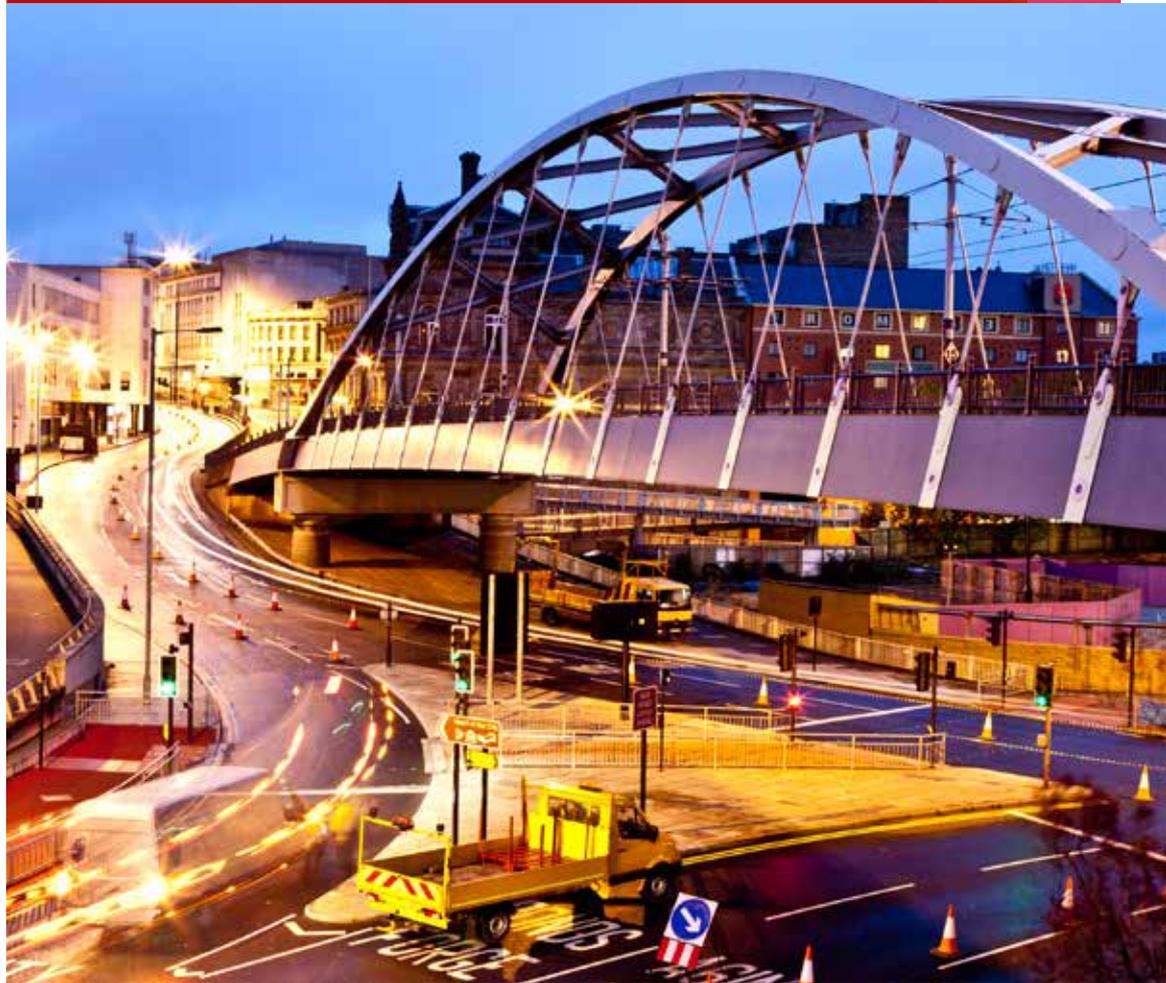


The Local State We're In

*PwC's annual local
government survey, 2015*



pwc

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1. Executive summary

Five years on from our original Local State We're In survey, and having largely successfully managed significant cuts to date, the long term outlook for the local government sector is more uncertain than ever. Local authorities are facing challenges on all fronts: financial pressures continue while demand and public expectations grow, alongside concerns about councils having the capacity and capability to respond.

With the pressures on councils growing, Chief Executives and Leaders have recognised the need to do things differently, looking beyond their organisational boundaries and taking a place-based, whole systems approach. However, new ways of working bring new risks and require new skills and collaborative relationships. As we look to 2015 and beyond, the challenge is to turn new strategies into new ways of working for staff, the public and partners that make a real impact on outcomes.

Key findings

Continuing the trend of the past five years, Leaders and Chief Executives **remain relatively confident** in the short term, with over seven out of ten confident that they will be able to make the necessary savings in the next year without seriously impacting the quality of service delivery and outcomes.

When it comes to the next five years, confidence crumbles with only one in ten Chief Executives confident in their council's ability to manage savings. When it comes to the sector as a whole, the **spectre of failure** looms large with nine out of ten Chief Executives believing that some local authorities will get into serious financial difficulties in the next five years.

And yet just over half of the public is aware of any reductions or cuts in services over the past 12 months. However, a similar proportion – 54% - is concerned about the impact of reductions on themselves personally, and 62% are concerned for their community.

Furthermore, the proportion of the public that accepts the need to make cuts or reductions has fallen by over 10% since 2011. There is also evidence of a missed opportunity on the part of councils to engage the public on the reasons behind service reduction or changes, with less than a third of the public saying their council has kept them well informed. Taken together, our public polling suggests a **sceptical public** view of councils and the continued impact of austerity that is only likely to heighten over future years when tough choices need to be made.

As council Chief Executives and Leaders look to the future, the realisation that **new ways of working** are needed is hitting home. Picking up a theme from last year's survey, three quarters of local authorities now agree that their **focus should be on outcomes**, rather than service delivery. Councils are well positioned to play a place leadership role, enabling a shift to outcomes by taking a holistic approach and co-ordinating action across a range of organisations and sectors. However, only a third of Chief Executives are confident they have a good understanding of the cost of securing outcomes across their area.

When we asked about one specific area - **integrated care** - 84% of our survey respondents believe that integration of health and social care will deliver better outcomes for the local population. Yet, while integration may generate savings for the health and social care system as a whole, less than three in ten agree that integration will lead to savings for their council. There are also frustrations with the Better Care Fund, with less than three in ten agreeing that it has had a positive impact.

New ways of working

Digital has the potential to play a key role in the shift to new ways of working that councils are making, offering the opportunity to respond to changing public digital demand and to make efficiency savings. However, confidence in the extent to which councils have embraced digital technology has declined slightly in the last year, as Chief Executives and Leaders begin to recognise the challenges of operationalising their **digital ambitions**. There also continues to be a wide gap between council expectations and the public's view: while 70% of Leaders agree their council is confidently embracing the opportunities new

technology offers, only 28% of the public agree. And while 61% of Leaders and Chief Executives say opening up data to the public is a priority, only 34% of the public trust their council to manage their data and information appropriately.

Data analytics and business intelligence will be critical for councils as they translate new priorities into smarter interventions, choices and working. However, just over half of our survey respondents are currently using data analytics to underpin their decision making and strategy. With only 34% of Chief Executives confident that their council has the capability it needs in terms of data analytics, local authorities urgently need to develop new skills and capacity to harness the potential data analytics offers to provide the insight needed.

As realisation grows that councils cannot operate in isolation if they are to tackle the big challenges they confront, **partnership working is key**, with councils increasingly achieving impact through influence, alliance and collaboration, rather than direct service delivery. The momentum now established behind **decentralisation**, from City Deals, Growth Deals and combined authorities and Greater Manchester's recent health and social care deal, offers local authorities new opportunities to invest in partnership working across their localities in order to deliver better outcomes.

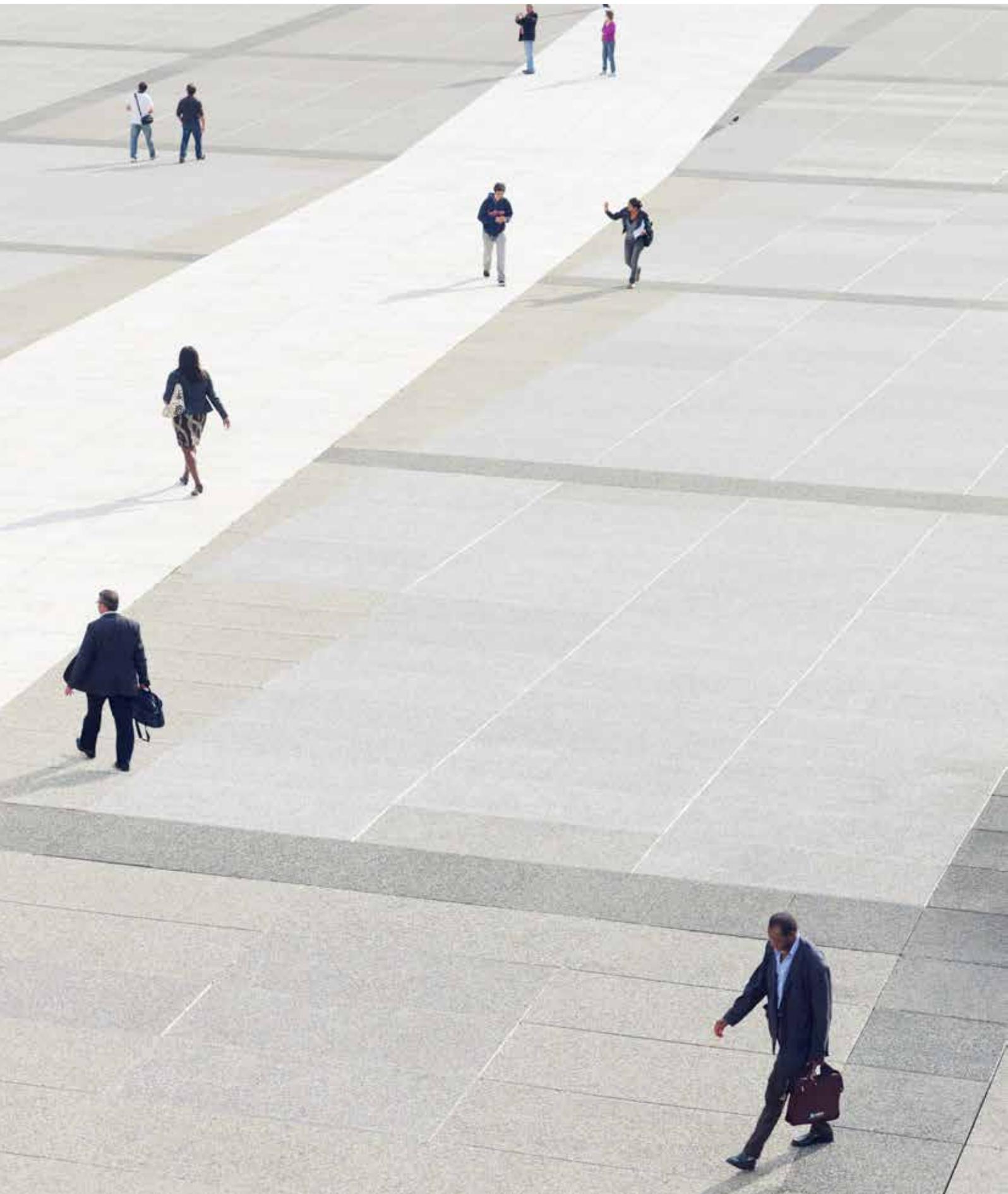
Hand in hand with the push to decentralisation, local economic growth has become a growing priority for local government. A majority of Leaders and Chief Executives identify the **local economy as their number one priority** for the next five years. The key barriers to growth identified by local authorities include lack of investment in infrastructure, lack of affordable or suitable housing and lack of influence over skills policy.

Local authorities increasingly recognise the role played by Local Enterprise Partnerships (LEPs) to help overcome these barriers, with 77% of Chief Executives and Leaders agreeing that LEPs are key partners for growth, up from 50% in 2013 and overtaking SMEs to take the top spot. It is up to local authorities to work with partners at the local level to demonstrate that they have the capability, capacity and accountability to deliver on the potential decentralisation dividend.

Overall, this year's survey paints a picture of the need for a fundamental redefining of the role and purpose of local government. Alongside growing pressures, new opportunities are emerging, particularly around:

- **Digital:** transforming processes and recasting the relationship between citizen and services;
- **Data:** underpinning business intelligence and informing new strategies; and
- **Decentralisation:** placing local government at the centre of local public services and outcomes.

Councils must move quickly to grasp these new strategies and opportunities in order to ensure they are fit for purpose for twenty first century Britain.



2. Introduction

In early 2015, we conducted our fifth annual survey of local authority Chief Executives and Leaders. As in past years, our aim is to explore how councils are dealing with financial pressures, their priorities for 2015 and beyond and their confidence in being able to deliver them. We also draw on a number of interviews with Chief Executives as part of our Global Government and the CEO survey¹. Alongside our local authority survey, we commissioned online polling of a representative sample of over 2,000 members of the public, exploring the public's views on the changing role of local government.

Over the past five years, local government has undergone a fundamental shift in response to deep and continued local austerity at a time of growing demand from an ageing and increasingly digitally savvy population.

Our annual local government surveys have tracked this shift over the past five years and tell a story of councils largely dealing deftly with the challenges they face and transforming significantly as a result. In this year's report we explore where local government stands at the end of a parliament characterised by significant public spending cuts in the sector. While the theme of financial challenges remains strong in 2015, local authorities are also increasingly embracing a positive agenda of collaboration and partnership working,

embracing the opportunity that digital and data analytics offers to transform relationships between the state and the citizen, and their priorities and ambitions for the next five years in 2015 and beyond.

