

**OVERVIEW AND SCRUTINY PANEL
FOR REGENERATION**

**SCRUTINY INVESTIGATION INTO THE
LIBRARIES AND INFORMATION CENTRES
PROJECT**

1. Introduction

1.1 Background to Scrutiny investigation

On 1 November 2005, the Overview and Scrutiny Management Committee resolved to refer a request from a member of the public to scrutinise aspects of the Library and Information Centres Project to the Overview and Scrutiny Panel for Regeneration.

The Overview and Scrutiny Panel for Regeneration agreed that a sub group of its members would undertake the piece of work. Councillor Nigel Patrick (Lead Member) and Councillor Jim Dodds agreed to carry out the scrutiny investigation. They were supported by Penny Bunker, Overview and Scrutiny Officer.

1.2 The scrutiny referral

The referral was made by a former employee of the council. HW had been employed for 12 years as a Librarian. HW wrote to Councillor Andrew Palfreeman (Chair of Overview and Scrutiny) on 19 September 2005 to raise concerns about the way in which the initiative to create Library and Information Centres had been managed.

HW's scrutiny request centred on the following aspects of the review:

Decision Making: Concerns about the transparency of the decision making process. Concerns about the quality of information provided and if it could inform a meaningful debate on the strategy and future direction for the Library Service.

Consultation: Concerns about the inadequacy of consultation with senior officers, staff and the public about the Frontline Service Points Strategy and the proposals for the service, in particular the future role of the Library Service

Communication: Concerns about the quality of management communication with staff.

1.3 Methodology

Initial evidence was gathered through a series of interviews which took place on 17th and 22nd of November and 14th December 2005. Evidence was gathered from the following people:

Councillor John Smithson - Cabinet Member
Cliff Stewart - Project Executive for LIC's Project Board
Kimiyo Rickett - Head of Culture and Leisure Service
Catherine Morris - Assistant Head of Service
Rob Warburton - Assistant Head of Service
Rosemary Gibson - Group HR Manager
Paula Dodd - Personnel Officer
Roger Prescott - Project Manager
Steve Washington - Unison
Lesley Kipling - Unison
HW – Former employee who referred issue to Scrutiny

In addition the panel had access to background papers and reports including a time line of key events (attached at appendix 1) and reports submitted to Cabinet and Cabinet Committee.

In March 2006 there was an informal discussion of the draft findings from the interviews, following which Management submitted further written information to clarify some of the points raised by the panel. A list of the additional written evidence is attached at appendix 2.

2. Outline of the Development of Library and Information Centres Project

The development of the Library and Information Centres (formerly known as Front Line Service Points) approach started in 2001 and a strategy was approved by Cabinet in December 2001. The strategy consisted of a three year investment strategy that aimed to improve customer contact points and rationalise the number of buildings used by up to 17 over a 5 year period. At that time, the Council had 61 core FLSPs which included Libraries, Housing Offices, Cash and Information Offices and Kirklees Information Points.

In November 2001, an informal discussion paper for Cabinet Members set out the aim that by 2005 “ to see 23 Libraries, 3 Town Hall Receptions, around 6 Housing Offices and around 3 Cash and Information Offices. These facilities would deliver a range of generic services mainly across the counter, but be supplemented by sessional provision in site.

.... The generic services will be delivered alongside and in part integrated with the primary function of the individual FLSP; all staff at a particular FLSP will be able to cover all front line roles at the FLSP.”

From the additional information supplied to the panel in 2006, it can be seen that from November 2001, all 23 libraries were part of the project and the intention was to develop a generic Customer Services Officer role for the FLSPs. This represented a significant change for staff undertaking frontline duties across three different service areas. The detail of how each FLSP would develop had not been thought through in any level of detail at this stage.

An initial pilot in Skelmanthorpe in 2001 was unsuccessful because it tried to run services back to back rather than adopting a generic approach by a dedicated customer services officer. Customers were not satisfied with the service offered.

The initial FLSP Officer Project Team was lead by Jonathan Drake, former Head of Culture and Leisure Service until he became terminally ill and Cliff Stewart, Head of E Government, took over the project in August 2002.

In October 2002, Cabinet considered a report on the progress of the FLSP Strategy and approved the extension of Birstall Library to provide a pilot FLSP. The proposal was to open the pilot in May 2004. In December 2002, Roger Prescott was appointed as the FLSP Project Manager.

During 2003 a cross political party, Member Reference Group was established to progress the Front Line Service Point work. Discussion areas for the Reference Group included customer experience and expectations, staff experience and operational issues. Draft project rollout proposals and broad indicative costs were produced in October 2003.

In July 2003 Cabinet agreed an allocation of £171K to the Birstall pilot project. The contractors started on site in January 2004 and the pilot opened on 29 May 2004. A second pilot was launched at Skelmanthorpe, opening on 24 July 2004.

