learning programmes but also informal opportunities to learn from colleagues across the partnership. We are the largest shared service across local government - working across three authorities increases the number of opportunities available for those that want to try something different

Have pride in the quality of service we offer

By working together, jointly investing in services and sharing best practice we can improve the quality of service we offer to our customers. This will help sustain our partnership but importantly will make sure our sovereign partners can continue to access the support they need to deliver services to local residents

Achieve more for our local areas

Our aspiration is to work more closely with our partners so provide a rounded and streamlined service to local residents. We want to explore how we can better join up what we do with Health, Police and Education and other partners, so the service our customers receive is the best it can be

Play a key part in shaping what we do

We want to involve our staff in thinking about how we deliver services differently – what will our services of the future look and feel like? This is why we will continue to communicate and engage with you to get your ideas about what we can do differently and create the structures that empowers you to make more decisions

What changes will you see over the coming years?

You will hear more about what is Orbis is about – we want all our staff to **understand what we want to achieve**

You will have more control about what you do – we want to **empower our staff** to make decisions

Investment in **technology and digital** solutions to support you to do your job

More focus on **how we are performing** – we want to get better at knowing how well we are doing

Growth in our business – serving our localities is our priority. We will join with partners but also generate income where we can

How we deliver services will change – what we do, how we do it and when we do it will be explored