This report presents the survey findings and focusses on five key themes that emerged from the results, covering the tough questions that Chief Executives and Leaders need to address for each:

- **Dealing with continued austerity:** How confident are council Leaders and Chief Executives about the future? Where do the views of Leaders and Chief Executives diverge? Are the public onside when it comes to continued austerity? What do the public see as the key purpose of local government?
- **New ways of working:** To what extent are local authorities moving to delivering outcomes rather than services? Is this shift in thinking resulting in new ways of working?
- **Rising to the digital challenge:** Are councils delivering on the opportunities offered by digital? What are the public's expectations of councils when it comes to digital?
- **Gaining insight:** Do councils have the capacity and skills they need to turn data into insight that can underpin decision making and strategy?
- **Delivering on decentralisation:** How well are local authorities working with partners at the local level to deliver better outcomes, from good growth to health and social care and two-tier collaboration? Do they have the capacity and capability they need to deliver on the opportunities that decentralisation offers?

3. Dealing with continued austerity: still under pressure

“Over the next five years we need to fundamentally redesign the shape of the organisation to respond to the challenges of reducing resources and increasing demands.”

Metropolitan Borough Chief Executive

Local authorities are relatively confident of their ability to deliver savings without adversely impacting services or outcomes in the short term, but this confidence quickly dissolves when they consider the three and five year outlook. Chief Executives and Leaders have a different take on the outlook for their councils, with Leaders more confident than Chief Executives about the financial picture. When it comes to the sector as a whole, the spectre of failure looms large with nine out of ten Chief Executives believing that some local authorities will get into serious financial difficulties in the next five years.

Confidence in the short term is growing

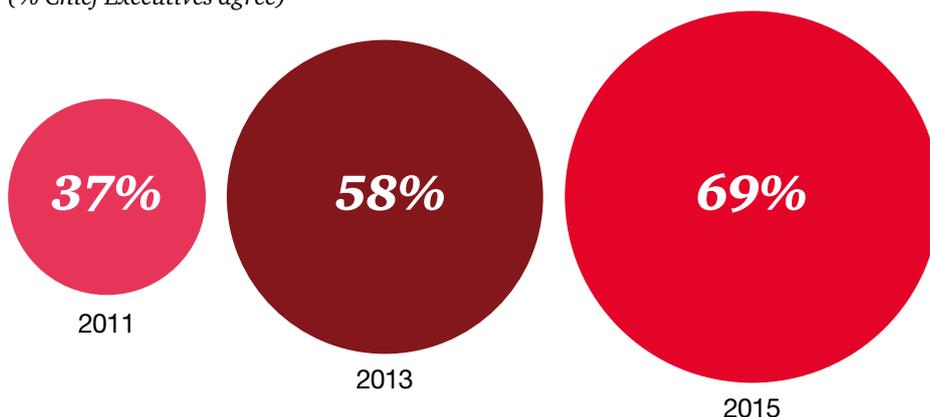
Overall respondents to our survey feel relatively confident about the outlook for the year ahead, with 73% of respondents agreeing that they will be able to deliver the financial savings necessary without impacting services or outcomes in the next year.

Looking further back, there has been an increase in the confidence of Chief Executives about the year ahead, from only 37% in 2011 when we first conducted our survey, to 69% in 2015 (Figure 1).

As continued austerity becomes the new normal, Chief Executives have adapted to confront the challenges they face: following the initial rounds of efficiency savings, Chief Executives may well have started to realise that they needed to think about, plan and budget for longer term austerity.

Figure 1: Confidence in the year ahead over time

We are confident that we will be able to make the necessary financial savings without seriously impacting the quality of service delivery and outcomes in the next year
(% Chief Executives agree)



The longer term outlook remains challenging

This apparent confidence in the short term falls markedly when the longer term outlook is considered, with only 29% feeling confident about the three year outlook, falling to 15% for the period to 2020 (Figure 2). Unlike the growing confidence in the one year outlook, this follows a similar trend to previous years, with Chief Executives in particular remaining very concerned about the longer term outlook. Despite their experience and achievements over the past five years, worries for the future persist.

Views divide

There is also a notable division in views between Chief Executives and Leaders (Figure 2), with a relative buoyancy of confidence among Leaders that isn't matched by Chief Executives. Whereas 22% of Chief Executives are confident in the outlook for the next three years, 39% of Leaders believe they can deliver financial savings without impacting quality. On the five year outlook, only 10% of Chief Executives are confident about their ability to deliver compared to 24% of Leaders.

Confidence in the sector

Despite their confidence in their council's ability to manage financial savings without impacting service delivery or outcomes in the next year, Chief Executives and Leaders remain very concerned about the outlook for the sector as a whole with 93% of Chief Executives and 82% of Leaders believing that some local authorities will get into serious financial crisis in the next five

years (Figure 3). Slightly fewer, but still a significant majority, believe that some local authorities will fail to deliver essential services in the next five years.

In the shorter term, while only 27% are concerned about their own council's outlook, almost half (49%) believe that some local authorities will get into serious financial crisis in the next year. This disparity isn't as apparent when it comes to the longer term outlook, where Chief Executive and Leaders' concern for the financial health of the sector reflects their concerns for their own council.

“What’s the deal? Why should talented people want to work in local government in five years’ time?”

London Borough Chief Executive

Figure 2: Confidence in making savings without impacting services and outcomes

We are confident that we will be able to make the necessary financial savings without seriously impacting the quality of service delivery and outcomes in the (% agree)

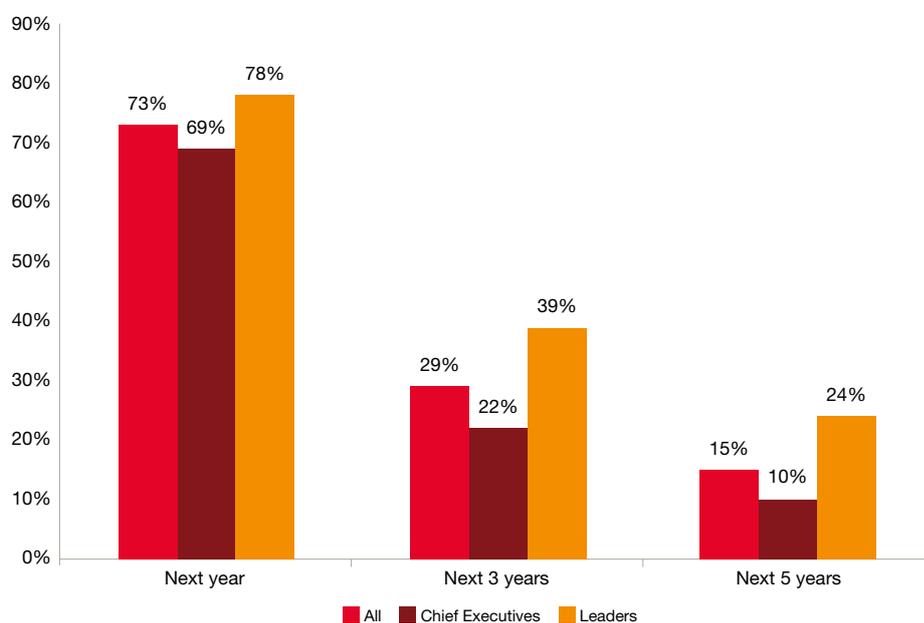
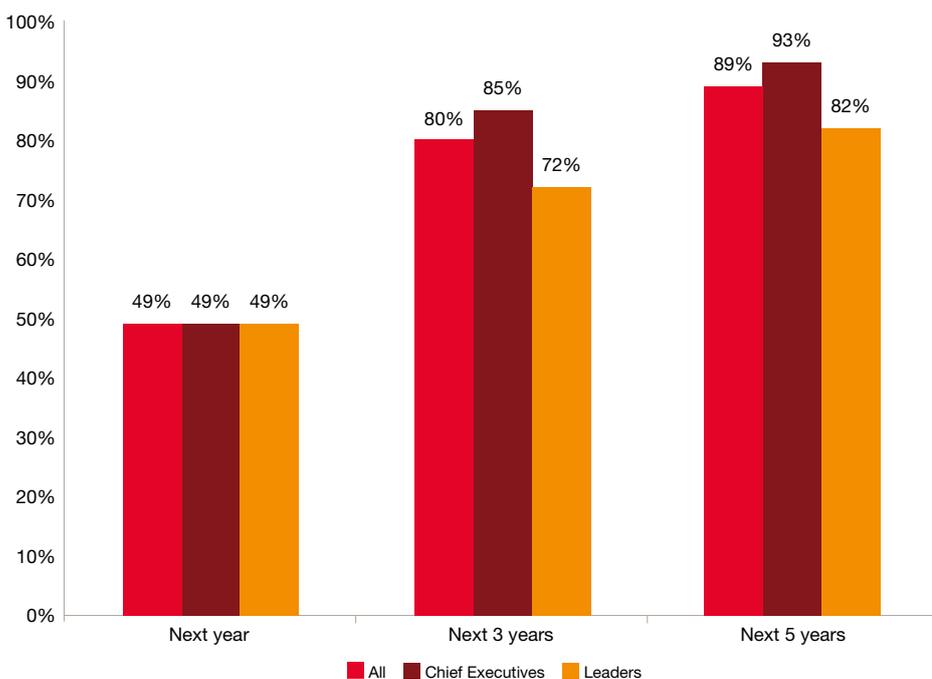
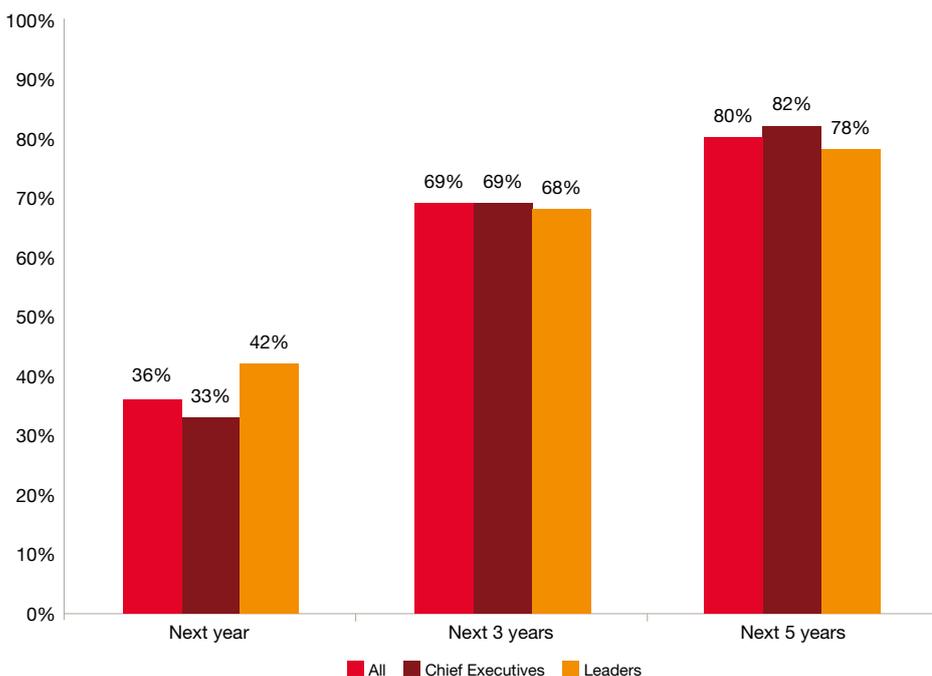


Figure 3: Confidence in the sector

Some local authorities will get into serious financial crisis in the (% agree)



Some local authorities will fail to deliver the essential services residents require in the (% agree)



Personal and community concerns are growing

Our survey of the public shows a rise in the proportion of the public who are aware of any reductions in local council services in their area, up from 54% in 2014 to 58% in 2015. Public concerns are growing, both in terms of the impact cutbacks have on them personally and the impact on the community. 54% are concerned about the impact on them personally, up from 50% in 2014, and 62% are concerned about the impact on the local community, up from 58% in 2014.

In line with previous years, repairs of roads and pavements (27%) and libraries (24%) are the two areas in which the public are most likely to be aware of service reductions or closures over the past 12 months (Figure 4). The area that has seen the largest increase in public awareness of cutbacks since last year is street lighting, with a 5% increase public awareness of reductions. Looking back to 2011, this figure has doubled from 9% to 18%, and may be related to public safety concerns. The increase suggests a potential trajectory that must sound a warning for councils as they look for new models that deliver outcomes in different ways.

“We’re struggling to balance protecting the vulnerable with running a cost effective organisation to deliver core services to the public.”

District Council Leader

The public continues not to accept the need to make cuts or reductions

While concerns are growing, there has been no change in the public's acceptance of the need to make reductions in council services, with a consistent 35% accepting the need for reductions or closures in their local area (Figure 5). While there has been no change in the past year, compared to our first survey in 2011, we've seen public acceptance of cuts drop by more than ten percentage points. The proportion of the public who feel their council has kept them well informed about the reasons behind changes in services is also consistent with 2014, with only 31% agreeing that their council has been communicating well with them.