In April 2004 an Implementation Team was appointed to lead on the staff and communication issues of the review. The Team was made up of one Manager from each of the Library Service, Cash and Information Service and the Customer Relations Unit.

On 6 October 2004. Cabinet Committee (Policy and Resources) received an update on the overall project, including a summary evaluation of the pilot schemes at Birstall and Skelmanthorpe. Budgetary information on the actual costs of the pilots was provided. Cabinet Committee approved the roll out of the Front Line Service Point programme, including the amalgamation of front offices of the library, cash and information services. Approval was subject to each individual project being approved before work commenced.

In October 2004 a programme of Area Committee briefings commenced to consult with Ward Members and communities on proposals for Library and Information Centre provision in their area. Consultation meetings were also held with Parish Councils.

In December 04 and August 05 the overall project programme, which set out the position each LIC had reached, was shared with Members.

At the time of the scrutiny request the programme was continuing to be rolled out, Cabinet was approving areas for investigation and approving the detail reports on LICs that were ready for implementation. The only LICs completed by November 2005 were those in Birstall and Skelmanthorpe.

3. Evidence Gathered by the Panel

3.1 The LICs review process

The Scrutiny Panel was informed that approximately 300 members of staff, from three service areas were affected by the proposals to amalgamate the Library and Cash Office Services to create the LICs.

The early work centred around developing a concept on how FLSP/ LICs would work. This included visiting other councils to look at a variety of approaches to frontline service delivery. The involvement of staff started with a briefing letter in April 2003. The letter was sent to staff in Libraries and Cash and Information Offices and gave a brief overview of the development of Front Line Service Points, the outline timetable for the Birstall Front Line Service Point, and the proposals for detailed briefings by Heads of Service and Managers over the coming months.

Following the initial briefing letter, Librarians were not involved until November 2003 when general discussions took place on the future of libraries. The Panel heard that there was no detail provided, including no structure charts. The Panel was told that the majority of Librarians were confused and concerned by the information received. Management were aware of concerns about the lack of clarity, but did not take any specific action to address the concerns of the Librarians.

In March 2006, Management told the panel that it had not been possible to produce structure charts or detailed information at the pilot phase. The aim was to pilot the concept in order to identify what was needed to make the approach work effectively in other locations.

As part of developing the implementation process, staff were divided into phases, with those staff whose job description was most affected being in the first phase. The first phase focussed on the new generic Customer Service

Officers who would be delivering front line services. Librarians, mobile library staff and Kirklees Information Point staff were included in a later phase. For the first phase the Librarians were considered “not affected” and therefore the review work focussed on those members of staff who were considered to be directly “affected”. Cliff Stewart informed the Panel that the Implementation Agreement (the 1991 policy relating to restructures) was followed and Unison was informed and consulted about the staff who would be affected.

Affected members of staff were consulted by the Implementation Team. Work was carried out on developing new job descriptions and asking staff to express a preference for where they wanted to work. The Librarians (35 in number) were not consulted on the proposals being developed for the first phase. No date was given for when the second phase would begin. The Panel was told that the work in developing the future role of Librarians, including a revised job description, started in July 2005.

From the outset, Management was clear that there would be no redundancies or need for redeployment as a result of the review. This satisfied the unions.

A project board was established, initially lead by Jonathan Drake and later by Cliff Stewart. The Project board that managed the roll out of the LIC’s programme comprised:

- Head of Service for Culture and Leisure
- Head of Service E Government
- Head of Service Customer Relations
- Head of Service Revenues and Benefits
- Assistant Director Social Affairs and Health
- Project Officer E Government

When JD was leading the project, Rob Warburton, Assistant Head of Service (Libraries and Information), attended board meetings with him. When JD became too ill to continue his role, RW took the Culture and Leisure Service’s place on the board and CS took over leading the project. It has not been made clear to the Panel what each board member’s role was.

The line of communication between the project board and the ‘affected’ staff was via the Implementation Team created in April 2004. The Implementation Team was lead Catherine Morris, who had been seconded into the role. The team dealt with concerns raised by staff. Catherine Morris, the libraries specialist member of the Implementation Team, told the panel that she felt that responsibility for consultation with staff lay with RW and she did not want to impinge on his role. However RW maintains that this responsibility was not made clear to him.

RW suggested to the Panel that the project board met infrequently and meetings were often cancelled. Other evidence suggested that the project board intended to meet once every four weeks and there were additional meetings of the different project teams that were responsible for progressing elements of the review. Minutes were taken at board meetings and circulated

to board members. The Panel saw examples of the minutes of board meetings and were aware that some meetings were cancelled.

RW told the panel that he did not feel fully briefed or kept in the communication loop by his fellow managers even though he was a member of the project board. For example, the Assistant Head of Service said that he was not told of the decision to include all 23 libraries in the LIC's project. Consequently he did not consider that he was in a position to brief his staff properly.