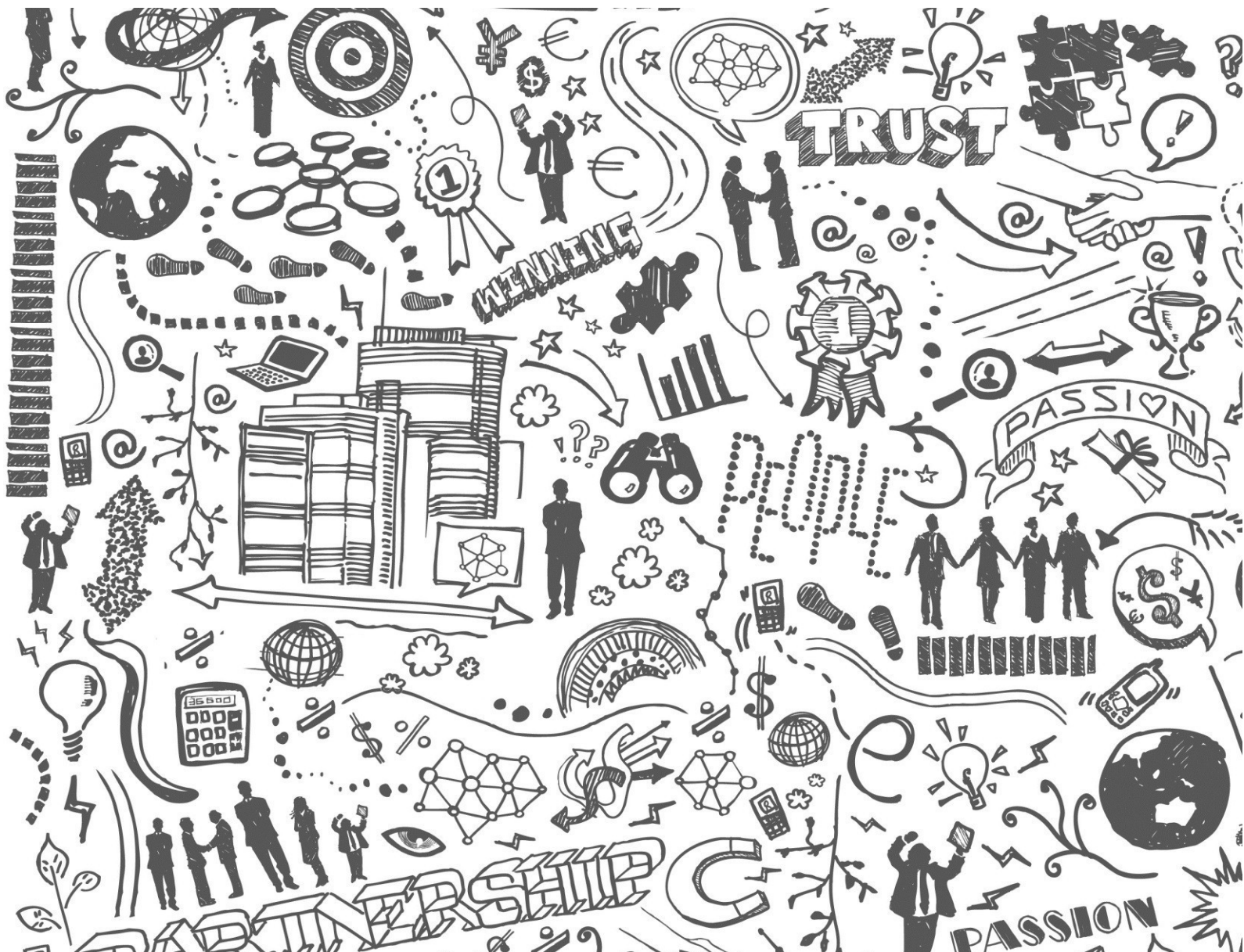
Our commitment to you

We will listen to the opinions and views of our staff

Orbis will be an **exciting and rewarding** place to work

We will deliver services to our customers that we can **be proud of**

3. How will we get there?

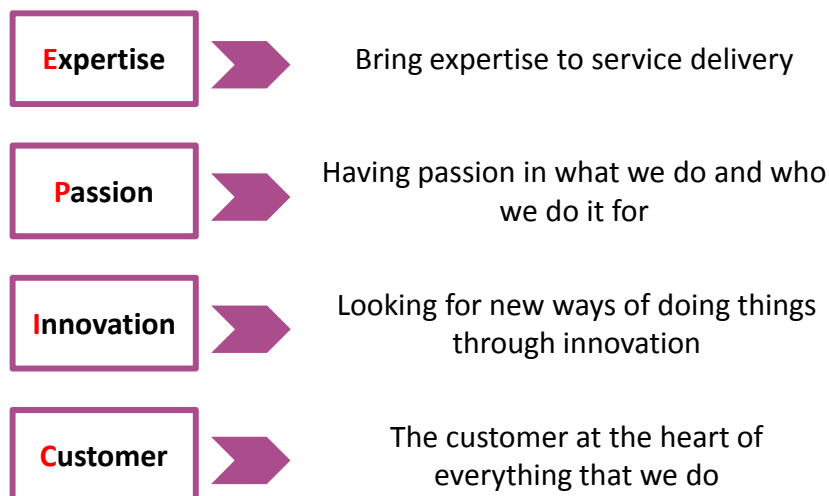


3.1 Investing in our people

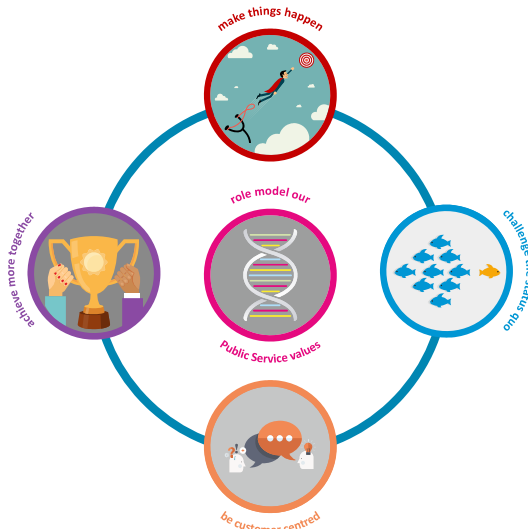
Our people are our unique differentiator; the success of our partnership is dependent upon the people that work within it. We want to create the 'Orbis way of working' to bring together the knowledge and expertise of our staff coupled with the behaviours and attributes to deliver our vision.

Since forming our partnership we have worked with staff to develop our EPIC culture and behaviours to guide the way we work. We will continue to invest wisely in our people and ensure that we have the right skills and expertise to deliver what we have set out to achieve.

The EPIC culture



The EPIC behaviours



We will continue to invest in developing our people further during the next stage of our partnership journey. Our aspiration is for EPIC behaviours to be consistently embedded across all levels of the partnership and we recognise that we have some way to go to achieving this. We have therefore identified a priority focus area for each year up to 2021 to support our day to day work. This priority area will not be the only element of the people agenda we invest in but will ensure we can dedicate time to building our workforce for the future.

Alongside our day to day work and the ongoing journey to embed the EPIC behaviours, we will dedicate time to:



3.2 Benefits

We believe we can achieve more and deliver greater benefits to our customers, staff and wider partner networks by working collaboratively together. Through further integration, transforming the way we work and generating income where we can, we will secure a wide range of benefits to achieve our vision and remain a sustainable partnership.

What benefits can we deliver together?

Provide more opportunities for our people	Working across three partners will enable us to provide more career development opportunities for our staff, by opening up opportunities across three partners and enabling our teams to share their skills and expertise with each other
Improve the customer experience	We will invest in new technology and explore different service delivery models to improve the customer journey, to make accessing our services as simple as possible
Become more resilient	By continuing to bring our services together we will be more resilient, share expertise and be better able to respond to peaks and troughs in demand
Get more for our money	We can use economies of scale to our advantage and make sure we secure the best price for the products and services we buy
Build our customer base	By continuing to improve the quality and efficiency of what we do, and maintaining our strong public sector ethos, we will build our customer base where it is appropriate to do so, to generate income for Orbis so we can continue to be sustainable
Value for money	The context in which we operate means that it is essential our services deliver value for money for our sovereign partners. By transforming the way we deliver services, through new delivery models and utilising technology as effectively as we can, integrating further across the three partners and generating income we will secure value for money and respond to the budget reductions our partners require

3.2 Benefits

The savings we need to deliver in 2018/19 have been confirmed by our sovereign partners and each Orbis service has plans in place to deliver these. The savings we are delivering in 2018/19 formed part of the original Orbis business plan, so the figure below is the total figure and is not additive. Local Government financing is facing particular uncertainty and change and therefore the 3 Sovereign Partners continue to review their service and financial strategies and plans for 2019/20 – 2020/21 and have not defined detailed savings targets at this stage. This is to ensure the target setting is done with the best insight and information available to inform what would need to be detailed planning; consultation and management.

