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**LOCAL GOVERNMENT REFORM – TRANSITION COMMITTEES AND
TRANSITION MANAGEMENT TEAMS**

ADVISORY NOTE ON KEY TASKS AND MILESTONES

Contents	Paragraphs
Introduction	1.1 – 1.4
Legislative Framework	2.1
Shared Implementation Plan – Short Term	3.1
Financial Management	4.1 – 4.2
Convergence - Plans, Programmes and Projects	5.1 – 5.4
Communication Strategy	6.1
Capacity Building	7.1
Winding-Up	8.1
Service Delivery and Performance Improvement	9.1 – 9.4
Customer Service	10.1 – 10.2
ICT	11.1
Community Planning	12.1 – 12.3
Chief Executive, HR and Finance Posts – Recruitment	13.1 – 13.3
Human Resources (HR)	14.1 – 14.4
Estates Strategy and Accommodation	15.1 – 15.2
Budget Planning and Financial Management System	16.1 – 16.2
Assets and Liabilities	17.1

General Administration	18.1
Bank and Insurance Appointments	19.1
Conclusion	20.1
Contacts	
Annex 1 Roles for Transition Committees	
Annex 2 Key Tasks and Milestones	

Introduction

- 1.1. This advisory note is issued to assist Transition Committees and Transition Management Teams in planning the transition work until the operative date of the new Councils in May 2011. In planning the schedule of work, the Department believes that there are key tasks to be completed by critical dates. These will form the important milestones to be met and will be used by the Department as a mechanism to monitor progress. The terms of reference in the Department of the Environment (DOE) circular LG 16/08 issued on 28 October 2008 establish the governance context for the work and the Strategic Leadership Board (SLB) has already approved the Programme Management Framework on which this advisory note is based.
- 1.2. A substantial body of work needs to be addressed by the Transition Committees if the milestones and deadlines are to be met. While much of the transition work (and in particular any key decisions to be taken) will fall to the Statutory Transition Committees when they are established later this year. There are significant tasks that must be taken forward by the Voluntary Transition Committees. The table at [Annex 1](#) provides an indicative list of the tasks that should fall under the remit of the Statutory Transition Committees and those which might be carried forward during the Voluntary Transition Committee phase. These tasks include the preparation of an interim / short term implementation plan for the new Council district, development of convergence plans, audits of existing systems, and assessment of needs in areas such as Capacity Building and IT.
- 1.3. Statutory Transition Committees and the Transition Management Teams themselves will determine the start dates and means of delivery for the various actions. They may also wish to insert their own interim milestones as significant steps in the work plan. What is vital, however, is that the milestone completion dates are met. Any slippage in the milestones will compress the time available for Statutory Transition Committee decisions and result in end loading of the programme.
- 1.4. The key tasks and milestones are set out in the following sections and tabulated in [Annex 2](#). 

2. Legislative Framework

- 2.1. The Department has established a legislative timetable for the local government reform process. The legislative milestones are the indispensable drivers to the formation of the new Councils. They are also important determinants in the

3. Shared Implementation Plan – Short Term

- 3.1. It is envisaged that the new Council will, as soon as possible after May 2011, develop a clear and challenging long term strategic vision for the area, based on effective and ongoing engagement with the local citizens, organisations, communities and so on, comprising the new area and, as a result, ensure that it is owned by its stakeholders. However, as stated in Department’s Circular LG 04/09 it will be important for a Statutory Transition Committee to agree a shared, short term implementation plan for the new Council area to help inform key decisions (on service delivery and programme priorities for instance) that will set the parameters for the determination of the operating budget and rate for the first year on the new Council. [i](#)

Task	Outcome	Completion Date
Short Term Implementation Plan	Agreed short term vision, associated aims and objectives.	Sept 09

4. Financial Management

- 4.1. Statutory Transition Committees, in drawing up the financial management and accounting arrangements, will ensure that they comply with the legislative provisions in the local government bills. Effective financial and accounting regimes operated by Councils and other public bodies should be considered in the design process.
- 4.2. It is important that the developed financial governance arrangements fulfil the highest standards of internal and external scrutiny and accountability. They also must address issues, such as standards of financial conduct, financial performance, risk management and internal control. Local Government Audit and the Audit Commission are important sources for guidance. [i](#)

Task	Outcome	Completion Date
Preparation of financial arrangements	Detailed financial management and accounting regime.	June 10

5. Convergence – Plans, Programmes and Projects

- 5.1. Convergence will be a challenging task. It will involve the integration of programmes, plans and projects of the merging Councils and also those linked to the functions transferring from government Departments and public bodies to each of the 11 new Councils. An important context for this work is the Local

Government Circular LG 04/09.

