



Observatory Business Plan 2009/10

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1 Executive Summary

1.1 Context

The Business Plan for 2009/10 is set in the context of the recent expansion of the Observatory and the need now for a year of consolidation.

There are a number of national and regional policies that influence the work of the Observatory, including the Government's response to the consultation on the Sub National Review. At the time of writing this Business Plan, we are still awaiting detailed guidance about the content of the proposed single regional strategy, amongst other things. The ambition set out in last year's Business Plan, to position the Observatory as the central shared intelligence base for the new strategy, remains in place.

At a regional level, we have a regional spatial strategy that is under revision and a recently revised regional economic strategy. We were heavily involved in the evidence base for the economic strategy and will remain closely engaged in both monitoring its progress, and drilling down into the data to help articulate the scale of the regional challenge in closing the £10bn output gap identified by the strategy. We also are involved in the annual monitoring of the regional spatial strategy and will be able to provide support for the Examination in Public during 2009/10.

Ian Austin, the West Midlands Regional Minister, has a clear focus, to build on the skills flexibility and resourcefulness of people and businesses in the West Midlands, and we will work with his office on these. We will also support the recently created West Midlands Taskforce and Regional Council of Economic Advisors through the provision of data and intelligence on the regional economic conditions and outlook.

We plan to build on the successful outcomes of our work for the Regional Leaders Board and place additional emphasis on developing our links with Local Authorities/Local Strategic Partnerships.

1.2 Planned activity

Our plan includes a substantial amount of commissioned research, including our work to support the Regional Skills Partnership, including the evaluation of the Regional Skills Action Plan. We will continue to take forward the three year programme of work to support similar advisory bodies such as the Enterprise Board, the Innovation and Technology Council and the Economic Inclusion Panel.

We will build on the changes we made to the State of the Region last year, by continuing the ongoing thematic dialogues and introducing up to six others, and produce a synthesis report in the autumn.

We will continue with our series of highly regarded seminars and workshops to engage with both policy colleagues and the regional data and intelligence community. Our annual conference will build on the very successful 2008 conference, and continue the theme of “better evidence...better policy”.

1.3 Delivery mechanisms

The Observatory will continue to be an effective co-ordinator of regional partners, to ensure that the research undertaken is aligned with policy needs. We will continue to develop the Regional Data and Intelligence Network and refine our offer to the network. We will work with the topic groups, data groups and User group to maximise the way in which these groups can both inform the Observatory’s activities and facilitate the delivery of the Business Plan.

1.4 Resources

Following successful applications in 2008, our funding from key regional partners (Advantage West Midlands, Learning and Skills Council, ESF and ERDF) has been secured from April 2008. This gives us some certainty of funding to March 2011.

Additional staff members were recruited during the current year to increase our research capacity and we plan to consolidate this growth during 2009/10.

1.5 Key risks to achievement

The main risks to the achievement of this Business Plan are the detail of the work needed to take forward outcomes of the Sub National Review and managing the increased demand for our work within the constraints of our capacity/resources.

2 Context

2.1 The Observatory's purpose and strategic objectives

Following an external evaluation in autumn 2007, the Observatory's purpose was confirmed as:-

**“...to improve the quality of strategy formulation and policy-making
in the West Midlands...”**

and the strategic objectives refreshed as set out below.

Strategic Objectives
1. Support regional policy decision-making through the provision of intelligence based conclusions and (where appropriate) policy implications.
2. Monitor and evaluate the progress and impact of regional strategies and programmes.
3. Engage the region in determining regional data and intelligence priorities and seek better alignment of regional resources.
4. Coordinate and facilitate the delivery of agreed new research priorities where appropriate.
5. Provide effective access to intelligence to encourage higher standards of evidence - based decision-making.
6. Lead best data and intelligence practice by sharing best practice for research methods and specifications, backed up by an enquiry service.

National policy influences

Whilst our main focus of activity is the West Midlands, there are a number of national policies which influence our work of the Observatory. One of the more important includes the Government's response, which was announced in November 2008, to its consultation on the outcome of the review of sub national economic development and regeneration (SNR).

The SNR recommended strengthening the local and regional tiers to ensure these are responsive to local economic conditions. The key recommendations for the regions included introducing a single regional strategy in every region that merges the current Regional Economic Strategy and Regional Spatial Strategy.

The Government's response includes the following (*italics added*):

- *“a genuinely collaborative approach between RDAs and local authorities is needed to produce the draft regional strategy and the Government will therefore give the RDA and the Local Authority Leaders' Board (previously referred to as the Leaders' Forum) joint responsibility for the regional strategy, including its drafting, implementation plan and monitoring of its delivery;*

The Government believes that the form and format of the regional strategy should be for each region to decide, but the aim should be to produce a concise and succinct document, which broadly covers:

- *an overview of the key regional challenges over the strategy period;*
- *how sustainable economic growth can best be delivered, having regard to employment and the key drivers of productivity (skills, innovation, enterprise, competition and investment), as well as regeneration;*
- *a distribution of housing supply figures consistent with addressing the Government's long term housing supply targets as well as targets for affordable housing and achieving quality homes for all, including vulnerable and socially excluded people;*
- *how the region will tackle climate change, including managing the impacts of unavoidable climate change and achieving development in a way which is consistent with national targets for cutting carbon emissions;*
- *those areas within the region identified as priorities for regeneration, investment and intervention;*
- *strategic requirements and provision for transport, waste, water, minerals, culture, energy and environmental infrastructure, insofar as these are not already specified in national policy; and*

- *additional policy areas that the Leaders' Board and RDA in each region decide and which fit with the objectives of the strategy.*

The Government believes that the regional strategy should set the framework in regions outside London for the activities, plans and investment decisions of the RDA, the Homes and Communities Agency and other public bodies (eg Government agencies, Health Authorities etc.) in the region, local authorities and other regional partners, to ensure sustainable economic development. It should set out which places and sectors should be priorities for development and investment, thus providing clarity and incentivising private sector investment in a region.

The level of detail may vary depending on the region or particular topic and will also cover appropriate sub-regional issues. This is initially a matter for the RDA and the Local Authority Leaders' Board, in consultation with other stakeholders, to determine."

Also at a national level, there is discussion of the guidance to support the statutory duty placed on Local Authorities to produce local economic assessments. We are engaged in the debate nationally through the Association of Regional Observatories, and at a regional level working with the regional transition team.

Whilst the Local Democracy, Economic Development and Construction Bill has now been published, much of the detailed guidance about the content of the Single Regional Strategy and Local Economic Assessments was not available at the time of drafting this Business Plan. When it is published, this guidance will clearly influence our activity.

The other major national influence on our activity flows from the 2007 Comprehensive Spending Review, which built on the initial response to Christopher Allsopp's review of the regional information and statistical framework needed to support the Government's regional economic performance PSA target. The 2007 CSR enabled RDAs to continue to provide funding to sustain the ONS's regional presence.

2.2 Regional issues

At a regional level, we have a recently revised West Midlands Economic Strategy (WMES) and the Regional Spatial Strategy is also undergoing a phased revision. The WMES contains a number of headline performance indicators as well as a more detailed monitoring framework to help review progress, and the Observatory is heavily engaged in both.

The WMES articulated a £10bn output gap, attributable 80% to drivers of productivity (skills, enterprise, innovation and infrastructure) and 20% to economic exclusion. We have been commissioned to undertake research into these aspects of the WMES so that the challenges can be better understood and appropriate policy responses made.

Ian Austin, MP, as the West Midlands Minister, has set a number of priorities for the region, including driving up skills levels, taking forward transport priorities, promoting opportunities in digital media and the low carbon economy, and strengthening our trade links with emerging economies such as India and China.

We are the first region to produce a skills action plan and the Observatory has a key role in producing headline indicators of regional progress against the plan and evaluating the impact of the activity.

Against these long term issues is balanced the need to focus on the current economic climate, and the recent creation of the Regional Council of Economic Advisers and a regional Taskforce to respond to economic shocks.

The State of the Region report 2008, published in October 2008, raised some challenges for the region, including:-

- Raising participation in cultural and sporting activities
- Addressing the needs of an ageing population and a growing gap in age profiles between urban and rural areas
- Enhancing the economic contribution of minority ethnic groups, who will form a growing share of the population
- Closing the £10 billion output gap by improving productivity and economic inclusion
- Raising qualification levels and reducing the number of people without qualifications
- Protecting the natural environment whilst taking advantage of opportunities brought about by climate change
- Improving lifestyles to prevent future health problems developing
- Building more houses to improve affordability while protecting the environment
- Addressing anti-social behaviour and improving access to services to raise quality of life
- Improving the image of the Region to encourage people and businesses to locate here
- Reducing worklessness so that more of the population are able to contribute to economic prosperity
- Improving the reliability of the transport network, allowing the Region to take advantage of its central location

Many of these will be informed by the work of the Observatory over the coming year, notably sustaining the recent upturn in employer investment in skills to tackle skill gaps and shortages; unlocking the potential demand for higher level skills and strengthening the region's knowledge economy; and assisting those marginalised in the labour market to access education, training and employment.