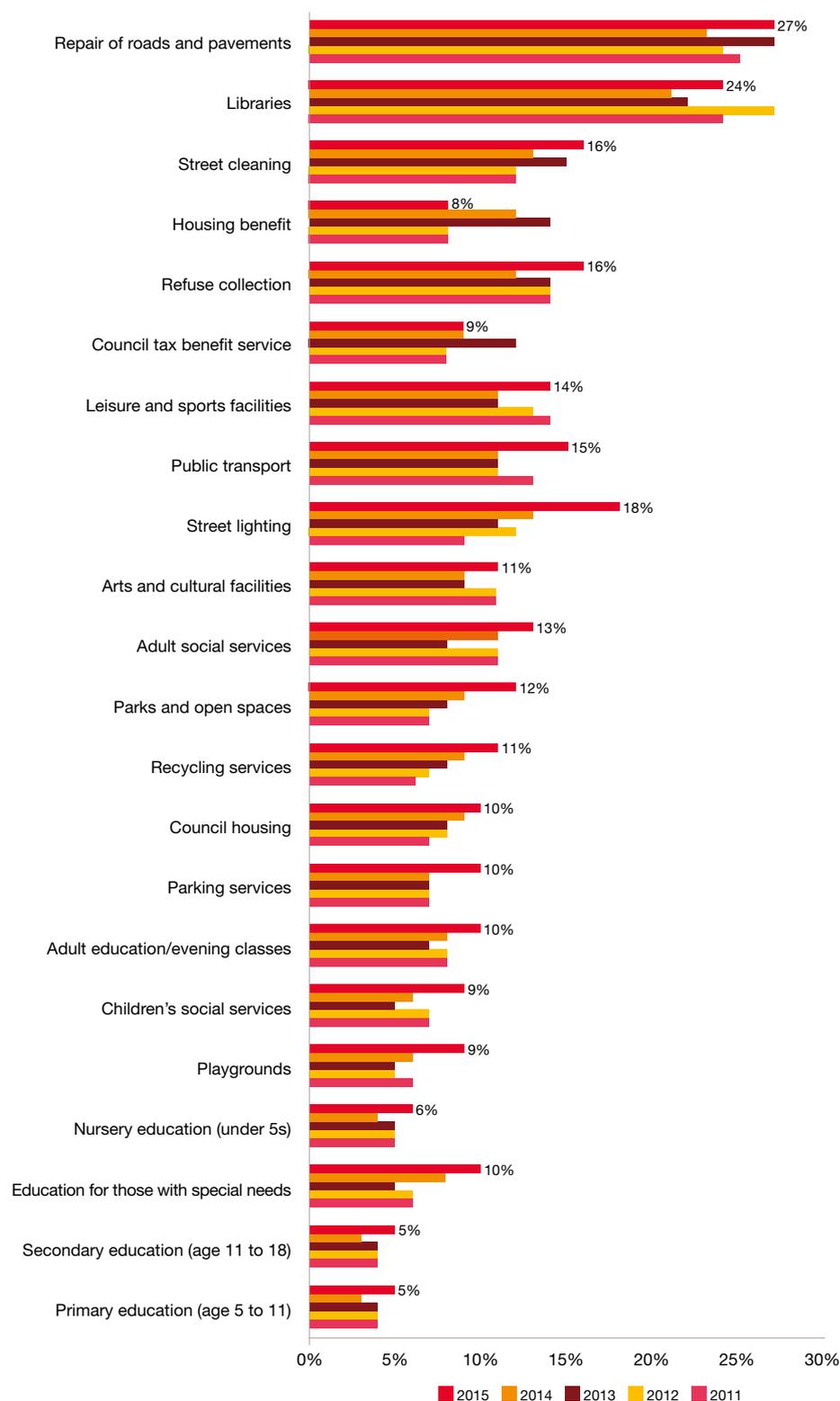
What's the purpose of local government?

Given that councils are redefining their role and purpose², we also asked the public what they see as the most important purpose of their council. Responses focused on the provision of local public and community services, alongside a worrying minority who claimed not to know their council's purpose. This indicates an engagement challenge ahead as councils shift to focusing on outcomes, and to enabling people to deliver those outcomes for themselves where possible, rather than service delivery (section 4).

Taken together, our public polling suggests there will be little let up in the public stance towards councils as they grapple with the continued impact of austerity and the tough choices that need to be made.

Figure 4: Public awareness of reductions in services

Which, if any, of the following services or facilities within your local area are you aware of having been affected by reductions in services or closures by your local council within the past 12 months?



4. New ways of working: from strategy to delivery

“We’re improving value for money and coherence by redefining the council offer and engaging the community in shaping services.”

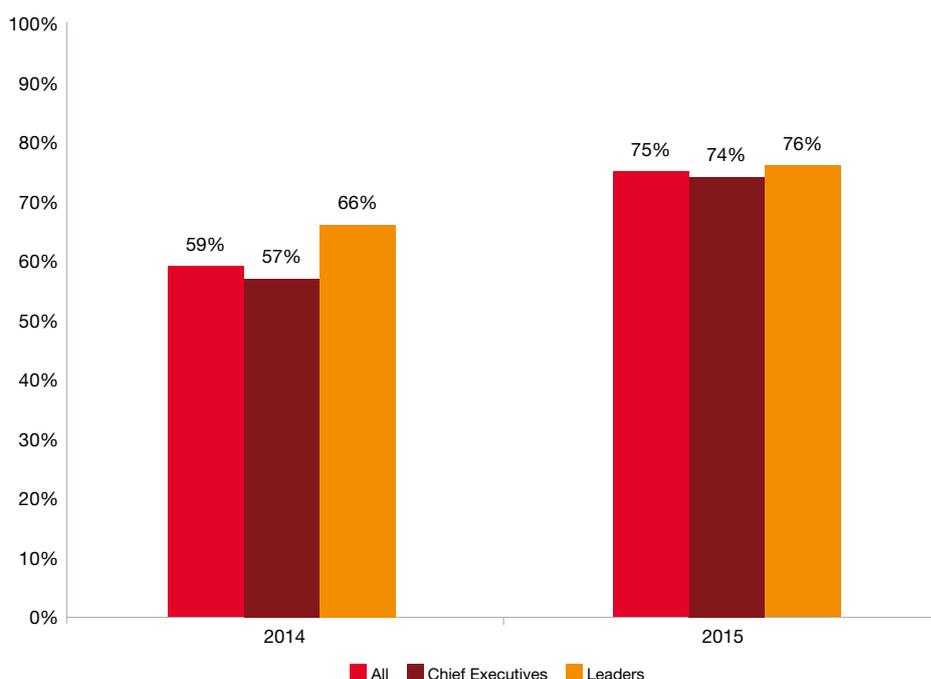
County Chief Executive

As councils look to the future, the realisation that new ways of working are needed is hitting home. Three quarters of Chief Executives and Leaders now agree that their focus should be on outcomes, rather than service delivery. However, only a third of Chief Executives are confident they have a good understanding of the cost of securing outcomes across their area. Translating an outcomes based approach into practice is the challenge ahead.

With the pressures on councils growing, Chief Executives and Leaders have recognised the need to do things differently, looking beyond their organisational boundaries and taking a place-based, whole systems leadership approach. There is an increasing belief among Chief Executives and Leaders that local authorities should be more responsible for facilitating outcomes rather than providing services. Whereas in 2014, 59% agreed that their council’s focus should be on outcomes, this year the proportion has risen to 75% (Figure 7).

Figure 7: Consensus shifts to outcomes

Local authorities should be more responsible for facilitating outcomes rather than delivering service solutions (% agree)



“Our vision is of a confident and ambitious place with a strong identity and clear outcomes that everyone works together to achieve”

Unitary Council Leader

Delivering and measuring outcomes

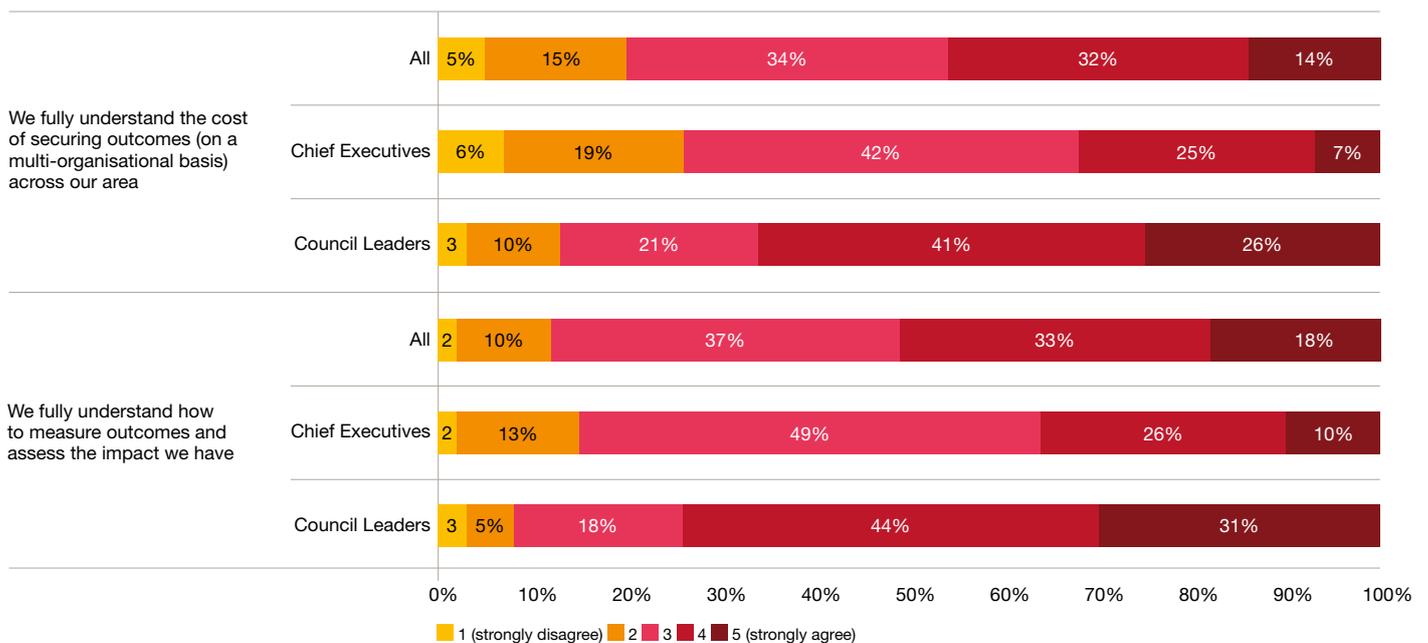
While there is growing consensus around the focus on outcomes, there is a marked gap between Chief Executives’ and Leaders’ perspectives of their understanding of the cost of delivering outcomes or how to measure impact (Figure 8).

Taken together, 46% of respondents agree they fully understand the cost of securing outcomes on a multi-organisational basis across their area. This is a similar figure to our 2014 survey suggesting little progress has been made over the past year. In addition, this year we also asked Chief Executive and Leaders if they fully understand how to measure outcomes and assess the impact they have and collectively 51% of our survey respondents agree

they do. There is clearly a gap in the ambition of councils to take an outcomes based approach and their capability and capacity to ensure value for money.

Furthermore, there is a marked difference in responses from Chief Executives and Leaders in this regard. While only a third of Chief Executive agree they fully understand the cost of securing outcomes, two thirds of Leaders agree. And where 36% of Chief Executives agree they fully understand how to measure outcomes and their impact, 75% of Leaders agree. This disparity reflects the overall confidence of Chief Executives, who will be closer to operational detail, compared to Leaders, who may be prone to measuring their impact in terms of electoral results. Section 6 explores the role of data and business intelligence for councils further.

Figure 8: Securing outcomes, measuring impact



Delivering outcomes through integrating care

In a similar vein, there has been solid support for integrating care as a means of delivering better health outcomes for the population, with 84% agreeing that further integration of health and social care will lead to improved outcomes (Figure 9). Following a now familiar pattern, Leaders are more likely than Chief Executives to believe that integration will generate savings for their council, with 33% of Leaders agreeing that it will compared to 29% of Chief Executives. However, there has also been a notable fall in the proportion of Leaders who believe integration will generate savings, from 43% in 2014 to 33%.

The Better Care Fund, a key vehicle for supporting the integration of health and social care, also continues to get a luke-warm reception, with 29% agreeing it has had a positive impact, a similar proportion to 2014. Where there has been a shift is from those who felt neutral about the Better Care Fund this time last year when it was in its early stages (down from 42% in 2014 to 33%), to those who disagree that it is having a positive impact (up from 29% in 2014 to 38% in 2015), suggesting that views towards the Fund have hardened (Figure 10).

From the open responses to our survey, it was evident that concerns also pervade about the capacity of Health and Wellbeing Boards. Following the announcement of the devolution and joint commissioning of Greater Manchester's health and social care funding (see more in section 7), local authorities will be exploring alternative local tools, mechanisms and relationships for facilitating the integration of health and social care that they believe will lead to better outcomes.

In their own words: Helen Patterson, Chief Executive of Wrexham Borough Council on redefining local government



Interview conducted by Jonathan House for PwC's 2015 Government and the 18th Annual Global CEO Survey

PwC: What are the big decisions which will face your organisation in the next few years?

HP: Our biggest decision is what our relationship is going to be with our public. How are we going to decide what the shape of the council will look like in the future, and what the shape of local government in its community and within its locality will be?

PwC: What could a shift to an outcomes based economy mean for business, government and the public?

HP: If we start with outcomes and start with better meeting local needs, however those local needs are defined, whether they are about people and jobs, or about wellbeing, whether they are about loneliness and people needing company – whatever the need is bearing in mind that the world has a finite set of limited resources – there is just a logical and a moral sense of the need to co-create, co-deliver and co-think about everything.

I think the public sector needs to savvy up to the private sector in terms of what brand it's got and what it's delivering in terms of its products. But it also needs to have a different kind of conversation with the public to say: "the reality is we won't have the opportunities to do things in the future in the way we did in the past. It's your future too, let's co-create, and let's deliver together". That's a massive societal shift because at the same time people are still paying their taxes and there is still an expectation from generations that they've paid for services and they should have them delivered.

PwC: How can business and government best collaborate to improve competitiveness to drive good growth and create good jobs across sectors in your area, or wider?

HP: The thing to recognise is that actually good growth and good jobs are the foundation of all communities, all families; they are the foundation of the economy.

I am thinking about what I would call indigenous growth – so something like Money Penny that's based here and stays here and develops good jobs. They are good jobs because of their quality; they are sustainable and they are actually targeting a sector of society that needs lots of support.

We also need to invest in our education system much more, it's all very well saying that big chunks of graduates go on to further education and/or jobs, but I am interested in the quality, where do they go and what are they actually doing?

PwC: Are you getting the balance right between an internal focus on cost base and an external focus on helping business grow?