3.2 Staff Consultation

The Panel found that officers had differing views about who was responsible for consultation with staff.

In addition to the briefings and reporting back from the project board, there were additional meetings held for staff at key points in the project. Management evidence indicated that meetings with Librarians were held on 29 April, 11 and 22 June 2004. Other staff meetings that included Librarians were held on 23 and 30 April, 14, 15 and 17 September 2004 and 4 May 2005. Regular staff briefing bulletins were dispatched and it became part of the Implementation Team's role to ensure effective communication with staff. A total of 17 staff briefing bulletins were produced between September 2003 and November 2005 (examples are attached at appendix 3).

Briefing note 26, published on 2 February 2004, stated that there would be a wider group of managers who would provide support and feedback. This group included two managers from the Library Service. During the course of the Panel's work, there was no mention of the support offered to Librarians by these managers, therefore the Panel could reach no conclusion about how effective they had been.

However, despite the efforts that were made to keep staff informed, the concerns of the Librarians were overlooked as their role was not part of the first phase. When Kimiyo Rickett commenced her role as Head Of Service in September 2004, her immediate priority was to address the negative budget position within the service. KR had been asked to respond to HW's letter to CS but did not feel that she had the appropriate background to the project to answer HW's questions. KR sent the letter back to CS to respond.

In the first part of 2005 when KR had dealt with immediate priorities, she held meetings with groups of Librarians to outline her vision for the Library Service. KR told the panel that nothing was finalised and Librarians were given the opportunity to contribute ideas. Many Librarians emailed KR and she responded to all of the emails she received.

As the job descriptions for affected staff were being created, Librarians became aware through talking to colleagues, that aspects of their current job descriptions were appearing in the new Senior Customer Service Officer job

description. The panel heard that the Librarians believed that the supervision element of their role was being taken away from them. Having supervisory responsibilities is reflected in the scale of a post, Librarians were concerned about what impact losing supervisory responsibility would have on the grade of their post.

Although Management argued that supervision and other elements could appear in more than one job description, at the time when the concerns were arising the Librarians were not able to get any detail on their future role. Staff for whom the Librarians had day to day supervisory responsibility were talking about their new job descriptions and the lack of clarity for Librarians lead to rumour and hearsay.

Many of those interviewed by the Panel indicated that there were very differing views amongst the Librarians towards the LICs approach and the future role of libraries. Some wanted to maintain the “status quo” and saw the LICs approach as eroding their professional role and the function of libraries. Others saw it as an opportunity to expand their role and wanted to be part of the development process. When speaking to the Panel, HW suggested that change was not necessarily a bad thing but her main issue was how the potential change had been approached and whether informed decisions were being made. HW did have reservations about the generic job description and felt that libraries were being over taken by the priorities of other services.

The Panel heard that since July 2005, the Assistant Head of Service (now Catherine Morris) has been holding regular meetings with the Librarians which are helping to alleviate the situation. Six Librarians attend the meetings on behalf of all 35 Librarians, to discuss a list of some 12 to 15 concerns. This work includes the drafting of new job descriptions.

At the end of 2005 when the panel gathered initial evidence, both the union and the management agreed that there was still a lot of uncertainty. Most of the senior management positions had been agreed, but not filled. The rest of the structure had not been worked out. Some posts do not appear on the new structure. The precise role of the Librarians is still not finalised.

3.3 Human Resources Involvement

The human resources (HR) officers that the Panel spoke to had become involved in the project from March 2004. Management advised the Panel that HR were involved at the start of the project, including the initial exercise to identify affected staff and all negotiations. Initially the support was provided by the Personal and Strategic Service Resource Group. However, the Panel have been unable to substantiate the quality of the HR input prior to 2004 and the additional information supplied by Management contradicts what the HR officers told the panel.

HR said that any complaints or queries were dealt with by the most appropriate officer, which may have been CS the Project Executive or CM Implementation Team Leader or an HR officer. HR dealt with questions

received via Unison about individual conditions of service. The panel was advised that 63.2% of staff involved in the review were members of Unison. HR indicated that no formal grievances have been submitted throughout the process.

HR Officers identified that ideally they could have been involved in the project at an earlier stage. If the review had been taking place now then there would have been a meeting of HR Managers from the affected service areas, at the earliest opportunity.

HR also told the panel that the review priorities were job descriptions, salaries and training. HR said that recent work had started to look at the pre stages of a review, before formal implementation, in an attempt to provide more guidance on how to resolve disputes and when information can be shared.

3.4 Unison Views

The Panel met with two representatives of Unison, one of whom was a Librarian. Although it was noted that the Unison Branch Secretary had lead on negotiations, the Panel were unable to speak to him directly due to his attendance at a legal tribunal.