We have therefore modelled what further savings targets would translate into within the range of 2-8%. Modelled below is the target at 5% over 19/20 – 2020/21. We recognise that this will need to remain under review as the sovereign partners develop their medium term financial plans during 2018/19 for the period 2019/20 onwards

We have therefore set out below the level of savings we anticipate being required, calculated based on the confirmed requirements of East Sussex and Brighton and Hove and applying the partnership ratios. We recognise that the budget available will need to remain under review as the budgeting process concludes.

We need to reduce our budgets, either by directly making savings or generating income, by the following:

	18/19	19/20	20/21	Total
Savings required per year	£4.5m	£1.8m	£1.1m	£7.4m

Over the course of 2018/19 a detailed savings plan will be developed, to define how we will deliver the savings and the proportion that will be allocated to each service in 2019/20 and 2020/21.

We have started to explore opportunities with each service, focusing on ‘areas of search’ and intend to continue this process to finalise the savings plans. The key areas we are considering are outlined below:

Transformation	▶ Re-designing the way we deliver services, making use of new models of delivery and technology to make our services are efficient and effective as they can be
Commercialisation	▶ Applying a more commercial mind set to how we work and actively exploring opportunities to generate income
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	▶ Changing the way we deliver services to manage demand, for example exploring self-service opportunities and the automation of processes
Adjusting our service offer	▶ There may be aspects of our services we need to reduce how much we do for our customers or explore the implications of stopping some aspects of service delivery completely
End to End Process Review	▶ Reviewing processes and the customer journey to further standardise and remove duplication, considering not only the way we serve but also who is best placed to do so

3.3 Investment

This document sets our ambitious vision for the future. We are on track to deliver circa 15% budget reductions across our partnership by 2019 and have outlined the additional budget reductions we anticipate needing to respond to by 2021, which are in the region of a further 5% reduction across our services. We will only achieve this by changing the way we work and ensuring that we are enabling our staff to deliver high quality services by providing effective and efficient tools and technology.

In the original business plan we made provision for investment in our services, to help up to establish some key enablers to transformation. We have reviewed this investment fund, taking into account what we have delivered to date and the addition of Brighton and Hove as a third partner. We believe it is important to continue to make provision for further investment, to support us on the next stage of our journey but recognise that some elements in our original investment case are no longer required so we have made adjustments accordingly.

The revised investment fund up to 2021 has been allocated against some key categories as shown below. This reflects an estimate of the investment we think may be required; detailed business cases will need to be considered so we can prioritise requests and direct our investment to where it will have greatest impact.

Investment Category	Overview	Investment Provision (2018 – 2021)
Orbis Programme Team	<ul style="list-style-type: none">To fund the cost of programme team resources to drive service transformation and provide change management support to services	£632k
IT Transformation	<ul style="list-style-type: none">Business Line specific applications to enable new processes in each service and across the partnership e.g. customer access platform	£1.9m
Total		£2.5m

Contributions by the sovereign partners to the investment fund will be apportioned in accordance with the partnership ratios:

- Surrey £1.4m (55%)
- East Sussex £0.6m (24%)
- Brighton & Hove £0.5m (21%)

3.4 Structuring ourselves to succeed

- As we embark on delivering the Orbis 2021 Business Plan we need to ensure that our business structures and infrastructure can support us to achieve our objectives, **enabling faster and more agile decision making and empowering our staff**
- The context in which we operate is one of reducing budgets and increasing demand for services, so the ability to **secure strong and effective decision making** continues to be of high importance
- As pressures on the sovereign partners continue, we need to **ensure that we are acting in our customers' best interests**, particularly where there are different emerging requirements, whilst sustaining the ethos of the partnership; our decision making needs to be **transparent**
- **Clear accountability** needs to be in place to **manage the risks** and to ensure informed, timely decisions are made.
- Finally, we want to **build understanding** amongst our staff and customers about how we run our business, so this is clear and easy to navigate.

To support the delivery of Orbis 2021 we want to:

- Establish a decision making structure that enables progress against the business plan to be monitored effectively and empowers staff to make decisions as appropriate
- Provide clarity of roles and responsibilities so there is a consistent understanding of where decisions can be made and by whom
- Increase visibility of decisions
- Optimise resources and ensure that decision making and engagement forums are adding value

We have developed some **Guiding Principles** that will underpin our approach to decision making. The structures we have in place will remain under review and may be subject to change but we will use these principles to inform how we operate and structure ourselves. Orbis will:

1

Provide clarity of leadership roles, responsibilities, accountability and decision making to support the delivery of the Orbis 2021 Business Plan and provide transparency to sovereign partners

2

Retain a distinct sovereign role to represent the sovereign interests

3

Establish clear distinction of duties between sovereign commitments and any operational or partnership wide roles