2.3 Positioning of the Observatory

The position of the Observatory must be set in the context of the outcomes of the evaluation and the changing policy context at both national and regional level.

The Government response to the consultation on the SNR remains a significant opportunity to position the Observatory as the regional centre of data and intelligence to underpin the new regional strategy. This will continue to be a major focus for the Observatory in 2009/10.

3 Planned activity

3.1 Activities to support strategic objectives

The planned activity for 2009/10 is set out in this section of the Business Plan, demonstrating how the activity will support the strategic objectives. A summary of the key milestones is given in Annex One.

3.1.1 Support regional policy decision-making through the provision of intelligence based conclusions and (where appropriate) policy implications.

3.1.1.1 State of the Region 2009

2008/09 saw the introduction of a new State of the Region process, focused on an ongoing dialogue between the research community and policy makers in the region. The process will be organised around a series of “thematic dialogues”, each leading to a published thematic report. The first six of these dialogues were underway by the end of the year and the first two thematic reports were due to be published around the year end, covering the knowledge economy and wider forms of innovation. Two further reports will be published in June or July 2009, covering sustainable communities and the development of the regional evidence base. The two remaining dialogues, covering changing population and climate change had just commenced at the start of the year and are due to publish thematic reports in the autumn.

During 2009/10, we plan to initiate 4-6 further thematic dialogues and publish around 6 further thematic reports. As with the existing dialogues, each will commence with an initial workshop, bringing together policy-makers and researchers in the thematic area to discuss priorities for developing the evidence base to inform policy. A work plan will then be developed to progress each dialogue towards the production of the thematic report, which will be jointly drafted by a research and a policy lead.

The State of the Region process will culminate at the Observatory's Annual Conference where the findings will be discussed. The conference will also see the publication of the annual State of the Region synthesis report. This report will draw together the key conclusions from the process and provide a commentary on what they tell us about the state of the region and about future priorities. The report will be published as a hard-copy document but will come with an accompanying memory stick which will provide access to other outputs from the process and to a wider bank of useful material.

3.1.1.2 Integrated Policy Model

During 2007/08, the Observatory developed the first version of a new modelling tool, the Integrated Policy Model. Unlike most previous models, it can project future developments across economic, demographic and environmental dimensions together, using the relationships between the different dimensions. It can also produce separate figures for the 34 local authority areas in the region, taking account of the interactions between neighbouring areas.

During the testing of the model, we have developed some examples of how it might be used for testing the impact of a range of scenarios. We will use these examples to publicise the model and encourage its use by a range of stakeholders around the region. To maintain the integrity of the model, we will only make copies of it available to users from not-for-profit organisations who have been appropriately trained. Other users will have to commission analysis from the Observatory or from approved users. In order to manage the anticipated workload, we will contract with one or more partners (academic or commercial) to carry out analyses on our behalf.

Whilst the new model provides a useful spatial dimension, the local authority areas used are still quite large and, in some cases, relatively heterogeneous. Previous scoping work has identified the potential to develop a second phase of the model, allowing disaggregation to around 900 middle-level super-output areas. In order to deliver this second model, we will need to secure funding from a range of regional partners. We will investigate the feasibility of raising sufficient funding to develop the model, perhaps in partnership with academia to allow us to access research council funding. If we are able to finance the model then we expect to commission it during the year.

It is also our intention to make the results of the model available through our website, although it is likely that we will restrict the features available to prevent uninformed or irresponsible use. We will develop the website to allow this in 09/10.

3.1.1.3 Regional Skills Partnership

We continue to provide a wealth of data to support the work of the Regional Skills Partnership. One of the key reports is the Regional Skills Assessment, produced on an annual basis which provides an overview of the key skills and labour market challenges the region faces. Specifically the Assessment provides the principal evidence base for:

- Further iterations of the Skills Action Plan
- Updating of the skills elements of the West Midlands Economic Strategy
- The Observatory's State of the Region process
- The skills and labour market elements of the Sub National Review and Single Integrated Regional Strategy
- The annual planning and policy development activity of funders of education and training such as the LSC, HEFCE and AWM

The 2009 Assessment will help ensure that efforts to address skills issues are targeted where they will have the greatest impact.

Other work for the Regional Skills Partnership includes updating the scale of the challenge, which will take place over the summer of 2009, specific research as detailed later in the Business Plan, and briefings that monitor the impact of the downturn on skills and the labour market.

3.1.1.4 Scale of the Challenge

During 2008/09, we were commissioned by Advantage West Midlands to develop a programme of work around five key priorities from the West Midlands Economic Strategy: Enterprise, Innovation, Economic Inclusion, Low-carbon Economy and Transport. This programme aimed to replicate elements of the successful programme of work to inform the Regional Skills Partnership. Where they exist, the outputs of the programme will both inform the work of, and be guided by, the relevant advisory boards, the Regional Enterprise Board, the Innovation & Technology Council and the Economic Inclusion Panel. Each strand will be supported by a small steering group and some will also organise a data group to ensure that the work supports the full range of regional partners and draws on all available evidence.

Work plans are being developed for each of the strands of work for 2009/10. Early work has focused on quantifying the challenge facing the region overall. We anticipate that the remainder of the programme will provide more detailed information about the performance of the region and about the issues affecting that performance. The aim will be to inform the policies required to close the gap between regional performance and the national average. We anticipate that this programme of work will generate a series of research reports during the year, including some aimed at filling gaps in the regional evidence base.

3.1.1.5 Cultural Observatory

During 2008/09, we continued to host the West Midlands Cultural Observatory under an agreement with Culture West Midlands. At the end of the year Culture West Midlands, in common with all of the Regional Cultural Consortia, is due to be wound up. As a result, we have been working with regional cultural agencies to identify possible sources of funding to continue the work of the Cultural Observatory. At the time of writing, the outcome of those discussions is not known.

In the circumstances, it is not possible to be precise about the expected work of the Cultural Observatory, if it continues. Priorities will include the monitoring and evaluation of activities relating to the 2012 Cultural Olympiad and other Olympic and Paralympic activities; development of cultural elements of the evidence base for the Single Integrated Regional Strategy; the role of culture in “place-shaping”; and assessment of the impact of the changing economic situation on the cultural sector.

In addition to the uncertainty about the future of the Cultural Observatory, the impact on the existing Cultural Research & Intelligence Network (CRIN) and the associated Cultural Research & Intelligence Group (CRAIG) is yet to be decided. One option is that the network will be absorbed within the Regional Data & Intelligence Network and that CRAIG will be reconstituted as an RDIN Topic Group.

3.1.1.6 Economic downturn

The Observatory will take forward work it has developed in the last few months of 2008/09 to support AWM and regional partners in the provision of data and intelligence to the Taskforce and the WM Council of Economic Advisors.

The Regional Minister has set up the West Midlands Taskforce to ensure that public sector agencies, workforce support services and business support organisations are working together to address the impact of the crisis so that more effective support can be provided to the businesses, individuals and communities that are being affected.

Key areas of work for the Taskforce include workforce retention and rapid response to lay offs; job replacement and retraining following large scale redundancy; enhanced Business Support through Business Link and the Manufacturing Advisory Service and financial assistance for companies.

The provision of timely data and intelligence is central to the work of the Task Force. Here there is a need to ensure efforts are co-ordinated and specifically that:

- data and intelligence is jointly shared and reflected on;
- research priorities are agreed around a consensus in respect of current / potential gaps
- mechanisms are in place to provide for the ‘systematic’ tracking of business sentiment

- opportunities for networking with partner organisations or stakeholders are realised with a view to encouraging dialogue and effective information exchanges
- issues affecting specific social groups / geographical areas / economic sectors are highlighted, which may require consideration of ‘soft’ as well as ‘hard’ data and sensitivity to factors that may not be well captured in data terms
- The approach to data and intelligence is pro-active not reactive.
- Data and intelligence reflects a consensus on key issues, providing the basis for providing consistent feedback to government and others.

The Integrated Policy Model referred to earlier in this section will be used to look at various scenarios and model the impact of the economic downturn. Our updates to the Regional Skills Partnership on the impact of the downturn on skills and the labour market will also inform the briefings for the taskforce.

