

# Tailored Review of Wilton Park



Foreign &  
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# Executive summary

1. Wilton Park acts as HMG's independent convener of neutral and discreet dialogue on the UK's strategic foreign policy priorities (and those of its friends and allies). It has built up a world class reputation and trusted brand with international partners over the past 70 years. Stakeholders universally acknowledged that the agency makes a valuable contribution to important issues in foreign and public policy. In the current geo-political climate, it remains as relevant now as it did when it first formed. The agency is a small but important soft power asset for HMG and a vehicle through which the Government is able to deliver its Global Britain agenda.
2. The review team found that the agency's work is closely aligned to the UK's foreign policy priorities and that Wilton Park is performing strongly across its strategy which in turn is well targeted to deliver on its mandate. Wilton Park could further enhance its effectiveness by broadening its engagement with a range of partners across different sectors and ensuring it remains responsive to evolving policy priorities and emerging threats and challenges.
3. Executive Agency (EA) status ensures Wilton Park "is a part of the FCO but is apart from it"<sup>1</sup>. Its connection to the FCO gives it credibility with international partners whilst the "arm's-length" model enables it to facilitate discreet conferences known and respected for their neutrality. Having carefully considered other public body models, the review team conclude that EA status remains the most appropriate classification for Wilton Park.
4. Wiston House has been Wilton Park's home since 1951. It is a critical component of Wilton Park's product and brand and represents good value for money. The review team recommends that the FCO retains Wiston House under the current leasing arrangement. But there are opportunities too for the agency to expand its product range by delivering a greater number of events outside Wiston House, including overseas.
5. As an income generating body, Wilton Park needs to earn around three quarters (around £4m) of its income target each year. The FCO sponsor department (SPEAD) currently provides approximately a quarter of Wilton Park's total income through core funding, which includes ODA. This helps the agency plan its events more evenly throughout the year. The current funding model, including the need for the agency to meet its income target within +/-1%, places some constraints on the agency. The review team conclude that Wilton Park and the FCO should be able to manage this with a higher level of risk tolerance e.g. by raising the surplus ceiling on the annual income target.
6. The composition of Wilton Park's funding base has remained reasonably static in recent years. There is scope for the agency to broaden its funding base and Wilton Park has incorporated this into its new business plan. The commercial arm of the operation works well in securing income to supplement that generated through Wilton Park events. There is potential to expand its commercial business (e.g. through higher income corporate events) but this needs to be carefully balanced against the agency's primary purpose of delivering Wilton Park events.
7. The review team is confident that Wilton Park has embedded efficiency into its behaviours and has made good progress across a range of efficiency targets since the 2015 Stokes' review. However, Wilton Park must continue to look for efficiencies and deliver good value for money for the British taxpayer. Greater asset utilisation of Wiston House and the opportunities afforded by digital transformation offer scope for further efficiencies.
8. There is a strong consensus among stakeholders that there is merit in having a Wilton Park US Hub. But the current model is not fit for purpose. There is a need to

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<sup>1</sup> "Structurally, Executive Agencies are clearly designated units of a central government department, administratively distinct, but remaining legally part of it". Executive Agencies: A Guide for Departments (March, 2018)

review the current arrangements to ensure that the Hub is more strategically aligned to Wilton Park's work and has clear governance and reporting structures in place.

9. Despite its "world leading" reputation amongst its alumni, Wilton Park continues to have an inconsistent profile in the FCO and even more so across Whitehall. The agency needs to initiate a step change in its engagement with the FCO and wider HMG partners. The FCO can also make greater use of the services Wilton Park provides and ensure they are more systematically engaged in supporting Posts and Directorates deliver on the FCO's priorities and strategic campaigns.
10. Wilton Park is well run in terms of its financial management and corporate governance arrangements. Stakeholder feedback reflected that the Board was effective in discharging its function. While the work of Wilton Park's Advisory Council was generally well regarded, the review highlighted some areas for improvement and we have recommended that the agency carry out a review to take this forward.
11. The FCO's Communication Directorate, as the Sponsor Department, provides appropriate support, oversight and scrutiny of Wilton Park's work. Despite some concerns about the level of senior FCO engagement in the agency's work, we found there was a constructive and mutually supportive dynamic between the sponsor team and Wilton Park, which is underpinned by regular and ongoing dialogue.
12. Under a new Chief Executive and a new incoming Chair of the Wilton Park Board, the agency is well positioned to start the next chapter in its rich and fascinating history.

# Recommendations

## Part 1: For Wilton Park

### *Function and Effectiveness*

1. We recommend that Wilton Park retain its status as an Executive Agency of the Foreign and Commonwealth Office. (paragraphs 2.14—2.21)
2. We recommend that, under current lease arrangements, the FCO retains Wiston House as Wilton Park's home. (paragraph 5.36)
3. Wilton Park and the USA Foundation should determine the shape, remit and strategic alignment of the US Hub by end financial year 2018/19. In doing so, we recommend they formalise their existing agreement by establishing a contract with clear governance and reporting structures. (paragraphs 3.26—3.35)
4. Wilton Park should improve its HR expertise by end financial year 2019/20 to ensure full compliance with Civil Service HR policies and government financial controls. (paragraphs 5.20—5.21)
5. Wilton Park should include an additional module on Unconscious Bias as part of their mandatory training schedule, in line with the FCO, and ensure that all staff complete this additional module by end financial year 2018/19. (paragraph 7.7)

### *Governance*

6. Wilton Park should undertake and complete a review of the Advisory Council by end September 2019 to ensure its role and size best meet its needs and that its membership has the right mix of skills and expertise to discharge its function. (paragraphs 6.6—6.9)
7. The incoming Chair of the Wilton Park Board should undertake and complete a Board Effectiveness Review within twelve months of assuming post. (paragraphs 6.3—6.5)