4

Be designed around the needs of Orbis so the structure can withstand any future changes in personnel and empower staff to take decisions as appropriate

5

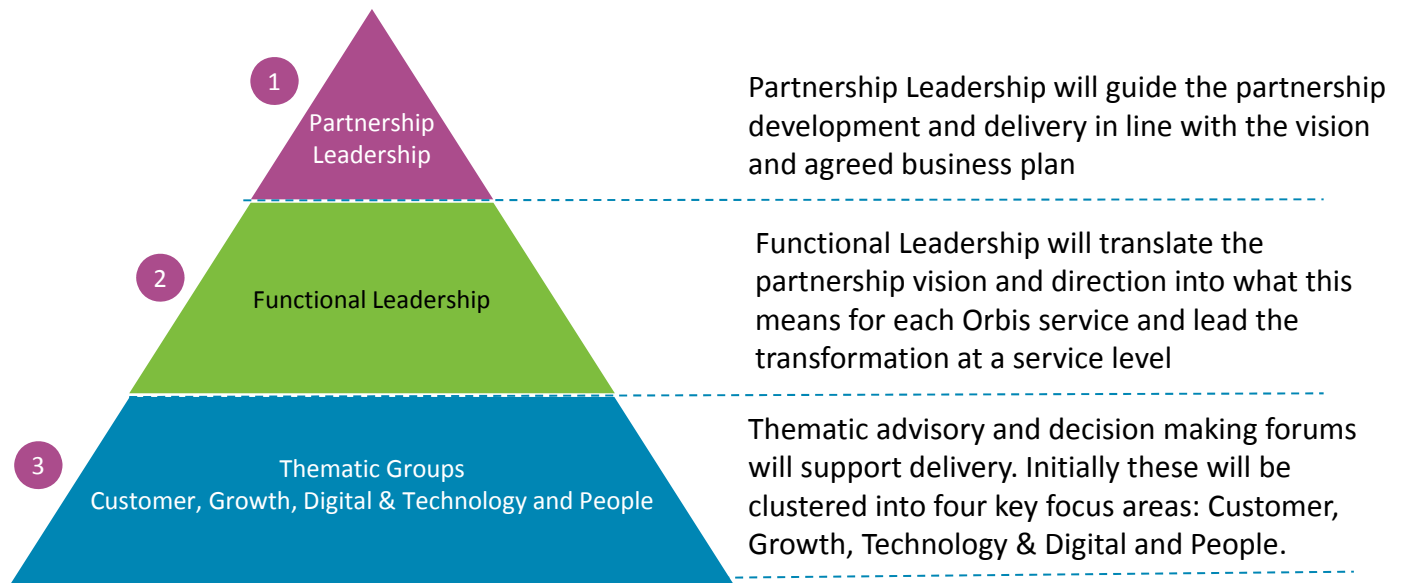
Provide value for money for the sovereign partners and customers

3.4 Structuring ourselves to succeed

Maintaining a strong relationship with our customers and continuing to operate with a public sector ethos is important to us. We will therefore continue to lead our partnership with a Joint Committee structure. The Joint Committee will include political representative from our three sovereign partners and will provide strategic direction and ultimate decision making across the partnership, representing sovereign interests.

The Joint Committee will then be supported by a number of decision making forums and advisory bodies. We will regularly review the way we operate, to ensure that this is fit for purpose and supports effective and timely decision making but also empowers our staff to make decisions.

There will be three core components to how we make decisions and lead our business, as shown below.



How will we structure ourselves initially?

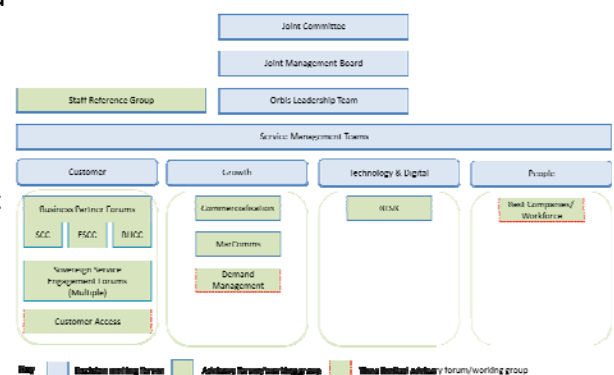
Joint Committee - Formed of two elected Members from each sovereign authority, the Joint Committee is responsible for setting the overall strategic direction for Orbis

Joint Management Board - Provide strategic direction to the development of the partnership, taking into account the vision and objectives set by the Joint Committee. The Board will represent sovereign interests in service delivery and planning and hold the ultimate responsibility for delivering the Orbis 2021 Business Plan

Orbis Leadership Team - Drive progress against the business plan and hold the day to day responsibility for operational and strategic management of the Orbis services. The OLT will monitor and review performance, drive service improvements and identify and manage strategic risks to the partnership

Orbis Service Management Teams - Responsible for day to day management of each service. They will develop service plans and drive performance against these plans, managing service specific risks as they arise

Thematic Groups - A blend of decision making forums and networks, the thematic groups will focus on cross cutting matters relating to Customer, People, Growth and Technology & Digital to



3.5 Risks

There are a number of risks that we will need to manage over the next three years. These have been grouped into four categories: strategic, financial, operational and reputational. We have summarised the key risks below and provided more information about how we propose to mitigate these in Appendix 1.

