REF.	MAIN ACTION RAG STATUS	RED QUADRANT RECOMMENDATION	KEY TASKS FOR DELIVERY	INTERNAL REF	PROGRESS RAG STATUS	REVISED SHORT / MEDIUM / LONG TERM	REVISED START DATE	REVISED PLANNED TARGET END DATE
PLANNING ENFORCEMENT								
ENFORCEMENT 001	Completed	Produce an up to date outward focused Planning Enforcement Charter with KPI's.	Hold initial meeting to discuss the task with Red Quadrant	EN001/01	Completed	N/A	N/A	N/A
			Agree process with Red Quadrant for assistance with undertaking the task, in consultation with Officers & Members. **Hold initial workshop.**	EN001/02	Completed	N/A	N/A	N/A
			Red Quadrant to produce report for comment.	EN001/03	Completed	N/A	N/A	N/A
			Team to create opportunity to involve others and create synergy with Enforcement Charter	EN001/04	Completed	N/A	N/A	N/A
			Link with communications- branding; design; website.	EN001/05	Completed	N/A	N/A	N/A
			PC to present to Portfolio Holder in advance of scrutiny meetings.	EN001/06	Completed	Short	01/11/2022	28/02/2023
			Signed off at Planning Committee & Council.	EN001/07	Completed	Short	01/11/2022	01/04/2023
ENFORCEMENT 002	Completed	The Planning Service, Enforcement Team and Legal Services conduct a workshop exercise to produce an SLA based on mutual undertakings and obligations. The SLA should include KPI's, fee structure and minimum documentation requirements.	Impartial facilitator to conduct workshop with Legal Services for discussion of issues.	EN002/01	Completed	N/A	N/A	N/A
			Consideration of current pay re-charge for legal services and limited resources in legal for planning matters.	EN002/02	Completed	N/A	N/A	N/A
			Conduct benchmarking exercise to compare process and practice with other authorities.	EN002/03	Completed	N/A	N/A	N/A
			Identification of solutions.	EN002/04	Completed	N/A	N/A	N/A
			Development of SLA once Legal and Democratic Services Manager and Monitoring Officer in place.	EN002/05	Completed	Short	01/01/2023	28/02/2023
			Present final progress report to the Our Future Transformation Programme Board.	EN002/06	Completed	Short	01/01/2023	28/02/2023
ENFORCEMENT 003	In progress	An Annual Report on Enforcement activities be submitted to the appropriate committees. Consideration be given to a six monthly review.	Determine the key criteria and information that will be included within the report (including key improvements made to service and tree enforcement information).	EN003/01	In progress	Medium	01/04/2023	31/05/2023
			Utilise existing template (used previously) as a starter for ten to update and further develop.	EN003/02	In progress	Medium	01/04/2023	31/05/2023
			Include Annual Enforcement Report on Forward Plan of meetings.	EN003/03	In progress	Medium	01/04/2023	31/05/2023
			Issue annual report to EO&S in May of each year and Cabinet in June, with the first report issued in May 2022.	EN003/04	In progress	Medium	01/04/2023	31/05/2023
			Circulate report (by email) to all members as a Member update following Cabinet endorsement.	EN003/05	In progress	Medium	01/04/2023	31/05/2023
ENFORCEMENT 004	Completed	The Planning Service consider if capacity and risk issues can be resolved via the delegation "down" to Enforcement Officers for writing non expedient reports and reports for action.	Conduct benchmarking exercise to compare process and practice with other authorities.	EN004/01	Completed	N/A	N/A	N/A
			Develop process mapping of current process. **(DUPLICATE OF 005.)**	EN004/02	Completed	N/A	N/A	N/A
			Review templates and efficiences within Uniform	EN004/03	Completed	Short	01/02/2023	01/03/2023
		The "traditional" approach to the management of Enforcement be replaced with greater accountability placed on Enforcement Officers and changes to management oversight.	Develop a standard pre-populated template as a starter for ten for Officers to further develop, as appropriate.	EN004/05	Completed	Short	01/02/2023	01/03/2023
			Consider changing job descriptions of Enforcement Officers to include as a key task of the role.	EN004/06	Completed	N/A	N/A	N/A
ENFORCEMENT 005	In progress	The Planning Service and Council consider whether the absence of a seamless service is in the best interests of the Council, the planning service and the citizens and stakeholders of West Lancs.	Determine how the team currently operates and communicates with the customer (including multiple customers and wider stakeholders). Process mapping.	EN005/01	Completed	N/A	N/A	N/A
			Undertake customer journey mapping exercise to process map the current 'as is' and the potential 'to be'.	EN005/02	Completed	N/A	N/A	N/A
			Investigate complaints etc. through Service Now and develop a single system/ approach for communication.	EN005/03	In progress	Short	01/02/2023	31/03/2023
			Proactively encourage a shift to move customers to self-serve (i.e. online) rather than ringing up for advice.	EN005/04	In progress	Short	01/02/2023	31/03/2023
			Investigate opportunities to utilise different technology.	EN005/05	In progress	Short	01/02/2023	31/03/2023
			Finalise approach for managing expectations of customers- including all stakeholders.	EN005/06	In progress	Short	01/02/2023	31/03/2023
ENFORCEMENT 006	Closed - no longer required	The Planning Service consider how best Building Control officers and others can support Enforcement Officers gather and corroborate evidence when carrying out site visits.	Explore as part of wider process mapping.	EN006/01	Closed - no longer required	N/A	N/A	N/A
			Explore capacity of role of officers to undertake the task.	EN006/02	Closed - no longer required	N/A	N/A	N/A
			Develop recommendations to implement a revised approach and embed new process, if appropriate.	EN006/03	Closed - no longer required	N/A	N/A	N/A
PRE-APPLICATION ADVICE SERVICE								
PRE-APP 001	Completed	a) The level of charging fees for Planning Services be updated from 2016 to 2021. b) A mechanism be introduced using a variety of criteria to provide an annual review and uplift of charges as part of normal business in setting the Council's budget.	Link to wider corporate project for fees and charges.	PRE001/01	Completed	N/A	N/A	N/A
			Produce benchmarking information to determine current national average for fees and charges.	PRE001/02	Completed	N/A	N/A	N/A
			Once determined implement new fees and charges, including publicising revised changes to customers.	PRE001/03	Completed	N/A	N/A	N/A
			Annually increase fees, in line with corporate approach, moving forward.	PRE001/04	Completed	N/A	N/A	N/A
PRE-APP 002	On target	The turnover of planning applications (note: does this reference Pre-Apps rather than actual Planning Applications?) from all categories for an agreed period be utilised as a base line for predicting income generation against the costs of the	Determine time period for assessing turnover of planning applications.	PRE002/01	Completed	N/A	N/A	N/A
			Apply formula to turnover of Pre-App applications X proposed charging fees to determine baseline for predicting income.	PRE002/02	On target	Medium	01/04/2023	30/06/2023
			Utilise baseline for predicting income to tailor processes, service structure and approach to service delivery to meet income expectations.	PRE002/03	On target	Medium	01/04/2023	30/06/2023