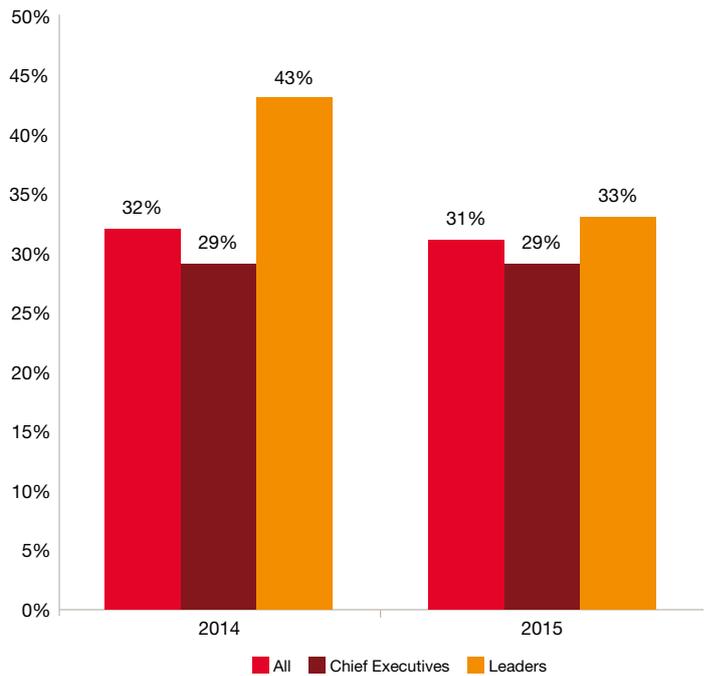
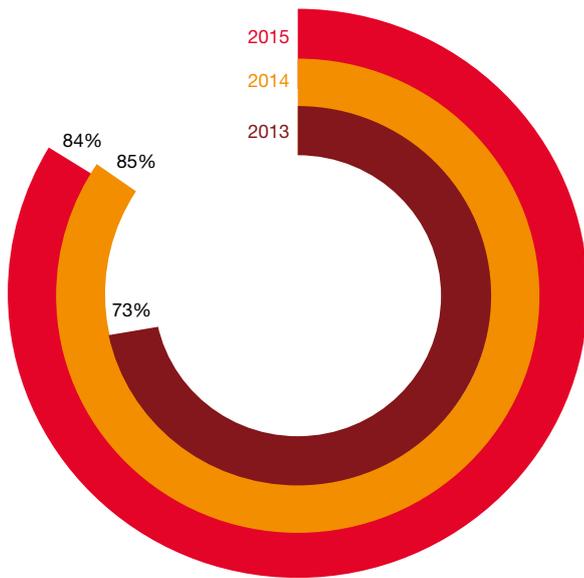
HP: Part of my challenge to the organisation has to be are we the best at doing any particular service? If we are not then we shouldn't be in the business and somebody else should be. But we should be clear what our business is.

My worry is that in delivering all the rest of the services and enabling delivery of them that we will lose the plot on helping businesses to grow, and actually business growth and jobs and talent development are the key to reframing that relationship with the public and making sustainable communities.

Figure 9: Delivering outcomes, and savings, through integrating care

Further integration of health and social care will have a positive impact on health outcomes (% agree)

Further integration of health and social care will generate savings for my council (% agree)

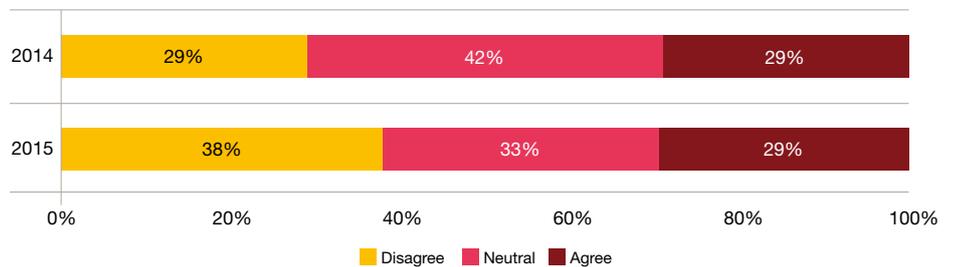


“I have concerns that Health and Wellbeing Boards do not have the capacity to do all that is being asked of them, and will not gain sufficient understanding and support from the NHS centrally or from NHS providers”

County Chief Executive

Figure 10: The impact of the Better Care Fund

The Better Care Fund has had a positive impact on our ability to deliver better public services/outcomes



New skills for new ways of working

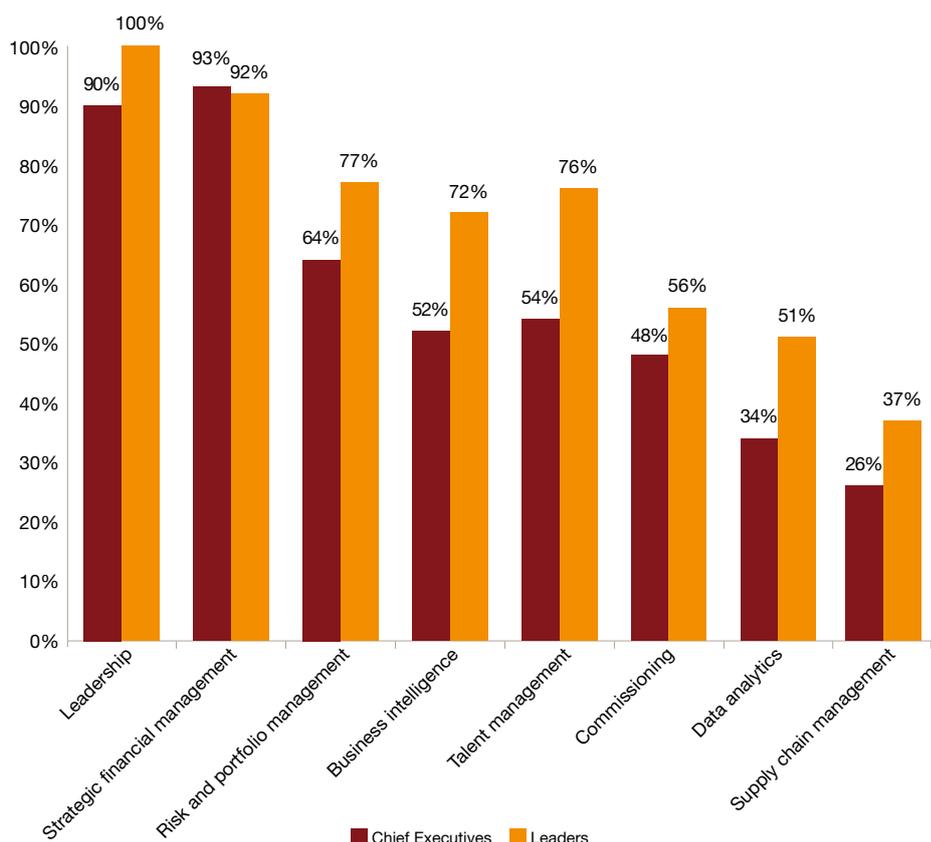
As councils make the shift to new strategies focused on outcomes, they will need to develop new capabilities. While Leaders are generally more confident of their council's capabilities compared to Chief Executives, the overall pattern is similar, with higher levels of confidence in their capabilities in terms of leadership and strategic financial management, compared to commissioning, data analytics and supply chain management (Figure 11). Investing in capability in these areas will be critical for councils as they shift from a service delivery model, to a focus to being an enabler and facilitator of outcomes.

“The critical challenge we face is how to deal with an ageing population and the need to transfer revenue from acute care to community care to provide better outcomes”

Unitary Leader

Figure 11: Council capabilities

My council is well equipped with the following capabilities (% agree)



Tough questions on transitioning to new ways of working

1. Do you have a clear vision of the outcomes and impact your council wants to achieve?
.....
2. How is this vision shared within your organisation and with other public and private sector organisations across your place?
.....
3. Do you have a strategy for turning that vision into practical plans that will deliver the desired outcomes?
.....
4. Is the capability in place to commission effectively for outcomes?
.....
5. Is the capability in place to measure outcomes and assess impact?

5. Rising to the digital challenge: are councils delivering?

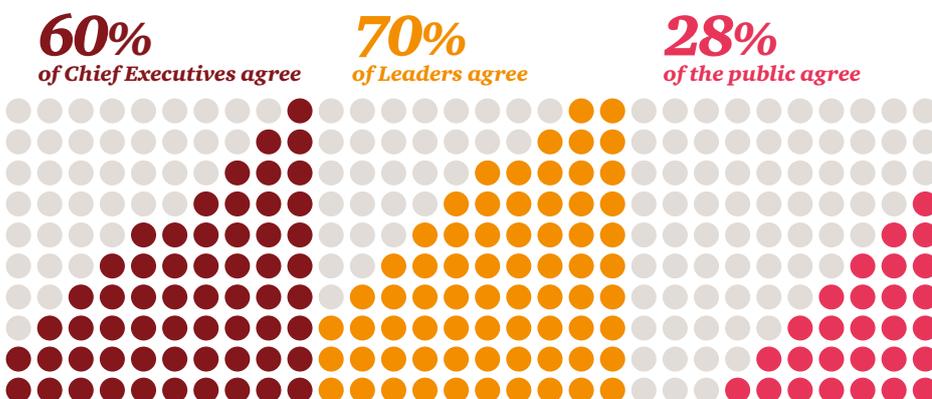
Digital technology is enabling local government to become more effective and reshaping the relationship between citizen and state. However, Chief Executives and Leaders have become slightly less confident over the past year regarding the extent to which they're rising to the digital challenge. Furthermore, councils still have a long way to go in meeting the expectations of citizens, who increasingly expect services to be available digitally. Embracing the opportunities that digital offers will be critical for local government in 2015 and beyond.

Over the last decade, the explosion of new digital technology – social media, mobile/smart technology, big data, cloud computing and more recently advanced automated intelligence – has triggered fundamental change in the way people communicate, make friends, buy things, exchange information and use data, with significant consequences for local government. As the majority of the customer base changes from traditional customers who would typically prefer face to face interaction and phone contact to a majority of 'digital natives' who have grown up with, and know nothing other than, life enabled by the internet and mobile phones, councils need to find new ways to engage with the public.

Public bodies need to embrace digital technology as a tool to drive innovation, transform how they engage with citizens, foster the interaction of citizens with each other and explore how outcomes can be better secured. Digital technology is opening up new opportunities to involve citizens in the design and delivery of services and co-produce outcomes. The challenge for local government is to respond to the evolving expectations of citizens, while dealing with the acute demands of continued financial austerity and rising demand.

Figure 12: Embracing the digital agenda

Q: My council is confidently embracing the opportunity new technologies offer for better local public services (% agree)



The digital gap

While Chief Executives and Leaders are relatively confident about their approach to digital, with 60% of Chief Executives and 70% of Leaders agreeing they are embracing the opportunities new technologies offer, less than a third of the public agree (Figure 12) and 62% are not regularly interacting with their council digitally (Figure 15).

Despite, or perhaps because of, the growing attention given to digital opportunities for local government, Chief Executives and Leaders are slightly less confident this year than in 2014 when 61% of Chief Executives and 75% of Leaders were confident of their digital approach. This perhaps reflects the growing realisation that the digital agenda is broader and potentially more complex to deliver than was originally thought, extending well beyond IT and involving internal cultural and behavioural change too.

Digital expectations

We also asked the public the extent to which they were satisfied with the digital services their council offers. Almost four in ten (38%) were satisfied with their council's approach to digital, similar to the 35% figure from 2014. Almost half (48%) would prefer more council services to be available online, with only 8% disagreeing with the prospect (Figure 13), whereas around a third continue to prefer to interact with their council in person (37%) or by telephone (34%).

There is variation by age and socio-economic grouping in response to questions on both how much digital interaction people have with their councils, with those groups who are more likely to use digital services also demanding more. Younger cohorts (18-34 years) are more likely to have interacted with their council digitally in the past month, and over half (56%) would prefer to have more council services available online, falling to 39% for the 55+ age group (Figure 14). What is notable, is the sizable proportions who feel neutral about council services being available online and perhaps need a nudge to shift to new ways of engaging with their local authority.

For socio-economic groups, 44% of those in ABC1 have interacted with their

council over the past month, compared with 31% in C2DE. However, there is less of a socio-economic divide between the groups in relation to whether they would like more digital services – 51% for ABC1 compared to 46% in C2DE – suggesting that while councils need to be aware of the varying levels of access different groups have to digital services, this doesn't appear to be an issue of reluctance to use digital services.