### *Efficiency*

8. Wilton Park should undertake an assessment by end March 2019 of how digital technology could be used more effectively in the agency's business processes. For example, by engaging the FCO's Digital Transformation Unit. (paragraph 5.24)

## Part 2: For the Foreign and Commonwealth Office

### *Function and Effectiveness*

1. Human Resources Directorate (HRD) should consider holding regular (e.g. quarterly) meetings with Wilton Park to ensure they are aware of and apply Civil Service-wide human resource policy and practice and that an initial discussion between HRD and Wilton Park takes place by end October 2018. (paragraphs 5.20—5.21)
2. Communication Directorate and Estates and Security Directorate should, in consultation with Wilton Park, form an agreed view by end January 2021 on whether or not to invoke the break clause on the Wiston House lease in March 2022. (paragraph 5.36)

### *Governance*

3. Communication Directorate should produce an annex to the Framework Document by end financial year 2018/19 which sets out in more detail the process to be followed where FCO approval is required for appointments and term extensions for members of the Wilton Park Advisory Council. (paragraph 6.8)

### *Finance*

4. We recommend that, all things being equal with FCO budget allocations and priorities, the FCO retain its current level of core contributions to Wilton Park over the next 3 year spending round. (paragraphs 4.2—4.6)
5. We recommend, if resources permit, that Finance Directorate support Wilton Park's revised business case for a rolling maintenance

programme for Wiston House, within this financial year (2018/19). (paragraphs 4.2—4.6)

## **Part 3: For Wilton Park and the FCO**

### ***Effectiveness***

1. We recommend that Wilton Park and Communication Directorate undertake a joint assessment of what progress has been made since the Stokes Review in getting Wilton Park into the “bloodstream” of the FCO. Wilton Park and Communication Directorate should prepare a paper for the Wilton Park Board by end financial year 2018/19 which sets out what specific actions both can take to make further progress in this area. (paragraph 3.14)

### ***Governance***

2. Wilton Park and Communication Directorate should undertake a review of the Framework Document by the end of financial year 2018/19 to ensure that the content and requirements set out in it are sufficiently clear, accurate and that, where appropriate, due process is being followed. We would particularly highlight the need for greater clarity on Pay and Conditions of Service. (paragraph 6.13)

### ***Finance***

3. We recommend that Wilton Park consistently apply its policy of establishing a contract with all financial partners of Wilton Park events, including with UK Government Departments and that Communication Directorate, in consultation with Commercial Directorate in the FCO, remind Directorates on an annual basis of their contractual and financial obligations when using Wilton Park’s services. (paragraph 4.11—4.12)



# Chapter 1: Introduction and Background

## Aims of the Review

**1.1** Good government requires public bodies that are efficient, effective and accountable. The Government's approach to public bodies' reform for 2015 to 2020 builds on the successes of the 2010 to 2015 Public Bodies Reform Programme. This new approach is based on a two-tier approach to transformation: a programme of cross-departmental, functional reviews coordinated by the Cabinet Office, coupled with ongoing, robust 'tailored reviews' led by departments with Cabinet Office oversight and challenge. For the first time, these reviews will now include executive agencies and non-ministerial departments, which is why Wilton Park is now being reviewed given its status as an Executive Agency of the Foreign and Commonwealth Office. The aim of all such Reviews is to provide a robust challenge to and assurance on the continuing need for the organisation in question—both in function and form.

This Review assesses in particular:

- > Wilton Park's capacity for delivering more effectively and efficiently, including identifying the potential for further efficiency savings. The Review will include an assessment of the performance of Wilton Park, or assurance that processes are in place for making such assessments; and
- > The control and governance arrangements in place to ensure Wilton Park and the FCO are complying with recognised principles of good corporate governance.

**1.2** Wilton Park has been prioritised by the Cabinet Office as a Tier 3 organisation for this Review, which reflects the relatively small size of the agency. Wilton Park employs 87 permanent staff (76.9 FTE). Its overall income is approximately £5.9 million per annum. The FCO provides annual core funding (administration and capital) which totalled £500k and £250k respectively for the 2017-18 financial year. Wilton Park also received £1.4 million of additional Official Development Assistance (ODA) programme money in 2017-18.

The majority of Wilton Park's remaining income is earned from FCO directorates, other government departments, foreign ministries, NGOs and the private sector. Further details about the financing of the agency can be found in Chapter Four.

**1.3** The Tailored Review was carried out in accordance with Cabinet Office guidelines stipulated in 'Tailored Reviews: guidance on reviews of public bodies'<sup>2</sup>

The Terms of Reference for this Review can be found at Annex A.

## Process

**1.4** The review team consisted of two full time FCO members of staff from outside the Sponsor Team for approximately four months with an additional two part time members of staff (again from outside the Sponsor Team), joining for approximately two and a half months. An FCO senior member of staff acted as the Senior Responsible Officer for the review to oversee and provide guidance to the review team. The review team consulted him throughout the process and maintained regular contact with the Cabinet Office Public Bodies Reform Team and other key stakeholders. In line with best practice, the review team formed a Critical Friends Group who periodically reviewed and challenged the content and process of the review to ensure its robustness. The Critical Friends Group consisted of four senior members of FCO staff outside the Sponsor Team.

## Methodology

**1.5** An internal review of Wilton Park was carried out in 2015 by Antony Stokes, a senior manager in the FCO. This became known as the Stokes Review. The review team have taken the findings of that review as a starting point for this Tailored Review. Though the team's enquiries have naturally looked at Wilton Park's work prior to the Stokes Review to gain a historical perspective on how the agency and its business model has evolved over time.