- 5.2. Transition Management Teams will need to secure active involvement of all the transferring bodies to achieve completeness and integrity of the process. Development of a realistic operating budget for the first year of the new Council is dependent on the successful outcome of convergence. Any agreed shared service arrangements would obviously need to be accommodated in the convergence arrangements.
- 5.3. The Regional Transition Coordination Group (RTCG) may be required to provide particular guidance on this aspect of the implementation. It is regarded as impractical to require Transition Committees to produce detailed and fully converged Corporate / Strategic Plans, Capital Plans and so on. However, it is essential for resource planning reasons to produce, as a minimum, a strategic framework plan of key priorities in terms of operational policies and related projects for the first year of the new Council. In particular, this strategic framework plan will provide the means of financial translation to the budget process and give direction to the development of Service Delivery and Performance Improvement arrangements.
- 5.4. As convergence is regarded as a comprehensive section of work, it is suggested that activity should commence as soon as possible. [↑](#)

Task	Outcome	Completion Date
Convergence of strategies, plans, programmes and projects – integrating new functions	A strategic framework plan of key priorities – operational policies and projects, incorporating service delivery and performance improvement: The plan will cover the first year of the new Council.	June 10 (interim progress reports)

6. Communication Strategy

- 6.1. It is important for Transition Committees / Transition Management Teams, in both the voluntary and statutory phases to have an effective communication strategy to inform all the stakeholders of their decisions, and also as an enabling process for efficient consultation. The Department's Communications framework and guiding principles, is a useful guide in completing this task and a copy can be accessed on the website. [↑](#)

Task	Outcome	Completion Date
Communication	Strategy and action plan.	Aug 09

7. Capacity Building

- 7.1. Capacity Building is regarded as very important to strengthen the skills of elected members and staff for the new Council environment. A local Capacity Building Programme should be developed as necessary, based on the recommendations on capacity building agreed by SLB, as developed through Policy Development Panel C (PDP C). [↑](#)

Task	Outcome	Completion Date
Capacity Building Programme	Capacity Building Programme for members and officers in liaison with local government providers.	Ongoing to April 11 (interim progress reports)

8. Winding-Up

- 8.1. Statutory Transition Committees / Transition Management Teams, existing Councils and other public bodies transferring functions, should ensure that local Winding-Up arrangements are put in place. The Department will be issuing a separate guidance note on winding-up. [↑](#)

Task	Outcome	Completion Date
Establish winding-up arrangements	Winding-up plan and process agreed and implementation commenced.	Aug 09 to May 11
	Residual activity to final completion.	Nov 11

9. Service Delivery and Performance Improvement

- 9.1. A priority consideration is the continuity of the delivery of high quality services during the transition process. All public bodies should manage the transfer arrangements, especially staff transfers, to ensure quality services are maintained. Shared service arrangements should be considered, where appropriate.
- 9.2. Transition Committees (both voluntary and statutory) / Transition Management Teams may consider convergence of the existing Service Delivery Plans as the starting point for the development of a new strategy. It will be necessary to integrate transferred services and new functions into the new Council's operations.
- 9.3. It should be noted that the government has placed a duty on local Councils to deliver services to clear standards – of cost and quality – by the most economic, efficient and effective means available. Similar targets have been set for public bodies. Accordingly, the opportunity to secure service delivery efficiencies and economies through service rationalisation measures should be examined. Performance Improvement should also be a key feature of the Service Delivery

Strategy for the new Council.