			income generation against the costs of the fee based service.	Undertake evaluation/ analysis on a minimum of an annual basis to assess appropriateness of fees and charges.	PRE002/04	Closed - no longer required	N/A	N/A	N/A
PRE-APP	003	On target	Financial and Planning Service include in their internal KPI financial transactions received and paid for online linked to the Validation Process.	Liaise with Finance colleagues to determine most appropriate approach to gathering and analysing financial transactions received.	PRE003/01	On target	Medium	01/04/2023	30/06/2023
				Undertake process mapping (where appropriate) to determine current 'as is' process and consider new 'to be' process.	PRE003/02	On target	Medium	01/04/2023	30/06/2023
				Re-assess current set of KPI's and include new financial KPI's	PRE003/03	On target	Medium	01/04/2023	30/06/2023
				Continue to monitor new financial KPI's to influence continuous service improvement and influence performance.	PRE003/04	On target	Medium	01/04/2023	30/06/2023
PRE-APP	004	On target	a) Financial and Planning Services evaluate the costs and benefits of utilising the Planning Portal only as a means of processing offline payments as against the current range of payment options. b) The Councils Planning Web Portal be reviewed and decisions made as to which elements of planning processes should be provided solely via the governments sponsored Planning Portal. (Note: the Planning Portal does not currently provide a service for Pre-Apps so this action cannot be undertaken.)	Undertake workshop to determine scope in terms of costs and benefits.	PRE004/01	On target	Medium	01/07/2023	31/10/2023
				Utilise benchmarking information i.e. approach of Warrington.	PRE004/02	On target	Medium	01/07/2023	31/10/2023
				Look to streamline the range of payment options to online only (with the caveat of phone payment etc. in circumstances where appropriate)	PRE004/03	On target	Medium	01/07/2023	31/10/2023
				Devise approach to channel customers to the portal payment only.	PRE004/04	On target	Medium	01/07/2023	31/10/2023
				Monitor revised process to determine effectiveness.	PRE004/05	On target	Medium	01/07/2023	31/10/2023
PRE-APP	005	On target	A precise explanation be provided on council documentation explaining that charges are for professional services provided by the Planning Service.	Draft statement to be produced.	PRE005/01	On target	Medium	01/02/2023	31/05/2023
				Gain approval of draft statement through appropriate channels.	PRE005/02	On target	Medium	01/02/2023	31/05/2023
				Publicise approved statement on relevant documentation and relevant WLBC website pages.	PRE005/03	On target	Medium	01/02/2023	31/05/2023
PRE-APP	006	On target	The Planning Service devise a consistent way of working for all planning staff that provides clarity to officers, elected members and applicants as to the limits of preliminary advice prior to it becoming a chargeable service.	Develop process maps to determine approach to be taken for preliminary advice and limits prior to becoming a chargeable service.	PRE006/01	On target	Medium	01/07/2023	31/10/2023
				Develop standardised approach to working practices for implementation.	PRE006/02	On target	Medium	01/07/2023	31/10/2023
				Communicate standardised approach to all stakeholders via appropriate channels of engagement.	PRE006/03	On target	Medium	01/07/2023	31/10/2023
				Provide officers with necessary training and 'permissions' to challenge stakeholders if revised process is not followed/ trying to be by-passed.	PRE006/04	On target	Medium	01/07/2023	31/10/2023
PRE-APP	007	On target	Planning Officers apply their time within this criteria and ensure this is recorded on Idox/Uniform for charging and management purposes.	Time recording system to be investigated. Use benchmarking information where appropriate.	PRE007/01	On target	Medium	01/07/2023	31/10/2023
				Revised time recording system to be approved.	PRE007/02	On target	Medium	01/07/2023	31/10/2023
				Revised time recording system to be implemented across the service, facilitating engagement and buy-in from all staff.	PRE007/03	On target	Medium	01/07/2023	31/10/2023
				Monitor appropriateness and effectiveness of new time management system and re-evaluate if not creating desired results.	PRE007/04	On target	Medium	01/07/2023	31/10/2023
COMPLAINTS PROCESS									
COMPLAINTS	001	Completed	The Planning Service affirm or otherwise that it is content that current council policy statements are sufficient reassurance to Officers who are the recipient of complaints alleging corruption and malpractice.	Review the existing process. Ensure input received from NP & JP.	COMP001/01	Completed	N/A	N/A	N/A
				Explore opportunity to develop a feedback process, include both compliments and complaints.	COMP001/02	Completed	N/A	N/A	N/A
				Develop new robust process to support and reassure Officers.	COMP001/03	Completed	N/A	N/A	N/A
				Create opportunities to showcase positive feedback received.	COMP001/04	Completed	N/A	N/A	N/A
				Link to Annual Report and utilise for continuous improvement for further service development.	COMP001/05	Completed	N/A	N/A	N/A
COMPLAINTS	002	Completed	The Planning Service affirm or otherwise that appropriate HR support is available should it be sought under such circumstances.	Review the existing process. Ensure input received from HR.	COMP002/01	Completed	N/A	N/A	N/A
				Develop new robust process to strengthen current procedures.	COMP002/02	Completed	N/A	N/A	N/A
				Further utilise the WLBC website to manage stakeholder expectations	COMP002/03	Completed	TBC	TBC - interdependency with Website Redesign Project	TBC - interdependency with Website Redesign Project
COMPLAINTS	003	Completed	The Planning Service carry out an annual and sixth monthly review of complaints to identify any learning opportunities (and/or gain reassurance) from complaints that may help both the planning service and corporate entity improve service delivery and reputation.	Explore opportunity to develop a feedback process, include both compliments and complaints.	COMP003/01	Completed	N/A	N/A	N/A
				Undertake process mapping to revise the process for monitoring of complaints and compliments to analyse the quantitative and qualitative responses received.	COMP003/02	Completed	Medium	01/09/2023	30/11/2023
				Link to EDM Project for issuing of FOI responses online.	COMP003/03	Completed	Medium	01/09/2023	30/11/2023
				Link to Annual Report and utilise for continuous improvement for further service development.	COMP003/04	Completed	Medium	01/09/2023	30/11/2023
STAKEHOLDER ENGAGEMENT & CONSULTATION									
ENGAGEMENT	001	Completed	The Planning Service breakdown its weekly Planning List by Ward to enable councillors to readily become aware of planning applications.	Establish capabilities of UNIFORM to breakdown to Ward level.	ENG001/01	Completed	N/A	N/A	N/A
				Establish small working group between Planning Service and Planning Support to investigate opportunities for a new approach.	ENG001/02	Closed - no longer required	N/A	N/A	N/A
				Determine clear ward boundaries for development of reports.	ENG001/03	Completed	N/A	N/A	N/A
				Begin issuing of new style reports.	ENG001/04	Completed	N/A	N/A	N/A
ENGAGEMENT	002	Completed	The survey data on home working be evaluated to inform best practice working and collate any issues that impact on the planning service that may have implications for service delivery.	Undertake analysis of staff survey results.	ENG002/01	Completed	N/A	N/A	N/A
				Undertake analysis of Red Quadrant survey results.	ENG002/02	Closed - no longer required	N/A	N/A	N/A
				Conduct a workshop to explore opportunities for different styles of working/ agile working.	ENG002/03	Closed - no longer required	N/A	N/A	N/A
				Link with health and safety at work policies, including developing procedures to lone working on sites etc.	ENG002/04	Completed	Short	01/09/2022	31/10/2022
				Link with health and wellbeing agenda, including issues surrounding mental health.	ENG002/05	Completed	N/A	N/A	N/A
				Develop a standardised approach to determine best practice and set boundaries as a team to determine flexibilities.	ENG002/06	Completed	N/A	N/A	N/A
			a) The Planning Service with Customer Services, Business Support and Legal Services engage in a workshop to assess process transfer and case monitoring to the first point of contact via the case management system and greater use of templates.	Conduct engagement to investigate the process and associated performance and determine what can be streamlined and/or automated.	ENG003/01	Completed	Short	01/06/2022	30/11/2022
				Process maps to be conducted. Determine use of templates; automation to be determined. Multiple channels for customer contact - look to streamline and control this process.	ENG003/02	Completed	Short	01/06/2022	30/11/2022