**1.6** The methodology included:

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<sup>2</sup> Tailored Reviews : Guidance on Reviews of Public Bodies (March, 2016)

- > Conducting desk research of key documents (e.g. Wilton Park's Strategy, Business Plan and Annual Reports);
- > In consultation with Wilton Park, the review team identified relevant stakeholders and key partners from six events across a representative cross-section of Wilton Park's work. Over 80 individuals were interviewed with a further 69 people responding to an online stakeholder survey. In addition, the review team looked across the breadth of events which Wilton Park organised since Financial Year 2015/16. This provided a rich evidence base to inform the review;
- > Conducting site visits to Wilton Park to speak to staff members to gain an in-depth understanding of how the Executive Agency operates;
- > Two members of the review team each observed an event hosted at Wilton Park;
- > Liaising with relevant policy and corporate service departments in the FCO who work closely with Wilton Park to help the review team with specific enquiries about the agency's work e.g. on financial and governance issues;
- > The review team gave Wilton Park the opportunity to periodically comment on the review's emerging conclusions and recommendations.

All the conclusions and recommendations in this review are based on an assessment of this evidence base.

## About Wilton Park

**1.7** Wilton Park is an Executive Agency (EA) of the FCO. It has been an EA since 1991. Its origins date back to the Second World War when the original Wilton Park estate (in Buckinghamshire) was used as a Prisoner of War camp and re-education centre. In the immediate aftermath of war, discussions and courses started to take place at Wilton Park with leading British figures and prominent Germans focusing on how to restore democracy in post-war Germany. Wilton Park moved to its current home at Wiston House in West Sussex in 1950.

**1.8** Wilton Park acts as HMG's independent convener of neutral and discreet dialogue on the UK's strategic foreign policy priorities (and those of its friends and allies). It shapes and convenes events linking a global network of experts from a range of sectors, including academia, the military, civil society, business, politicians and diplomats. As a front-line resource for the FCO and wider Government, Wilton Park's purpose is to support HMG's strategic priorities, with particular reference to the FCO's Single Departmental Plan (2015-2020). Wilton Park is also a resource for a wide range of international partners and actors keen to explore issues of international importance.



**1.9** The majority of Wilton Park's events take place at Wiston House. When the property is not being used for Wilton Park events, it is also used to generate commercial income from private hire (e.g. for weddings or corporate functions) to offset their costs.

**1.10** Wilton Park has 87 permanent staff (76.9 FTE) who are broadly divided into four teams covering Policy (who design the conference programmes and establish stakeholder relationships), Operations (who act as a hospitality team and run events e.g. duty managers, kitchen and dining staff, reception etc.), Delivery (who administer and deliver the events) and Corporate Services (who are responsible for the administration of Wilton Park including finance and human resources and the running of the property). An organogram of Wilton Park can be found at Annex F.

## **Acknowledgements**

**1.11** The review team would like to thank all those who took time to contribute to the Review. Throughout the process, the team worked closely with Wilton Park, FCO Communication Directorate and the Critical Friends Group and was grateful for their full and active engagement.

# Chapter Two: A role for Wilton Park in the 21<sup>st</sup> century

This section examines whether there is a continuing need for Wilton Park in the 21<sup>st</sup> Century. It explores its remit and function; its status as an Executive Agency; its value as a soft power tool and the possible implications on the agency of the UK exiting the EU.

## Wilton Park remit

**2.1** Wilton Park organises its work under the following six themes:

- > Conflict prevention, resolution and state building
- > Defence and security
- > Global economy
- > Human rights, health, good governance and faith
- > Multilateral institutions, key countries and regions
- > Sustainable development and the environment

As well as these themes, Wilton Park's portfolio of events continues to evolve and is responsive to emerging HMG priorities.

**2.2** Events are designed and delivered by Wilton Park's Policy team in consultation with partners (predominantly FCO/HMG). The Wilton Park Advisory Council (WPAC) also provides input, guidance and advice. Detail on this body is covered in Chapter 6. Events are often developed from themes or ideas emerging from previous Wilton Park events or suggestions through participant feedback. Many dialogues are part of a series, which not only enables follow up or expansion on a particular topic but also allows policy positions to develop over time. Chapter 3 assesses how aligned Wilton Park's work is to the FCO and broader HMG priorities.

## Product Delivery

**2.3** On average, approximately 50 participants attend each event and the agency hosts around 60 Wilton Park events per year, though this is

expected to rise to nearer 70 this financial year (2018/19) under their Strategic Plan (2016/17 to 2019/20). In addition to these, Wilton Park has also convened a number of events overseas and in the UK in the past year (13 and 1 respectively in 2017/18). Chapter 3 explores Wilton Park's product model in greater depth, including the opportunity to expand the suite of products it offers.

**2.4** Events at Wiston House are residential, usually lasting two and a half days, but occasionally up to five days. Each event is led and moderated by a Programme Director (PD) and can include, for example, an introduction by the Chief Executive, a formal dinner or an address by a keynote speaker—which can range from a leading expert in the field to a government Minister.

**2.5** Conferences are typically divided into plenary sessions each lasting up to 90 minutes. There are break-out sessions where delegates split into smaller groups for focussed discussion, with the conclusions being fed back to all delegates in plenary. Additionally, participants share all their meals together in the dining room, giving them opportunities to mix outside of the plenary sessions and continue discussions and develop ideas.

**2.6** Through our own site visits and participant feedback we found that facilitation is of a very high standard. Each session is described in the programme (sent out a week or two before the event) with questions posed to encourage participants to start thinking about the topics in advance. During conferences, the PDs are excellent moderators, ensuring all participants have an opportunity to contribute, whilst keeping them to time and skilfully summarising each session and pressing participants to think about next steps and what impact they want to have.

*In our stakeholder survey 94.2% of respondents said they were very/mostly satisfied with the facilitation methods used to deliver the event they attended.*

**2.7** Wilton Park’s Discussion Protocol is a key element to the success of conferences. This ensures conversations are frank, honest and non-attributable, enabling participants to understand each other’s views and perspectives, which in turn have the potential to unblock and move issues on.