9.4. Further advice on this aspect will issue in due course, when Policy Development Panel B (PDP B) has completed its deliberations. [i](#)

Task	Outcome	Completion Date
Service Delivery	Continuity of quality services during the transition.	Ongoing to May 11
	Production of a new Service Delivery Plan and associated Performance Plan – integrating transferred services and new functions.	Nov 10

10. Customer Service

10.1. The Department believes that development of excellent customer services should be a hallmark of the new Council. Statutory Transition Committees / Transition Management Teams should seek to formulate a local Customer Services Strategy that is innovative and improves citizen access to services and information.

10.2. Further advice on this aspect will issue in due course, when PDP B has completed its deliberations. [i](#)

Task	Outcome	Completion Date
Customer Service	A customer service strategy for the new Council.	Nov 10

11. ICT

11.1. A draft IT Strategy for local government has been developed under the auspices of PDP B. Statutory Transition Committees should develop a cohesive IT strategy for the new Council drawing from the overarching strategy for the sector. [i](#)

Task	Outcome	Completion Date
ICT	Cohesive IT Strategy and Implementation Plan.	Oct 10

12. Community Planning

- 12.1. The SLB and Policy Development Panel A (PDP A) have agreed proposals for the legislative framework for Community Planning. Work is now being taken forward to develop the guidance that would underpin and support the operation of community planning in the new Councils.
- 12.2. Consideration is also being given to whether there is the opportunity for the trialling of community planning by the Statutory Transition Committees. This would enable them to prepare for effective and efficient lead management of the function by the new Councils as soon as possible after May 2011. Such a process would also inform the finalisation of the supporting guidance.
- 12.3. Further advice on this aspect will issue in due course, when PDP A has completed its deliberations. [↗](#)

13. Chief Executive, HR and Finance Posts – Recruitment

- 13.1. Chief Executive (CEX) and senior appointments, such as HR and Finance, are regarded as front-end decisions because of the essential management leadership they will provide to Statutory Transition Committees in the lead up to the operative date in May 2011. These appointments are clearly decisions for the Statutory Transition Committees to take when they are established.
- 13.2. PDP C is currently developing policy proposals to underpin these appointments. Further advice and guidance will issue in due course.
- 13.3. Recruitment of the Senior Management Team should follow these appointments, when the staff structure has been determined. Administrative support will be required for these posts. [↗](#)

Task	Outcome	Completion Date
Chief Executive recruitment	Appointment.	March 10
HR and Finance Officers recruitment	Appointments.	May 10
Administrative support	Appointments.	May 10

14. Human Resources (HR)

- 14.1. The effective management of the Review of Public Administration (RPA) staffing issues is central to the successful completion of the local government reform process. Statutory Transition Committees / Transition Management Teams, Councils and other transferor bodies (for example the Department for Social Development (DSD) and Planning Service), are required to adhere to the updated Public Service Commission (PSC) Guiding Principles which have been

approved by the Northern Ireland Executive.

14.2. PDP C is presently providing policy advice to the SLB and RTCG on – transfer schemes, vacancy controls, secondments, pensions and severance for instance – in line with the PSC Guiding Principles. Associated discussions and agreements with the trade unions will be facilitated through a HR Coordination Group that includes the Local Government Staff Division (LGSC).

14.3. As the LGSC has a statutory responsibility in terms of Local Government HR matters, the Commission will provide essential implementation advice and oversight to Statutory Transition Committees / Transition Management Teams.

14.4. A key first step in the Statutory Transition Committees / Transition Management Teams HR process is the design of a new staffing structure that is fit for purpose for the new Council. Further guidance, together with the process for dealing with remuneration levels for the new posts will issue in due course. Particular arrangements may be agreed by Departments for their staff transferring from the Civil Service and these will be taken into account. [↑](#)

Task	Outcome	Completion Date
Assess staffing needs	Staff structure established. Staff Transfer Plan.	June 10
Task	Outcome	Completion Date
Staff transfer arrangements, as per approved LGSC scheme, Civil Service Transfer Scheme and PSC Guiding Principles	Severance scheme, staff location, staff mapping and system of filling of posts in new structure – such as selection pools and matching of posts.	June 10 June 10 June 10 June 10 June 10
Complete staff handover	All staff transfer arrangements completed – such as appointments, post allocations and location.	May 11

15. Estates' Strategy and Accommodation

15.1. Statutory Transition Committees will develop an Estates' Strategy to secure the efficient and effective use of the transferring property assets. This strategy should take account of the convergence process, the strategic framework plan and priorities, service delivery arrangements, staffing issues and budgetary plans. It should also take account of the organisational design work undertaken by PricewaterhouseCoopers.