Shifting services online is only one aspect of digital transformation. When we look at the breakdown of current digital activity a similar pattern is seen as in 2014 with almost a quarter of people (23%) using digital means to access council information and 11% paying for services digitally (Figure 15). One in ten have given feedback to the council

Figure 13: Channel shift

Almost half of the public would prefer more council services to be available online

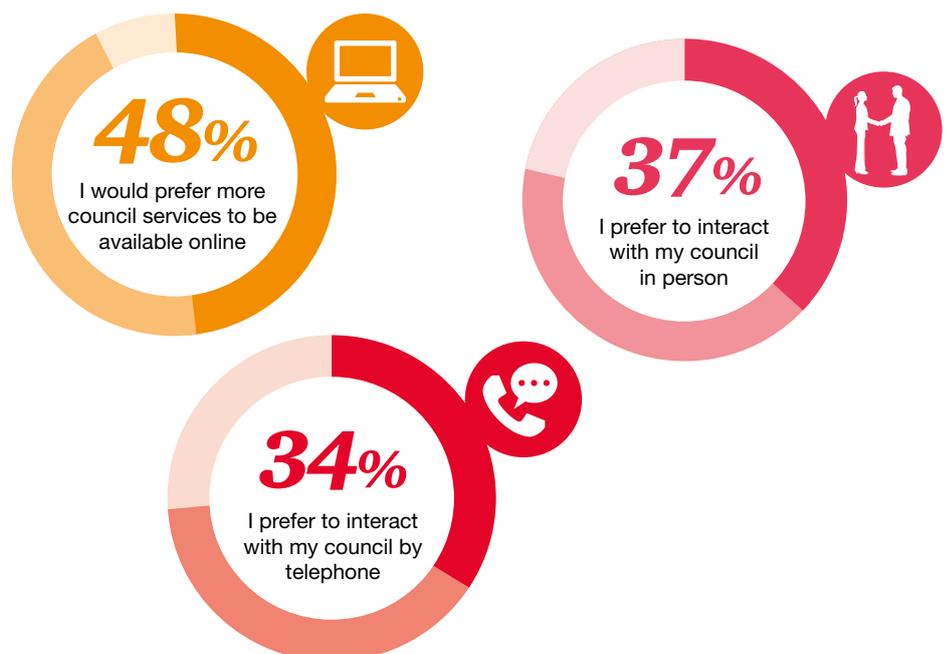


Figure 14: Digital natives leading digital demand

I would prefer more council services to be available online

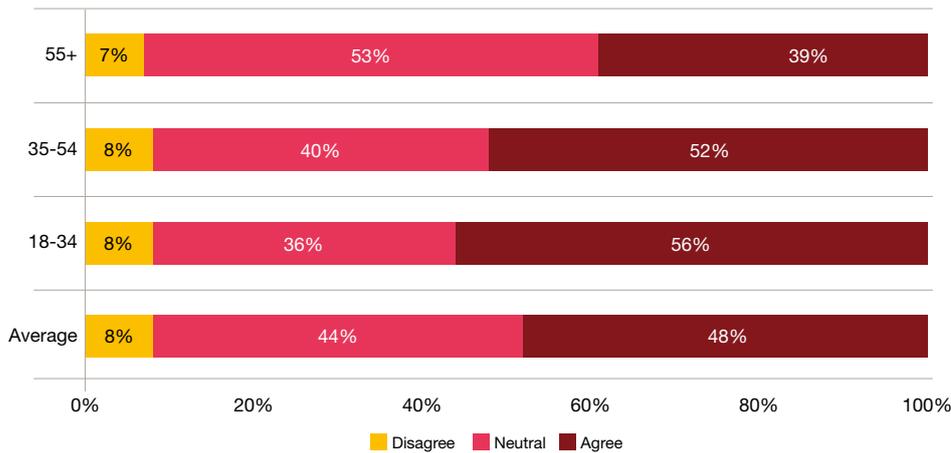
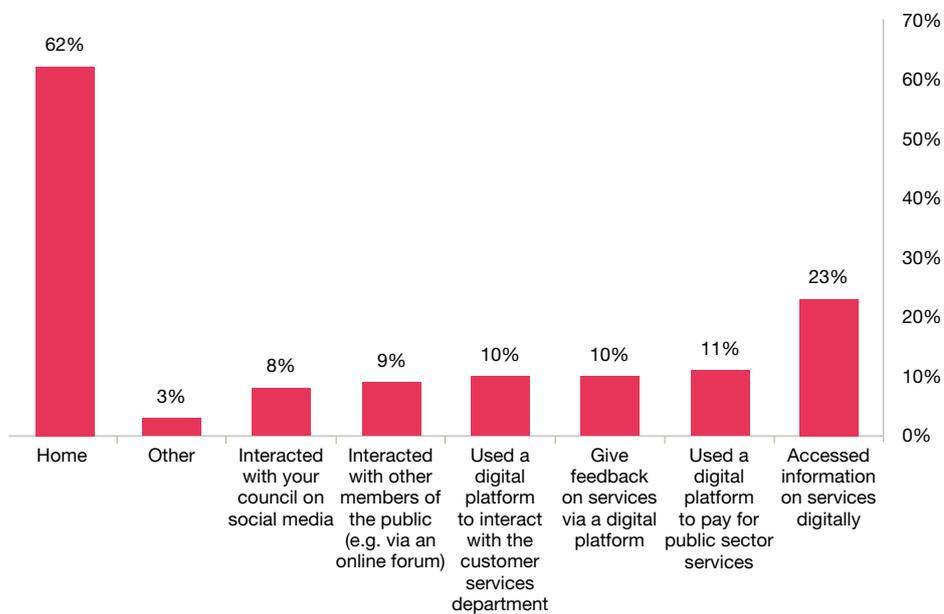


Figure 15: Digital interactions

In the last month, have you interacted with your council in the following ways?



or interacted with customer services. Where there has been some slight movement is in the proportion who have contributed to council-hosted online forums – up to 9% from 5% in 2014 – and those who have interacted with their council on social media – up from 6% in 2014 to 8% in 2015. While these are small steps forward, councils need to ensure they have the capacity to capture and analyse social media and digital activity and use the insight gained.

New risks

Clearly, new digital approaches offer great opportunities for local authorities, but it is important to put in place the relevant safeguards both for privacy but also to ensure cyber security. This is a concern for the public, with only a third (34%) trusting their council to manage and share their data and information appropriately (Figure 16).

Cyber security was included in the top three threats identified by state backed CEOs (68%) in our recent global Government and the CEO report.³ Respondents to our local government survey are less worried about cyber threats, with 50% agreeing that their council is confident that its approach to digital security will cope with cyber threats (Figure 17). Perhaps more worrying is the fact that 46% of respondents are neutral on the issue, suggesting that perhaps Chief Executives and Leaders aren't as knowledgeable, and prepared, as they should be for potential cyber threats.

³ PwC, 2015, Government and the 18th Annual Global CEO Survey: Delivering outcomes, creating value

Next steps on digital

Public sector organisations need to develop a clear vision, strategy and plan to get the most value out of their digital investments, as well as ensuring that they have the capacity and capability to respond to these opportunities, including the use of data analytics to generate insight (see section 6).

In order to deliver on the opportunities digital presents it needs to be fully embedded in the council's broader change agenda. Taking a digital approach is not about introducing an IT change: digital thinking brings a new paradigm and with it comes cultural and organisational change that needs to be embraced throughout the organisation, workforce and community. Councils don't need a digital strategy, they need a business strategy for a digital age.

While some local authorities across the country are placing digital thinking right at the heart of their change programme, embracing innovation, technology and change management in equal measures across the entire council, many have not yet responded deeply enough to the challenges and opportunities digital presents. Delivering transformation on the scale required takes strategic vision and leadership and a preparedness to take risks and experiment. But with public expectations growing, digital is an agenda councils cannot afford to ignore.

In their own words: John van de Laarschot, Chief Executive of Stoke-on-Trent City Council on outcomes, collaboration and data



Interview conducted by Jonathan House for PwC's 2015 Government and the 18th Annual Global CEO Survey

PwC: What are the big decisions which will face your organisation in the next few years?

JvdL: The challenges that we face is how do we balance our budget and meet the needs and aspirations of growth while still maintaining protection for the most vulnerable in our communities. This involves a much more rigorous approach to prioritisation and a much more scientific approach to automation or digitalisation of services to ensure we secure the maximum efficiency and effectiveness from every pound we spend.

PwC: Who will be involved in this decision making and how will you perhaps use big data, open data and data analytics to help you in your decision making?

JvdL: What is crystal clear is that the decisions that now need to be made on a national and local basis are way beyond the remit of just local government. In an area like Stoke-on-Trent we need to work, and we do, very collaboratively with all of our partners across health, across fire, across police, across education, and others to ensure we take a holistic view of how to address the needs of our communities from within the budget that, collectively, we have available to us. This means a requirement for data sharing, cooperating, transferring data and working collectively to provide early intervention and predicted services for our communities.

As we work on a much more cooperative and collaborative basis with our partners, there is a huge need to share intelligence and data amongst those partners. One of the most effective ways of being able to do this

is through digitalisation where you can use the same data of an individual or a member of the community on multiple occasions without having to continually re-record it at every interface.

PwC: In making this transformation, are there risks that you perceive in relation to perhaps cyber security or data loss?

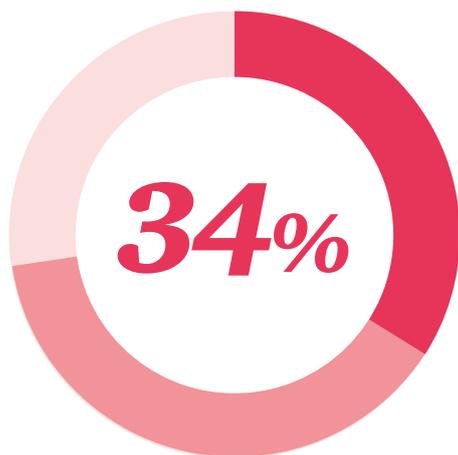
JvdL: Data loss and security is always a massive issue because of the type of information we hold so it's important that we have the appropriate controls and mechanisms in place to ensure this doesn't happen. The challenge is to make sure that data is used for the appropriate purpose, and only for that purpose, and that it is protected against all eventualities so that it doesn't fall into the wrong hands or used inappropriately.

PwC: What does a shift to an outcomes-approach mean for local government?

JvdL: An outcome based economy is a situation where you stand in the future and you visualise where you would like to be. You define the specific outcomes that you would like to see, in terms of business growth, health and wellbeing and then look backwards to define the steps that are needed to get you there. This is not about chasing targets and false hopes. This is about having clarity and purpose of where you want to be in the future, with a very sound rationale as to why, and then taking the optimal steps to get you there.

When you look at our organisation, the most important factors are clarity of direction, alignment of the organisation and our partners behind that direction, and effective collaboration to efficiently deliver on our collective goals and aspirations.

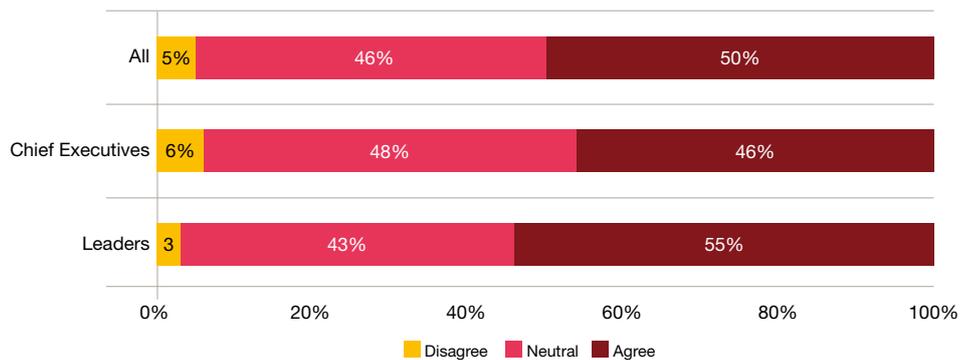
Figure 16: Public trust in handling data and information



I trust my council to manage and share my personal data and information appropriately

Figure 17: Digital security

My council is confident that its approach to digital security will cope with cyber threats



Tough questions on rising to the digital challenge

1. Do you have a clear vision of how digital technologies can help deliver your outcomes while achieving savings?
.....
2. Is your Leadership team championing the use of digital technologies?
.....
3. What would a 'Digital First' approach mean to your organisation in policy and delivery?
.....
4. What cultural and behavioural changes need to be put in place to make 'going digital' everyone's responsibility?
.....
5. How will your organisation be resilient to cyber risks and threats?

6. Gaining insight: embracing data analytics

Data analytics and business intelligence will be critical for councils as they translate new priorities into smarter interventions, choices and working. However, only half of our survey respondents are using data analytics to underpin their decision making and strategy, and concerns over capability when it comes to data analytics is high. Local authorities urgently need to develop new skills and capacity in order to uncover the potential that data analytics offers and to provide the insight they need.

When planning and delivering initiatives that are focused on outcomes, and particularly given the challenging financial context, councils need to be sure that they are investing in areas that get the best return. Increasingly evidence is going to be required that shows the relationship between inputs, outputs and outcomes and impact. The capacity and capability to do this well is not common place in local government. As highlighted in section 4, only 7% of Chief Executives strongly agree that they fully understand the cost of securing outcomes across a place, and 10% strongly agree they understand how to measure outcomes and impact.

Making smarter choices is about combining strategic intentions with data, insight and understanding to prioritise interventions that have the greatest impact. Half of our survey respondents agree that their council is using data analytics to inform decision making and strategy, with Leaders more likely to be confident of their council's use of data analytics (55%) compared to Chief Executives (46%). A significant minority of Chief Executives and Leaders are neutral about their councils approach to data analytics, suggesting untapped potential when it comes to translating data into insight.

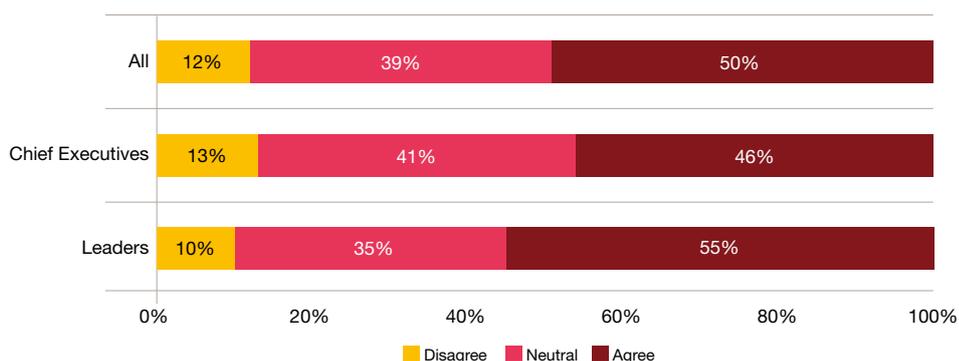
Big data, big ambitions?

Over half (54%) of Chief Executives and 73% of Leaders agree that transparency and opening up data to the public is a priority (Figure 19), suggesting social media, the cloud and Big Data could all potentially play a large role in transforming the information and insight of local authorities in 2015 and beyond.

However, master data management standards and policies and clarity on who is gathering what data for what purpose is under-developed in most

Figure 18: Data analytics

My council uses data analytics to inform decision making and strategy



In their own words: Martin Esom, Chief Executive of Waltham Forest Borough Council on shifting to new ways of working



Interview conducted by Georgina Cox for PwC's 2015 Government and the 18th Annual Global CEO Survey

PwC: What are the big decisions which will face your organisation in the next few years?

ME: I think it's about survival. If we carry on doing what we're doing at the moment there is no future, it's as bleak as that.