Category		Status	Description	Action	Code	Status	Term	Start	End
ENGAGEMENT	003	Completed	b) The Planning Service review its case management processes and expectations to ensure all elements of the Planning resource have a formal responsibility and ability to respond to internal and external enquiries thereby enhancing the ability to manage case load in a seamless way.	Develop case management process with Legal Services, to track progress. Agents Forum to be implemented to support delivery.	ENG003/03	Completed	Short	01/02/2023	31/03/2023
			c) Legal Services and Planning agree an SLA for Enforcement.	**DUPLICATE - This is already covered under Enforcement.**	ENG003/04	Closed - no longer required	N/A	N/A	N/A
ENGAGEMENT	004	Completed	The Planning Service with support from Customer Services initiate periodic customer experience interviews. **(This has been considered as part of the new Customer Feedback Policy)**	Implement sample survey approach and determine frequency of sample survey.	ENG004/01	Completed	Medium	01/09/2023	31/10/2023
				Undertake workshop with customer services to determine scope and availability.	ENG004/02	Completed	Medium	01/09/2023	31/10/2023
				Implement revised feedback process, including compliments and complaints. Promote and feedback results of analysis in a variety of formats, including Annual Report to Elected Members.	ENG004/03	Completed	Medium	01/09/2023	31/10/2023
				Create a customer journey based on planning perspective- not just customers itself.	ENG004/04	Completed	Medium	01/09/2023	31/10/2023
				Further utilise the WLBC website to manage stakeholder expectations.	ENG004/05	Completed	Medium	01/09/2023	31/10/2023