The Panel heard that Unison representatives had asked questions of management that did not receive a response. Initially Unison thought that this was because Management were unwilling to share information with staff. However, Unison came to realise that Management did not have the answers to their questions. Unison denied being heavily involved in the negotiations, contrary to claims by Management. However, Unison did not raise concerns with Councillors or Cabinet Members, believing that the process had the full backing of all Councillors. In his evidence, Cllr Smithson, Cabinet Member confirmed that he had not been approached with any concerns by members of staff or the unions. The panel felt it was perhaps regrettable that the union failed to raise their concerns with Councillors. Unison told the Panel that there would be no job losses as a result of the restructure and they were satisfied by this information.

In response, Management suggested that if Unison had any serious concerns about the strategy and approach these should have been raised through the formal Central Negotiating Team or Members Negotiating Team mechanisms.

Evidence from both HR and Management suggested that meetings were held with Unison throughout the review. Within the additional evidence supplied by Management there were copies of correspondence sent to Unison on key issues in February 04, July 04, September 04 and February 05.

There were clearly differing perspectives put forward about the review and the communication between Unison and Management. A further example being whether it was a buildings led or a people led review. Management would argue that there was an implementation date of 16 May 2005 when

staff were appointed into their new posts, irrespective of whether they were actually working in a LICs building at that point. Once that had happened the placement of staff was dependent on the roll out of the building programme. However the union representatives believed it was building led with the structuring based on the changes to and availability of buildings. Unison representatives described the process as one of 'chaos'.

3.5 Decision Making

The decision making process was difficult for the Panel to follow. There did not appear to be an overarching, comprehensive plan. The perception of the Panel was that the process simply evolved, and gathered pace in summer 2004 when the Birstall pilot and the (second) Skelmanthorpe pilot yielded favourable results. The 6th October 2004 Cabinet Committee signalled the roll out of LIC's to all libraries. However, it was the view of the Panel that basic questions still remained unanswered.

Discussions with the Cabinet Member, Councillor Smithson, who had been responsible during the implementation phase, indicated that he was not aware of any staff concerns about the project. He had visited Libraries, including Batley and whilst he was aware that there were some disgruntled staff, he was not approached directly with any concerns. Councillor Smithson said if he had been made aware of concerns about communication and staff unease, he would have discussed them with senior managers.

As Cabinet Member, Councillor Smithson said he had a periodic overview of the project whilst officers managed the project implementation, including staff and Union consultation. Councillor Smithson did not see it as his role to go below the overview role i.e by talking to staff. Councillor Smithson said he saw this as a Scrutiny role. Cabinet agreed that a detailed report on each LIC should be submitted for approval before any works commenced. Councillor Smithson's view was that the LICs approach to service delivery extended the services already provided by libraries. Libraries provided information, not just books, and would be contact points for the local authority.

In tracing the formal decision making process, the panel noted that many of the discussions took place in informal arenas. Decisions were made by Cabinet and Cabinet Committees but the reports did not reflect any in depth discussion on the future role of Librarians. There were brief summaries of the functions and role of a Library and Information Centre.

3.6 HW's Correspondence

Following the staff briefing bulletin number 6 issued May 2004, CS met with the Librarians on 11th and 22nd June 2004. By this time CS was aware that the Librarians had concerns about the review and their future role. CS suggested if anyone had any concerns that they contact him.

HW wrote to CS with a number of questions about the future role of Libraries and Librarians. CS confirmed to the Panel that he was reluctant to enter into a dialogue until the new Head of Culture and Leisure Service was in place. He sent a holding reply saying it would take sometime before he could answer questions in full. The correspondence was forwarded to the new Head of Service to respond to.

When KR commenced work in September 2004 she referred the correspondence from HW back to CS and he replied to HW in December 2004. The panel concluded that it was regrettable that HW's letter was not addressed sooner.

4. Conclusions and recommendations:

4.1 Management of the Review

The LICs project represented a significant organisational review affecting approximately 300 staff. The roles of frontline staff were changed considerably and officers took on responsibilities previously outside the remit of their service area. The development of a generic approach to customer service that incorporated the library function, is thought to be the first time such an approach has been tried nationally.

The way in which the staff groups were divided into affected and not affected for each implementation phase created tension. The documentation supplied to the panel indicated that although Management initially identified all staff as affected in 2003, by April 2004 the Librarians were no longer being identified as affected. Staff Briefing Note 26 stated *"...It is not envisaged that professional librarians will be included within the groups of affected staff.."*

Management were looking to give Librarians slightly different roles. They would lose the day to day supervision responsibilities without a reduction in pay, and manage projects such as promotional and outreach work instead. The panel concluded that it would have been better if the Librarians were to learn of this through official consultation channels, including union involvement, rather than by chance.