The big decision is whether we continue to do a lot of things at a lesser level, or concentrate on fewer things at a greater level. I think local government is going to have to remove some of its offer and that will be tough decision. We've got experience of divesting ourselves of various services that other people can run better and cheaper and I think there's probably going to be more of that: we'll be doing less, and then enabling others to do more.

PwC: What do you need as an organisation to be able to make those decisions?

ME: Firstly, we need a really clear steer from communities, an in depth conversation with the community that really makes the point that these are their services and not ours. It's their decisions about their services for which we are the enabler or the provider.

Secondly, our newly formed insight function is a key part of our operating model and what that's about is getting the best intelligence in terms of the services that we either provide, or not provide, and how we provide it. This gives us a real close handle on how we best meet demand and the performance of the services that we deliver, to see whether or not they are having maximum impact, and in the right way.

PwC: How will you use digital technology to drive innovation?

ME: For me it's about having a corporate insight to service design function that sits independent of our service blocks but where the service blocks feel that they can use, and get value from, this function and there's a real bonus to the organisation.

What I don't want is a social services slant on digital; I don't want an environment slant on digital. What I do want is a corporate approach to digital that is informed by the service blocks. So you need purity around what you're trying to create and where you're going with it.

PwC: What does a shift to an outcomes-approach mean for local government?

ME: I think it's around looking at the area rather than the Council and it's about really identifying those things that you would like to see happening in your area that enable business growth and for the community to live a full life. Then, what you have to be is a really good story teller, you have to be able to really eloquently describe what this looks like and the way in which you might get there, but also allow others to share in that picture to allow them to paint their part of it.

To shift from a 'I'm in charge of a service model' approach, to an enabler and facilitator of a theme in an area, is quite a demanding shift.

authorities. Very little truly integrated data exists within authorities and across the public sector. The relevant data is often held in different forms in many different places and is not stored in a way that makes it easy to integrate. This will become a major challenge if it is not dealt with.

This does not assume that we need a big (and expensive) system to achieve these goals. This is about collecting, using and sharing information better, both within and between public sector organisations and with the public themselves. rather than investing in very expensive technology. For example, most councils do not gather data by unique customer IDs and/or postcode systematically across their places and cannot easily share this data in an integrated way. It also means they are often not able to understand customer preferences or perform rigorous evaluation of the effectiveness of current interventions or options and the return on investment.

Capability concerns

Councils need strong capacity and capability in terms of data collection, management and analytics to produce the quality insight and intelligence required to underpin the new strategic planning framework and ensure their interventions are effective. Currently, while 46% of Chief Executives say that they use data analytics to inform decision making and strategy (Figure 18), only 34% of Chief Executive agree their council is well equipped with data analytic capability (Figure 20). In contrast, 52% agree they are well equipped with business intelligence capabilities, suggesting that Chief Executives still have a traditional view of the nature of business intelligence in a digital age and that the need to invest in the right capabilities and capacity to underpin these new approaches is more pressing than ever.

Figure 19: Opening up

Transparency and opening up data to the public is a priority for my council

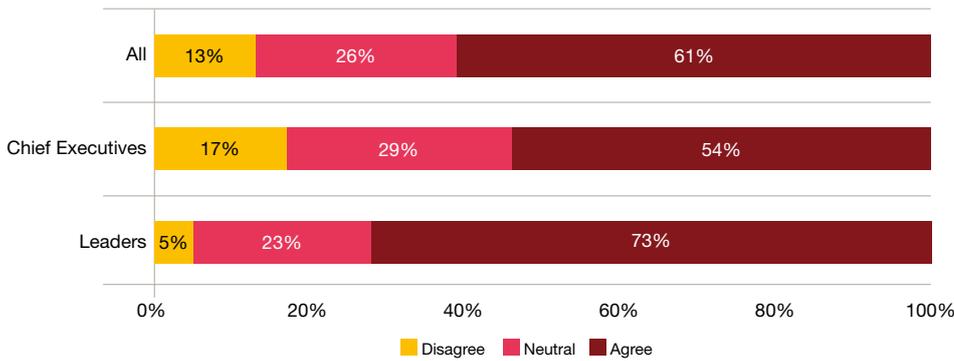
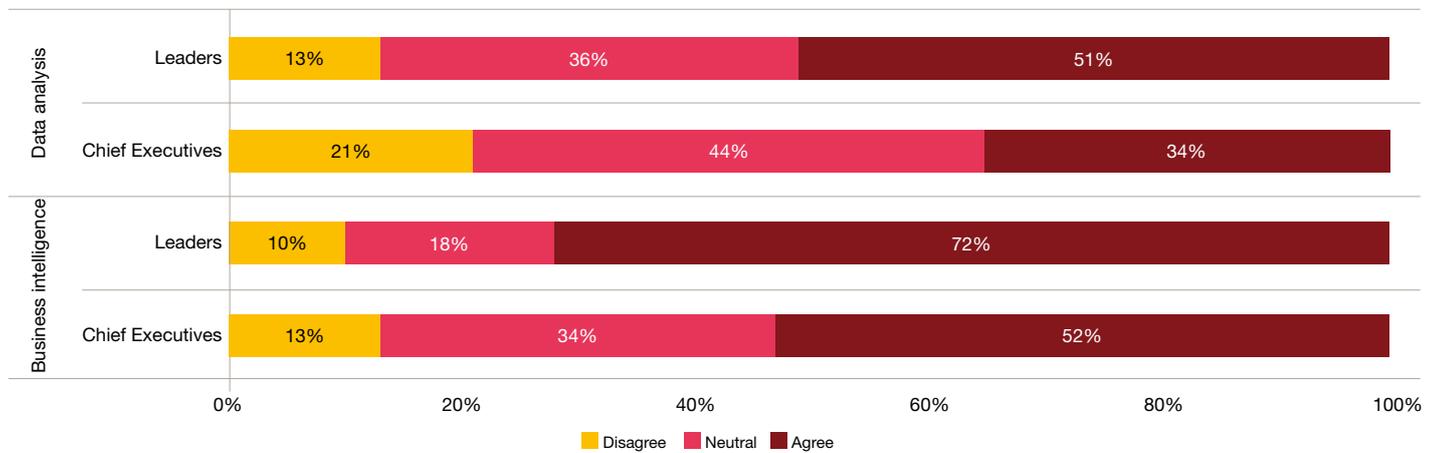


Figure 20: Capability concerns

My council is well equipped with the following capabilities



Tough questions on gaining insight

1. To what extent will data analytics help in your decision making?
.....
2. What needs to be done to make better use of big data e.g. to better predict demand and reduce it through early intervention?
.....
3. How will you develop and acquire the data analytic capabilities you need?
.....
4. How will the barriers to sharing data across public agencies be overcome?



7. Delivering on decentralisation: collaborating to achieve outcomes

“We need a clean sheet approach to all public service provision: a redefining of what is provided locally and centrally and a reworking of public sector resource distribution.”

District Chief Executive

There is increased realisation that local government cannot operate in isolation. Taking a whole systems approach and collaborating with partners across a place is key to delivering outcomes, particularly in the context of the growing momentum behind the decentralisation of powers and funding to the local level. Enabling local growth – the number one priority for local authorities over the next five years – is a case in point, with collaboration across the public, private and third sectors being essential.

Is decentralisation the answer - both to unleashing the potential of regions and improving public service outcomes? There are economic problems associated with too much centralisation, leading

to unbalanced growth. The UK is the fifth most centralised economy in the EU, as measured by the proportion of subnational revenue generated by subnational taxes, and almost four times more centralised on this measure than the EU average. In addition, a centralist, top-down approach of target setting from the centre risks stifling public sector innovation while also making it less clear where accountability lies for public service provision.

With momentum growing behind decentralisation of powers and funding to the local level, local authorities have a key role to play in coordinating and leading the collaboration of partners across a place. Local authorities – along with other local institutions such as LEPs – need to ensure they have the capacity and capability to make use of the devolved powers and associated funding and support a shift in culture towards ‘decentralisation by default’⁴.

Figure 21: Prospects for decentralisation in 2015 and beyond

By the end of the next parliament, my council will have significantly more powers and responsibilities

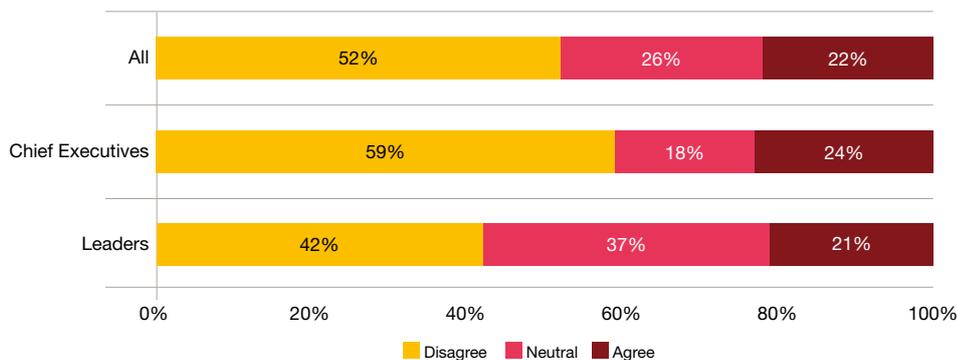
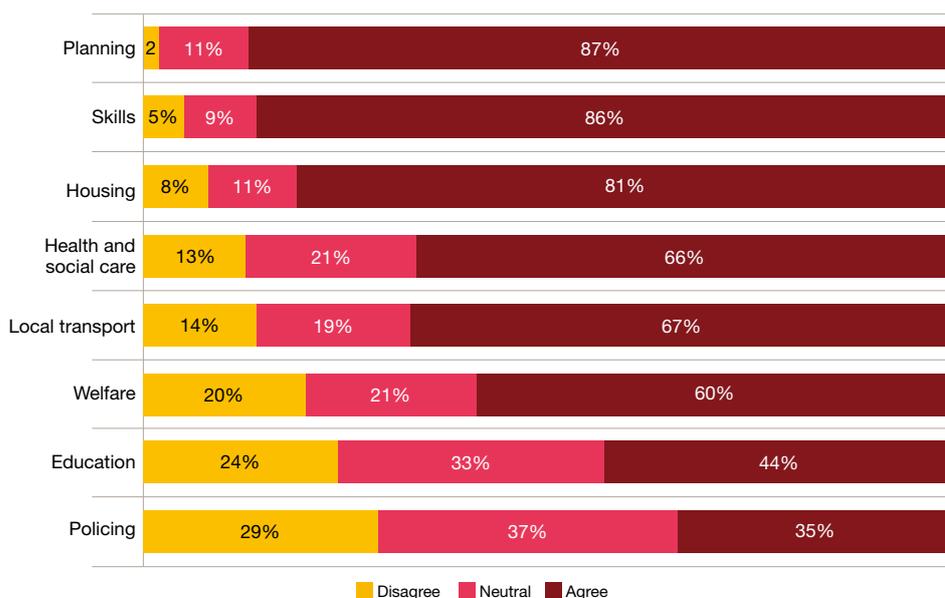


Figure 22: Priorities for decentralisation

My council's priorities for decentralisation are additional powers over

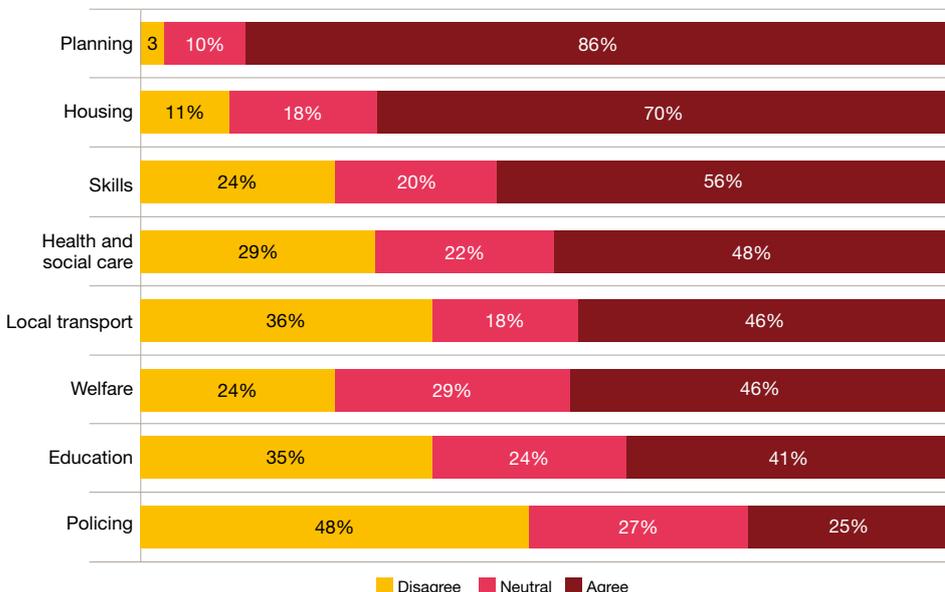


“Localism has not been delivered. Centralism pervades.”

Unitary Chief Executive

Figure 23: Capacity and capability to deliver

My council has the capability and capacity to take on additional powers and responsibilities in the following areas



The outlook for decentralisation in 2015-2020

While there have been numerous announcements on decentralisation over the past year, councils remain sceptical that there will be a significant rebalancing of powers and funding to local government by the end of the next parliament, with only a minority of Chief Executives (24%) and Leaders (21%) agreeing that there will be significant change (Figure 21). Interestingly, Chief Executives are more likely to disagree that there will be a power shift (59%), compared to Leaders (42%), where a higher proportion are unsure (37%).

Priorities for decentralisation

Notwithstanding this scepticism about decentralisation being delivered, councils are very clear on their priorities when it comes to additional powers if decentralised. Planning (87%), skills (86%) and housing (81%) top the agenda, with around two thirds also identifying additional powers for health and social care and local transport as a priority (Figure 22).