CONSULTATION PROCESS

Category		Status	Description	Action	Code	Status	Term	Start	End
CONSULTATION	001	Completed	The Parish Councils be encouraged where they have staff to accept the responsibility as the first point of contact for the promotion of awareness of local planning applications.	Engage with Parish Council's to determine their future requirements and current capabilities.	CON001/01	Completed	Medium	01/09/2023	31/10/2023
				Determine whether Parish Council's have the resources and willingness to undertake this.	CON001/02	Completed	Medium	01/09/2023	31/10/2023
				Determine opportunities to link with existing member training i.e., at the Parish Council Liaison Meeting.	CON001/03	Completed	Medium	01/09/2023	31/10/2023
				Utilise exiting learning and development tools to strengthen our approach i.e., e-learning; Design Guide.	CON001/04	Completed	Medium	01/09/2023	31/10/2023
				Be more pro-active in 'handholding' parish councils from the outset. Invest time at early stages. NOTE: Risk of high turnover and therefore wasted time of Officers.	CON001/05	Completed	Medium	01/09/2023	31/10/2023
				Implement preferred approach to revise processes and support Parish Councils' through learning and development.	CON001/06	Completed	Medium	01/09/2023	31/10/2023
CONSULTATION	002	On target	The Planning Service engage with developers and council partners on major applications to persuade them to deploy a wider range of tools including Planning for Real sessions that are interactive thereby promoting a greater understanding of their objectives.	Investigate opportunities to conduct 'Planning For Real' exercises.	CON002/01	On target	Medium	01/09/2023	31/10/2023
				Investigate a range of interactive tools for deployment within the service and provide recommendations for approval.	CON002/02	On target	Medium	01/09/2023	31/10/2023
				Conduct benchmarking exercise to compare process and practice with other authorities.	CON002/03	On target	Medium	01/09/2023	31/10/2023
				Escalate recommendations through approval process for implementation.	CON002/04	On target	Medium	01/09/2023	31/10/2023