15.2. It may be necessary for Statutory Transition Committees to address any urgent accommodation issues. However, all major decisions on offices should be left to the new Council having responsibility for policy determinations on centralisation,

decentralisation, localism – for instance, service centres – and taking particular account of service delivery and staff location issues. [i](#)

Task	Outcome	Completion Date
Estates and Accommodation	Estates Strategy including – detailed inventory of property and costs.	Dec 10
	Completion of transfer plan for implementation.	Feb 11

16. Budget Planning and Financial Management System

16.1. As part of the convergence process, it will necessary for Statutory Transition Committees / Transition Management Teams to establish a corporate financial management system. This will take account of agreed financial regulations and the accountability regime developed under governance arrangements. Statutory Transition Committees will have the responsibility to prepare the budget for the first year of the new Council and thus set the rate for the first year of the new Council.

16.2. The new Council may however wish to adjust the transferred budget after taking office, for example – redefine budget allocations and priorities. Statutory Transition Committees may consider developing a budget plan for the second year for consideration by the new Council. This should in effect be the financial translation of the organisation’s strategic framework plan developed through the convergence process. [i](#)

Task	Outcome	Completion Date
Finance Systems	Corporate Financial Management Systems.	Sept 10
Preparation of Budget	Agreed budget.	Jan 11
	Short term budget plan – one to two years.	Feb 11
	Establish rate.	Feb 11

17. Assets and Liabilities

17.1. Existing Councils and relevant public bodies should put in place management arrangements to transfer to the new Council the required assets and liabilities, and the associated legal and administrative issues. The compilation of a detailed inventory (and so on) will require significant activity on the part of staff. [i](#)

Task	Outcome	Completion Date
Assets and Liabilities	Detailed inventory of assets and list of liabilities, as well as associated legal and administrative issues.	May 10
	Completion of transfer plan for implementation.	Feb 11

18. General Administration

18.1. The administrative systems operating throughout the transferring public bodies in relation to, for example, records management, contracts, servicing committees, should be merged and / or harmonised as far as is practical during the transition. Opportunities for improvement and efficiencies should be explored and implemented where possible. [i](#)

Task	Outcome	Completion Date
Administration	Implementation Plan with identified improvements and efficiencies.	Nov 10

19. Bank and Insurance Appointments

19.1. Statutory Transition Committees will have to appoint bank and insurance providers for the new Council. The process should comply with best practice procurement procedures. [i](#)

Task	Outcome	Completion Date
Bank	Appointment made.	July 10
Insurance / brokers	Appointments made.	July 10

20. Conclusion

20.1. The advice contained in this note will develop as the change management process proceeds during the transition. For example, functional transfers and shared service arrangements may change the delivery setting. It is anticipated that major modernisation will proceed with the new Councils post May 2011. Further advice will be available as the SLB, PDPs and RTCG continue to create policy and offer implementation guidance. [i](#)

CONTACTS

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Roles for Transition Committees

The following table contains an indicative list of tasks that should be carried out by Transition Committees both in their voluntary and statutory phase. There are also a number of tasks identified which will be the responsibility of the new Council and in some cases the existing Councils.

	Voluntary Transition Committees
Agree change management arrangements	Voluntary Transition Committees (VTCs) should begin preparation for the implementation of the reform programme. To assist members and officers in this work VTCs should now agree change management arrangements including, where relevant, the appointment of key change management staff.
Develop a Communications Strategy	It is important for Transition Committees in both the voluntary and statutory phases to have an effective communications strategy to inform all stakeholders of their decisions, and also as an enabling process for efficient consultation. VTCs should now develop a local communication strategy for all key stakeholders, including staff.
Establish existing priorities of amalgamating Councils and transferring functions to inform convergence of key plans	Statutory Transition Committees (STCs) will be tasked with agreeing a short term implementation plan for the new Council area to help inform key decisions on service delivery and programme priorities. The short term implementation plan will set the parameters for the determination of the operating budget and rate for the first year of the new Council. VTCs should now begin work on establishing existing priorities of amalgamating Councils and transferring functions (where possible) to inform the convergence of key plans (for example corporate and business plans of existing Councils) by the STCs.
Collate information on existing service delivery arrangements	VTCs should now begin the collation of information on existing service delivery arrangements*. The information collated will assist STCs to develop a short term service delivery model for the first year of the new Council. The following list indicates work that should take place: <ul style="list-style-type: none"> • an audit of existing activities • an assessment of current financial systems • development of recommendations for convergence of an audit of current estates and assets • compile a composite register • a data collection pro forma is being drawn up through PDP C and will issue to VTCs shortly