These priorities are closely aligned to the areas where councils feel they have the capability and capacity to take on additional powers and responsibilities, where planning, housing and skills are the areas where the majority of respondents feel most confident, compared with welfare, education and particularly policing (Figure 23).

Fiscal devolution

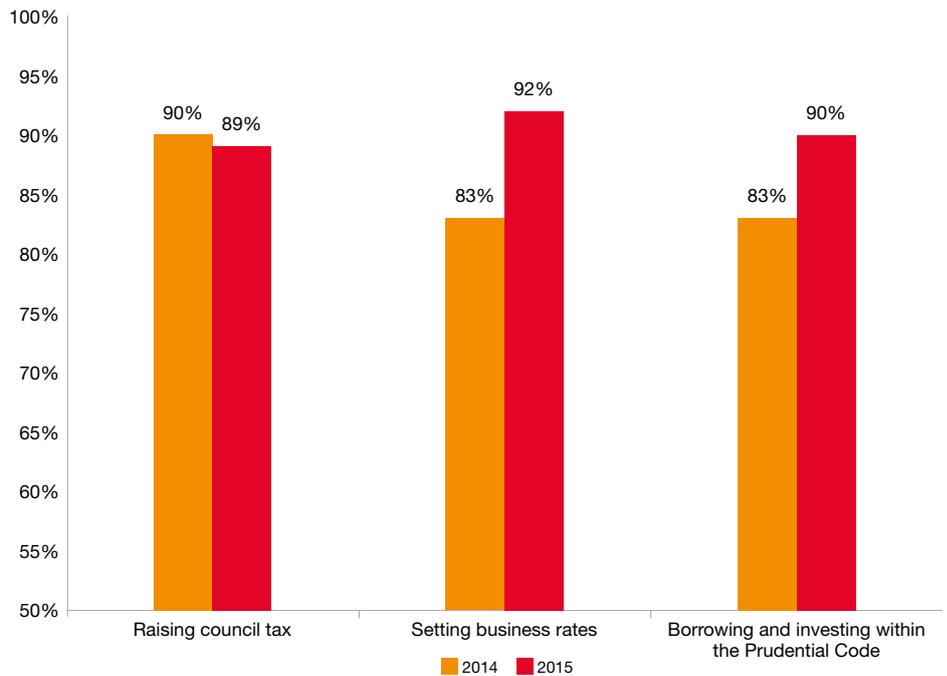
While many of the announcements on devolution to date have focused on the devolution of functions and associated budgets, there is also a growing appetite for fiscal devolution to the local level, with nine out of ten respondents agreeing that local authorities should have greater freedom over raising council tax, setting business rates and borrowing and investment within the Prudential Code. While there has been a slight increase from last year, only around half agree that local authorities should be assigned a small proportion of income tax, whereas 86% agree that local authorities should be able to levy and retain property tax, and 70% agree they should be able to levy and retain other taxes.

Collaboration for public service reform

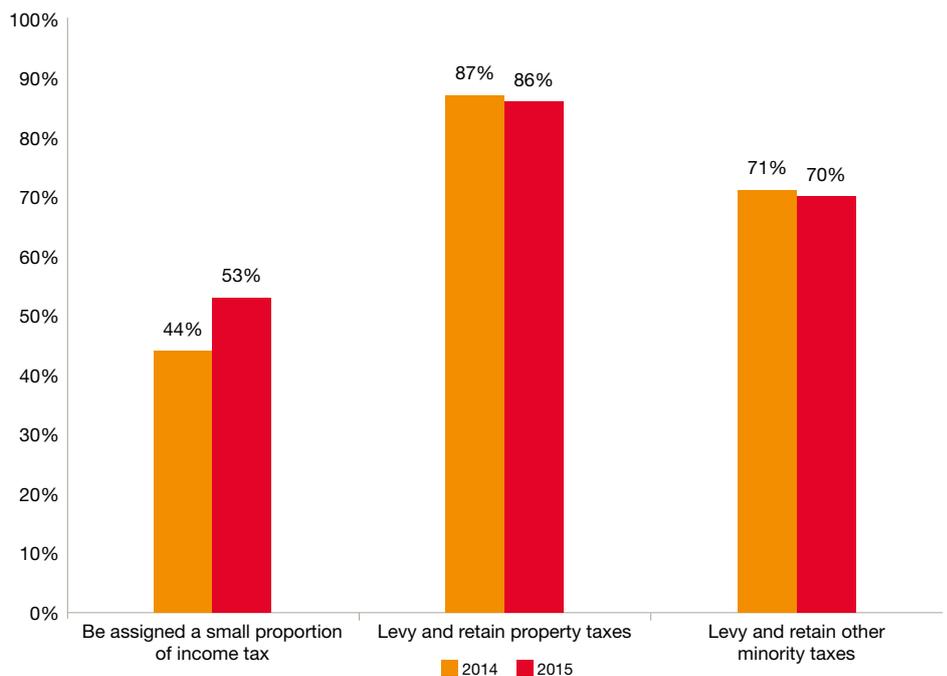
Just over half (55%) of respondents believe that significant reorganisation of local government will happen over the next parliament. While in the past the question of reorganisation in England focused on reforming two-tier structures, the majority of those who believe reorganisation of local government will take place in the next five years think this will take the form of a move towards combined authorities (82%). 61% agree there will be a move to unitary local government and 55% think the focus will be on voluntary collaboration between local authorities. There is also a growing recognition of the need to look beyond local government and move to whole systems working, with 41% agreeing there will be further collaboration across the public sector (Figure 25).

Figure 24: An appetite for financial freedom

Local authorities should have greater freedom over (% agree)



Local authorities should (% agree)



Box 1: Is decentralisation the way forward for health?

The changes now possible in Greater Manchester as a result of the £6bn health and social care deal will be watched with interest by other parts of the country and make the prospect of similar decentralisation deals elsewhere in the near future a real possibility. While the detail of Greater Manchester's health and social care deal have yet to be set out, there is huge potential for Greater Manchester to take a population based approach in order to tackle the causes of ill health, while also creating the opportunity to align budgets and create real added value to every pound spent.

The transformational change will come if Greater Manchester supports the population to become active participants in their health and wellbeing, especially if the Combined Authority uses the democratic platform on which it sits, to be more transparent with the public about the scale of the financial challenge and the need for change to services in order to get better outcomes for less money.

With Greater Manchester embarking on new territory with regards to decentralisation, the degree of scrutiny both from the public and Whitehall and Westminster is likely to be high. As Greater Manchester, and other combined authority areas, make the transition to new governance arrangements, they need to ensure that they have the capability, capacity and accountability to deliver on the potential that decentralisation of powers and funding to the local level offers.

The example of health and social care in Greater Manchester (Box 1), indicates that locally-led collaboration to deliver public service reform might be coming closer to reality.

Given the particularities of local government reorganisation in Wales, we have explored the implications of the Williams Commission separately (Box 2).

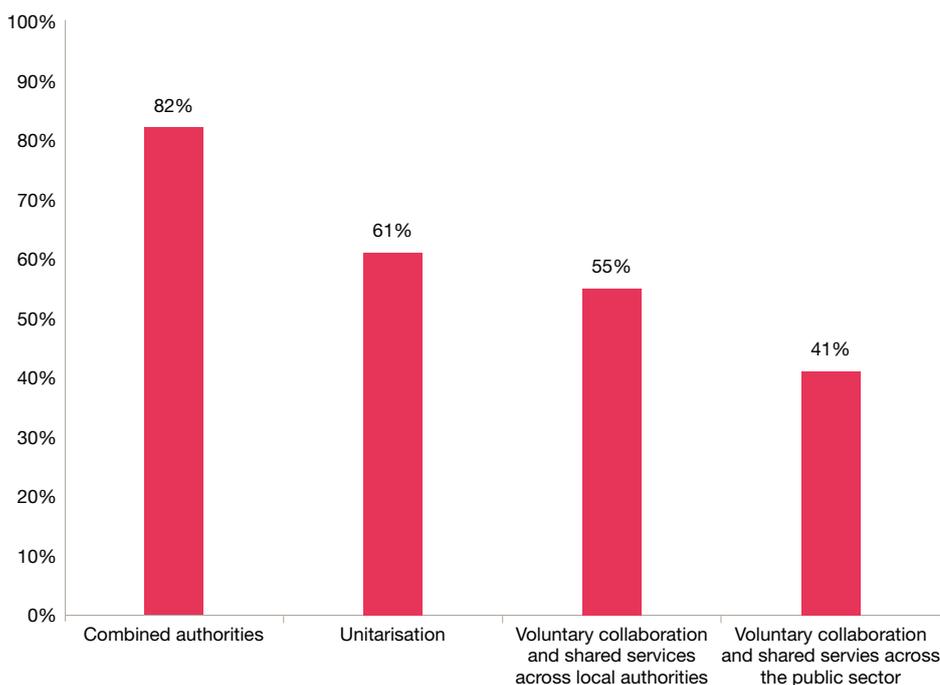
Power in numbers

Even given the recent enthusiasm towards combined authorities, led by Greater Manchester and now established in the Sheffield City Region, the North East, Liverpool City Region and West Yorkshire, with further proposals on the table, it is still perhaps surprising that almost half of respondents believe that their council will be part of a combined authority by 2020 (Figure 26).

However, potential combined authority councils must ensure and be able to demonstrate that through this form of collaboration they have the capacity and capability to deliver better outcomes on the back of devolved powers and funding. With different places having different capacities and appetites to take on new powers and responsibilities, a multi-speed approach to decentralisation is needed⁵.

Figure 25: Forms of reorganisation

What form do you think reorganisation might take?



Note: Base is those who believe local government reorganisation will happen

On the question of timing of any shift, while it may look like combined authorities such as Greater Manchester are moving at speed, in reality their current status is the result of relationship building and partnership working that has been established over the past 20 years. Emerging combined authorities must not underestimate the critical importance of effective collaborative relationships, built on trust and strong local leadership and governance, to make things happen: the structural solution of the combined authority of itself will not guarantee that outcomes will improve.

Furthermore, only 12% of those who believe they will be part of a combined authority think that they will be governed by an elected mayor, suggesting a potential barrier to the wider roll out of the model if directly elected mayors become a condition.

“Lower tier councils need to lift their vision and join upper tier councils with partners from the private and public sector to reform delivery of public services in an area”

County Council Leader

Box 2: Wales and the Williams Commission

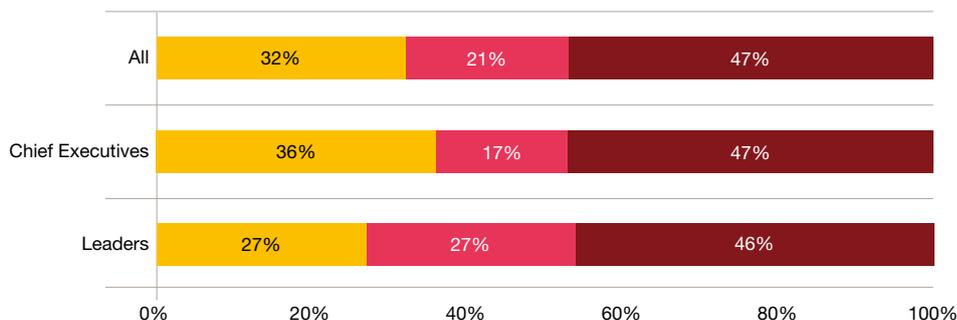
With the publication of the Williams Commission report including recommendations on the reorganisation of local government in Wales in 2014, we asked our subset of Welsh respondents to our survey for their views on the report and its implications.

While the small sample size – seven Chief Executives - means that we shouldn't draw too much from the data, there does not appear to be a strong appetite for reorganisation across local government in Wales.

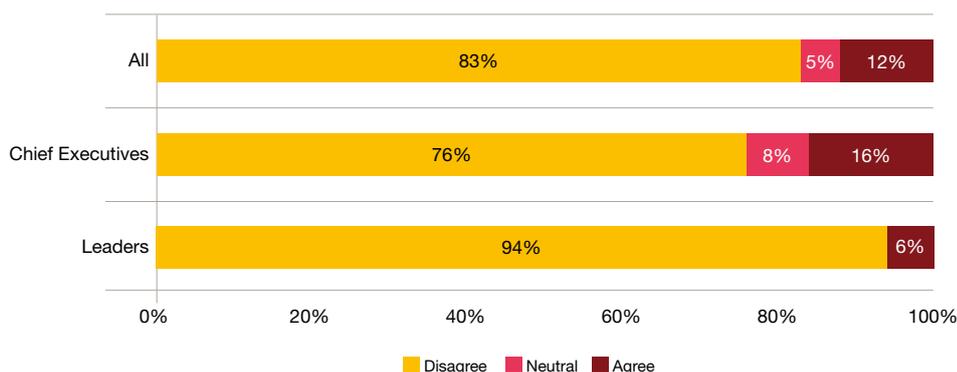
Six of the seven Chief Executives we surveyed disagreed that local government reorganisation as proposed by the Williams Commission is the right solution for Wales, or that the implementation of the Williams Commission will deliver the anticipated benefits in terms of outcomes or savings. Views vary on whether local government in Wales has the capacity and capability to successfully deliver the relevant recommendations of the Williams Commission, suggesting that this isn't the key concern behind Chief Executives' lack of enthusiasm for the recommendations.