From the evidence presented to the Panel there appeared to be confusion about whose responsibility it was to consult with and brief the Librarians. Some managers, when interviewed, believed it was the Assistant Head of Service (Libraries and Information) responsibility, but the Assistant Head of Service said that he was never instructed to carry out that role, although he did take on that role to some extent. At a time when the Library Service was managing both affected and none affected staff, effective communication was the key to avoiding a culture of rumour and uncertainty.

The staff briefings went some way to informing on operational issues but with a lack of concrete structure charts or dates for the second phase of discussions, it was likely that the Librarians would start to feel isolated as change happened around them.

Officers emphasised the impact that the death of JD, Head of Culture and Leisure Service, had on the developmental phase of the review. JD would have had a vision for the Library Service and would have built this into the development of the review.

The Panel felt that as Assistant Head of Service, RW should have been more aware of what his role and responsibilities were with regard to consultation and communication with his staff. If he had any doubts these should have been discussed with CS.

The Panel feels that roles and responsibilities should have been clear and the project board should have picked up on areas where effective consultation and communication were not happening and addressed the issue.

4.2 Decision Making

From the evidence gathered by the Panel it is clear that discussion on the development and roll out of the Library and Information Centres took place in several arenas. The Project Board, Executive Management Group, Cabinet's Executive Briefing and Member Reference Group are all private discussion arenas where members of the public can not track what had been discussed or agreed. Cabinet Committees have a public agenda but many of the Frontline Service Point discussions were private agenda items due to the nature of the financial information in the reports. To a member of the public, like HW, it was not possible to track the discussions and decisions that shaped the LICs programme.

The panel questioned whether the pilots had been operating for a long enough period of time to enable an effective evaluation of the approach. Birstall was launched at the end of May 2004 and Cabinet approved the roll out of the LICs programme at the beginning of October 2004.

The panel concluded that it was a failure of the process that the Cabinet Member was not informed of the concerns raised by staff, either by management, the union or the staff themselves. The panel believe that action could and should have been taken much earlier to address their concerns

4.3 Human Resources Involvement

The panel felt that HR appeared to have taken a minor role in the process which the panel considered surprising given the size of the restructure. HR only got involved in March 2004 after the decision was made to go ahead with the pilots.

HR should have been involved in the project at the earliest opportunity, playing a full role. There is recognition that the pre implementation stages of reviews can be improved through providing better guidance on information sharing and dispute resolution. This may help prevent a similar situation to that experienced by the Librarians from arising again.

4.4 Communication and Consultation

The view of the Panel is that once authority was given to roll out the buildings programme, officers were left to get on with it. The approach appears to have worked for the majority of staff who were consulted, but not for the 35 Librarians who were not consulted early enough in the process. It would appear that the decision that Librarians were not affected by the first phase and therefore were not consulted, is key to what has happened here. Some of the managers interviewed accepted, with hindsight, that they could have taken a different approach.

As Librarians were not considered affected staff, questions asked were deferred by members of the project board. The panel concluded that the situation created uncertainty which led to misunderstanding, fear for the future, mistrust and anger. Some Librarians felt sidelined and that their role was under threat.

4.5 HW's Correspondence

Having made the offer that staff could contact him with questions, CS had a duty to respond in a reasonable time frame. Certainly before the report approving the roll out of the LICs programme went to Cabinet in October 2004. A holding reply was sent but the further delay of six months before a final response exacerbated the situation.

The Panel wondered why CS had not referred the issue to RW, as Culture and Leisure representative on the project board, to respond to.

From the evidence the panel heard, the panel concluded that HW was regarded as a valued member of staff. HW stated that she was not a lone voice but represented concerns shared by a number of librarians. This was supported by evidence presented to the panel by Unison representatives.

The panel concluded that it was regrettable that the contents of HW's letter were not addressed sooner.

4.6 Learning points and Recommendations

In summary, the panel concluded that the restructure was not sufficiently planned, poorly implemented and staff concerns were not dealt with as they should have been. There was no leadership from Cabinet and no direction from senior officers. In the view of the panel the decision not to consult the Librarians was a mistake. There was no obvious decision making path that can be traced.

Management do not support the Panel's view and following discussion of the initial findings of the Panel, management produced additional written evidence. According to management, the new information shows that there were discussions on the concept of front line service points and the roll out of the pilot projects. The majority of discussions took place in meetings that were not open to the public, including Member Reference Group, Executive Briefing and Executive Management Group. None of the new information submitted included any reference to in depth consideration of the future direction and delivery of the library service.