3.1.2 Monitor and evaluate the progress and impact of regional strategies and programmes.

3.1.2.1 WMES monitoring

During 2008/09, we produced the first monitoring report on the performance indicators for the West Midlands Economic Strategy. This report will inform the wider monitoring report on the strategy and its associated delivery framework which will be produced by Advantage West Midlands.

This year we will produce a second monitoring report, updating the performance indicators. As part of the process, we will complete the development of four new indicators and also review the other monitoring indicators and recommend any changes which would improve the reliability or relevance of the indicators.

3.1.2.2 RSS monitoring

During 2008/09, the Observatory contributed a chapter to the Annual Monitoring Report for the Regional Spatial Strategy for the second time. The chapter covered progress towards the overarching Urban and Rural Renaissance policies of the RSS. We will again produce a similar chapter for the Annual Monitoring Report during 2009/10.

3.1.2.3 ONS

Since April 2007, the Regional Statisticians from the Office for National Statistics (ONS) have been based at the Observatory. Since then they have facilitated access to a range of data to inform several Observatory projects, they have contributed to improvements in the quality of key regional statistics and have collaborated with us on a number of research projects, including the Regional Perceptions Indicator and Regional Integrated Economic Assessment.

During 2009/10, we expect the role of the Regional Statisticians, and their contribution to our work, to develop further. We anticipate that they will provide a significant role in supporting the programme of work on the Scale of the Challenge facing the region economically and will contribute to the State of the Region process. We also expect that they will make significant contributions to the development of the SIRS evidence base, including support for local authorities developing Local Economic Assessments. Other elements of the work programme, including further collaborative projects, will be identified during the course of the year.

3.1.2.4 Regional Perceptions Indicator

During 2008/09, we developed and piloted a methodology for a Regional Perceptions Indicator. The indicator is one of six headline impact measures for the West Midlands Economic Strategy and it will also inform policy and communication across a wide range of areas. Towards the end of the year, we developed proposals for how the indicator should be constructed and how the required information should be collected.

The decision to proceed with the indicator was taken by Advantage West Midlands towards the end of 2008/09. We have commissioned the survey work from an external contractor. This will enable us to undertake the analysis and reporting necessary to deliver the first version of the indicator during the autumn of 2009.

3.1.2.5 Single Integrated Regional Strategy evidence base

At the time of writing, we are still awaiting guidance from government about the details of the new regional strategy. During 2008/09 we have undertaken several projects aiming to provide a strong base for the development of the evidence base to support the proposed new Regional Strategy. This places us in a strong position to take forward much of the additional work on the evidence base.

During 2008/09, we produced the Regional Integrated Economic Assessment, the first of its kind anywhere in the country. We anticipate that there will be a need to update, and perhaps expand, this report in the future and we would expect work on this to begin during 2009/10. A project to review the functioning geography of the region is expected to get underway in 2009/10, leading to a major report on the subject, a key component of the evidence base for the SIRS.

Details of other elements of the SIRS evidence base will emerge once the guidance from government is available. It is likely to be an iterative process informed by emerging policies. The requirements may also be informed by the findings from the State of the Region process, particularly the thematic dialogue relating to the combined evidence base.

One of the other outcomes of the SNR is that strategic local authorities will have a duty to produce a Local Economic Assessment. These will form part of the evidence base for the SIRS, as well as informing local policies and strategies. We have been working with the region's local authorities to develop a common approach which will ensure that the assessments can fulfil both roles. We will continue this collaboration during the coming year and will also provide analytical support to local authorities in the discharge of their new duty.

3.1.2.6 Skills research

We have developed an index of regional skills performance on behalf of the Partnership, underpinned by a three tier framework of indicators that focus on overall economic performance, broad skills outcomes and progress at an operational level. This provides headline measures of success and will be an integral part of the monitoring and evaluation of the Skills Action Plan. The framework and index will be updated in summer 2009.

However, while the shifts in the index against national averages are important, these are driven by other factors as well as the outcomes of initiatives within the Skills Action Plan. We are also developing additional indicators that relate specifically to the desired outcomes from successful business engagement articulated in the plan. These will be updated on a quarterly basis during 2009/10.

3.1.2.7 Other Research Projects

During the year, the Observatory will carry out a range of additional research on behalf of partners in the region. Past trends have seen demands for such work increasing and we expect this to continue. However, with an increased commitment of staff resources to longer-term research programmes, such as those outlined above, we anticipate that we will have to be more selective in the ad-hoc projects that we take on. The key test will be whether by undertaking the project we can strengthen the evidence base underpinning the development of regional policies. This will be particularly true of areas where our wider viewpoint may allow a wider perspective than is available to others. This will allow us to focus our resources on the areas where we can add the most value.

Amongst projects which have already been identified for 2009/10 are: data and analytical support for Government Office West Midlands; development of a bank of information to support inward investment advisors; mapping of activities aimed at preventing religious extremism and terrorism; and a series of ongoing monitoring reports including Rural Regeneration Zone, Regional Manufacturing Support Strategy and Inward Investment successes.

3.1.3 Engage the region in determining regional data and intelligence priorities and seek better alignment of regional resources.

Working with regional partners to identify and fill research gaps remains a priority for the Observatory, and is a continuing focus for the Regional Data & Intelligence Network. Over the past year, progress on filling research gaps has been slower than previously, due, in part, to newly emerging strands of work competing for resources. As a result, we are planning to adopt a more proactive approach to identifying, assessing, prioritising and filling gaps.

In future, we expect to maintain a register of research gaps identified, regardless of the source. Furthermore, the identification of gaps will become a standard element of all research projects, State of the Region dialogues and RDIN Topic Group meetings. Gaps identified will then be assessed by the most relevant RDIN topic group to ensure that they are relevant and will then be prioritised in consultation with the RDIN User Group. We will then actively seek ways of filling the gaps which have been prioritised, either through securing funding for the Observatory or by collaborating with partners.

We will continue to chair and co-ordinate the activity of the RSP Data Group and supporting the RSP Board in:

- Reviewing the range of skills and labour market research activity being undertaken by partners across the region
- Identifying key synergies and opportunities for collaboration and pooling expertise
- Identifying gaps and weaknesses in the evidence that need to be addressed
- Agreeing priorities for new research and developing a work programme to address these

A number of recent developments, including the sub-national review, 14-19 funding arrangements and local area agreements, mean that the Observatory will need to work more closely with the region's local authorities in the future. To date, our links with local authorities have been patchy and depended on particular individuals. We now need to build stronger and more systematic links with local authorities and ensure that our work complements and supports theirs.

As part of this process we have identified lead contacts for each sub-region (see section 5.1). During the early part of the year, they will be discussing how the Observatory can help each of the local authorities in their area, and how we can work together more effectively. This process will continue through the year, with the possibility that we may organise a series of “roadshows” to enable us to build links and raise awareness of the Observatory across a wider cross-section of local authority contacts.

3.1.4 Coordinate and facilitate the delivery of agreed new research priorities where appropriate

3.1.4.1 Demographics

There has been a long-standing desire within the region to develop better information about the population and how it is changing over time. Details of the various requirements are not yet fully elucidated but a State of the Region thematic dialogue which is underway is expected to provide greater clarity about requirements, as well as addressing some of the issues with the existing evidence. As this dialogue progresses, we will decide whether there is a case for undertaking a more substantial research project later in the year.

3.1.4.2 Skills research

We plan to take forward gap filling research that has been identified as a priority by partners. This potentially includes:-

- Research to assess the capacity of the region’s education and training infrastructure to meet the demand for new and upgraded skills from employers and the regional economy and deliver the step change in skills attainment required by the WMES and the Skills Action Plan
- Research to identify issues relating to the supply and demand for skills in key sectors such as environmental technologies
- Analysis of the impact of the economic downturn on the demand for labour and skills and investment in training and up-skilling

3.1.4.3 Regional Lifestyle Survey

It is nearly 4 years since the Observatory undertook a Regional Lifestyle Survey and we will review this year whether or not to repeat the survey, including an assessment of the demand for, and funding of, such a survey.

We recognise that the timing of the fieldwork element of any survey would need to be carefully thought out, particularly in light of the current economic situation.

3.1.4.4 Register of consultants

During 2008/09 we implemented a Register of Consultants on our website. This filled a gap in regional data and intelligence identified in previous years. During the coming year our focus will be on increasing the number of consultants registering on it, and the number of customers using it. Promotion of both these elements will be built into the operational time-line of the Communications Plan.