ORGANISATIONAL STRUCTURES IN PLANNING

Category		Status	Description	Action	Code	Status	Term	Start	End
ORGANISATIONAL 001		Completed	The senior managers of the Planning Service produce a joint position statement in relation to the opportunities for change and service delivery within the context of proposals contained in the current White Paper for the Corporate Management Team.	Keep abreast of White Paper development and anticipate changes that potentially may impact the service.	ORG001/01	Completed	Medium	01/11/2023	30/11/2023
				Determine timescales for White Paper implementation and further develop scope for change and service delivery.	ORG001/02	Completed	Medium	01/11/2023	30/11/2023
				Determine if Chief Officer for design and place making is to be a requirement in the Bill.	ORG001/03	Completed	Medium	01/11/2023	30/11/2023
				Begin to scope 'look and feel' of what potential structure and future service will look like.	ORG001/04	Completed	Medium	01/11/2023	30/11/2023
ORGANISATIONAL 002		Completed	The Planning Service anticipate the changes in the White Paper and review operational work practices to identify potential latent capacity and digital platforms for delivery of the service without disruption.	Keep abreast of White Paper development and anticipate changes that potentially may impact the service.	ORG002/01	Completed	Medium	01/11/2023	30/11/2023
				Determine timescales for White Paper implementation and further develop scope for change and service delivery.	ORG002/02	Completed	Medium	01/11/2023	30/11/2023
				Consult with colleagues/ partners from neighbouring authorities to share best practice and develop consistency.	ORG002/03	Completed	Medium	01/11/2023	30/11/2023
ORGANISATIONAL 003		Completed	a) The Planning Service adopt an integrated approach to work flows and operational practices that place the responsibility for customer engagement with all elements of the Service to support a seamless service delivery and promote resilience.	Undertake joint workshop with Business Support Team (formerly Planning Support) to determine revised workflows and operational practices to improve service delivery.	ORG003/01	Completed	Short	01/11/2022	30/05/2023
			b) The Planning Service engage in an internal divisional workshop to consider how daily operational practices for customer engagement and satisfaction can be enhanced by all elements of planning contributing to managing the customer engagement process including telephony contact and case management.	Develop and undertake necessary workflows and customer journeys to identify the 'as is' and the 'to be'.	ORG003/02	Completed	Short	01/11/2022	30/05/2023
				Create process whereby Planning Officers upload documentation to the system instead of Business support (formerly planning support) to create more efficient use of resource. New process to include development of a consistent labelling system that is clear to all.	ORG003/03	Completed	N/A	N/A	N/A
			c) A business workshop exercise be conducted between the Planning service, Telephony and Business Support to identify service transfer opportunities and the means by which they can be delivered to provide a seamless service.	Explore possibility of online booking service. Develop and implement as appropriate.	ORG003/04	Completed	Short	01//07/22	30/11/2022
				Develop and implement an integrated approach that is seamless for the customer.	ORG003/05	Completed	Short	01//07/22	30/11/2022
ORGANISATIONAL 004		Completed	a) The Planning Service and HR consider pathways to promotion and development thresholds for career development based on work experience and qualifications.	Hold discussion with HR to scope potential for alternative thresholds for career development within the service. Include discussion with Trade Unions when appropriate.	ORG004/01	Completed	Short	01/08/2022	30/09/2022
				Re-assess criteria and requirements within existing grading structure, with the intention to streamline and strengthen (removing unnecessary barriers to career progression).	ORG004/02	Completed	Short	01/08/2022	30/09/2022
			b) The Planning Service and HR review with trade unions and staff the range of acceptable qualifications and type of work experience relevant to becoming a Planner or career development within the Service.	Benchmark with other Local Authorities to learn from best practice and determine whether the career grading thresholds at West Lancashire are fit for purpose.	ORG004/03	Completed	short	01/08/2022	30/09/2022
				Develop a range of approaches which seek to retain people within the organisation, including exploring the opportunity for a career graded system based on qualification and experience. Gain approval and implement as appropriate.	ORG004/04	Completed	short	01/08/2022	30/09/2022
ORGANISATIONAL 005		Completed	The Planning Service enable staff to gain experience across all divisions and develop a mutual exchange programme with other LA's.	Continue current internal programme whereby a range of staff are gaining experience in other areas of the service and expand programme where appropriate.	ORG005/01	Completed	N/A	N/A	N/A
				Create template to showcase which staff have gained experience in which areas.	ORG005/02	Completed	N/A	N/A	N/A
				Long term objective to develop in conjunction with other authorities in the local area.	ORG005/03	Completed	N/A	N/A	N/A
ORGANISATIONAL 006		Completed	Financial Services and the Planning Service review the processes, audit tracking mechanisms for determining the level of	Confirm with Finance that the new 2021-22 mechanism for determining the level of CIL/ infrastructure payments is in place and working effectively.	ORG006/01	Completed	N/A	N/A	N/A

Ref	Status	Recommendation	Action	Action ID	Action Status	Priority	Start	End
	Completed	CIL/infrastructure payments to be paid and collected.	Review the mechanisms if required.	ORG006/02	Completed	N/A	N/A	N/A

BUSINESS SUPPORT & CUSTOMER SERVICES

Ref	Status	Recommendation	Action	Action ID	Action Status	Priority	Start	End
BUS SUPPORT 001	In progress	A subject and volume analysis of back office calls to Planning including failed attempts be carried out.	Determine whether the data required is currently available and if not determine approach to begin to gather it.	BUS001/01	In progress	Medium	01/05/2023	31/08/2023
			Undertake analysis of calls via statistics gathered, based on subject and volume.	BUS001/02	In progress	Medium	01/05/2023	31/08/2023
			Undertake process mapping to re-assess work flows to full capacity in Uniform.	BUS001/03	In progress	Medium	01/05/2023	31/08/2023
			Investigate the 'failed attempts' of calls to analyse why and develop an appropriate solution.	BUS001/04	In progress	Medium	01/05/2023*	31/08/2023*
BUS SUPPORT 002	In progress	The council consider carrying out a full business mapping process exercise of a planning process that focuses on complexity, risk , customer pathways and income generation.	Investigate current customer pathways to analyse the quantity and journey made. Look at the high level journeys to showcase opportunities to improve service delivery.	BUS002/01	In progress	Long	01/01/2024	31/03/2024
			Focus on re-developing the high level journeys to showcase opportunities to further improve service delivery.	BUS002/02	In progress	Long	01/01/2024	31/03/2024
			Identify simple ways to improve service to customers.	BUS002/03	In progress	Long	01/01/2024	31/03/2024

