

Appendix A - Transformation Portfolio Q2 performance update for Cabinet and OSMC (Dec 25)

Purpose of Report

The purpose of this report is to provide an update on the council's Transformation Portfolio for Quarter 2 as a part of the wider Q2 2025/26 Council Plan and Performance Update report. The Transformation Portfolio is the council's strategic programme of change, bringing together a range of programmes and initiatives that are designed to deliver the ambitions set out in the Council Plan.

The portfolio aims to modernise services, improve efficiency, and ensure the council is equipped to meet current and future challenges. Through its work, the Transformation Portfolio seeks to:

- Deliver the priorities and commitments outlined in the Council Plan,
- Improve outcomes for residents, communities and the organisation,
- Foster a culture of innovation and continuous improvement,
- Enhance customer experience and service delivery,
- Achieve better value for money.

1. Executive Summary

This element of the Q2 Council Plan and Performance Update report outlines progress to date, highlights key achievements and challenges, and sets out the next steps for the council's transformation portfolio. The report is intended to support effective oversight, and assurance by the Cabinet and will also be shared with the Overview and Scrutiny Management Committee (OSMC) enabling the committee to hold the council to account for the delivery of its transformation ambitions.

Directorate: Adults & Health

The Adults Change Programme has sustained a Red RAG status this quarter. £3.02m in savings have been achieved through changes in practice ensuring our residents achieve positive adult social care outcomes that maximise their independence. Whilst project targets remain broadly in line with expectations, a proportion of financial benefit realisation is now anticipated to slip into 2026/27. The risk profile has increased due to additional pressures—particularly resourcing constraints resulting in delays to some projects and risks linked to stakeholder engagement. Continued close monitoring, phased delivery, and strengthened engagement strategies are being implemented to maintain progress.

Work to shape the future of integrated neighbourhood health is progressing well, with strong collaboration across our regional partnership and national engagement through

the Neighbourhood Health Implementation Programme. The Model Region Blueprint now provides clarity on regional roles, core functions, and activities. The ICB is co-designing future arrangements with the regional NHSE and remains focused on its strategic commissioning role, supported by new good practice guides for SEND, safeguarding, continuing healthcare, and medicines management.

Key developments include:

- Provider partnerships in each place to deliver services by April 2027 or earlier.
- Continued provider collaboratives for acute, mental health/learning disability, and community services across West Yorkshire.
- Place-based arrangements evolving beyond ICB governance, with local authorities and Health and Wellbeing Boards playing a formal role in neighbourhood health plans.
- Strengthened partnership with the West Yorkshire Combined Authority.

Next steps include finalising discussions with NHSE on our 30 May submission regarding future design and any required changes.

Directorate: Children & Families

The SEND Transformation Programme remains at a sustained Red status to reflect the significant financial challenges which exist in this area. However, there has been positive movement, with NHS England and the DfE formally signing off the Big Plan 3 and commending the approach. Compliance rates for EHCPs remain above the national average, though continued focus is needed to maintain and improve performance.

Corporate Parenting has maintained a Green status, reflecting good progress across all workstreams. Some milestones are Amber due to timescales, but overall delivery is on track.

The Sufficiency programme is Amber, reflecting the progress in increasing family-based placements and developing new children's homes, alongside ongoing foster carer recruitment. 75% of our children looked after are now living in family-based settings.

Directorate: Place

The Homes & Neighbourhoods (H&N) programme has sustained an Amber status. The Cx system is now live and key workstreams are progressing, but resourcing and timeline pressures persist, particularly in phase 2 of the Cx project and the Total Repairs system upgrade.

Asset Transformation and Waste programmes' RAG status are both Amber, reflecting continued positive progress but also delays due to external factors such as market conditions and the timing of funding announcements.

The Asset Transformation programme's benchmarking exercise is complete, but final report sign-off is delayed. Whilst the final benchmarking report is being refined, potential programme activity is being identified and will be shared with the SRO and Exec Sponsors. This is expected to focus on improvements to asset data (to support data-informed decision making), strengthening of cross-council governance for asset management decision making, and clarification of current roles and responsibilities.

OSAMS and Fleet programmes have sustained Amber status, with positive progress on procurement and process mapping, though resource pressures and system issues are being managed. Passenger Travel remains Red, reflecting ongoing significant risks and a likely year-end overspend due to increased service demand.

Directorate: Public Health & Corporate

Digital Transformation programme is newly established, with the programme in early mobilisation and all core foundations in place. This period saw the publication of the Digital Review specification finalised, tender launched, and evaluations completed to progress the award of the external Digital Review.

