

**Chamberlain 2024-25 Business Plan Quarterly Report**  
**Q3 1 October - 31 December 2024**  
**Report completed by Chamberlain's SLT in Jan 2025**

**Executive Summary**

The Chamberlain's department continue to make good progress against our Business Plan.  
 Highlights from quarter three of 2024/25 include:

- The FSS Systems Team have upgraded the 'Information@Work' document management system. This will enable the Housing and Council Tax Benefit Team to become fully digital. Go live is scheduled for Q1 25/26 but the team are ahead of schedule and a Q4 go live remains a possibility.
- Successful recruitment campaign with the Commercial, Change and Portfolio delivery team to resource the new structure.
- Internal Audit are on track to deliver the 600 audit days target for the 2024/25 year.
- The Chamberlain's transformation programme continues to gain momentum via the ERP Programme achieving Gateway 5, a draft Digital, Data, and Technology strategy for the City of London Corporation, launching the commercial and contract management review, and collaborating with stakeholders on income generation opportunities.
- Audited 2023/24 City Fund accounts were published.

**Cross-cutting themes:**

1. EEDI	<p>Work on our EEDI plan continues with quarterly meetings ongoing. The team have relaunched in Q3 as the group has had some changes in membership. The team contribute to the Corporate EDI Groups and a few members of the team are co-chairs of staff networks, colleagues are also encouraged to join networks. EQIAs are completed on projects.</p> <p>Our EEDI action plan focuses on the following:</p> <ol style="list-style-type: none"> <li>1.Ensure that professional development, opportunities are accessible for all Chamberlain's staff to promote development, career progression and equality of opportunity for promotion and the development of a workforce that reflects the make-up of our communities.</li> <li>2.Raise awareness of ED&amp;I good practice, responsibilities, and corporate initiatives across the department.</li> <li>3.Support the Corporation to identify, analyse review and monitor key data sets to introduce strategies to address barriers for underrepresented groups as part of our overall Workforce Strategy.</li> <li>4.Establishment of a cross-Corporation "Women in Tech" group, bringing together women working in technology across the wider City of London Corporation – including our Institutions.□</li> </ol>
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2. Transformation	<p>The SAPphire programme team was fully mobilised over the last quarter and the team completed the first wave of fit-to-standard workshops in readiness for Wave 1 go live (Learning Management Solution (LMS), Recruitment &amp; Goal Setting) in Quarter 1 next year. Highlights included:</p> <ul style="list-style-type: none"> <li>•Statement of works approved by Board / Committee and signed with system integrator which covers the scope of work and delivery plan with the system integrator (HCL).</li> <li>•Joint kick-off meeting completed with system integrator led by SRO and programme leadership team.</li> <li>•Wave 1 detailed plans completed and 90 day plan for all waves.</li> <li>•Completion of all Wave 1 (LMS, Goal Setting, Recruitment) fit-to-standard workshops and sign-off for the solution design document.</li> <li>•Trial data migration completed for LMS.</li> </ul> <p>The draft digital strategy was developed to establish a unified approach for Digital, Data, and Technology (DDaT) across the entire City of London Corporation. This DDaT strategy is scheduled to be presented to Policy and Resources as well as the Court of Common Council in Q3.</p> <p>The initial phase of the Commercial and Contract Management strategic review began during the summer. The findings and the corresponding implementation plan are scheduled to be presented to the Projects and Procurement Sub-Committee in December.</p> <p>Work continues the Income Generation opportunities, enabling business areas to develop business cases and mobilise plans.</p> <p>As part of the Financial Improvement and Transformation (FIT) Strategy, budget manager training workshops have been conducted during quarter 3. These workshops are initial steps toward a self-service monitoring process. This workshop had 11 attendees, with further 2 training sessions planned in quarter 4. There will be a pause on training during March and April 2025 due to prioritising year-end closing with a view to increase training with multiple sessions per month starting from May. The training is still on track to reach all 450 budget managers by December 2025. Initial feedback responses have been positive and continue to be evaluated to help shape the training. The strategy aims to transform operations and processes within FSD to align with modern and best practices, enhancing efficiency, accuracy, and accountability in financial management. This strategy is important for current operations and prepares for future innovations and advancements, such as the new ERP system. Additionally, the FIT Strategy will provide a framework for continuous improvement and adaptability. By focusing on skill development, process optimisation, and strategic alignment, we aim to create a finance function that is prepared for future needs.</p>
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3. Risk and interdependencies	<p>The Chamberlain and her SLT regularly review new and emerging risks which are discussed at monthly SLT meetings. A new emerging risk is currently in the process of being drafted ready for review by Chamberlain's SLT at the next meeting. Collaboration with service leads is in relation to the management of risk is an essential component of the delivery of Internal Audit, the team also works closely with Corporate Strategy and Performance Team in relation to corporate and strategic risk management.</p>
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Workstream	Workstream Assessment	RAG Status	Next Steps	Corporate Plan 2024-2029 Outcomes	Performance Measures data submitted? Y/N
<i>Insert additional rows as required.</i>	<i>If workstream performance measures are provided and the data is on target, note the workstream is GREEN and do not provide a narrative update.</i>	<i>Provide Rag Status ('refer to key)</i>	<i>What action will be taken to address challenges to Amber, Black or Red workstreams?</i>	<i>Link the workstream to one or more Corporate Plan 2024-2029 outcome</i>	<i>Note that N responses must be explained</i>
"Collection of: -Business Rates -Council Tax"	In Year collection rates for business Rates during Q3 2024/25 is at 92.57% a reduction in 1.34% on Q3 2023/24. Council Tax collection has increased by 1.6% on 23/24 to 81.6% in Q3.	A	Business Rate collection is being reviewed. However a number of large bills have recently been sent out which may have impacted the collection rate.	Providing Excellent Services	Y