3.1.5 Provide effective access to intelligence to encourage higher standards of evidence - based decision-making.

Following on from a review of content, ease of navigation and ‘usability’ of the website in 2008/9, further improvements to www.wmro.org will be implemented in 2009/10. Largely, this will involve setting out a new editorial policy on the content we include on www.wmro.org and revising the site content in line with this new policy. The majority of this work will be done using the existing Content Management System (CMS), but will also involve some design changes to the way navigation is structured and training for staff on writing for the web.

The overall aim of this exercise is to improve the quality of content and the ‘findability’ of information on our website, to deliver an improved customer experience. It will also improve our ranking in search engine results, such as Google. These changes are integral to the Communications Plan and will be led by the Communications and Networking team, with technical support from the IT and Project Manager.

Our “Observations” blog (<http://wmro.wordpress.com>) was reviewed by the management team in the final quarter of 2008/9, following a six month trial period. The review covered the impact of the blog on traffic to www.wmro.org, its value to the RDIN and value to communications. Tangible benefits were demonstrated to each and so the decision was taken to confirm Observations as our official blog. As part of the ease of navigation and usability changes to the website in 2009/10, the blog will be better integrated into the homepage of www.wmro.org.

In last year’s business plan we set out our intentions to investigate ‘dataset discovery’, a term we use to describe methods of holding, searching for and retrieving data sets. The analysis and scoping of this are currently in progress, but our initial view is that the need and opportunities for this may be less than we thought last year and so it is likely that we will not proceed with this. Nevertheless as part of the review we have established that we want to make better use of our existing Instant Atlas tools to present datasets to users. We will therefore modify and augment our suite of Instant Atlas tools used on the website in the coming year to provide a richer and more flexible display of data in map and chart format.

This year the Department of Communities and Local Government (DCLG) put live a private on-line data hub for the collection, verification and collation of data that evidences LAA indicator targets. Although regional Observatories were not intended to be primary users of the data hub, it is a source of data that could be useful and may be important in any work we do for the Government Office. We will therefore make the necessary representations for us to get access to the hub and consider how best to interact with the data it contains, making technical changes to our website or other tools where needed.

3.1.5.1 Regional Information Services

At the time of writing, we are currently reviewing the regional resource catalogue and looking at how best to move it forward. There are two aspects of its development that we see as important for its success: (1) substantially increasing the size of its content and (2) increasing the range of partner web sites that it can automatically extract content from. In response to feedback from users, we also want to improve the presentation of search results so that those that are most relevant to the user's search are listed first, as this could also significantly increase its value to users.

We have identified a potential technical solution that would allow all these improvements to be achieved using a well established and proven on-line service. We are currently conducting a technical evaluation of the system. This will inform a business case for the investment which we need to consider before reviewing availability of resources. **Subject to budget availability (and Board approval if appropriate)** we would implement the system in summer 2009. The estimated costs for 2009/10, which are not currently in the budget, are £15k licence and £10k set up costs, with annual maintenance £10k thereafter.

However, if the evaluation is not successful or the business case is not accepted, then we will continue with existing methods of populating the catalogue and establishing interoperable links with partner web sites. In this case the method of populating the catalogue will be modified to put more emphasis on submission using Observatory resources. We plan to increase the size of the resource catalogue with 300 external submissions, which with internal submissions, will bring the total number of resources to nearly 4,000.

Likewise, if we retain the current approach to developing the catalogue then we will continue to pursue interoperability with partners. Interoperability can loosely be described as the ability for the user of one website to interchange information with another, and in our context it allows our users to search other websites and return their results merged with results from our site. Our website is already interoperable with the Regional Public Health Observatory and we are currently working with AWM and the Black Country Observatory to achieve interoperability with theirs. This work is proceeding slower than planned due to financial or other constraints affecting our partners and it will carry over into 09/10. In addition to completing the current interoperability projects we hope to create interoperability with one more partner in the coming year.

Other information services offered through the website (e.g. regional organisations, the directory of specialists and research gap handling) are also currently under review, and any changes identified as desirable will be implemented in the coming year.

3.1.5.2 Regional Data Sharing Protocol

Initiatives to improve the sharing of data are now being developed at a national level. This reduces the need for regional solutions to data sharing and so we do not plan on leading the further development of the regional data sharing protocol, although we will ensure that it is adapted as necessary to align with national initiatives.

3.1.5.3 RDIN Seminars

The change in the programme of seminars to deliver six per year (four through the RDIN topic groups) has proved to be more manageable. It has also allowed us to maintain a higher quality of seminar and we plan to use the same model in 2009/10. Content and structure of the 2009/10 programme will be driven by the topic groups and the Regional Data and Intelligence Network, taking in to account evaluations of the 2008/09 seminar programme. Current suggestions currently include a follow up to Geographical Information day, Sharing Information Digitally, Aerial Photography as a resource and Mapping carbon footprints/climate change.

3.1.5.4 Annual conference

Following the highly successful 2008 conference, we will soon begin to plan for the 2009 conference. At present, it is too early to determine a topic, but the Government response on Sub-National Review or developments with the economy may give us a good steer. As in previous years, we will continue to charge for attendance at the conference.

As part of our follow up from the 2008 conference, we are investigating how to progress the following issues raised in the discussions:

- Ensuring that we take full account of cross-linkages between different issues as we take forward our programme of research
- Birmingham's role in the region and how it impacts on the rest of the region
- Links with Higher Education, particularly their role within enterprise, innovation and business
- The importance of cultural/attitudinal issues through a more qualitative approach to get underneath the numbers and find out about what drives people's behaviour
- Learning from elsewhere - UK or international

3.1.6 Lead best data and intelligence practice by sharing best practice for research methods and specifications, backed up by an enquiry service.

The work-plans of the Regional Data and Intelligence Network Topic Groups for 2009/10 will include targets for the groups to share best practice between members and other groups, and also to disseminate relevant information via the Network. There will also be provision for dissemination via various Communications channels, both internal (the Oracle, e-newsletters, events etc) and external (Local press, Specialist press, external networks etc). Details of this are in the 2009 Communications Plan and Topic Group work-plans (see appendix 1).

This year we have put development time and money into moving our largely manual enquiry service to one that is predominately on-line. The new process went live in February 2009 and will be promoted in Q4 08/09 and Q1 09/10. We expect that operational experience and user feedback will identify further opportunities for developing this service and we will take these forward in the coming year.

3.2 Key performance indicators

The measurement of the Observatory's achievement of strategic objectives, and business plan, will be through Key Performance Indicators (KPIs).

The suite of KPIs proposed is set out below *to be considered by the Board in March*.

Key Performance Indicator	2007/08		2008/09	2009/10
	Target	Actual	Target	Target
KPI-1: Overall customer satisfaction rating	3.00	3.00	3.00	3.00
KPI-2: Customer rating of State of the Region Report/process	3.00	3.13	3.20	3.20
KPI-3: Composite measure of partner engagement	3.00	2.84	3.00	3.00
KPI-4: Composite measure of web access and enquiries handled	+20%	+50%	+15%	+15%
KPI-5: Average project satisfaction rating	2.50	3.05	3.00	3.00
KPI-6: Ratio of non core/grant income to total income	0.38	0.60	0.45	0.60
KPI-7: Staff satisfaction rating	3.00	3.32	3.00	3.30

4 Delivery mechanisms

4.1 Partnership working

By its very nature, the Observatory works in partnership with a number of regional organisations. Whilst much of the work falls to the Observatory, there is an emphasis on our role in being a catalyst for activity, be it a debate around policy implications, reaching agreement on regional research priorities or ensuring best practice.

4.2 The Regional Data and Intelligence Network (RDIN)

The RDIN plays a key role in both informing the activities of the Observatory and also in helping deliver the Business Plan, particularly through the four topic groups and the User Group.

4.2.1 Topic groups - work plans

In the final quarter of 2008/9, a review of the RDIN and its topic groups took place. The purpose of this review was to see how the Observatory could better serve the topic groups and vice versa. In particular, the way that the topic groups fit with other groups running at the Observatory (e.g. data groups, State of the Region work) was assessed. The e-bulletins produced by the groups were reviewed as part of this process, and changes made where necessary.

This has resulted in rebranding the Society, Demography & Health group to the Population & Society Group and the Environment & Natural Resources group to the Environment group. The Economy & Labour Force and Geographical Information group names remain unchanged. In terms of work priorities, the following links will be made in 09/10:

- the Population & Society group will take a lead role on the State of the Region Demographic Change dialogue.
- The Environment group will take a lead role on the State of the Region Climate Change dialogue, developing the evidence base for the SIRS and supporting the Observatory's low carbon economy work.
- The Economy & Labour Force group will help inform the State of the Region work undertaken on the economy.

- The Geographical Information (GI) group will provide GI support to all the topic groups, but particularly to the Environment group around the subject of climate change mapping.