A

Strategic

- **Political changes** impact on the strategic direction of one/more sovereign partners, de-stabilising the partnership
- **Strength of relationship** between Orbis and customer is eroded as budget reductions result in a smaller workforce and a requirement to work across multiple sites therefore reducing visible presence
- Changes in the **strategic direction or national legislation** impacts on sovereign partner requirements of Orbis and requires adaptations to the service offer
- The **scale of financial challenge reduces** removing the catalyst for innovation and striving to deliver value for money services
- **Sovereign expectations and service delivery capabilities are not aligned** as Orbis does not effectively articulate the consequences of budget reductions to enable informed decision making
- **Loss of strategic relationships** with sovereign partners due to leadership changes, compromising the future sustainability of Orbis

B

Financial

- One sovereign **partner requires a different level of savings** from Orbis, either over and above the agreed target or lower
- Financial savings are **predicated on technology solutions**; delays to implementation and/or investment in process and ways of working not sufficient result in delays to benefits realisation
- The financial efficiencies required by sovereign partners **cannot be delivered sustainably** whilst maintaining Orbis values; target budget reductions are not realised or Orbis value proposition is eroded to achieve the requirements
- **Loss of Orbis customer base** (e.g. social care and/or traded services) adversely impacts on the future financial sustainability of Orbis
- **Value of Orbis is eroded** due to a 'race to the bottom' meaning Orbis cannot sustain both transactional and strategic offers

C

Operational

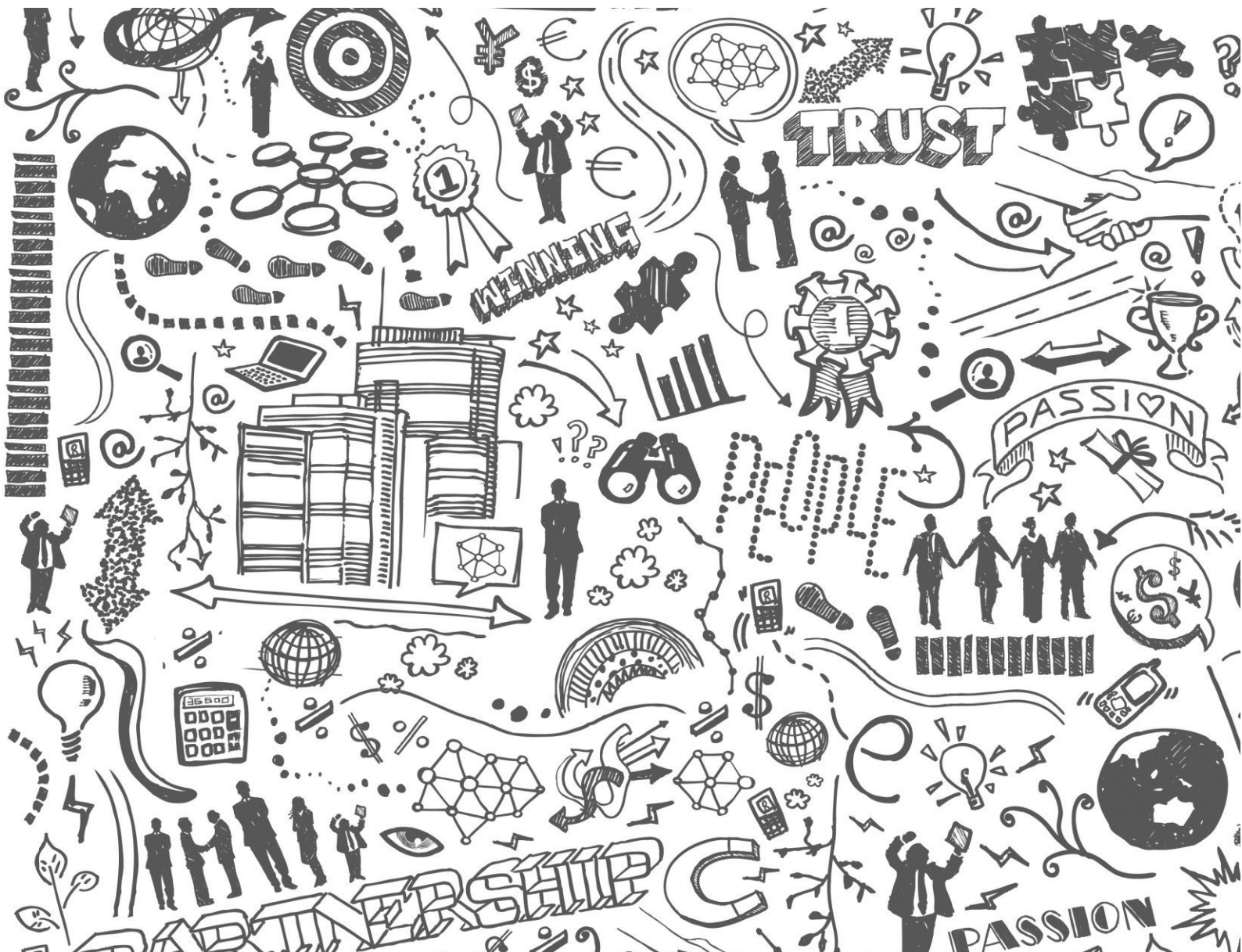
- **Business as usual service delivery** is adversely impacted by a programme of sustained change; service quality reduces along with customer satisfaction
- **Differing terms and conditions** across the sovereign partners can de-stabilise the working environment, adversely impacting on the Orbis culture, staff satisfaction and retention
- **Resistance to change** from staff and key stakeholders; delays and/or inhibits service transformation
- **Service behaviours are not consistent** with the desired EPIC behaviours; prevents the creation of the target Orbis culture and way of working
- Historic under-funding of services results in an **organisational debt** for technology and infrastructure within MOBO budgets, limiting capabilities and reducing business continuity
- **Staff retention** declines due to limited awareness of potential career paths/perception of limited career paths
- Unable to meet aspirations for place based growth due to **absence of required capabilities** to provide back office services to a more diverse public sector customer base
- **Services operate in silos**; opportunities for financial efficiencies and place based growth not maximised