Payment of Housing and Council Tax Benefits	New claims paid within 12.44 days in Q3. Changes of Circumstances assessed within 3.05 days.	G	N/A	Providing Excellent Services	Y
Brilliant Basics - capital and revenue reporting through to statement of accounts	Having addressed the backlog of work, the team has successfully delivered the statement of accounts on time and, in some instances, ahead of the pending deadlines. Regular revenue and capital reporting have identified the need for additional training for both budget holders/project managers and accountants. As part of the FIT strategy - initial training sessions commenced in November and will continue into Quarter 4 and the 2025/26 fiscal year.	A	"A FIT Strategy is under review and will be rolled out in the Autumn. This strategy includes development plans aimed at ensuring brilliant basics and creating a finance team that is fit for the future, these include: The rollout of budget holder/project manager training on revenue and project forecasting is currently in progress and will continue throughout the Autumn; Alongside this, several measures are being put in place to support the Financial Services Division. These measures include: •Skills matrix: To help identify gaps in the current skill sets and ensure targeted development - During Quarter 4 and Quarter 1 of 2025/26 •Training for Finance Business Partners: Shifting the focus from merely completing forecasts to adding value through insightful analysis and strategic recommendations - to be delivered in Quarter 4 •Streamlining processes: Preparing and aligning with the new ERP implementation to enhance efficiency and accuracy in financial operations." - Not yet commenced.	Providing Excellent Services	Y
Delivery of a programme of Internal Audit work to inform the Head of Internal Audit Annual Opinion on the adequacy of the Internal Control Environment, Governance and Risk Management arrangements	The Internal Audit Team is now fully resourced and is making good progress in delivery of planned work for 2024/25. Head of Internal Audit is confident that sufficient work will be completed to inform the annual opinion (based on the assessment that a greater volume of work will be completed in 2024/25 than in the prior 2 years).	G	N/A	Providing Excellent Services	Y
Planning, organisation, delivery and administration of Freedom Ceremonies and events at the Guildhall	The Court continue to receive fantastic feedback. With the number of ceremonies increasing, resilience within the team for conducting ceremonies has been a concern. As such the position of Court Registrar has been created and recruited to. This post will provide support to the Clerk and Deputy to conduct ceremonies when required ensuring resilience is restored.	G	N/A	Providing Excellent Services	Y
Develop medium term cash flow modelling for both City Fund and City's Estate enabling advice on internal borrowing caps, external borrowing requirements/limits, draw down on financial investments and reserves held in illiquid asset classes such as property	A substantial amount of effort has been dedicated to developing a robust cashflow forecast, which has been rigorously tested over several months and updated with actual data and revised projections. This process will inform the necessary amount and timing of drawdowns required from the disposal of assets. The initial update was presented to the Investment Committee in December. However, this was before the decisions regarding the Markets and Barbican were approved, which will be presented to Investment Committee in Quarter 4.	G	N/A	Providing Excellent Services	Y
"Enterprise Resource Planning system implementation across Finance, HR, Payroll, IT and Procurement"	The programme team was fully mobilised during quarter 3 and the team completed the first wave of fit-to-standard workshops in readiness for Wave 1 go live (Learning Management Solution (LMS), Recruitment & Goal Setting) in Quarter 1 next year. Highlights included:  •Statement of works approved by Board / Committee and signed with system integrator which covers the scope of work and delivery plan with the system integrator (HCL) •Joint kick-off meeting completed with system integrator led by SRO and programme leadership team •Wave 1 detailed plans completed and 90 day plan for all waves •Completion of all Wave 1 (LMS, Goal Setting, Recruitment) fit-to-standard workshops and sign-off for the solution design document •Trial data migration completed for LMS	G	N/A	Providing Excellent Services	
Proactive deployment of measures to prevent and detect fraud against the City of London Corporation and provision of a corporate wide responsive fraud investigation service	Investigations are being conducted and managed accordingly, proactive counter fraud work focusses on completion of Fraud Risk Assessments.	G	N/A	Providing Excellent Services	Y