	<ul style="list-style-type: none"> an assessment of current IT and information systems <p>Note: VTCs should not take any decisions that will bind STCs, although recommendations can be formulated for consideration by STCs. * This should include service delivery arrangements for the transferring functions, pending further advice from PDP C.</p>
Assess capacity building needs	STCs will be required to develop a local capacity building programme. VTCs should now begin work on an assessment of the capacity building needs of elected representatives and all staff, including those transferring from central government. Further advice on a supporting structure for capacity building will issue when PDP C has completed its work on this matter.
Audit of number of staff employed, roles, grades and conditions of employment	Existing Councils should now begin the work that is required to develop a Council** staff transfer scheme(s) and compliance with the Transfer of Undertakings (Protection of Employment) Regulations 2006 (TUPE). This work should include a complete audit of the number of staff employed, roles, grades and conditions of employment. This information will be important to STCs who will design the staff structure of the new Council. ** Transferor Departments will prepare their own transfer schemes.

Statutory Transition Committees	
Agree standing orders	STCs will be required to agree standing orders and put in place the procedures and systems necessary to support their change management role.
Appointment of Chief Executive and senior staff designate	STCs will be responsible for the appointment of a Chief Executive and senior staff (Directors) designate. The appointment of the Chief Executive designate will be one of the first tasks of the STCs when they are formed.
Develop and agree short term implementation plan Prepare an integrated set of new operational priorities for new Council for the year 2011 / 2012	STCs shall develop and agree a short term implementation plan for the new Council area to help inform key decisions on service delivery and programme priorities. The short term implementation plan will set the parameters for the determination of the operating budget and rate for the first year of the new Council. STCs shall set the rate for the year 2011 / 2012. In developing the short term implementation plan it will be necessary to converge key plans;

Examine potential for service delivery efficiencies	comprehensively review existing priorities of amalgamating Councils as well as the existing priorities of transferor bodies. STCs should prepare an integrated set of new operational priorities for new Council for the year 2011 / 2012. STCs should, in developing the short term implementation plan, examine the potential for service delivery efficiencies and economies through service rationalisation measures. Further advice will issue from PDP B on opportunities for efficiencies and economies on a regional basis.
Make arrangements for winding-up existing Councils	STCs will be required to make arrangements for winding-up the existing Councils.
Agree and implement Capacity Building Strategy	STCs will be required to agree and implement a capacity building strategy for elected members and staff, including those transferring from central government, in preparation for the formation of the new Councils.
Develop Service Continuity Plan	Throughout the period up to 2011 Councils will continue to deliver services. STCs should ensure that standards of service are, as far as possible, kept at an acceptable level. This will require STCs to develop a Service Continuity Plan.
<p>Ensure systems and procedures are in place to support the transition process</p> <p>Secure resources to ensure that the systems and procedures necessary to support the work of the new Council are in place</p> <p>Develop an Information Systems Strategy</p> <p>Develop a Customer Service Strategy</p>	<p>STCs should ensure that the necessary systems and procedures are in place to support the transition process. Building on the work of the VTCs, and having regard for advice from the SLB and the PDPs, STCs should ensure that the necessary systems and procedures are in place to support the transition process. The STCs should also ensure that resources are secured to ensure that the systems and procedures necessary to support the work of the new Council are in place.</p> <p>STCs should develop an Information Systems Strategy which will identify the systems required. For example, a financial system, network and specific programmes necessary to support work across the Council, personnel systems. STCs should also develop a Customer Service Strategy for the new Council for its first year of operation. Further advice will issue from PDP B on developing the necessary strategies.</p>
Develop recommendations on governance arrangements for the new Council where appropriate	STCs should where possible develop recommendations on the governance arrangements for the new Council. This should include a committee structure and the development of a list of possible positions which will be appointed to by one of a number of prescribed methods of proportionality. The new Council will at its first meeting consider the governance arrangements