**2.8** Feedback from Wilton Park and stakeholders suggests the current length and format is probably optimum, as it enables participants to benefit from being together in a peaceful residential setting, free from distraction for a productive amount of time while not being so long that it prohibits individuals (particularly more senior ones) from leaving busy day jobs.

## The Venue

**2.9** Most events are held at Wiston House, a 16th Century, Grade 1 listed building in West Sussex. It is leased to the FCO by the Goring Family who own and manage the large estate in which the house and gardens sit. Details on the lease arrangements and estate management are covered in Chapter 5.

**2.10** Wiston House is synonymous with Wilton Park. As one senior stakeholder commented, “they are indivisible”. Wiston House gives Wilton Park events their unique selling point. The house and grounds are quintessentially British, epitomising the Wilton Park brand. The house is architecturally and historically fascinating and lends a gravitas to events, whilst managing to be cosy and welcoming. The accommodation is comfortable and reasonably well maintained, if “a little tired”<sup>3</sup>. Beneath the surface there are a number of pressing maintenance and renovation works for which the agency is not adequately resourced to undertake. These issues are explored further in Chapter 5.

**2.11** The secluded location leaves participants with few distractions and enables them to focus on their event, which one participant described as “extremely rare” in today’s fast-paced world. Most participants said that if held in London (or another large city), they would be tempted/under pressure to dip in and out of the event and schedule other meetings. We were interested to note just how little participants used their electronic devices particularly during plenary

sessions, giving their full attention to discussions. This was also remarked on by other participants.

**2.12** During a Wilton Park dialogue, Wiston House is made available for the exclusive use of participants. This is a strong pull factor. There is 24/7 security in place and all permanent and most casual staff have security clearance (levels are determined by job role). Few central London locations would be able to offer this level of exclusivity and fewer still would be able to provide adequate security clearance for their staff. Given the nature of some of the discussions that take place at Wilton Park, the integrity of the environment is critical.

**2.13** Participants invest a lot of time in attending a Wilton Park event—typically a minimum of three full days (including travel time), though Wilton Park does host shorter events. Once at Wiston House, participants report that it is an intense and immersive experience. The event format, comfortable country house setting, strong customer service and warm welcome provided by the staff ensure participants have the space and time to listen to and focus on the topic in hand. Wilton Park dialogues are conducive to forging and strengthening contacts and networks in which to explore new perspectives and ideas.

*When asked to consider whether Wiston House was a good venue and location for Wilton Park, 92.7% of respondents said that it was excellent/good.*

## Executive Agency Status

**2.14** Wilton Park currently operates as an Executive Agency (EA). The review team considered whether the following operating models might better suit the organisation.

- > Non-Departmental Public Body (NDPB)
- > Trading Fund
- > Charitable status

**2.15** According to government guidance on Public Bodies<sup>4</sup>

<sup>3</sup> Some feedback noted that the bedroom furniture was in need of replacing and the conference room tables and chairs were quite dated.

<sup>4</sup> Classification of Public Bodies: Guidance for Departments (April, 2016)



*“Executive Agencies are clearly designated (and financially viable) business units within departments which are responsible for undertaking the executive functions of that department, as distinct from giving policy advice. They have a clear focus on delivering specified outputs within a framework of accountability to Ministers. While they are managerially separate, they are independently accountable within their home department, which also reports to Parliament on their agency-specific targets. Due to this close working relationship, executive agencies are part of their department, and do not have the same level of legal separation from their home departments that other categories of public bodies often possess.”*

**2.16** Executive agency status ensures Wilton Park “is a part of the FCO but is apart from it”. It supports HMG in tackling global challenges affecting the UK’s security and prosperity. Its connection to FCO gives it credibility with international partners enabling it to secure high level participation from a global network of policy experts. The “arm’s-length” model enables Wilton Park to facilitate discreet conferences known and respected for their neutrality. The FCO benefits from this arrangement as it has oversight and the authority to determine Wilton Park’s area of focus. In turn, Wilton Park has the autonomy to deliver dialogues in the way it sees fit, using the expertise of the PDs. However, it is able to use its close ties with the FCO to leverage engagement with a wide range of expert partners around the world. Executive Agencies must be run by security cleared civil servants. This requirement means that Wilton Park is a trusted organisation amongst partners, particularly foreign governments.

**2.17** However, the funding model for EAs constrains the agency’s operating model. The FCO requires Wilton Park to generate income within +/- 1% of its annual income target. If its annual surplus exceeds 1% it is unable to carry that over into the following financial year to fund new events or contribute to the maintenance of the estate. Chapter 4 sets out the funding model in further detail and explores ways the agency can operate more effectively within these constraints.

**2.18** Non-Departmental Public Body status offers a similar operating model to EA status however, where the latter “acts as an arm of its

home department”, a Non Departmental Public Body “operates separately from its sponsoring department” and is a legally separate entity. Our consultation with stakeholders, particularly with Wilton Park, reflected that the agency’s positioning as formally part of the FCO was of real value. As noted above, it enhanced its reputational brand and aided the agency’s ability to attract high calibre individuals and organisation to their events. If the agency were to be entirely separate from the FCO there is a risk that these benefits could be lost or least diminish. As an NDPB, Wilton Park would be required to take on a number of administrative functions (e.g. finance and HR) which are currently undertaken by the FCO on its behalf. The transitional and ongoing operational costs would be significant and we judge disproportionate for an organisation of Wilton Park’s size. The review team therefore agrees with Stokes’ assessment that a change to NDPB status would not bring any discernible benefits to either Wilton Park or the FCO.