IT INFRASTRUCTURE

Ref	Status	Recommendation	Action	Action ID	Action Status	Priority	Start	End
IT INFRASTRUCURE 001	Completed	West Lancs should if possible novate the contract with IDOX from BTLS in order to benefit from a more direct contractual relationship	Check with Chris Walker if the contract has been novated. The contract was novated on 1st April.	IT001/01	Completed	N/A	N/A	N/A
			Check the date of contract renewal (3 year contract until 31/03/2024).	IT001/02	Completed	N/A	N/A	N/A
IT INFRASTRUCURE 002	In progress	Engage with IDOX to undertake a full audit of the use of the planning system as well as provide a cost/benefit analysis of on premise v hosted delivery.	Via the user group - discuss with other councils which options work best (on premise or hosted delivery.)	IT002/01	In progress	Long	01/04/2023	31/03/2024
			Produce a report with the current issues and possible options, including undertaking full audit (if required)	IT002/02	In progress	TBC	TBC	TBC
IT INFRASTRUCURE 003	In progress	Establish a user group of district councils that utilise the same systems to provide collective leverage that focuses on sharing operational practices; intelligence, problems and workaround solutions to system applications, pilot test updates and sign off regardless of whether the management of IT systems are externalised.	Discuss with user group if possible to jointly procure IDOX. Investigate practicalities of developing a system that works for everyone.	IT003/01	In progress	Short	01/01/2023	28/02/2023
IT INFRASTRUCURE 004	In progress	a) Following the audit, West Lancs should commission a formal programme of training on the Uniform system for all planning and Business support staff (formerly Planning support). b) Identify lead officers from within other LA's who are familiar with IDOX Uniform and commission them to provide regular training for planners on a regional or bespoke basis.	Understand what tasks need to be completed in Uniform and the full range of functionality of Uniform. Consider both Business Support (formerly planning support) and planning use of Uniform/IDOX.	IT004/01	In progress	Medium	01/08/2022	31/08/2023
			Undertake training gap analysis (Kate Turner has access to both and the level of skills required.)	IT004/02	Completed	N/A	N/A	N/A
			Identify super users for the service, with advanced training (medium term goal)	IT004/03	Completed	N/A	N/A	N/A
			Explore arranging a training session - joint training session between Business support (formerly Planning Support) and planning.	IT004/04	In progress	Short	01/07/2022	31/12/2022
			Create "how to" training guides with consistent indexing system used by planning support.	IT004/05	In progress	Medium	01/08/2022	01/08/2023
IT INFRASTRUCURE 005	In progress	WLBC should consider the need to upgrade display screen equipment for planning staff and within environments used for planning committee meetings	Obtain views of officers about what they require.	IT005/01	Completed	N/A	N/A	N/A
			Identify what equipment is currently being used.	IT005/02	Completed	N/A	N/A	N/A
			Identify who would like additional equipment.	IT005/03	Completed	N/A	N/A	N/A
			Identify what equipment is needed for onsite visits for planning committee and planning officers	IT005/04	In progress	TBC	TBC - Interdependency with SWOW Project	TBC - Interdependency with SWOW Project
			Identify budget for the equipment.	IT005/05	Completed	N/A	N/A	N/A
			Identify who is responsible for planning committee equipment (screens in the committee room and hand held devices)	IT005/06	In progress	TBC	TBC	TBC
IT INFRASTRUCURE 006	In progress	IT facilities and access to the Idox case management system should be reviewed to enable Planning Support and Customer services to provide a wider range and deeper level of service	Identify which staff/teams can access planning systems and what they use it for	IT006/01	In progress	Short	15/11/2022	28/02/2023
			Investigate if customer services could get basic access to view information to support phone call enquiries.	IT006/02	Closed - no longer required	N/A	N/A	N/A
			Investigate how customers can get access to updates on where their case is up to. Provide instructions on how to use the system to find out information.	IT006/03	Completed	N/A	N/A	N/A
IT INFRASTRUCURE 007	In progress	The look and feel of the Planning service web planning portal (Council webpage) requires fundamental change to facilitate the promotion of the Planning Service as part of the One Council Vision and to enhance customer access and understanding.	Scoping exercise - see what the functionality is on the current webpage and compare with other LA's.	IT007/01	Completed	TBC	TBC - Interdependency with the Website Redesign Project	TBC - Interdependency with the Website Redesign Project
			Hold workshop to look at the different options and which areas planning officers would like to implement/take forward.	IT007/02	In progress	TBC	TBC - Interdependency with the Website Redesign Project	TBC - Interdependency with the Website Redesign Project
			Identify a web champion within planning.	IT007/03	Completed	N/A	N/A	N/A
IT INFRASTRUCURE 008	On target	a) IT systems should support the easy uploading of large files. b) The capacity of software and hardware be reviewed to enable easy downloads for large plans.	Produce/reinforce communications about the acceptable file types that can be submitted. Suggestion of the files being flattened before sending.	IT008/01	On target	TBC	TBC	TBC
			Link this with the action around asking people to submit applications via the planning portal.	IT008/02	On target	TBC	TBC	TBC
			Contact Legal Services to see if there are any issues with asking people only to submit through planning portal.	IT008/03	Completed	N/A	N/A	N/A
IT INFRASTRUCURE 009	In progress	The Planning Portal (MHLG) function, templates and financial transaction services should be assessed by Planning and Finance to determine which links may offer efficiency savings in monetary and work load transfer terms.	Ensure clear signposting toward the portal on our website.	IT009/01	Completed	Short	01/08/2022	31/08/2022
			Explore the options for different types of payment.	IT009/02	In progress	Medium	01/06/2023 - TBC	30/08/2023 - TBC
			Assess whether only to allow BACS payments for payments over a certain value.	IT009/03	In progress	Long	01/12/2023	31/03/2024
			Discuss with Service Now how this could be used for pre-apps and have an interface with IDOX.	IT009/04	In progress	Long	01/12/2023	31/03/2024
			Investigate if Planning/Planning Support can procure or be allocated Service Now licences.	IT009/05	Completed	Short	01/08/2022	30/09/2022
IT INFRASTRUCURE 010	In progress	a) The Council ensure that IT can support virtual site assessments and presentations to the Planning Committee. b) The Planning Service ensure its IT capabilities enable virtual site assessments to support Enforcement, Development and Policy review.	Ensure that microphones and screens work correctly in the chamber.	IT010/01	Completed	N/A	N/A	N/A
			Look at what technology is required for members to use and arrange procurement.	IT010/02	In progress	Short	01/01/2023	31/03/2023
			Ensure that members are trained in the use of their IT equipment.	IT010/03	In progress	Short	01/01/2023	31/03/2023
IT INFRASTRUCURE 011	Completed	An appointment system be introduced for Members enquiries with casual attendance at the planning office discouraged.	Coordinate a standarised approach for an appointment booking system with all planning officers.	IT011/01	Completed	N/A	N/A	N/A
			Produce communications to explain the new appointment booking process. To include comms to members and team.	IT011/02	Completed	N/A	N/A	N/A
			Comms with the team to ensure the new approach works.	IT011/03	Completed	N/A	N/A	N/A
			Implement the new standardised booking system approach.	IT011/04	Completed	N/A	N/A	N/A
			Implement and monitor new process	IT011/05	Completed	N/A	N/A	N/A