Whilst Scrutiny cannot turn back the clock there are clearly lessons to be learned from this:

- **Leadership** – the Cabinet member should take a greater role in leading a restructure, working closely with a senior officer who has been put in charge of the process. There needs to be open and honest dialogue throughout the project.
- **Better planning from the outset** – plans should be drawn up with structure charts before entering formal consultation with all staff and before implementation.
- **Clear decision making process** – there should be a clear and open decision making process for officers, cabinet members and staff.
- **Closer working** – managers involved in the restructure process must be made aware of their roles with regular, minuted reporting mechanisms in place.
- **Better communication** - between managers, HR, members, unions and all staff.
- **Feedback** - mechanisms in place to address all staff concerns

The Panel **RECOMMENDS:**

(1) That in all structural reviews the 1991 Implementation Agreement is fully adhered to and properly implemented.

(2) That officers should make full use of the Corporate Project Management Standards, in particular being clear about roles and responsibilities on the project board and responsibilities for consultation and communication with staff.

(3) In review situations there should be clear two way channels of communication established for all staff, to help to remove uncertainty and keep staff updated on progress.

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Ref: 05/06/ Standing panels/Regen/ LICS/ Final report Cabinet 2.

Response of the Cabinet Member

Councillor Ken Sims, Cabinet Member for Regeneration forwarded the following response to the report: -

“ This report clearly shows that during a traumatic time within the Service, it lead to some problems. This should be noted and taken on board for the future of the Service, to ensure that in the future mechanisms are in place to minimize the effects on management and policies in progress. “

Green Cabinet, EMG etc,

Yellow work with staff etc,

Blue Consultation

7/12/01	Cabinet FLSP Strategy approved
May 02	Jonathan Drake's illness starts
June 02	Project Team ask for help
August 02	Cliff Stewart takes over
18/09/02	Members' Briefing – FLSP Progress report
09/10/02	Cabinet - Birstall pilot, negotiation with unions, use of POs & corner shops
07 /11/02	Batley HMC
14/11/02	KNH North Board
20/11/02	Cabinet - Customer Services Strategy progress
21/11/02	Birstall & Birkenshaw Area Committee - Birstall pilot, negotiation with unions, use of POs & corner shops CS RP
02/12/02	First FLSP Board meeting (meet monthly from this date) initial board C.Stewart, J Drake, C. Taylor, J Brady, J Doyle, H Geldart, A. Howard, R Scott, T Cornwall, R Prescott. - R Warburton joined Aug 03
09/12/02	Roger Prescott starts as Project Manager
10/12/02	Cashiers briefing start monthly
11/12/02	Birstall Project Team start work meeting monthly and continue until Birstall pilot is opened C Stewart, A Blakeley, D Chapman, P Thorp, N Rhodes, L Armitage, R Scott, A Bey, R Prescott
03/12/02	KNH Main Board CS RP
09/01/03	Branding Team start work meeting monthly until pilot opens
13/01/03	Rob Vincent, JB, CT, J Drake, CS, RP – single line management, opening hours, branding
20/01/03	Member's Reference Group Customer experience, staff experience, operational issues (plus 3/3 and 4/4)
03/02/03	Kirklees Open Door Access consultation
27/02/03	Libraries - J Drake, R Warburton, A Blakeley C Stewart, R Prescott
01/03/03	HR- C Stewart, P Dodd, R Prescott JDs staff consultation, organisational change, training
03/03/03	Member's Reference Group – concept and definition
12/03/03	Architectural Consultants appointed
17/03/03	EMG - Strategy
21/03/03	Rob V, JB, J Doyle, CT CS JDrake, RP – Implementation Programme
28/03/03	Paper to Marina Turner - FLSP HR overview
04/04/03	Member's Reference Group – strategy update
08/04/03	Rob Greenwood re DDA access
11/04/03	UNISON (plus 14/4/03, 30/10/03, 20/11/03, 16/2/04, 15/3/04, 11/4/04, 19/4/04, 20/8/04, 29/8/04, 15/11/04, 10/9/04, 06/01/05, 03/03/05, 10/3/05, 13/5/05 24/05/04 continuing)
13/05/03	Birstall & Birkenshaw Members consultations