**2.19** Trading Fund status also offers a similar model to that of an EA and NDPB but it allows the organisation to meet its outgoing expenditure from receipts with no detailed advance approval required by Parliament of its gross income and expenditure. Whilst this could make financial management easier than current arrangements (see Chapter 4), Wilton Park would no longer be entitled to any core funding from the FCO automatically, which would present significant challenges in the short term. In the medium to long term Wilton Park would likely depend on commercial events as its main source of income which could result in fewer Wilton Park dialogues. In addition, as with NDPB’s, ties between the FCO and Wilton Park would likely lessen to the detriment of both. Those factors aside, Government guidance on Public Bodies updated in 2016, states that no new arm’s-length body trading funds should be created and those which already exist should be reviewed.

**2.20** We considered whether charity status would be a good fit for Wilton Park. In order to qualify as a charity—an organisation must meet the following two criteria:

- > the purposes of the organisation must be *exclusively charitable*. There cannot be a mix of charitable and non-charitable purposes; and

- > the organisation must be set up for public benefits (rather than for individual or small select group of people).

Charity status would allow Wilton Park to manage its budgets outside of the annualised government systems and give it the financial flexibility that it seeks. But in order to meet the criteria for charitable status Wilton Park would have to transform its objectives and finance model. It would also separate completely from the FCO legally, bringing the same disadvantages outlined as for NDPB and trading fund status. The review team therefore discounted it as a viable option.

**2.21** In carefully considering these alternate models, we conclude that changing the status of Wilton Park from Executive Agency would bring limited benefits, except in relation to its financing model. The review team did not think it would be beneficial to remove Wilton Park entirely from the public body arena where its scope and mandate would no longer be aligned to the FCO and HMG priorities and it would be a loss to HMG's soft power assets. For these reasons, we judge that EA status remains the right model for Wilton Park.

## Wilton Park and the UK's exit from the EU

**2.22** Under the Terms of Reference, the review team were asked to assess any potential impact of the UK exiting the EU on Wilton Park's model. We raised this in our interviews with stakeholders. From that, three clear points emerged:

1. **Demand:** It was likely that there would be greater demand for European-focussed events. The political sensitivities around the negotiation may mean that this may not clearly present itself until the process had concluded. Although the evidence suggests this may already be happening with the agency hosting almost twice as many events with a specific focus on Europe in 2017/18 than it did the previous year (with an increase from 5 to 9).
2. **Model:** There was also a strong feeling that Wilton Park's model naturally lent itself to these types of discussions, where it provided a neutral policy platform for people to come together to address challenges and find solutions;

3. **Soft Power:** The third issue relates to the final section of this chapter which is about soft power. Many stakeholders thought there was a very real perception among the UK's international partners and close allies that the UK was withdrawing from its traditional global role and commitment to multilateralism. Wilton Park was seen as a key asset in countering that perception—by keeping its doors open and for the UK to be convening international events and providing thought leadership on the topics that matter most.

**2.23** One of Wilton Park's prime objectives in its Strategic Plan is to "reinforce the unique role of Britain in the World". As part of that, it says that it will "focus on the creation of new and enhanced bilateral relationships that are significant to the UK as it leaves the European Union". In our view, the UK's exit from the EU is unlikely to impact on Wilton Park's model. A more likely impact is that wherever the EU Exit negotiations end up, the complex nexus of issues which are and will continue to emerge from those discussions are likely to feature more significantly on Wilton Park's programmes over the short term than they have done in recent years.

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*"A country's soft power depends on both the attractiveness of its assets and its success in using those assets for influence."*  
**Professor Joseph Nye, Pioneer of Soft Power Theory**

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## Wilton Park as a soft power asset

**2.24** Having built up a world class reputation and trusted brand with international partners over the past 70 years, Wilton Park is a small but important soft power asset for HMG and a vehicle through which the Government is able to deliver its Global Britain agenda. As part of its soft power strength, it has a role to play in supporting delivery of the UK's national security objectives. In March this year, the Prime Minister set out in a review of national security<sup>5</sup> a new doctrine, the Fusion Doctrine, which aims to improve the UK's collective approach to tackle national security challenges. Soft power levers are an integral part

<sup>5</sup> National Security Capability Review (March, 2018)

of that doctrine and Wilton Park's longstanding work on defence and security issues demonstrates how it contributes to this key HMG priority.

together to carve out a new Europe, looking for peace, prosperity and security, which continue to be at the heart of foreign policy.

**2.25** Wilton Park embodies the dual function of soft power. Its model creates an **enabling environment**, which helps build understanding and trust among partners and countries. It is also part of HMG's **toolkit** by providing a platform on which the UK can pursue a broad range of policy specific objectives, from modern slavery to health security. We note that in the NSCR 2018, the Government announced its intention to create a cross-government soft power strategy. Given its strength in convening and enabling, we judge that Wilton Park would be able to make a proportionate but valuable contribution to any such strategy.

**2.26** It is difficult to measure the soft power impact of Wilton Park but participants were clear that the dialogues leave a lasting, strong and extremely favourable impression. Of those interviewed by the review team, all said that:

- > the events they attended were relevant to the current global / sectoral challenges of the day;
- > they would consider attending future events; and
- > they would recommend Wilton Park as a convener of these types of events to colleagues and contacts.

Chapter 3 explores in greater detail Wilton Park's effectiveness, but as one foreign government participant said:

*"Funding for officials to attend overseas conferences had been slashed in recent years. However, one of the exceptions is attendance at Wilton Park conferences, they are too valuable in terms of content and networking opportunities to miss."*

**2.27** We conclude that Wilton Park represents good value for money to the British taxpayer and remains as vital and relevant in the current geo-political climate as it did when it emerged after the second world war, as people came

# Chapter 3: Performance and Effectiveness

This section examines Wilton Park’s effectiveness—how aligned its priorities are to HMG’s strategic foreign policy priorities, the effectiveness of its current strategy and how the impact of Wilton Park’s work is measured and evaluated.