D

Reputational

- The **reputation of Orbis is adversely impacted** as a result of poor performance
- **Political dissatisfaction** with Orbis proposals to realise the required budget reductions
- Orbis fails to remain compliant with **legislative requirements**; brand negatively impacted
- Due to a reduced workforce and service changes following financial efficiencies, Orbis is **unable to meet its growth aspirations**
- **Service quality is compromised** due to unsustainable growth, either in type of growth or scale
- Orbis **cannot effectively demonstrate value** to sovereign partners due to the absence of robust performance measures and evidence

Appendix 1: Risks and mitigations



A. Strategic risks

Strategic (S)			
ID	Risk	Description & Implication	Mitigation
S1	Political changes impact on the strategic direction of one/more sovereign partners, destabilising the partnership	<ul style="list-style-type: none"> Changes in the political direction of one/more sovereign partners may require significant changes to the operating model of Orbis Different political priorities may potentially result in a requirement for an alternative delivery model for back office services 	<ul style="list-style-type: none"> Continue to have a signed Inter-Authority Agreement in place to outline commitments and exit arrangements Build flexibility into service models to enable service delivery to be tailored to sovereign priorities as required
S2	Strength of relationship between Orbis and customer is eroded as budget reductions result in a smaller workforce and a requirement to work across multiple sites therefore reducing visible presence	<ul style="list-style-type: none"> Due to operating across multiple locations face to face visibility of senior service leads reduces Ability to deliver customer insight and be responsive to changing needs to reduce Potential for the value proposition of Orbis being connected to the customer to weaken, compromising the sustainability of Orbis 	<ul style="list-style-type: none"> Promote the use of existing and new technology to support service delivery e.g. video calls Retain business partnering roles/responsibilities and clearly outline the activities and outputs Refresh customer feedback forums e.g. reference group, Chief Executive meetings Develop a customer performance report
S3	Changes in the strategic direction or national legislation impacts on sovereign partner requirements of Orbis and requires adaptations to the service offer	<ul style="list-style-type: none"> Partner strategies diverge to a greater extent than anticipated; significant changes are required to the operating model and/or service strategy Changes in legislation command a greater focus on some functions requiring a review of budget allocation to ensure delivery Service adaptations cannot be delivered at the pace required 	<ul style="list-style-type: none"> Develop and periodically maintain service catalogues to identify the service offer per authority Build flexibility into service models and decision making processes to enable Orbis to respond to strategic of legislative requirements

A. Strategic risks

Strategic (S)			
ID	Risk	Description & Implication	Mitigation
S4	The scale of financial challenge reduces removing the catalyst for innovation and strive to deliver value for money services	<ul style="list-style-type: none"> • Austerity reduces thus budget pressures reduce, removing the incentive and 'burning platform' to drive innovation • Service transformation opportunities are not maximised and value for money is not at the optimum level 	<ul style="list-style-type: none"> • Establish framework and tools for innovation across all levels of the organisation and promote a culture of challenging the status quo • Regularly review service quality
S5	Sovereign expectations and service delivery capabilities are not aligned as Orbis does not effectively articulate the consequences of budget reductions to enable informed decision making	<ul style="list-style-type: none"> • Sovereign partners expect a higher quality and scope of service than can be delivered within the budget envelope and constraints set, due to consequences of delivering financial efficiencies not being made clear • Results in dissatisfaction amongst the customer base 	<ul style="list-style-type: none"> • Develop service catalogues and hold informed discussions with sovereign bodies as part of budget setting process • Develop options for delivering efficiencies with clearly identified enablers and consequences
S6	Loss of strategic relationships with sovereign partners due to leadership changes, compromising the future sustainability of Orbis	<ul style="list-style-type: none"> • Orbis leadership and/or sovereign leadership changes therefore loss of personal relationships which understand subtleties of the Orbis model • Future sustainability is compromised if new relationships cannot be established 	<ul style="list-style-type: none"> • Empower decision making across the Orbis leadership community to enable others to develop relationships with the sovereign bodies • Develop and implement performance monitoring so performance can be assessed robustly to take away reliance upon individual relationships