Work plans for the Economy and Labour Force, Geographical Information, Population & Society and Environment groups have been developed and agreed, informed by the review of topic groups. These are set out in Annex Two of the Business Plan.

In addition, in early 2009/10, all groups will assess whether their membership is appropriate for the work they plan to do and make appropriate changes. All groups will make a concerted effort to widen membership and encourage individuals involved in policy as well as data leads within the Region to join topic groups.

All topic groups now have active board ambassadors, who will be invited to contribute to the assessment of membership of their chosen topic group and act as a conduit to the Board.

4.2.2 User group

The User Group meets twice yearly, once to provide input into the business plan, and secondly to review progress towards meeting the objectives set out in the business plan. They also act as a conduit between the Observatory Partnership Board and all topic groups.

This year three RDIN representatives have been nominated to the Partnership Board, Claire Edwards (GI), Shelley Howard (E) and Richard Wilson (P&S). It is the role of the RDIN Board representative to provide a report on RDIN activity to the Partnership Board for discussion, and to feedback to the User Group and Topic Groups the key issues from the Board, thus providing high level guidance on the work of the RDIN.

4.3 Role of RSP data group

The Observatory's work for the Regional Skills Partnership will continue to be delivered in partnership with the RSP data group. This group, which is chaired by the Observatory, enables data, analysis and research findings to be shared across a range of regional partners. It takes an overview of the range of research being undertaken in the Region, identifying gaps in the evidence base. Working with policy colleagues, the data group seeks to prioritise gap filling research, and the data group is a source of advice and expertise to develop research proposals.

The RSP data group also provides links to other regions, government and other national bodies through representation on the RSP cross-regional research group.

4.4 State of the Region Reference group

The State of the Region process will be overseen by a reference group drawn from key regional partners supplemented by those leading the ongoing State of the Region dialogues. For the first time, the group will also incorporate two independent members to ensure that the process is rigorous and innovative. The group will advise on the process and its outputs, play a key role in communication and in encouraging engagement and ensure that it achieves its aim of improving the link between research and policy.

4.5 Cultural Observatory

There is a strong demand to maintain the Cultural Observatory and its close links to the Regional Observatory, through the location of the cultural analyst within the research team. The synergy between the work streams is seen to benefit both organisations. However, as outlined above, the funding of the post is yet to be secured for 2009/10. The uncertainty also affects the future of the Cultural Research & Intelligence Network and the associated Cultural Research & Intelligence Group. One possible way forward is for CRAIG/CRAIN to become an integral part of the wider RDIN, whilst retaining their separate identities.

4.6 Economic Inclusion data group

As part of the work programme on the scale of the challenge, the Observatory chair and support a data group that focuses on Economic Inclusion. The group was established in summer 2008 with the aim of providing the partners within the Economic Inclusion Panel with a comprehensive, robust and up to date evidence base to inform its strategic thinking and action planning

The priorities for action of the Data Group in 2009/10 will be guided by the need to focus on a number of key research questions to be determined by the Economic Inclusion Panel. Activity will include the following:-

- Identification of critical data/intelligence gaps and needed data enhancements
- Agreeing the priority order of the critical data/intelligence gaps and needed data enhancements
- Identification of appropriate actions to fill the prioritised critical data gaps and to implement agreed data enhancements.

- Undertake data analysis and interpretation in relation to agreed key questions sought by the Economic Inclusion Panel.
- Ensure that the catalogue of relevant existing data sources is updated regularly and that new data sources are added as appropriate
- Engage with similar data activity that supports Economic Inclusion work in other regions where appropriate

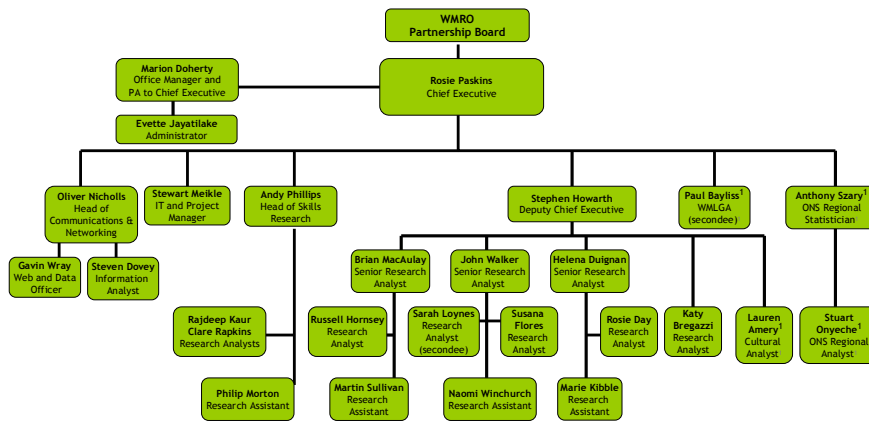
5 Resources

5.1 Staff requirements

The Observatory’s staffing position was strengthened in early 2008 with a number of new appointments. We have also made more capacity available to project manage externally commissioned research.

The current organisation structure is given in the chart below:-

West Midlands Regional Observatory
Organisation Structure February 2009



1. Employed by external agencies and with dual reporting.

0

There has been substantial expansion in 2008 of the Observatory’s resources to address the increased demand for our research. We do not propose any additional substantive recruitment in 2009/10.

We will continue to host the ONS regional statisticians (up to 33% of whose time is available for regional work) and, subject to funding being made available, the analyst from the Cultural Observatory

We will also seek specific secondments for particular projects as the need arises.

As part of our increased focus on Local Authorities, we have allocated lead responsibilities within the team as follows:-

Birmingham and Solihull	Helena Duignan
Black Country	Katy Bregazzi
Coventry & Warwickshire	Russell Hornsey
Stoke on Trent and Staffordshire	Brian MacAulay
Herefordshire and Worcestershire	John Walker
Shropshire and Telford	Rajdeep Kaur

We have a colleague from WMLGA working with us part-time, to assist in planning for the proposed Single Integrated Regional Strategy.

5.2 Investors in Excellence

As an organisation that seeks continuous improvement, we will be exploring over the coming year how we can use the Investors in Excellence model as a tool to improve our performance.

5.3 Summary of forecast income and expenditure

The summary budget for 2009/10 is set out below together with the forecast outturn for 2008/09, which is based on the management accounts to end January 2009.

Summary of Funding and Expenditure		
Detail	2008/09 (Forecast)	2009/10 (Budget)
	£	£
Sources of Funds		
Consortium funding	471,260	463,700
Sponsorship	9,200	10,700
Grant Funding	304,790	195,000
Other Revenue	884,099	1,024,124
Total Funding	1,669,349	1,693,524
Expenditure		
Staff	922,000	1,131,516
Overhead	42,059	70,191
Premises	126,388	128,151
Project & Consultants	69,592	62,000
Operational	247,236	225,573
Depreciation	16,700	17,338
Total Expenditure	1,423,975	1,634,768
Surplus	245,374	58,756

5.3.1 Sources of income

The main sources of income are set out in the following table.

Summary of Funding		
Detail	2008/09 (Forecast)	2009/10 (Budget)
	£	£
Consortium Fees		
Advantage West Midlands	451,900	451,700
Regional Assembly	15,319	10,000
Sales and other income	4,041	2,000
Subtotal: Consortium	471,260	463,700
Sponsorship		
State of the Region	1,500	1,500
Newsletter	0	100
News Bulletins	0	100
Annual Conference	7,700	6,000
Seminar Programme	0	2,000
Regional Economic Model	0	1,000
Subtotal: Sponsorship	9,200	10,700
Grant Funding		
Old ERDF Technical Assistance	259,790	0
New ERDF Technical Assistance	45,000	195,000
Subtotal: Grant	304,790	195,000
Other Revenue		
Net project revenue	799,650	778,750
Carried forward	84,449	245,374
Subtotal: Other	884,099	1,024,124

Total Funding	1,669,349	1,693,524

Core funding from Advantage West Midlands has been secured for the three years ending March 2011 and we expect to draw down a similar level of revenue funding each year, of around £450k.

Funding from the Regional Assembly has been falling over the last few years and is expected to drop to £10k in 2009/10

In 2008/09 we claimed the remainder of ERDF technical assistance under the “old” programme. We have an approved application for ERDF technical assistance under the “new” programme which is just under £200k per annum, reflecting the smaller amount of funds available under this new programme.

Net project revenue is expected to be broadly similar to 2008/09.

5.3.2 Net project revenue

An analysis of net project revenue is shown in the following table.

