

Somerset Council MTFP 2024/25 - 2028/29 Savings Proposal



Title of savings proposal	Review the delivery of the Heritage Service to deliver a minimum service
URN (Corporate Finance use only)	

Executive Directorate	Community Services
Service Directorate	Culture
Service	Heritage

Sponsor (service director)	Elizabeth Dawson
Lead officer (service manager)	Gavin Fear
Lead member	Cllr Federica Smith-Roberts - Communities, Housing and Culture
Lead Finance Business Partner	Kerry Priscoe

Cost centre name	Heritage Service General
Cost centre code	G001815

Overview of proposal	
Description of savings proposal (alt+return for new line)	
The Council deliver a Heritage service to the communities of Somerset for which some of this service is a legal requirement.	
This proposal is to review the Heritage Services to deliver a minimum service and in doing so realise a saving for	

the Council.

This proposal is subject to further legal review and recommendations.

Listed below are the services which are provided to the public via agreements with the South West Heritage Trust and overseen by the Cultural Services team.

Statutory Duties:

- Archive Services
- Local Studies Services
- Museum Services

The non-statutory elements of the SWHT contract (cost of c£150,000) are:

- Educational & outreach services
- Promotional events
- Museums (i.e.: the Museum of Somerset; Somerset Rural Life Museum; The Somerset Brick and Tile Museum)
- Heritage Land Assets
- Other projects (including archaeological)
- Somerset Archaeological & Natural History Society agreements (SANHS)

What will the saving achieve? (alt+return for new line)

A proposed saving of circa £150,000

Type of saving	Non-LGR - Contract
Which of the 17 key areas does the saving cover?	
Is this saving once-off or ongoing?	Ongoing
Does this impact on either the Council's priorities or another service?	Yes

Are there any policy change requirements? If yes, please provide further information below.	

Benefits of the proposal		
	Tangible Benefits - savings/income £ (pro-rata for part year)	Intangible benefits (e.g. cost avoidance)
2023/24 (in-year)	0	No anticipated savings
2024/25	0	No anticipated savings
2025/26	Approx. £150K	If this proposal were to be actioned we could expect to achieve a saving £150,000

Delivering the proposal
Describe the high level milestones for delivery, including timescales and target delivery date for the saving.
<p>The service was set up and put in place in 2014 with separate leases. NB - the grant contract and the leases are not concurrent: the contract ends Oct 2024 whilst the leases for buildings and museums end between</p>

2044/2056.

Savings proposal:

The contract to deliver the services ends in October 2024 and the proposal is to generate savings by limiting future delivery to those elements of the service which are statutory.

The Council would look to review the contract to minimum statutory requirements, and save up to £150,000 from 2025/26. This has been communicated to the SWHT, and while this would be a pressure to the SWHT, it is also a reshaping and reduction of the service.

This savings option is to review the delivery of the heritage service, and implement a new grant from October 2024 to the South West Heritage Trust, removing non-statutory elements.

Who are the key people/services involved/required (internal and external).

Finance/Legal

What activity is needed to achieve the saving?

Legal/Financial Assistance

What are the financial resources required?

Financial Business Partner

Are there any limitations or constraints?
Limitations and Constraints will apply and are being actively worked through with legal
What is the anticipated impact on service delivery to residents or business?
Social economic impacts, given the potential reduction in service access for financially disadvantaged people, and other third parties that may be impacted. Direct link to Council's Corporate Plan re: Culture Objectives (Flourishing and Resilient Somerset)

Please note that an equalities impact assessment is required for all proposals.

Other implications	
Impact	Number or description
Staffing impact (#s)	None
Redundancy or vacancy?	
Legal impact	Potential contractual implication.
Insurance or other impact	While a reduction in service can be achieved, there are legal issues which need to be addressed.
Equalities impact	Given the potential reduction in service, access for financially disadvantaged people, and other protected characteristics.

Please ensure that you have consulted HR and your Finance Business Partner regarding any staffing savings.

Risks	
What is the risk status of the proposal?	Medium
What are the risks associated with this proposal?	

Grant funding liabilities and clawback risk

Service delivery

Lease implications and liabilities for Somerset Council regards significant repairs and maintenance liabilities (scheduled monuments and listed properties)

TUPE transfer implications

Reputational risk

Educational programme

Socially disadvantaged people

Are there mitigations or actions that if implemented can reduce those risks?

Service director approval:
(either signature or screenshot of email on additional worksheet)

Please see SD Evidence tab - unable to import into form

Date (dd/mm/yyyy):

Form completed by:

Elizabeth Dawson

Date (dd/mm/yyyy):

Tuesday, November 14, 2023

Please send your completed form to your Finance Business Partner for sign-off and submission of request.