Figure 26: Combined authorities

My council will be part of a combined authority by the end of the next parliament



My council will be part of a combined authority governed by an elected mayor

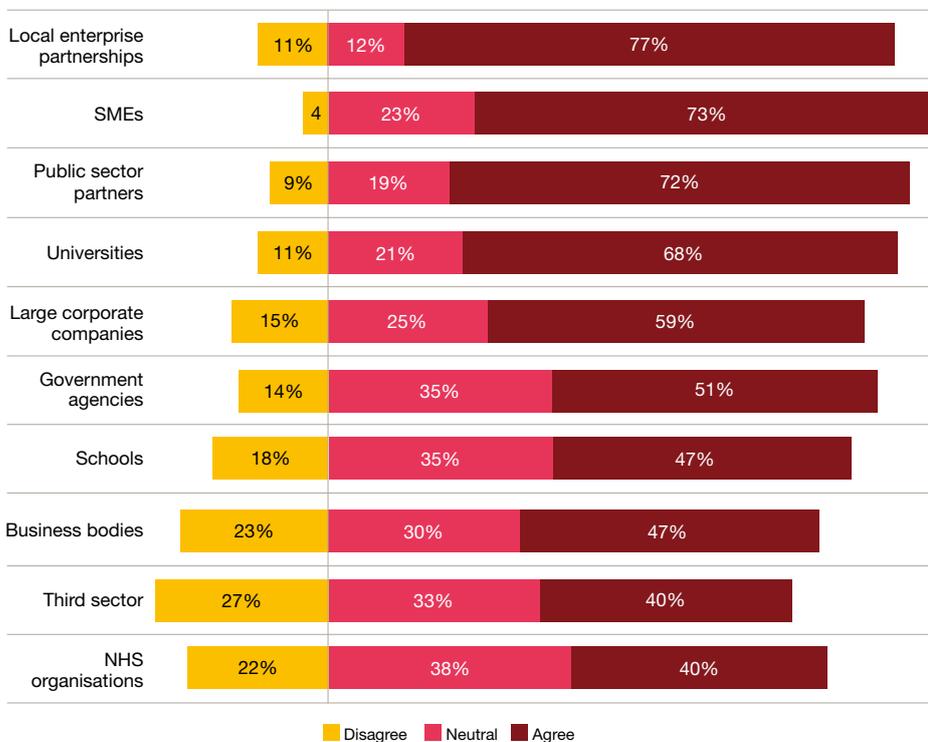


Collaboration for growth

Local authorities recognise that they need to work with a range of partners in order to achieve local economic growth (Figure 27). Local Enterprise Partnerships (LEPs) were identified as the key partner for growth, with 77% agreeing that they had a significant role to play. This is up from 50% in 2013 and 72% in 2014 (Figure 28), suggesting that LEPs are becoming increasingly recognised for the role they play in bringing together public and private partnerships in order to enable growth (Box 3).

Figure 27: Key partners growth

The following are key partners for us in achieving growth



Small and medium enterprises (SMEs) and other public sector partners and universities are also cited by 73% and 72% of respondents respectively.

Barriers to growth

When we asked local authorities about barriers to economic growth, lack of investment in infrastructure again topped the table with 74% agreeing that it is a significant barrier to growth (Figure 29). However, lack of affordable or suitable housing has grown as a barrier, with 66% identifying it as an issue compared to 50% in 2014. Similarly, a growing proportion identify the lack of influence over skills policy as an issue, up from 51% in 2014 to 65% this year (see Box 4 for how collaboration is helping address skills issues in Leeds).

These findings reinforce our Good Growth for Cities⁶ research which highlighted the need to invest in the assets and enablers that businesses require to succeed and grow over the long term, particularly skills, infrastructure and innovation.

Lack of capacity within the local authority is also cited by a growing proportion, with 41% identifying it as an issue, up from 29% in 2014. Given the priority given by councils to supporting the local economy, investing in the capacity to deliver is essential, both for local authorities and for their partners, in particular, Local Enterprise Partnerships (see Box 1).

Box 3: Delivering the decentralisation dividend – the role of LEPs

Over the past three years, we've seen a substantial increase in the proportion of local authorities, and Chief Executives in particular, identifying LEPs as key partners for growth (Figure 28).

With 1 April 2015 marking a shift for LEPs as they move from a strategy into a delivery phase, we're working with the Smith Institute to explore the views of LEP chairs on the challenges they face over the next five years.

Emerging findings show that LEP chairs are proud of their achievements to date and relatively confident about their future. Concerns remain around governance – how can LEPs, as non-statutory bodies, work with their local authority partners to achieve accountability? – as well as scale – is the small size of LEPs a strength, bringing agility, or a weakness, undermining their ability to deliver on their strategic ambitions? With LEP funding largely capital rather than revenue based, LEPs have had to largely rely on local authorities to provide the capacity they need. Post 1 April, do that have the capability and capacity they need to deliver on the substantial capital projects under their remit?

LEP chairs identify skills and infrastructure as two particular priority areas, in line with our local government respondents. However, tensions remain around the nature of the relationship between LEPs and

local authorities, with the emergence of combined authorities providing another dimension to be resolved. If the rhetoric on LEPs is to be translated to economic reality, clarity is needed over the various roles and responsibilities of each organisation for local economic development, matched by ensuring each has the capacity to deliver.

A final report will be published at the LGA conference in summer 2015.

Figure 28: LEPs make their mark

Local enterprise partnerships are key partners for achieving growth (% agree)

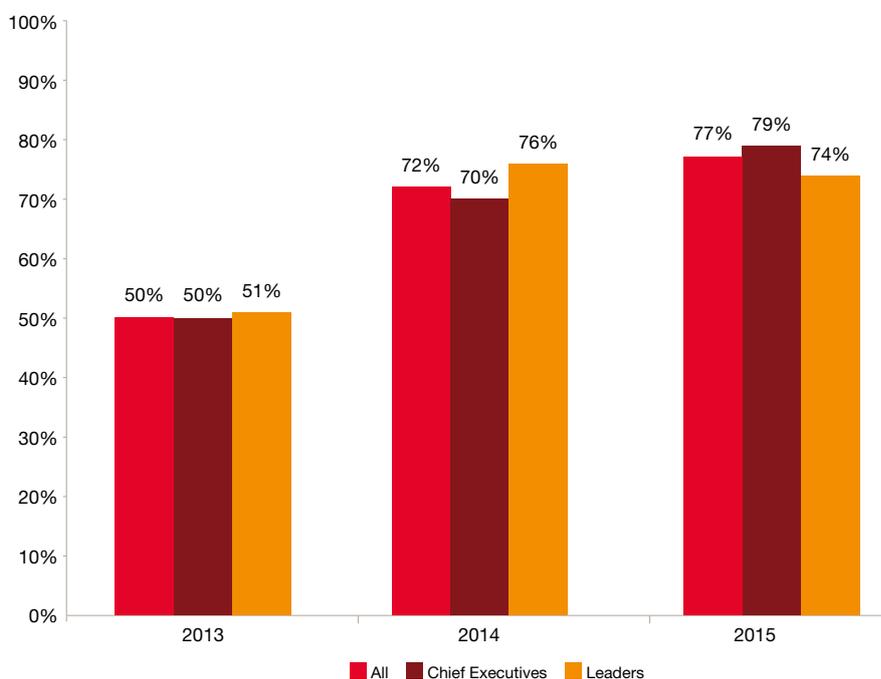
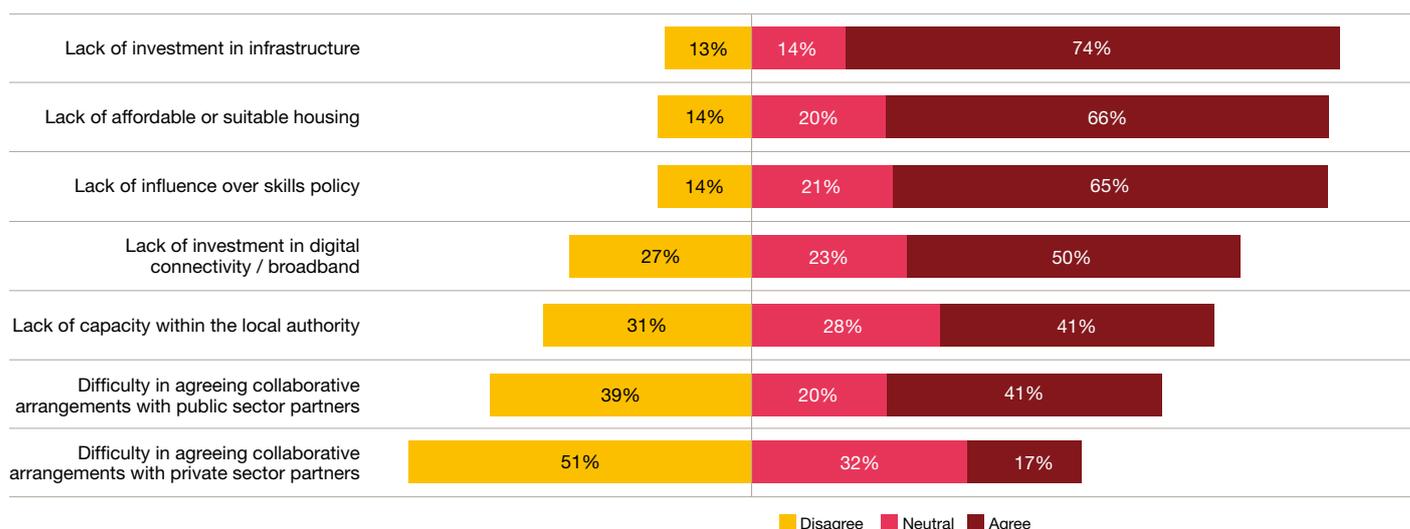


Figure 29: Key barriers to growth

The following are significant barriers to economic growth in my area



Disagree Neutral Agree

Box 4: Jobs, skills and growth - how can collaboration improve outcomes in Leeds?⁷

Jobs, skills and growth are at the top of the agenda for Leeds City Region, where pledges have been made to create 8,000 jobs by 2021, invest £100m in skills capital and improve working links and the matching between job opportunities and skills in the area.

We are working with Collaborate to explore the ‘why’, the ‘what’ and the ‘how’ of collaboration to inform policy and practice. Together, in February 2015 we convened a group of representatives from across the public, private and third sectors in the Leeds City Region to discuss how to: generate

more and better jobs in Leeds; create a workforce with a sustainable skills base; and ultimately deliver on the City Region’s aspiration of becoming NEET (Not in Education, Employment or Training) free.

While there was much agreement on the end goal, by bringing a range of stakeholders from across the public, private and voluntary sectors together we were able to tease out where different parts of the skills agenda can rub up against each other, resulting in dissonance in the form of perverse incentives and conflicting advice to young people as they make their move

from education to work.

Furthermore, while there was agreement on the need for organisations to improve working across operational silos and sector boundaries, there was also recognition that collaboration is one of those things that is easier said than done, needing the right alignment of committed and inspired leadership, trusted relationships and incentives which are appropriate to the place. Achieving real collaboration takes time and investment, but it is essential if Leeds is to deliver the **good growth** and good jobs to which it aspires.

Tough questions on delivering on decentralisation

1. Are you making effective use of collaborative partnerships e.g. with the private and voluntary sectors across the relevant area or population?
.....
2. How aligned are the stakeholders in your place on the vision and priorities for outcomes, including good growth?
.....
3. Do you have the governance arrangements in place to be held to account for the delivery of outcomes?
.....
4. Can you provide evidence of the benefits and value of decentralising additional powers and budgets?

8. Agenda for action

While local authorities have been largely successful in managing cuts to date, as we look to the challenges of the future, it's clear that the fundamental transformation of local government is yet to come.

This year's Local State We're In survey highlights the big challenges and growing pressures that local authorities must confront, but also the emerging opportunities councils must grasp in order to redefine their role and purpose:

- **Focus on outcomes and impact, rather than services:** Councils need to redefine their role and purpose, taking a whole systems approach and considering how multiple organisations across a place can contribute to securing desired outcomes for people and communities.

- **Rising to the digital challenge:** Embedding digital thinking offers councils the opportunity to both make significant savings, and meet the changing expectations of the public. While some progress has been made to date, there is much councils can do to ensure consistency across all service areas in their digital offer. Social media and other collaborative digital platforms allow councils to engage directly with residents and communities, and also to facilitate their interaction with each other.
- **Gaining insight through data analytics:** Data analytics and business intelligence will be critical for councils as they translate new priorities into smarter interventions, choices and working. Local authorities urgently need to develop new skills and capacity to harness the potential this offers to provide the insight they need.
- **Delivering on decentralisation:** Partnership working across a place is key to delivering outcomes, particularly in the context of the growing momentum behind decentralisation of powers and funding to the local level. Collaboration across the public, private and third sectors is essential to ensure the capacity, capability and accountability essential for decentralisation is in place.

9. Methodology

Our research covered local authority Chief Executives and elected Council Leaders across England, Scotland and Wales. These surveys were conducted online during January - March 2015. The range of responses from different types of council and the geographical spread gave us confidence that the results were a broad representation of views from across the sector as a whole.

An online survey of 2,000 UK adults aged 18+ was carried out from 30 January – 2 February 2015. The results of the public opinion poll have been weighted to nationally representative criteria.

This is the fifth edition of the Local State We're In, the first being published in August 2011.

10. About us

Working together with our clients across local government, health, education, transport, home affairs, housing, social care, defence and international development, we look for practical, workable solutions that make a difference in solving the pressing challenges that are being faced every day.

As well as bringing our insight and expertise to this sector, we contribute our thinking and experience to the public policy debate through our Public Sector Research Centre. To join this free online community, go to www.psrc.pwc.com and register today for our research and analysis.

10. Contacts

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Chris leads our local government practice. He has been with PwC for 23 years. Chris has considerable experience in organisational transformation, customer management, change management and procurement within local government.

Chris manages relationships with a number of our key public sector clients and regularly operates with officers and members on sensitive strategic policy and change management issues. He is the author of our recent publications 'The Agile Council' and 'Redefining Local Government'.

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Jonathan joined PwC's government and public sector practice in 2013. He concentrates on business model redesign, public services reform and the growth agenda. He

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Previously, Jonathan was the Chief Executive of Cardiff City Council, leading the £1.1bn organisation delivering services to 346,000 residents. Prior to this, he was the Deputy Chief Executive at Bristol City Council.

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Prior to joining PwC, Ian led a significant change programme within the Civil Service.

Acknowledgements

We would like to thank the Chief Executive and Leaders from across Great Britain who shared their views with us for the Local State We're In. We are grateful for their contribution and valuable insights.

Thanks also to Nick C Jones, Niamh Sands and Asa Jenkins for their advice and support on this project.

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