## Strategic fit with HMG Priorities

**3.1** Wilton Park’s aims, priorities and objectives are set out across a number of key documents (e.g. in the overarching Framework Document and Strategic Plan). They are primarily focused on the FCO’s strategic foreign policy priorities although their mandate also includes the foreign policy priorities of the UK’s “friends and allies”, as well as broader HMG policy priorities. In theory, this leaves the agency with a potentially very broad spectrum of topics on which it might be expected to convene. There is a risk here that Wilton Park spreads itself too thinly across this broad policy landscape. This has the potential to limit its strategic impact.

**3.2** However, from our analysis of over a hundred events which Wilton Park has undertaken since 2015, our assessment is that the agency’s work remains closely aligned to the UK’s foreign policy priorities, with the highest proportion of events focussing on defence and security and human rights and good governance (53 in total). Even where the FCO was not the formal sponsor or partner for an event, the topic itself was invariably a priority area for the FCO e.g. on conflict or Euro-Atlantic security. While the number of events against each of the FCO’s priorities was naturally uneven, it is worth noting that the number of events around global trade and economic diplomacy was significantly less. Given the importance the Government attaches to this area of work and the scale of work

currently being undertaken across-Whitehall in this space, Wilton Park may want to explore how they could add further value in this policy area.

**3.3** To help achieve this level of alignment, Wilton Park has a number of strategic, structural and process mechanisms in place which guide their work and decision-making process. For example, the agency produces a one page document (at annex E) which sets out how Wilton Park’s objectives map on to the FCO’s. This is then integrated into the decision-making process by Wilton Park’s Resource Allocation Group<sup>6</sup>, who determine which events they will undertake. As part of that process, they consider its strategic fit with FCO and HMG priorities. From a structural perspective, Wilton Park’s has recently restructured its programmatic work into two broad pillars: Defence and Security and Peace and Prosperity. Underneath that, are the six broad policy areas set out in paragraph 2.1.

**3.4** Foreign policy covers a broad and complex landscape. This breadth rightly enables Wilton Park to convene on a wide range of topics across a number of key priorities for HMG. This is one of Wilton Park’s key strengths. As the agency develops an ever more strategic approach to its work that does not mean it should narrow the policy sphere in which it operates. To maintain its relevance, it needs to retain an agility to respond not only to pressing priorities of the day but to initiate early dialogue on new and emerging threats and challenges. Busy policy teams across Whitehall invariably have limited capacity for this kind of horizon scanning. Here Wilton Park can add value by identifying and convening on these issues and help stimulate and bridge policy discussion within and between governments.

Peace and Prosperity			Defence and Security		
Global economy	Human rights, health, good governance and faith	Conflict prevention, resolution and state building	Sustainable development and the environment	Multilateral institutions, key countries and regions	Defence and Security

<sup>6</sup> The Resource Allocation Group is made up of Wilton Park’s Senior Management Team and the Head of Delivery, who consider which events the agency will undertake.

For example, Wilton Park's business plan has identified a number of areas it wishes to focus on in 2018/19, including on Artificial Intelligence (AI), the use of block chain technology, ageing and bio-surveillance. A number of key stakeholders within and outside government also identified these as emerging challenges and on which Wilton Park could play a helpful convening role.

## Wilton Park's Strategy

**3.5** Wilton Park has a Strategic Plan in place, which has been endorsed by its Board. It runs from 2016/17 to 2019/20. The plan sets out the agency's key objectives, performance targets, sources of funding, a high level implementation strategy as well as a recently adopted set of organisational values (see Chapter 7). At the time of this review, the agency was embarking on the third year of this four year plan. Since the plan was initially adopted, the agency has appointed a new Chief Executive, Sharmila Nebhrajani, and is also recruiting a new chair for its Board, which should be complete by September 2018. The challenges of a change in personnel on governance and leadership are rightly reflected in the plan and are covered in more detail in Chapter 6.

**3.6** Our overall assessment is that Wilton Park is performing strongly across its strategy and that the strategy is well targeted to deliver on its mandate. Our engagement with stakeholders underlined Wilton Park's particular strength in four of its core objectives:

1. Reinforcing the unique role of Britain in the World
2. Convening Power
3. Active neutrality
4. Excellence in facilitation

**3.7** On the fourth area, we judge there has been improvement since the Stokes Review. In 2015, Stokes found that Wilton Park was overly reliant on "flipcharts and post it notes". Since then Wilton Park has started to explore different technologies such as use of e-voting and remote access. It has improved the way in which it broadcasts its events through technology platforms e.g. on social media where it is active on Twitter, Facebook and its website. It also produces high quality podcast material from

the events it hosts, which provide an excellent way to amplify key messages coming out of them.

**3.8** As reflected in the Stokes Review, we too found there were some mixed views around the use of technology. Some respondents felt that more could be made of technology to support plenary and working group discussion e.g. more interactive visual presentations. However, Wilton Park's delivery model is essentially about convening a conversation around an issue. The approach is consciously about stripping back the event to a conversation and an exchange between people which positively encourages people to both talk and listen. There is an implicit sense in that model that the unnecessary use of technological aids and tools can hinder that process. To some, that may appear a rather old-fashioned approach. However, the stakeholders that were consulted as part of this review almost unanimously agreed that this was one of Wilton Park's unique facets. One commented that there was no great need for gadgets or "tech" to aid conversations. The "traditional" approach enables participants to quickly get to the core issues in a topic and, more critically, start exploring solutions and next steps. Wilton Park's facilitators were well regarded in this respect for the vital role they play in shepherding that conversation.

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*"...we just need to make the journey from hearing to listening, to seeing the other point of view, to analysing that and concluding that we were right all along, or we need to change our views and actions."*  
*Feedback from event participant*

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**3.9** From the events which the review team observed, there was limited use of technology, with PowerPoint presentations being actively discouraged. We did not think that approach in anyway undermined the value of the events. Whilst we would encourage Wilton Park to continue to explore how innovative and novel facilitation tools can support event delivery, including virtual participation as a means of broadening Wilton Park's reach; we judge that Wilton Park should retain its emphasis on the conversation.