IT INFRASTRUCURE 012	On target	The hardware available to Members and Officers with particular reference to visual presentations be reviewed.	Engagement to find out what the members would appreciate in terms of equipment.	IT012/01	On target	Short	01/01/2023	31/03/2023
			Obtain costings and look at the different options for equipment.	IT012/02	On target	Short	01/01/2023	31/03/2023
IT INFRASTRUCURE 013	On target	a) The issues around IT and understanding of its capabilities and limitations be addressed as outlined below. b) Given the current challenges impeding site visits the Planning Service consider how an interactive technical solution can be provided to Members and on line to the public.	Check what is required by law for information shown on drawings.	IT013/01	Completed	N/A	N/A	N/A
			Look at the validation process - update instructions/advice for submitting plans - to include measurements.	IT013/02	On target	Medium	01/04/2023	30/11/2023
			For more complex schemes agents to submit more detailed drawings.	IT013/03	Completed	N/A	N/A	N/A
PLANNING PORTAL (WLBC WEBSITE)								
PORTAL 001	Completed	The Planning Service remove all redundant documents from the Web Portal and validate that embedded links actually function.	Currently two validation checklists on website. Old version to be removed.	PORT001/01	Completed	N/A	N/A	N/A
			SPD's to be reviewed and old ones removed/ archived as appropriate.	PORT001/02	Completed	N/A	N/A	N/A
PORTAL 002	Completed	The SCI's role as a critical tool for community engagement, education and promotion of the Councils reputation be reflected in the Planning Web Portal with an appropriate explanation that is more than a short link.	Appropriate explanation of the SCI's role developed and uploaded to Portal.	PORT002/01	Completed	N/A		
COMMUNICATIONS								
COMMS 001	Completed	The Planning Service consider how the current West Lancs website referencing Enforcement links can be improved to reflect the Councils Vision and Values, public access, understanding and external sources of advice including links to the Planning Portal.	Review the enforcement content on the website and the contact details that are provided.	COM001/01	Completed	N/A	N/A	N/A
			Benchmark against other websites from LAs.	COM001/02	Completed	TBC	TBC - interdependency with Website Redesign Project	TBC - interdependency with Website Redesign Project
			Design the new content.	COM001/03	Completed	TBC	TBC - interdependency with Website Redesign Project	TBC - interdependency with Website Redesign Project
			When new policies/information are developed ensure this is uploaded.	COM001/04	Completed	TBC	TBC - interdependency with Website Redesign Project	TBC - interdependency with Website Redesign Project
COMMS 002	On target	The Planning Service and Corporate Communications engage in a plain English review and communication strategy for Enforcement within the context of the law, planning policy and the Council's Vision and Priorities mission statement.	Look at how other LAs explain and communicate the key messages.	COM002/01	Completed	TBC	TBC - interdependency on Website Redesign Project	TBC - interdependency on Website Redesign Project
			Comms campaign to stress that WLBC will enforce planning regulations. Zero tolerance on abuse of officers. On website and all external communication. Review the current statement on the website regarding vexatious complaints. **(Links to the Customer Feedback Policy)**	COM002/02	On target	Medium	01/03/2023	30/11/2023
			Create link to the Corporate Complaints Policy **(now called the Customer Feedback Policy)**- complaints about decisions do not come under the Corporate Complaints Procedure.	COM002/03	On target	Short	01/01/2023	31/03/2023
COMMS 003	On target	The Planning Service and Corporate Communications devise a periodical promotional campaign of the benefits of the Pre Application Advice Service.	Identify budget for the campaign.	COM003/01	On target	Long	01/11/2023	31/01/2024
			Devise promotional campaign using a range of measures - website, Parish Councils, posters in key venues, such as DIY stores etc.	COM003/02	On target	Long	01/11/2023	31/01/2024
COMMS 004	In progress	The Planning Service ensure that embedded links in web documents actually function.	Check links associated with planning are functioning.	COM004/01	Completed	N/A	N/A	N/A
			Explore feasibility of a digital request to LCC to create a table of contents page. Obtain costs/timescales.	COM004/02	Completed	N/A	N/A	N/A
			Resolve any issues with links in website documents that are identified.	COM004/03	Completed	N/A	N/A	N/A
			Identify top 10 most used planning webpages on our website.-	COM004/04	In progress	TBC	TBC - interdependency on Website Redesign Project	TBC - interdependency on Website Redesign Project