	recommended by the STC.
Complete work associated with transfer schemes, for example, audit of the number of staff employed, roles grades Develop a Staff Transfer Scheme for any staff transferring from the STC to the new Council, for example, Chief Executive Designate and Designate Directors	Existing Councils should now begin the work that is required to develop Council Staff Transfer Schemes and compliance with TUPE. This work should include a complete audit of the number of staff employed, roles, grades and conditions of employment. STCs should build on the work of the VTCs and design a staff structure for the first year of the new Council. STCs should develop a Staff Transfer Scheme for any staff transferring from the STC to the new Council, for example, Chief Executive Designate and Designate Directors.
Develop an Estates Strategy	STCs should develop an Estates' Strategy building on the scoping work completed by the VTCs. This strategy should identify the estates transferring from existing Councils and relevant government Departments and should address the accommodation needs of the new Council in its first year of operation.
Make arrangements for smooth transfer of assets and liabilities	STCs should put in place the necessary arrangements to ensure the smooth transfer of assets and liabilities from existing Councils and relevant government Departments to the new Council in May 2011.

	New Council
Corporate vision	Develop a Corporate vision.
Governance arrangements	Agree local governance arrangements.
Standing orders	Agree standing orders.
Review strategic documents prepared by the STC	Review the budget, service delivery plan, corporate priorities and improvement plan prepared by the STCs.



Key Tasks and Milestones

Date	Task detail
Ongoing to April 11 (interim progress reports)	Capacity Building Programme – for members and officers in liaison with local government providers.
Ongoing to May 11	Service delivery – continuity of quality services during the transition.
Aug 09	Communication - strategy and action plan.
Aug 09 to May 11	Establish winding-up arrangements – Winding-Up Plan and process agreed; implementation commenced.
Sept 09	Short Term Implementation Plan - agreed short term vision, associated aims and objectives.
March 10	Chief Executive recruitment – appointment.
May 10	Assets and Liabilities - detailed inventory of assets and list of liabilities; associated legal and administrative issues.
May 10	HR and Finance Officers recruitment – appointments.
May 10	Administrative support – appointments.
June 10	Assess staffing needs - staff structure established.
June 10	Staff transfer arrangements, as per approved LGSC scheme, Civil Service transfer scheme and PSC Guiding Principles: <ul style="list-style-type: none"> • staff transfer plan • severance scheme • staff mapping • system of filling of posts in new structure – selection pools, matching of posts • staff location

Date	Task
June 10 (interim progress reports)	Convergence of strategies, plans, programmes and projects – integrating new functions. A Strategic Framework Plan of key priorities – policies and projects, incorporating performance management: the Plan will cover the first year of the new Council.
Jun 10	Preparation of financial arrangements – detailed financial management and accounting regime
July 10	Bank – appointment made.
July 10	Insurance / Brokers – appointments made.
Sept 10	Finance systems – corporate financial management systems.
Oct 10	ICT - Cohesive IT strategy and implementation plan.
Nov 10	Administration - Implementation Plan with identified improvements and efficiencies.
Nov 10	Service Delivery – Production of a new Service Delivery Plan and associated Performance Plan – integrating transferred services and new functions.
Nov 10	Customer Service – A customer service strategy for the new Council.
Dec 10	Estates and Accommodation – Estates Strategy including detailed inventory of property and costs.
Jan 11	Preparation of Budget – agreed budget.
Feb 11	Preparation of Budget – short term budget plan – one to two years.
Feb 11	Preparation of budget – establish rate.
Feb 11	Estates and Accommodation – completion of transfer plan for

	implementation.
Feb 11	Assets and liabilities – completion of transfer plan for implementation.
May 11	Complete staff handover – all staff transfer arrangements completed – such as appointments, post allocations, location.
Nov 11	Establish winding-up arrangements – residual activity to final completion.