Automation of Invoice Payments	27.6% of invoices were processed automatically.	A	The delay in deploying an invoice automation product has impacted our aspirations. It is hoped that post SAP go live this will be achievable.	Providing Excellent Services	Y
Provide high level executive & programme management support to Chamberlain's senior leaders in the strategical and operational delivery of CHB's transformation programme	The team continue to provide high level support for the Chamberlain's transformation programme. The Chamberlain's Transformation Board continue to meet fortnightly where deep dives on those projects that are off track or at risk are reviewed and actions to right this are discussed and agreed.	G	N/A	Providing Excellent Services	Y
Training and Development/Succession planning	Chamberlain's Learning and Engagement Board continue to meet on a monthly basis. The Chamberlain's learning policy has been refreshed and a lunch and learn programme has been developed.	G	N/A	Providing Excellent Services	Y
Portfolio management implementation	Revised timescales for the approval of the new Project Procedure were agreed by Members in November 2024 to allow for greater engagement to take place across the Corporation and taking into consideration the pre-Election period. Phase 1A Cora implementation for COLP is complete and feedback has been positive. Phase 1B roll-out is underway. Need for some further CoL led requirements workshops to be accommodated but with no slippage to overall timescales to Portfolio Board. Plans for testing and training are being reviewed and optimised to ensure that there sufficient technical and user confidence ahead of and following go-live. Stakeholder communications have increased in preparation for go-live. The PMI learning and development offer is now being designed however there are budget pressures and alternative funding sources are being explored	A	Transformation fund bid to be developed to support maturity journey over next 12 months.	Providing Excellent Services	
Commercial maturity assessment and improvement plan (procurement governance review)	The initial review of procurement and contract management is now complete and an improvement plan to address the recommendations was agreed by Members in December 2024. Delivery against the plan is now underway; however, capacity remains a key issue. The review also exposed significant capability needs across the organisation and a business case will be developed proposing ways of meeting those needs. Further discussion is also required at a corporate level regarding the future operating model for contract management.	A	Limited capacity within the Commercial Service to deliver change at pace. Proposals for future model and capability needs will require additional funding.	Providing Excellent Services	
Data and insights – understanding our impact	COL has now published the inaugural Annual Responsible Procurement Impact report and the mid-year update. Positive feedback has been received and there is a plan to improve the availability and integrity of our data. Work is also underway to develop corporate guidance and templates to support the production of robust business cases with well-articulated financial and non-financial benefits.	G	N/A	Providing Excellent Services	
Transformation and improvement framework (embedding RPR)	The new Transformation Framework has now been approved by ELB and the programme delivery structure is being stood up. There is a lack of capacity in terms of SROs for the transformation pillars with officers within the Chief Officer and deputy's cadre reporting not having the capacity to assume these roles. Soft market engagement is underway in order to shape proposals for a strategic transformation partner. The change network is being refreshed with representatives from across COL now being sought.	A	Lack of capacity to deliver change at scale and pace required. Gaps in transformation leadership capabilities have been identified.	Providing Excellent Services	
Service development – capacity and capability	The new Commercial, Change and Portfolio Delivery division was launched in October 2024 following a successful recruitment campaign however, key roles remain unfilled with in the transformation function. The move to new governance frameworks and ways of working across projects and procurement will necessitate a comprehensive training plan for the division.	G	N/A	Providing Excellent Services	
Procurement Act implementation	All members of the Commercial Service have now completed the Government's Transforming Procurement learning modules. A lead for implementation has been appointed and a clear implementation plan is in place. We have been working with CIPFA to validate our priority areas of focus and to develop stakeholder communications. The departmental risk register has been updated to acknowledge the fact that key enablers/guidance are still to be provided by Government such as the central digital platform and the revised National Procurement Policy Statement. However, based on the information that has been provided thus far, the organisation is on track to be compliant by go-live date though there will still be significant work to be undertaken across the rest of the calendar year 2024 to embed the new post-tender requirements.	G	N/A	Providing Excellent Services	