Project Income and Expenditure		
Detail	2008/09 (Forecast)	2009/10 (Budget)
	£	£
Project income		
Other major projects	311,432	281,250
Secondees	30,000	30,000
Other internal projects	157,625	225,000
Regional Skills Partnership	350,000	400,000
Outsourced research	111,850	187,500
Sales and other income	0	0
Size of the Challenge	275,000	275,000
Total income	1,235,907	1,398,750
Project costs		
Other major projects	193,505	225,000
Other internal projects	18,124	15,000
Regional Skills Partnership	120,000	180,000
Outsourced research	85,724	150,000
Sales and other income	0	0
Size of the Challenge	18,904	50,000
Total cost	436,257	620,000
Net project revenue	799,650	778,750

Our most significant programme continues to be the work to support the Regional Skills Partnership, where funding has been secured from AWM, LSC and ESF. Other key projects include the “scale of the challenge” work programme for AWM and the evidence base for the single integrated regional strategy, both of which have funding agreed.

We expect additional work to be commissioned from us in support of the Climate Change Action Plan, and to take forward further work on the regional perceptions index and the Integrated Policy Model.

5.3.3 Analysis of expenditure

As noted earlier the main expenditure of the Observatory is on staffing and related overheads.

Summary of Expenditure		
Detail	2008/09 (Forecast)	2009/10 (Budget)
	£	£
Staff		
Staff	900,000	1,116,516
Temporary staff	22,000	15,000
Subtotal: Staff	922,000	1,131,516
Overhead		
Travel and expenses	5,000	6,600
Welfare	309	315
Recruitment	20,000	16,541
Relocation	0	18,000
Training	10,000	21,850
Parking	6,750	6,885
Subtotal: Overhead	42,059	70,191
Premises		
Rent	74,160	75,643

Service and maintenance	25,750	25,500
Utilities	3,200	3,264
Insurance	1,648	1,681
Rates	21,630	22,063
Subtotal: Premises	126,388	128,151
Projects & Consultants		
Website development	30,000	30,000
State of the Region	32,592	25,000
ARO Subscription	7,000	7,000
Subtotal: Projects	69,592	62,000
Operational		
Finance and HR SLA (AWM)	25,000	25,000
IT SLA (MPPL/Tempus)	28,000	28,000
Network access	2,000	2,000
Telecoms	2,891	3,000
Office equipment	10,840	12,209
Consumables and stationery	20,235	21,000
Website/ICT operations	16,000	16,000
Petty cash	1,445	1,500
Marketing and dissemination	14,420	16,000
RDIN Events	20,000	25,000
Catering & Room Hire	5,150	6,000
Professional fees	2,000	2,040
Software	4,255	4,500
Irrecoverable VAT	90,000	58,324
Contingency	5,000	5,000
Subtotal: Operational	247,236	225,573
Depreciation		

IT Equipment	5,500	6,724
Furniture	4,000	3,562
Fixtures and fittings	7,200	7,052
Subtotal: Depreciation	16,700	17,338
Total Expenditure	1,423,975	1,634,768

5.3.3.1 Staff costs

Staff costs show an increase of some 20% over the forecast for this year. This reflects the increase in staff during 2008/09 - in 2009/10 we expect to have a full complement, and pay progression.

A brief summary of capital expenditure is given below.

Summary of Capital Expenditure		
Detail	2008/09 (Forecast)	2009/10 (Budget)
	£	£
Computer Equipment	9,900	9,900
Furniture	2,000	1,400
Fixtures and Fittings	2,000	2,000
Total	13,900	13,300

6 Key risks to achievement

We have classified our key risks into four types: Strategic risks that may jeopardise our strategic objectives; financial risks that could undermine our budget and create financial problems; project risks that arise from our need to take on and satisfactorily deliver research on a semi-commercial basis; and operational risks that might threaten our work programme.

The risks the Observatory faces and the actions planned in mitigation are detailed in the following table:

Area of Risk	Risk Weight ¹		Consequences	Planned Actions
	L	I		
S: Strategic Risks				
S1: Failure to secure effective strategic support from partners	M	H	The Observatory becomes sidelined and increasingly irrelevant to regional research and intelligence	Ongoing communication and marketing programme at all levels (including through Partnership Board and RDIN) with partners and other organisations in the region, so that they think of the Observatory first. Proactive dissemination of research outputs to highlight publicly the work of the Observatory
S2: Failure to secure reputation for independent analysis	L	H	Our analysis is not trusted and would need to be duplicated or, at least, validated, undermining our key value proposition	Ensure effective peer review of all output for QC and validation Maintain independent Observatory identity in all events and publicity

¹ L = likelihood of risk occurring; I = impact of occurrence. Arbitrary scale: L=low, M=medium, H=high.

S3: Unsuccessful in engaging with key regional policies, particularly taking forward the outcomes of the SNR, exacerbated by uncertainty over guidance to take forward the new regional strategy and February 2009 Conservative policy statement on regional issues.	M	M	Reduced use of evidence to inform key strategies. Inability to develop comprehensive strategic overview of the Region for the new regional strategy	Pro-active engagement with partners and appropriate policy forums to identify Observatory role as we move towards the new regional strategy Increased emphasis on interaction with policy through the State of the Region process. Greater involvement with Local Authorities to facilitate local economic assessments Engagement with SNR transition team.
S4: Change in Government policy on RDAs	H	H	Uncertain future for the Observatory as currently not legally independent of the RDA	Review move to independent legal status
F: Financial Risks				
F1: Unable to secure sufficient project work and revenue	M	H	Unable to secure necessary funding to meet Observatory costs. Reduced impact in regional research	Pro-actively seek projects, and seek support for them Ensure in-house capacity to deliver probable projects Maximise value of existing project work to promote Observatory offer
P: Project Risks				
P1: Poor delivery quality of project output	L	H	Loss of reputation, undermining the overall role of the Observatory	Establish quality acceptance criteria in advance for all projects Maintain strong QC processes including appropriate peer review of all projects Ensure and continuously develop Observatory skills and knowledge
P2: Observatory challenged over state aid for commercial projects	L	M	Legal action and possible penalties. Possible loss of valuable income source	Ensure all project work generates income to cover full costs Maintain a project by project P&L based on robust costing model Keep complete records of proposal, costing, and staff time allocation

P3: Time committed before contracts agreed	M	M	Failure to convert project into contracted work results in loss of income. Early investment of time may not be recovered even if project goes ahead, resulting in project losses	Monitor and minimise time allocated to developing proposals and bids Seek to secure a signed contract before starting work on any project and, where this is not possible, minimise pre-contract work and only then on large projects with strategic partners
O: Operational Risks				
O1: Cannot secure funded secondees from partners	H	L	Ability to manage growth and match capacity to short term project demand will be constrained, resulting in slower progress towards objectives and reduced participation by WMRO in regional research and analysis	Promote awareness among partners of the value of projects requiring seconded capacity Seek Board support in identifying and securing appropriate secondees Demonstrate value to potential seconding organisation of filling the position Effectively define requirement, job role and person spec to simplify search process
O2: Breakdown of the RDIN as an effective vehicle for communication with practitioners in the region	L	H	Loss of visibility of regional projects. Inability to link up initiatives and best practice. Loss of key resource and source of data and intelligence	Act on review of topic group function from 2008/9 quarter 4. Continually review the role, programme, membership and remit of the RDIN to ensure it is appropriate and valuable Offer an added-value programme of seminars, conferences and publications to RDIN members Maintain RDIN involvement in the programme and development of the Observatory
O3: Poor staff retention and/or failure to recruit suitable employees	L	M	Reduced capacity to deliver objectives. High cost of staff recruitment and replacement.	Ensure effective staff management, coaching and development Provide appropriate training opportunities Seek to provide high value, high visibility projects for Observatory staff Ensure resource levels adequately match demand

O4: Increased demand for our work outstrips our capacity to deliver	M	M	Inability to deliver requested support, to time and to specification needed, undermining our reputation and potential influence in informing key strategies	Increased focus on a planned approach to capacity building through the annual Business Plan and internal work planning mechanisms Take on new work that maximises progress on our strategic objectives
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Appendix One: Key research activity outputs and timetable

The details of much of our research programme for the forthcoming year has yet to be determined. However, a number of outputs are already scheduled and details are provided in the table below. In some cases, we have been able to provide an indicative date for publication but these dates may change.