B. Financial risks

Financial (F)			
ID	Risk	Description & Implication	Mitigation
F1	One sovereign partner requires a different level of savings from Orbis, either over and above the agreed target or lower	<ul style="list-style-type: none"> Budget requirement of one/more sovereign partners cannot be achieved whilst still continuing to meet the requirements of the other partners Potential that the differences in budget requirements by sovereign partners cannot be reconciled; results in a breakdown of the partnership 	<ul style="list-style-type: none"> Agree and maintain an Inter-Authority Agreement to document financial contributions and agreed savings over the business plan period Develop and maintain a service catalogue to demonstrate the service offer per authority
F2	Financial savings are predicated on technology solutions; delays to implementation and/or investment in process and ways of working not sufficient result in delays to benefits realisation	<ul style="list-style-type: none"> If delivery timescales are delayed and enabling technology is not established by the anticipated date, benefits are delayed Necessary investment is not made to process and ways of working in the required timescales to supplement the technology and realise the anticipated benefits High number of dependencies in place and budget reductions limit the resource and investment available which will impact on the pace of delivery 	<ul style="list-style-type: none"> Implement robust governance for the consideration of technology enabled/driven initiatives to ensure investment is prioritised Ensure that technology driven initiatives are supported by a change plan to adjust processes and ways of working accordingly
F3	The financial efficiencies required by sovereign partners cannot be delivered sustainably whilst maintaining Orbis values; target budget reductions are not realised or Orbis value proposition is eroded to achieve the requirements	<ul style="list-style-type: none"> An increased requirement for financial efficiencies from the sovereign partners cannot be delivered whilst retaining the agreed service scope and quality and remaining aligned to Orbis values and political priorities (i.e. local presence) Delivery of the required financial efficiencies would compromise ongoing service delivery e.g. compliance with statutory financial processes 	<ul style="list-style-type: none"> Hold ongoing discussions with sovereign partners regarding the impact of planned and future budget reductions, to ensure informed decision making Invest in enabling initiatives to support the delivery of further financial efficiencies where possible

B. Financial risks

Financial (F)			
ID	Risk	Description & Implication	Mitigation
F4	Loss of Orbis customer base (e.g. social care and/or traded services) adversely impacts on the future financial sustainability of Orbis	<ul style="list-style-type: none">Existing Orbis customers choose to access back office services from another organisation; customer base reduces and service delivery is not financially sustainable at the reduced scale; results in a breakdown of the partnership	<ul style="list-style-type: none">Undertake viability assessments of the loss or change in requirements of key customersInvest in developing and maintaining relationships with key customer groups
F5	Value of Orbis is eroded due to a 'race to the bottom' meaning Orbis cannot sustain both transactional and strategic offers	<ul style="list-style-type: none">Scale of financial efficiencies results in difficult decisions and requires a focus on the cheapest possible delivery mechanismOrbis value of transactional and strategic services that uphold the public sector ethos lost	<ul style="list-style-type: none">Hold informed discussions with sovereign partners regarding the options for delivering further financial efficiencies and consequencesInvest in developing people and the culture to foster innovation and encourage a proactive approach to trying alternative delivery models

C. Operational risks

Operational (O)			
ID	Risk	Description & Implication	Mitigation
O1	Business as usual service delivery is adversely impacted by a programme of sustained change; service quality reduces along with customer satisfaction	<ul style="list-style-type: none"> Ongoing change programme results in staff anxiety and impacts adversely on performance Insufficient capacity to deliver business as usual services alongside service transformation; reduces staff morale and impacts on service quality and pace of change 	<ul style="list-style-type: none"> Develop and implement a change management plan Target learning and development initiatives to key competencies i.e. change management Ensure clear communication of the strategic direction and future vision to sustain engagement
O2	Differing terms and conditions across the sovereign partners can de-stabilise the working environment, adversely impacting on the Orbis culture, staff satisfaction and retention	<ul style="list-style-type: none"> Differences in pay and terms and conditions can create a disjointed workforce Differences result in tensions, acting as a barrier to creating the desired Orbis culture; staff become dissatisfied, negatively impacting on performance and retention 	<ul style="list-style-type: none"> Engage regularly with Trade Unions Clearly communicate offer to staff Support staff to develop skills and work flexibly across the partnership via a secondment programme Develop partnership roles for pan-Orbis responsibilities Review the partnership structure at periodic sessions over the life of the business plan to ensure that this remains aligned to the aspirations from the partnership
O3	Resistance to change from staff and key stakeholders; delays and/or inhibits service transformation	<ul style="list-style-type: none"> Staff anxiety results in resistance to further change and disengagement in change programmes Pace of change is delayed Service performance and quality reduces 	<ul style="list-style-type: none"> Develop and implement a change management plan Target learning and development initiatives to key competencies i.e. change management Implement quick wins where possible to build credibility Engage staff in the development of service transformation plans to build ownership
O4	Service behaviours are not consistent with the desired EPIC behaviours; prevents the creation of the target Orbis culture and way of working	<ul style="list-style-type: none"> EPIC behaviours are not modelled at all levels of the organisation so the Orbis way of working is not established Staff therefore do not develop a sense of loyalty to Orbis and the value proposition is weakened 	<ul style="list-style-type: none"> Continue to raise awareness of the EPIC culture and Orbis brand amongst the workforce through regular and consistent communication Review the extent to which leadership role model behaviours and create the conditions for open feedback Target staff development programmes so activities to build the culture are focused