16/05/04	Staffing Project Team – P Dodd, M Manson (Peart), D Chapman, D Hatcher, S Lenton, A Hanson, A Taylor met to put together affected staff lists
23/05/03	Visit to Tameside (library based FLSP)
20/06/03	Visit to Liverpool (library based FLSP)
23/06/03	Cabinet
26/06/03	Libraries Management Team visited by CS
30/06/03	EMG – management issues
11/07/03	CS & DH visits Libraries
15/07/03	CS & DH visits Libraries
17/07/03	CS & DH visits Libraries
16/07/03	Members' Briefing
21/07/03	Birstall & Birkenshaw Members briefing
23/07/03	Cabinet – Develop Birstall pilot, Agree £171k allocated to project
October 03	Jonathan dies
23/10/03	Training – Heather Paul
16/11/03	Process Mapping – Cash Services
08/12/03	Rob Vincent briefing CS RP
11/12/03	Process Mapping – Libraries Services
19/01/04	EMG – progress report
22/01/04	Libraries Management Team attended by CS & RP
22/01/04	Cllr Battye/Rob V/ CS – update re FLSP
28/01/04	Members' Briefing - Progress report, merger cash offices, functionality, cash kiosk, funding, toilets, HR
28/01/04	Contractors start at Birstall
30/01/04	CS meeting with Cash & Information/Libraries Staff HTH
05/02/04	Birstall & Birkenshaw Area Committee
17/02/04	CS & Library Area Staff Meeting
20/02/04	CS & Library Area Staff Meeting
26/02/04	CS visit to Kirkburton Library
27/02/04	Disabled Access Group
01/03/04	CS/RW/FLSP Implementation Team
02/03/04	CS FLSPs + Library Provision Meeting
08/03/04	FLSP Project Team + Paula Dodd
17/03/04	Members' Briefing – Lib Standards, locations inc KNH, Lib & Cash stats, 2 mile map, indicative costs
22/03/04	Work starts on plans for Skelmanthorpe
29/03/04	Birstall & Birkenshaw Tenants & Residents Forum
31/03/04	Cabinet FLSP Progress, Payment kiosk acquisition, Skelmanthorpe pilot, project management funding
April 04	Implementation Team - Catherine Morris, Phil Thorp & Diane Chapman start work - Weekly meetings held with team CS and RP
06/04/04	Denby Dale Parish Council
19/04/04	EMG Rollout
23/04/04	Library Staff Meeting
29/04/04	C Morris & Professional Librarians
30/04/04	Library Staff Meeting – HTH Batley Library Staff – Cleckheaton
10/05/04	Birstall/Skelmanthorpe Staff

13/05/04	Consultation with Primary Care Trust re Kirkheaton
21/05/04	Visit to Cash Offices with D Chapman
24/05/04	FLSP Meeting with Unison and Cash & Info. Meeting with Unison
29/05/04	BIRSTALL PILOT OPENS
04/06/04	Visit to Cash Offices – D Chapman
11/06/04	Building Users Skelmanthorpe
11/06/04	Meeting with Professional Librarians
18/06/04	Skelmanthorpe closes for work
24/06/04	Visit to Cash Offices – D Chapman
25/06/04	Visit Birstall FLSP with DC
02/07/04	Ravensthorpe Library Area Meeting re FLSPs at Ravensthorpe Library.
06/07/04	Birstall FLSP event – at Birstall
12/07/04	FLSP Workshop, Oval Room, Hudawi
22/07/04	Library Management Team
24/07/04	SKELMANTHORPE PILOT OPENS
26/08/04	Libraries Management Team presentation re library future
31/08/04	FLSP Workshop, Hudawi
08/09/04	Celebratory Meal – opening of FLSP, Skelmanthorpe
14/09/04	FLSP staff meeting – Holmfirth Town Hall
15/09/04	FLSP staff meeting – Dewsbury Town Hall
17/09/04	FLSP staff meeting – Huddersfield Town Hall
20/09/04	CS to brief Holme Valley Parish Council
04/10/04	Joint de-brief of Birstall and Skelmanthorpe staff
06/10/04	Policy & Resources Cabinet Progress, organisation structure, building prog, project management cost analysis of pilots, staffing bring together 2 sets of staff
12/10/04	Area Committee Briefings start – Dews/Batley
01/11/04	Adrienne Stanley starts as 2nd Project Manager
04/11/04	Area Committee – Colne Valley
18/11/04	Police consultation
23/11/04	P & R Cabinet Briefing re FLSPs
30/11/04	Area Committee – Holme Valley South
02/12/04	FLSP Imp. Team/Review & Improvement Team
03/12/04	Consultation with Primary Care Trust re Kirkheaton
07/12/04	Area Committee – Holme Valley North
08/12/04	Area Committee – Kirkburton
14/12/04	Area Committee – Huddersfield North
14/12/04	Area Committee – Spen Valley
21/12/04	Area Committee – Huddersfield South
13/01/05	Area Committee – Denby Dale
17/01/05	Area Committee – Mirfield
20/01/05	Kirkburton Parish Council
21/01/05	Dewsbury Consultation
25/01/05	Colne Valley Consultation
27/01/05	Batley Consultation
03/02/05	Holme Valley North Consultation
07/02/05	Holme Valley South Consultation
08/02/05	Mirfield Town Council briefing
09/02/05	Spen Valley Consultation