*“The best element of the act of listening is learning something you don’t already know”. Mary Anne Hobbs, Broadcaster and Journalist*

**3.10** In other areas of the agency’s strategic objectives, the review team felt that further progress could be made on rapid response to changing FCO priorities and asset utilisation. On the former, while there were some good examples of the FCO’s use of Wilton Park as an internal resource (e.g. roundtable pre-posting events for Ambassadors and Directors), we feel there is more that could be done in this space. For example, it was not clear what the “simple standard toolkit of services” (Wilton Park Strategic Plan 2016/17—2019/20, paragraph 2.5) was or how it could be used.

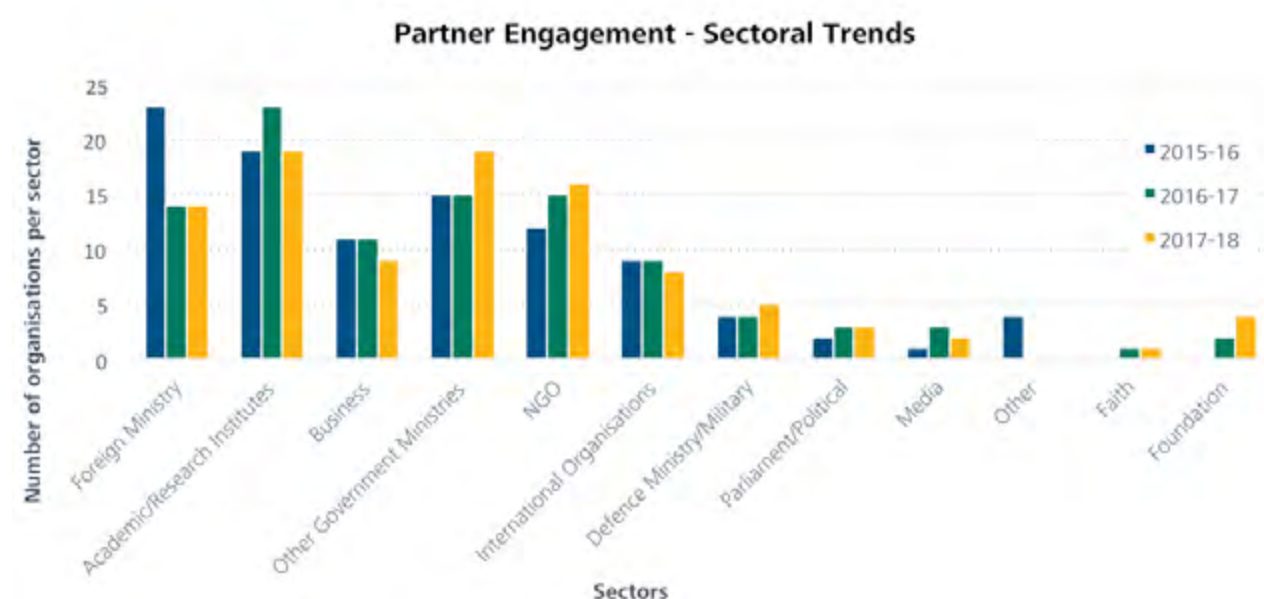
**3.11** On asset utilisation, we note the progress the agency has made on its occupancy rates for both commercial and Wilton Park events. However, the review team would concur with Stokes’ view that Wilton Park has the capacity to increase utilisation of the house and we judge that a target of 60% is realistic. Chapter 5 provides a more detailed analysis of this issue.

## Engagement with Partners

**3.12** One of Wilton Park’s key strengths lies in its ability to convene a broad spectrum of expertise around a topic. In stakeholder feedback, several commented how valuable it was to have the

opportunity to engage with people outside their own sector. Many regarded this as a unique feature of Wilton Park events. A good example was an event on modern slavery (a high priority for the Prime Minister) which brought together people from industry, government, academia and the third sector. Wilton Park rightly prides itself on its ability to convene the “unusual suspects”. It is the tension and challenge between these partners that brings different perspectives and ultimately novel approaches and solutions e.g. in the area of countering violent extremism.

**3.13** However, Wilton Park’s business continues to be dominated by its interaction with the UK Government and its close allies (e.g. Canada, the US, Norway and some EU partners). Given the agency’s focus on foreign and UK policy priorities, this is entirely logical. The work Wilton Park does, for example, with Norway and Canada on defence and security issues reflects the UK’s reputation in this policy arena. The fact that these countries continue to provide funding for these events is, in part, testament to Wilton Park’s continued relevance and expertise. But there is scope to engage more deeply with other sectors too e.g. parliamentary, philanthropy, foundations as well as a range of UN entities. The graph below shows the level of engagement from different sectors in Wilton Park events over the past few years. The agency has recognised this need to broaden its engagement in its new business plan. This will help expose it to a greater breadth of issues and perspectives but more importantly it rightly acknowledges



the ever increasing role that non-state actors play in international relations and the need for multi-sectoral responses to the global challenges we face now and are likely to face in the future. Expanding this partner base also has the potential to unlock additional funding for Wilton Park. This aspect is explored further in the next chapter.