				Review and update top 10 most used planning webpages on our website.	COM004/05	In progress	TBC	TBC - interdependency on Website Redesign Project	TBC - interdependency on Website Redesign Project
COMMS	005	Completed	All out-dated planning documents be removed from the councils Web Portal and time of last review dates be placed on all documents as a matter of course.	Remove outdated validation check lists from the website. Quick win.	COM005/01	Completed	N/A	N/A	N/A
				Add updated guidance notes on the pre-app process (along with fee schedule) and the enforcement documents. Link to the Pre-app and Enforcement actions. **This is a duplicate and covered under PRE-APP 005 SO WILL BE CLOSED AND COVERED UNDER THE ABOVE ACTION.**	COM005/02	Completed	N/A	N/A	N/A
COMMS	006	In progress	The Planning Service and Corporate Communications reflect on how best to promote in the public eye the integrity of the Planning Service.	Create an FAQ document	COM006/01	In progress	Short	01/08/2022	31/10/2022
COMMS	007	Completed	It is good practice in relation social media sites where Council Officers and Members are maligned to demand the Administrator remove the postings.	When this happens, look to see if the person should be directly contacted, or sent to the service manager to comment.	COM007/01	Completed	N/A	N/A	N/A
				Take the communication away from social media to have direct conversation.	COM007/02	Completed	N/A	N/A	N/A
COMMS	008	On target	The three service areas agree thresholds of access to case management systems to enable enhanced communications with the public on progress and annotations recording contact and response.	This action would be led by development management, business support and customer services. DEPENDENCY - availability of a suitable back office system.	COM008/01	On target	Medium	01/03/2023	30/11/2023

ELECTED MEMBER TRAINING

MEMBER TRAINING 001		On target	a) Member Training be provided on the Enforcement Process with particular reference to prosecutions and retrospective applications. b) Democratic Services amend the Council's Constitution following agreement with Members to make formal training a condition of serving on the Planning Committee. c) A workshop training module be developed for elected members and officers that covers the Pre-Application Advice Service Charging and Validation process. d) The Planning Service in conjunction with the Planning Committee prioritise key areas of training that are essential to their role including the role of Officers in presenting Reports and recommendations.	Identify what the annual training includes.	MEM001/01	On target	Short	01/08/2022	31/01/2023
				Undertake gap analysis to find out what the training should include.	MEM001/02	On target	Short	01/08/2022	31/01/2023
				Design bitesize courses for members.	MEM001/03	On target	Short	01/08/2022	31/01/2023
				Develop a booklet/guide on the planning process/ FAQs - link with the enforcement plan	MEM001/04	On target	Short	01/08/2022	31/01/2023
				Organise one training session which covers this criteria and Elected Member 002.	MEM001/05	On target	Short	01/08/2022	31/01/2023
				Take the suggestion to member development commission.	MEM001/06	On target	Short	01/08/2022	31/01/2023
MEMBER TRAINING 002		On target	a) The Council's Constitution be amended to ensure newly elected or appointed Members to the Planning Committee may attend with Observer Status until training is provided. b) Party Leaders consider whether training for all members on Planning be mandatory.	Benchmark against other local authorities e.g. Wigan Council.	MEM002/01	On target	Short	01/08/2022	31/01/2023
				Terms of reference for the planning committee would need to be amended to say that training is mandatory.	MEM002/02	On target	Short	01/08/2022	31/01/2023
				Terms to reference taken to member development	MEM002/03	On target	Short	01/08/2022	31/01/2023
				Taken to planning committee	MEM002/04	On target	Short	01/08/2022	31/01/2023
				Pre-meet with the Leaders prior to any reports being submitted to Cabinet.	MEM002/05	On target	Short	01/08/2022	31/01/2023
				Take to Council for approval.	MEM002/06	On target	Short	01/08/2022	31/01/2023
MEMBER TRAINING 003		On target	Democratic Services build into Members Annual diary provision for several training modules including Enforcement, Pre-Application Advice and Validation on Planning for all Members.	Planning Team to determine the possible dates.	MEM003/01	On target	Short	01/08/2022	31/01/2023
				Once training identified liaise with Member Services to get the dates built in.	MEM003/02	On target	Short	01/08/2022	31/01/2023
				Prior to training session, an email to be sent out to all members.	MEM003/03	On target	Short	01/08/2022	31/01/2023