Theme	Project	Date for completion
Highlighting the changing needs of the labour market	2009 Regional Skills Assessment and sub regional profiles	October 2009
	Rural skills assessment	February 2010
	E-bulletin for careers advice and guidance practitioners	Spring, summer and autumn academic terms
	Environmental industries skills review	July 2009
	Further sectoral and cross cutting skills analysis (detail to be agreed by RSP partners)	To be agreed
	Analysis to support the 14-19 agenda (detail to be agreed)	To be agreed
Evaluating the impact of the RSP	Further development of the framework of skills performance indicators	On-going throughout the year
	Annual review of performance report	July 2009
	Monitoring and evaluation of the Skills Action Plan	Quarterly to inform the RSP Board
Addressing gaps in the evidence base	Analysis of potential growth in the education and training provider network	July 2009
State of the Region process	Thematic report on “Benefits of Wider Forms of Innovation”	April 2009

Theme	Project	Date for completion
	Thematic report on “Knowledge Economy”	April 2009
	Thematic report on “Building an integrated evidence base”	June 2009
	Thematic report on “Sustainable Communities”	June 2009
	Thematic reports on demographics and climate change	September 2009
	State of the Region annual synthesis report and memory stick	October 2009
	Further thematic reports	January 2010
Scale of the Challenge	Benchmarking start-up businesses	May 2009
	Profiling enterprise culture	July 2009
	Performance of West Midlands businesses	October 2009
	Strategic Positioning of West Midlands enterprise	January 2010
	Causes and dynamics of worklessness	To be agreed
	Employer attitudes to worklessness	To be agreed
	Regional Economic Inclusion Assessment report	December 2009
	Additional outputs relating to Economic Inclusion strand	To be agreed
	Outputs relating to Innovation, Transport & Low-carbon economy strands	To be agreed
Strategy Monitoring	Contribution to RSS Annual Monitoring Report	January 2010
	RES Monitoring Indicators Update Report	February 2010

Theme	Project	Date for completion
	Rural Regeneration Zone monitoring report	March 2010
	Manufacturing Support Strategy monitoring report	January 2010
	Climate Change Action Plan monitoring indicators	To be agreed
SIRS Evidence Base	Functional Geographies scoping report	August 2009
	Functional Geographies final report	January 2010
	Other contributions to SIRS Evidence Base	To be agreed
Cultural Observatory	Regional Cultural Sector Assessment	To be agreed
	Other cultural sector research reports	To be agreed
Other known research outputs	Regional Economic Update	Monthly
	Regional Perceptions Indicator Annual Report	December 2009

Appendix Two: Topic group work plans

Work plans for the Economy and Labour Force, Geographical Information, Population & Society and Environment topic groups were finalised at the 08/09 quarter 4 group meetings. The work plans link directly to the overall KPIs and strategic objectives of the Observatory (particularly KPI-3 and KPI-8 and strategic objective 3 and 6).

Economy and Labour Force

ELF Topic group Work Plan Project - 2009/10	Target date	Links to KPI	Lead
Identify critical data and intelligence gaps and needed data enhancements. Agree the priority for filling those gaps and identify appropriate actions and resources to fill them.			
• Identify one gap in data and intelligence as a priority for regional research.	Mar 10		Anne Green
• Assess and prioritise relevant gaps as requested through the Observatory's new gap-filling process.	Ongoing		Anne Green
Disseminate good practice information to the RDIN on data relevant to the theme of economy & labour force			
• Members to post at least 6 articles on "Observations" in each 6 month period	Mar 09 / Sept 09	3	All
• WMRO to provide co-ordination and administrative support for delivery of the group's e-bulletin, which will be a synopsis of relevant Observations posts from the last six months.	Mar 09 / Sept 09	3	Russell Hornsey
Promote and lead the work to share information within the scope of economy and labour force data and intelligence within the region and other central bodies			
• Members to develop one seminar on economy and labour force for the RDIN.	Jan 10	3	Anne Green
• WMRO to provide co-ordination and administrative support for the development of the seminar.	Jan 10	3	Observatory
Identify resources for inclusion into the resource catalogue within the theme of economy and labour force			
• Identify 50 resources for inclusion into the resource catalogue via "Suggest a resource" or by the full submission process.	Mar 10	4, 8 & 9	All
• Identify 2 external organisations that the Observatory could approach regarding mapping projects	Mar 10	4, 8 & 9	Steven Dovey
Review the objective of the topic group over time and evaluate the work of the group on a regular basis to secure feedback for reporting to the User Group and the WMRO Partnership Board.			
• Provide a quarterly report to the WMRO Partnership Board.	Ongoing	n/a	Anne Green

ELF Topic group Work Plan Project - 2009/10	Target date	Links to KPI	Lead
<ul style="list-style-type: none"> Review work programme on an annual basis. 	Q4 09/10	n/a	Anne Green
<ul style="list-style-type: none"> Ensure the work programme is reviewed at every meeting 	Quarterly	n/a	Anne Green
<p>Nominate up to three representatives of the topic group to the User Group. The representatives will act as the main conduit between the WMRO Partnership Board and the RDIN.</p>			
<ul style="list-style-type: none"> The Chair and at least two representatives from the topic group to attend two User Group meetings per year. 	May 09 / Dec 09	n/a	Anne Green tbc
<ul style="list-style-type: none"> Feedback from the WMRO Partnership Board to group members 	Quarterly	n/a	Roger Mckenzie

Geographical Information

GI Topic Group Work Plan Project 2009/10	Target date	Links to KPIs	Responsibility
Promote and lead work to share geographical data and information within the region.			
<ul style="list-style-type: none"> Maintain a watching brief on Ordnance Survey licensing arrangements and identify any data sharing and licensing issues as they arise. 	March 09	3	All
<ul style="list-style-type: none"> Provide a forum for sharing best practise in the provision of geographic resources for the region. 	Ongoing	3	Diane Edwards
<ul style="list-style-type: none"> Maintain a watching brief on the quality requirements of geo-spatial meta data for the region and report to the group regularly, leading developments as required. 	March 09	3	Katy Bregazzi
Disseminate good practice in the use of GI through the RDIN and RDIN topic groups.			
<ul style="list-style-type: none"> Topic Group members to post at least 6 articles to "Observations" in each 6 month period. 	April 09 April 09 April 09 May 09 May 09 May 09 June 09 June 09 July 09 Aug 09 Sept 09 Oct 09 Nov 09 Dec 09	3	Shona Frost Chris Styche Carmen Mayo Angela Johnson Lucy Bastin Michelle Haynes Diane Edwards Huw Davies Claire Edwards Graham Smith Rob Ellis Shona Frost Carmen Mayo Diane Edwards
<ul style="list-style-type: none"> WMRO to provide co-ordination and administrative support for delivery of the topic group's e-bulletin, which will be a synopsis of relevant Observations postings from the previous six months. 	Jun and Dec 09	3	Katy Bregazzi
<ul style="list-style-type: none"> Members to develop a 2nd Annual GIS day for the Region - this might focus on future priorities for GI in education (to be discussed with Geographical Association in May 2009). 	Nov 09	3	Sub working group
<ul style="list-style-type: none"> WMRO to provide co-ordination and administrative support for the development of GI day. 	Ongoing	3	Oliver Nicholls
Provide support to the Observatory's State of the Region process			
<ul style="list-style-type: none"> Provide support to the Environment Topic Group in co-ordinating a launch event for the State of the Region Climate Change dialogue. 	Pre Mar 09	2	Claire Edwards
<ul style="list-style-type: none"> Provide support to the Environment Topic Group to identify common resources that will help us understand the effects of climate change in all sectors and identify gaps in data provision. Identify new ways to present our results. 	July 09	2	Claire Edwards

GI Topic Group Work Plan Project 2009/10	Target date	Links to KPIs	Responsibility
<ul style="list-style-type: none"> Provide GIS solutions or advice regarding State of the Region work undertaken by the Observatory and other topic groups as required. 	Ongoing	2	All
Identify resources for inclusion into the resource catalogue which may be applied to geographical investigations			
<ul style="list-style-type: none"> Identify 50 resources for inclusion into the resource catalogue via “Suggest a resource” 	Mar 2010	4, 8 & 9	All
<ul style="list-style-type: none"> Identify 2 external organisations that the Observatory could approach to submit geographical resources to the resource catalogue. 	Mar 2010	4, 8 & 9	All
Identify gaps in regional geographical information, data and analysis and develop project proposals for filling them. Prioritise gaps identified and seek appropriate actions to fill those gaps.			
<ul style="list-style-type: none"> Review, update and develop the “GIS facilities within the region” document, identify new entries (including web-based resources) and publicise. 	June 09	3	Oliver Nicholls / Chris Styche
<ul style="list-style-type: none"> Assess and prioritise relevant gaps as requested through the Observatory’s new gap-filling process. 	Ongoing	3	Diane Edwards
Nominate up to five representatives of the topic group to the User Group. The representatives will act as the main conduit between the WMRO Partnership Board and the RDIN.			
<ul style="list-style-type: none"> The Chair and at least two representatives from the topic group to attend two User Group meetings per year. 	Ongoing	3	Diane Edwards Claire Edwards ANO
<ul style="list-style-type: none"> Liaise with the Partnership Board’s Topic Group Ambassador to ensure two way dialogue between Partnership Board and RDIN. 	Ongoing	n/a	Sharon Palmer Diane Edwards Claire Edwards ANO
Review the objectives of the topic group and evaluate the work of the group on a regular basis to secure feedback to the WMRO Partnership Board.			
<ul style="list-style-type: none"> Provide a quarterly report to the WMRO Partnership Board. 	Ongoing	n/a	Diane Edwards
<ul style="list-style-type: none"> Ensure the work programme is reviewed at every meeting, 	Ongoing	n/a	Diane Edwards
<ul style="list-style-type: none"> Review work programme on an annual basis. 	Apr 09	n/a	Diane Edwards