C. Operational risks

Operational (O)			
ID	Risk	Description & Implication	Mitigation
O5	Historic under-funding of services results in an organisational debt for technology and infrastructure within MOBO budgets, limiting capabilities and reducing business continuity	<ul style="list-style-type: none"> If investment in infrastructure is not at the optimal level the ability to undertake routine maintenance will be hampered Greater risk of system failure or a compliance breach, resulting in significant financial and reputational risk 	<ul style="list-style-type: none"> Identify minimum system maintenance requirements and document on an annual plan for transparency Ensure sovereign partners are aware of the potential consequences of dis-investment in infrastructure (e.g. IT, Property etc) prior to budget decision making
O6	Staff retention declines due to limited awareness of potential career paths/perception of limited career paths	<ul style="list-style-type: none"> Additional job reductions and decisions not to fill vacant posts raises concerns regarding more limited career progression opportunities Loss of talent from the organisation 	<ul style="list-style-type: none"> Promote opportunities available to staff e.g. secondments, Joint Learning Programme, training etc Undertake exit interviews to understand common themes Undertake a regular staff survey to capture the organisational mood
O7	Unable to meet aspirations for place based growth due to absence of required capabilities to provide back office services to a more diverse public sector customer base	<ul style="list-style-type: none"> Potential additional customers deterred from selecting Orbis as a provider; loss of potential growth opportunity Additional customers secured but not retained due to skill shortage 	<ul style="list-style-type: none"> Identify target potential customers Undertake a viability assessment to understand potential Identify skills and knowledge required and develop a programme to upskill the workforce
O8	Services operate in silos; opportunities for financial efficiencies and place based growth not maximised	<ul style="list-style-type: none"> Service specific performance metrics and financial savings targets drives silo working Potential benefits of an Orbis wide approach not realised Customer journey disjointed resulting in reduced satisfaction 	<ul style="list-style-type: none"> Continue to progress pan-Orbis activities and priorities Raise awareness of service specific activity at leadership events to facilitate knowledge share and joint working

D. Reputational risks

Reputational (R)			
ID	Risk	Description & Implication	Mitigation
R1	The reputation of Orbis is adversely impacted as a result of poor performance	<ul style="list-style-type: none"> If good quality performance is not sustained the reputation of Orbis may be adversely impacted, resulting in potential loss of funding, reduction in scope and media attention 	<ul style="list-style-type: none"> Develop a clear vision and set of priorities for Orbis Monitor service and pan-Orbis performance Continue to raise awareness across sovereign partners and the workforce of Orbis
R2	Political dissatisfaction with Orbis proposals to realise the required budget reductions	<ul style="list-style-type: none"> Proposals are not in line with political priorities Results in dissatisfaction and potential loss of funding or support 	<ul style="list-style-type: none"> Prepare options for budget reductions and clearly identified consequences Engage Joint Committee in discussions regarding focus areas
R3	Orbis fails to remain compliant with legislative requirements; brand negatively impacted	<ul style="list-style-type: none"> Due to reduced workforce capacity following budget reductions regulatory standards are not met Orbis brand negatively impacted posing a threat to the future sustainability 	<ul style="list-style-type: none"> Document regulatory requirements and assign accountable officers Leadership to review compliance on a regular basis Compliance audits to be undertaken periodically
R4	Due to a reduced workforce and service changes following financial efficiencies, Orbis is unable to meet its growth aspirations	<ul style="list-style-type: none"> Workforce does not have the capacity to respond to growth opportunities Service offer is not attractive to potential customers resulting in loss of opportunity 	<ul style="list-style-type: none"> Undertake viability assessment of growth opportunities and investment required Continue to focus on service transformation to release capacity
R5	Service quality is compromised due to unsustainable growth, either in type of growth or scale	<ul style="list-style-type: none"> Customer base grows at the expense of the quality of service to existing customers 	<ul style="list-style-type: none"> Undertake viability assessment of growth prior to pursuit Develop and implement performance framework to maintain visibility of service quality
R6	Orbis cannot effectively demonstrate value to sovereign partners due to the absence of robust performance measures and evidence	<ul style="list-style-type: none"> If value cannot be communicated to customers they may seek services from other delivery models, impacting on the sustainability of services 	<ul style="list-style-type: none"> Develop and implement a performance framework to maintain visibility of service quality Maintain and develop further relationships with sovereign partners