Customer and Access, Temporary Accommodation, ERP Replacement, and CCTV programmes RAG profiles remain Amber, reflecting ongoing delivery with some challenges around costs, operational stability, and timelines. The Temporary Accommodation programme, for example, has seen reductions in the no. households in Temporary Accommodation but not in overall costs, prompting a finance review.

Contract Management RAG status remains Green, with good progress on the development of training resources and register management.

2. Information required to take a decision N/A

3. Implications for the Council

3.1 Council Plan

- The Transformation Portfolio is one of the council's main vehicles for delivering the Council Plan.
- All programmes and projects are aligned with the Council Plan's priorities for 2025/26.
- The Portfolio covers Adult & Health, Children & Families, Place, and Public Health & Corporate.
- Key programmes include Adult Change, SEND Transformation, Homes & Neighbourhoods, Waste Transformation, and Digital Transformation.
- Each programme supports the Council Plan's aims: modern services, improved outcomes, and financial sustainability.
- Cross-service projects (e.g., Customer & Access, Contract Management, ERP Replacement) drive joined-up and efficient services.
- Progress is reviewed regularly, with clear priorities and escalation routes.
- The Portfolio ensures the Council Plan's ambitions are translated into action and measurable results for residents and the organisation.

3.2 Financial Implications

- The Transformation Portfolio is central to delivering the council's financial strategy and medium-term plan.
- Programmes within the portfolio are designed to achieve savings, improve efficiency, and ensure value for money.
- Financial performance is monitored at Directorate and programme level, with regular reporting and oversight.

- Risks and pressures are managed at Directorate and programme level, and any significant variances are escalated through established governance.
- The portfolio approach enables the council to align investment and savings with its strategic priorities.

3.3 Legal Implications

- Legal considerations are assessed and managed at the programme level within the Transformation Portfolio.
- Each programme is responsible for identifying and addressing relevant legal requirements.
- Any significant legal risks or issues are escalated through established governance arrangements.

3.4 Climate Change and Air Quality

- Climate change and air quality implications are considered at the programme level within the Transformation Portfolio.
- Each programme is responsible for assessing and managing its impact on climate and air quality.
- Any significant risks or opportunities are escalated through established governance arrangements.

3.5 Risk, Integrated Impact Assessment (IIA) or Human Resources

Risk

- Risks are identified and managed at the programme level within the Transformation Portfolio.
- Each programme is responsible for assessing and mitigating its own risks.
- Significant risks are escalated through established governance arrangements.
- Portfolio oversight ensures that key risks are monitored and addressed across all transformation activity.
- Programmes and the Portfolio Team work collaboratively with corporate risk colleagues where appropriate to ensure alignment with the Council's overall risk management framework and to support effective identification, escalation, and mitigation of strategic risks.

Integrated Impact Assessment (IIA)

- IIAs are completed and managed at the programme level within the Transformation Portfolio where required.
- Each programme is responsible for assessing its impact, including equality, climate, and other relevant considerations.
- Any significant findings or risks are escalated through established governance arrangements.

Human Resources

- Human Resources considerations are addressed at the programme level within the Transformation Portfolio.
- Each programme is responsible for identifying and managing workforce implications, including staffing, skills, capacity, and organisational change.

- Where relevant, programmes work in partnership with HR colleagues to ensure alignment with workforce policies, procedures, and strategic priorities.

4. **Consultation**

- Consultation activities are planned and managed at the programme level within the Transformation Portfolio.
- Each programme is responsible for ensuring appropriate consultation with stakeholders and service users.
- Any significant findings or issues arising from consultation are escalated through established governance arrangements.
- Portfolio oversight ensures that consultation informs decision-making across all transformation activity.

5. **Engagement**

- Engagement with staff, partners, and communities is coordinated at the programme level.
- Each programme identifies and implements suitable engagement approaches to support delivery and change.
- Key engagement outcomes and challenges are reported through portfolio governance.
- This approach ensures that transformation activity is shaped by those it affects and remains responsive to feedback.

6. **Next steps and timelines**

- **Regular Transformation portfolio performance updates will be provided. The next update will be Q4 25/26.**

7 **Contact officer**

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8 **Background Papers and History of Decisions**

5th March 2025, Full Council approval of the Council Plan:

[Public Report Pack - 05 March 2025, Council meeting](#)

9 **Appendices**

Transformation Portfolio Q2 performance summary

10 **Service Director responsible**

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