Population & Society

Population and Society Topic group Work Plan 2009/10	Target date	Links to KPI	Responsibility
Identify critical data gaps and needed data enhancements. Agree the priority for filling those gaps and identify appropriate actions and resources to fill them.			
<ul style="list-style-type: none"> Identify one gap in data and intelligence as a priority for regional research. 	Mar 10		Richard Wilson
<ul style="list-style-type: none"> Assess and prioritise relevant gaps as requested through the Observatory's new gap-filling process. 	Ongoing		Richard Wilson
Provide support to the Observatory's State of the Region process		2	
<ul style="list-style-type: none"> Identify possible speakers for the launch event of the Demographic Change dialogue 	Pre Mar 09	2	All
<ul style="list-style-type: none"> Assist in the identification of policy & research priorities for State of the Region: Demographic Change dialogue 	Mar 09	2	All
<ul style="list-style-type: none"> Develop a work programme for the dialogue and agree leads for particular work streams within the group 	Apr 09	2	All
<ul style="list-style-type: none"> Provide evidence to inform the dialogue 	Ongoing	2	All
<ul style="list-style-type: none"> Assist in linking with relevant policy makers in the region 	Ongoing	2	All
<ul style="list-style-type: none"> Draft sections of the final report on State of the Region: Demographic Change 	Sept 09	2	All
Disseminate good practice information to the RDIN on data relevant to the theme of demography and health.			
<ul style="list-style-type: none"> Members to post at least 6 articles on "Observations" in each 6 month period 	May 09 / Oct 09	3	All
<ul style="list-style-type: none"> WMRO to provide co-ordination and administrative support for delivery of the group's e-bulletin, which will be a synopsis of relevant Observations posts from the last six months. 	May 09 / Oct 09	3	Raj Kaur / Rosie Day
Promote and lead the work to share information within the region and other central bodies.			
<ul style="list-style-type: none"> Members to develop a seminar on "Digital information sharing" for the RDIN 	Jul 09	3	All
<ul style="list-style-type: none"> The Observatory to provide co-ordination and administration for the seminar 	Jul 09	3	Oliver Nicholls
Identify resources for inclusion into the resource catalogue within the theme of population & society			
<ul style="list-style-type: none"> Identify 50 resources for inclusion into the resource catalogue via "Suggest a resource" or by the full submission process. 	Mar 10	4, 8 & 9	All
<ul style="list-style-type: none"> Identify 2 external organisations that the Observatory could approach regarding mapping projects 	Mar 10	4, 8 & 9	All
Review the objective of the topic group over time and evaluate the work of the group on a regular basis to secure feedback for reporting to the User Group and the WMRO Partnership Board.			

Population and Society Topic group Work Plan 2009/10	Target date	Links to KPI	Responsibility
<ul style="list-style-type: none"> • Provide a quarterly report to the WMRO Partnership board 	Ongoing	n/a	Richard Wilson
<ul style="list-style-type: none"> • Review work programme on an annual basis. 	Quarter 4	n/a	Richard Wilson
<ul style="list-style-type: none"> • Ensure the work programme is reviewed at every meeting 	Quarterly	n/a	Richard Wilson
Nominate up to three representatives of the topic group to the User Group.			
<ul style="list-style-type: none"> • The Chair and at least two representatives from the topic group to attend two User Group meetings per year. 	May 09 Dec 09	n/a	Richard Wilson
1. Feedback from the WMRO Partnership Board to group members	Quarterly	n/a	Jammi Rao

Environment

Environment group Work Plan 2009/10	Target date	Links to KPI	Lead
Develop the climate change evidence base for the West Midlands region, to inform the work of the climate change office			
<ul style="list-style-type: none"> The group understand the priorities of the climate change panel (following details of their March meeting being circulated) 	March 09	3	Paul Cobbing
<ul style="list-style-type: none"> Through reaching a common understanding of the West Midlands' evidence base for climate change, the group identify gaps in data and intelligence as a priority for regional research. 	Dec 09	3	Martin See
<ul style="list-style-type: none"> All gaps in the evidence base for climate change, identified through the Observatory's gap-filling process, are assessed, prioritised and where necessary filled by the group. 	Quarterly	3	Martin See
<ul style="list-style-type: none"> Possible speakers are identified for the launch event of the Observatory's State of the Region Climate Change dialogue 	Pre Apr 09	2	All
<ul style="list-style-type: none"> The group identify policy & research priorities for the Observatory's State of the Region: Climate Change dialogue 	Feb/Mar 09	2	All
<ul style="list-style-type: none"> The group develop a work programme for the dialogue and agree leads from within the group to take forward particular work streams 	May 09	2	All
<ul style="list-style-type: none"> The group identify evidence to inform the SoR Climate Change dialogue 	Oct 09	2	All
<ul style="list-style-type: none"> By the end of the Climate Change dialogue, the group reports that it has engaged with relevant policy makers in the region with an interest in Climate Change 	Mar 09	2	All
<ul style="list-style-type: none"> The group deliver draft sections of the final report on State of the Region: Climate Change 	Oct 09	2	All
Review the environmental priorities and accountabilities for the region (PSA targets 27/28), and ensure that they are underpinned with evidence			
<ul style="list-style-type: none"> The group Investigate the work already done by other England regions to underpin PSA targets 27 and 28 and decide which elements it would be useful to take forward in the West Midlands 	May 09	3	tbc
<ul style="list-style-type: none"> The PSA 28 priority statements for each region are reviewed and compared with that of the West Midlands 	May 09	3	tbc

Environment group Work Plan 2009/10	Target date	Links to KPI	Lead
Alongside the Observatory, identify and develop the evidence base to support the environmental strand of the Single Integrated Regional Strategy (SIRS)			
<ul style="list-style-type: none"> The group understands the environmental priorities of the region and develops an appropriate evidence base to support them. 	March 10	3	tbc
<ul style="list-style-type: none"> Alongside partners, the group identify and agree what the regional environmental evidence base consists of 	May 09	3	tbc
<ul style="list-style-type: none"> Through reaching a common understanding of the West Midlands' evidence base for the environment, the group identifies 50 resources for inclusion into the Observatory's resource catalogue 	By Mar 09	3	tbc
Contribute to the work and overall objectives of the Regional Observatory, including communication, advice on projects, identification of resources			
<ul style="list-style-type: none"> Evidence on the region's low carbon economy is both identified and sourced by members of the group 	tbc	3	tbc
<ul style="list-style-type: none"> John Walker will report satisfaction with the advice and support provided by the group on the Observatory's work on low carbon economy 	tbc	3	tbc
<ul style="list-style-type: none"> Members to post at least 6 articles on "Observations" in each 6 month period 	Apr 09 / Oct 09	3	All
<ul style="list-style-type: none"> The group deliver 2 e-bulletins over the course of the year, which will be a synopsis of relevant Observations posts from the last six months. 	Apr 09 / Oct 09	3	John Walker
<ul style="list-style-type: none"> Members develop and deliver a seminar on a related Environmental topic for the Regional Data & Intelligence Network 	Sept 09	3	All
<ul style="list-style-type: none"> The chair provides a quarterly report to the WMRO Partnership board 	Quarterly	n/a	Martin See
<ul style="list-style-type: none"> The group review the work programme on an annual basis. 	Feb 10	n/a	Martin See
<ul style="list-style-type: none"> The work programme is reviewed at every meeting, 	Quarterly	n/a	Martin See
<ul style="list-style-type: none"> The Chair and at least two representatives from the topic group attend two User Group meetings per year. 	Jun 09 Dec 09	n/a	Martin See

Environment group Work Plan 2009/10	Target date	Links to KPI	Lead
<ul style="list-style-type: none"> The Partnership Board provide adequate feedback and direction to group members 	Aug 09 Feb 09	n/a	Dave Marr

Full document information

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