15/02/05	Spenn Valley Planning Meeting
22/02/05	Staff Welcome Meetings (plus 10 others)
22/02/05	FLSP Meeting re Funding
23/02/05	Kirkburton Consultation
28/02/05	CS Meeting with staff – Birstall Information Point
28/02/05	Holme Valley South Consultation
02/03/05	Policy & Resources Cabinet Change management, report of presentations to Area Committees, Building programme, future reports top Regen Cabinet
03/03/05	Services Consultation – Dewsbury
17/03/05	Services Consultation - Batley/Cleckheaton
17/03/05	Librarians Briefing Meeting RW, KR, CM, RP
20/04/05	Regeneration Cabinet – Approval to make an offer for Heckmondwike site
22/04/05	Huddersfield North Consultation
26/04/05	Huddersfield South Consultation
27/04/05	Services Consultation – Colne Valley
10/05/05	Denby Dale Consultation
11/05/05	Mirfield Consultation
19/05/05	Batley staff meeting re concerns AB, CM, RP
25/05/05	Members' Briefing with Police - background, vision, roll & function, partners, additional LICs, future reports to Regen Cabinet
19/07/05	Overview Scrutiny
26/07/05	Batley staff consultation AB, RP, AS
27/07/05	Holme Valley Members re Holmfirth
01/08/05	Regeneration Cabinet re Additional Four LICs
02/08/05	Golcar Library staff re brief RP, AS
23/08/05	Lindley Library staff re brief RP, AS
31/08/05	Regeneration Cabinet – Decision on location of additional four LICs
05/09/05	Meltham Town Council
08/09/05	Batley Cash Office staff consultation RP, AS, DC, JM
05/10/05	Education & Peoples Cabinet - Acquisition of site at Heckmondwike
12/10/05	Regeneration Cabinet - Approval of funds for site at Heckmondwike

Appendix 2

LICS Project – Additional Documents Provided to the Scrutiny Panel

Planning/Project Documentation

- | | | |
|-----|---|------------------|
| 1. | Report to Cabinet | 9 October 2002 |
| 2. | Discussion paper Member Reference Group | 20 January 2003 |
| 3. | Draft FLSP Strategy/Report EMG | 17 March 2003 |
| 4. | Project Timeline | 25 March 2003 |
| 5. | Project Timeline | 5 September 2003 |
| 6. | Indicative Rollout/Costs/Site information | 30 October 2003 |
| 7. | Progress Report EMG | 19 January 2004 |
| 8. | Progress Report Cabinet | 28 January 2004 |
| 9. | FLSP Rollout Discussion Cabinet | 17 March 2004 |
| 10. | FLSP Progress Report and Approval of
Cash Amalgamation | 6 October 2004 |
| 11. | FLSP Progress Report | 2 March 2005 |
| 12. | Review of LICs (FLSP) | 25 May 2005 |

Birstall / Skelmanthorpe Pilots

- | | | |
|-----|---|------------------|
| 13. | Customer Interaction/Transactions
Project Team | 17 March 2003 |
| 14. | Report Building Approval Cabinet | 23 July 2003 |
| 15. | Project Plan Project Team | 14 November 2003 |
| 16. | Report Approval Funding,
Skelmanthorpe, Kiosk | 31 March 2004 |

Overall Project Plan

- | | | |
|-----|-------------------------------|---------------|
| 17. | Shared with Members and Staff | December 2004 |
|-----|-------------------------------|---------------|

- 18. Shared with Members and Staff August 2005
- 19. Shared with Members February 2006

Staff Briefing Information

- 19a Letter to staff 25 April 2003
- 20. Briefing No. 1 September 2003
- 21. Briefing No. 2 17 December 2003
- 22. Briefing No. 3 2 February 2004
- 23. Briefing No. 4 10 February 2004
- 24. Briefing No. 5 20 April 2004
 - Met with Librarians 29 April 2004
- 25. Briefing No. 6 27 May 2004
 - Met with Librarians 11 June 2004
 - Met with Librarians 22 June 2004
- 26. Briefing No. 7 13 July 2004
- 27. Briefing No. 8 20 December 2004
- 28. Briefing UP FRONT 31 January 2005
- 29. Briefing UPFRONT 1 February 2005
- 30. Briefing UP FRONT 25 February 2005
- 31. Briefing UP FRONT 18 March 2005
- 32. Briefing UP FRONT 3 May 2005
- 33. Briefing UP FRONT 26 May 2005
- 34. Briefing UP FRONT 16 June 2005
- 35. Briefing UP FRONT 1 August 2005
- 36. Briefing UP FRONT 2 November 2005
 - Other staff meetings including Librarians
 - 23 April 2004
 - 30 April 2004
 - 14 September 2004

15 September 2004
17 September 2004
4 May 2005

36a Library meeting

29 April 2004

- Other Library staff meeting

22 June 2004
21 December 2004
17 March 2005

Unison Letters (only key notes)

37. Letter dated

18 February 2004

38. Letter dated

15 July 2004

39. Letter dated

9 September 2004

40. Letter dated

14 February 2005