"DITS Strategy Implementation"	Work to update our Digital, Data and Technology Strategy has now completed, with a single strategy covering the Corporation including the institutions now agreed at Digital Services Committee, Policy and Resources Committee and Court of Common Council.	G	N/A	Providing Excellent Services	
ERP Programme	<p>Programme Sapphire is being implemented and has monthly board meetings. It's January board update reports these key DITS activities have progressed:</p> <p>Data Migration Update: Learning Management System (LMS):</p> <ul style="list-style-type: none"> <li>Data migration templates have been signed off by LMS team.</li> <li>Initial data migration uploads have been successfully completed into preview environment</li> </ul> <p>Employee Central :</p> <ul style="list-style-type: none"> <li>Data template format has been agreed upon.</li> <li>Migration file is ready for upload into mini Employee Central (EC) this week.</li> </ul> <p>Employee Payroll :</p> <p>Integration Update: Wave 1</p> <ul style="list-style-type: none"> <li>Design for interim interface between legacy iTrent system , mini EC &amp; LMS has been agreed.</li> </ul>	G	N/A	Providing Excellent Services	
"Managed Print Service"	The initial procurement exercise for our Managed Print solution was abandoned as there were concerns raised by the Print Room regarding the suitability of the preferred supplier. Following a short review period, the new procurement exercise is due to go live by the end of January, the Print Room and the Managed Print Service split into two lots and an updated specification. The new approach will allow the maximum level of benefit to be achieved whilst ensuring that the unique requirements of the Print Room can be accommodated.	A	New procurement approach has meant delays to implementation however also ensures best possible fit.	Providing Excellent Services	
Network Refresh	<p>We have agreed a direction of travel for our future network and will be carrying out a full refresh with a "wireless first" approach. Work is continuing to ensure effective procurement of the new solution.</p> <p>This solution will be a blueprint for our wider organisation, allowing colleagues across the Corporation – including Institutions, to connect without friction to a network regardless of which building they are working from.</p>	G	N/A	Providing Excellent Services	
"SharePoint Migration (COL and COLP)"	Our SharePoint migration has now completed. We are sharing best practice around this migration and lessons learnt with our Institutions.	G	N/A	Providing Excellent Services	
"Data Maturity Programme"	A Lighthouse project was carried out earlier in the year, which demonstrated the value of Data to the organisation. Following on from this, we have secured transformation funding to build a single CRM for the wider organisation.	G	N/A	Providing Excellent Services	

**Red:** Slippage to planned progress is significant and cannot be achieved in the next quarter. Risk of non-delivery.

**Black:** A decision to pause or stop workstream activities has been taken.

Provide Rag Status (\*refer to key)

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