**3.14** Notwithstanding our judgement that the agency needs to diversify its partner base, we believe Wilton Park also needs, in parallel, a step change in its engagement with the FCO and partners across government. In these settings, understanding of the agency's work and offer remains uneven, particularly among junior and middle ranking policy officers. At the same time, the FCO has an equal responsibility to avail itself of the services and expertise that Wilton Park can offer. As an internal (albeit chargeable) resource, Wilton Park should be regarded as a "preferred provider" for the FCO. The review team suggest that Wilton Park be considered systematically as part of the FCO's business planning activity and especially on priority campaigns (e.g. on modern slavery or countering violent extremism etc.). FCO Directors and Diplomatic Posts overseas can play a supportive role in helping Wilton Park identify and build sustained partnerships with governments and organisations in other countries. These issues have been highlighted in previous reviews. Both Wilton Park and the FCO have made efforts to address this (e.g. through a pilot project which launched in 2017). However, we believe more progress is needed. To this end, we **recommend** that Wilton Park and Communications Directorate undertake a joint assessment of what progress has been made since the Stokes Review in getting Wilton Park into the "bloodstream" of the FCO. This might also look at the level of strategic engagement with other UK Government Departments and their use of Wilton Park. The joint assessment should identify concrete actions which both can collectively take forward.

**3.15** One final area of Wilton Park's engagement with partners which is worth reflecting on in this section is how the agency interacts and maximises the opportunities presented by its alumni network. From our findings, we did not see evidence of an established and actively managed alumni network. The agency has an extensive knowledge and information management (KIM) database which holds details of participants that Wilton Park has

hosted over the years. It appears to primarily use these contacts as part of its strategic communication outreach efforts. However, we think there is potential here to establish a more formalised alumni network which enables the agency (and FCO) to identify the next generation of opinion formers and policy makers. We would suggest that Wilton Park discuss with Chevening programme managers in the FCO, who run a large alumni network, on how this might be achieved in a way which is proportionate to Wilton Park's needs and size.

## Product Range

**3.16** As noted in Chapter 2, Wilton Park's standard product model is a 2 nights' residential event at Wiston House. In recent years, Wilton Park has been undertaking a number of overseas events as well as a limited number of events in London. We would encourage Wilton Park to be even more ambitious about the range of products it is able to offer, including where it hosts its dialogues (i.e. in the UK and overseas). Whilst residential events at Wiston House should remain its primary focus and, in doing so, ensuring a high level of occupancy at the House, where there is merit in hosting an overseas event (e.g. the ability to access regional players), they should continue to do so. When Wilton Park does work overseas, it should continue to take care in venue selection to replicate the "immersive" style of dialogue achieved at Wiston House. Getting out into the regions, using the Hub in the US (see paragraphs 3.26—3.27 below), and working with the Marshall Aid Commemoration Commission (MACC) would provide Wilton Park with an opportunity to expand the Wilton Park brand and enhance UK reputation and influence in the policy areas on which it is convening. We note that these types of events can prove transaction heavy and logistically challenging for Wilton Park. The onus is on programme and delivery teams to ensure there is a robust business case for doing so.

**3.17** There are also a number of other event formats (e.g. shorter dialogues and teach-in sessions) which would again enable Wilton Park to draw a wider and potentially new audience. It might also enable them to address the rapid response objective highlighted above, whereby Wilton Park could "repurpose" event material or provide a briefing session or facilitated discussion on new and emerging challenges for an FCO/

Whitehall audience. The agency might also look at increasing the number of annual events it operates. Its current approach to running a series of events and building sustained partnerships (as highlighted above) means that these could be hosted on rotating basis between Wilton Park and partner countries/organisations. We note that Wilton Park's new business plan objectives identify the need to explore different delivery models.

## Monitoring, Evaluation and Impact

**3.18** Wilton Park has developed a detailed and comprehensive monitoring and evaluation system. It has benefited from having evaluation experts sitting on its governing and advisory bodies who have helped shape and refine the process over the years.

## Process

**3.19** Each Wilton Park event has a short session in the programme in which participants are encouraged to complete an evaluation form (an eQuestionnaire). The form looks at a range of areas: if the event met its objectives, the quality of Wilton Park's facilitation techniques and subject expertise, the quality of the accommodation and services provided. At the end of each event, a standard evaluation report (SER) is produced which collates comments and ratings from the eQuestionnaires as well as key issues identified by Wilton Park staff. The SER also includes a digital engagement analysis, which enables Wilton Park to gauge the reach of particular events as well as their ability to measure the scale of their outreach over time through social media (see example below). Teams from across the agency hold a debrief session after each event so that any immediate issues can be rectified in advance of the next one.

**3.20** Wilton Park conducts a follow up survey with participants 3-6 months after the initial questionnaire to assess what impact or action has taken place since the event. Staff collate these returns to produce an impact report. We note that the response rate to these follow-up surveys is invariably low, at around 15% on average. But we acknowledge that in many sectors getting customer feedback this length of time after an event or transaction is often challenging. We also recognise that, in foreign policy terms, being able to credibly attribute one intervention to a policy

## Extract of digital engagement report from a 2018 event on the UK's bilateral relationships in Europe

Twitter	
Wilton Park Total Tweets	6
External tweets	69 from 35 accounts
Retweets	22
Likes	27
Website	
Page views	328
Programme downloads	36
Hashtracking— #EuropeBilateralWP	
	(31 Jan 5 Feb)
Timeline deliveries	312,036
Reach	137,037
Tweets	95 by 42 users

impact is challenging and that achieving that level of impact in what are often protracted and slow burn issues is equally difficult. However, we judge that there is value in doing these impact assessments and would encourage Wilton Park to pursue its efforts in increasing the response rate. The survey provides useful feedback to the agency on how the networks developed at these events and the learning that takes place leads to further collaboration either within their home country and/or at an international level. For example, the event on modern slavery (a HMG priority issue) led directly to a private sector collaboration which yielded \$2m in new anti-slavery technology funding. The event on youth and peacekeeping has led to a network of youth advocates who are supporting each other in ensuring their respective countries are implementing their obligations under UN Security Council Resolution 2250. And a series of events on antimicrobial resistance have played an important part in supporting delivery of the UK's global health security objectives by: building support among low and middle income countries for a succession of high level events across the UN and by driving the design and implementation of National Action Plans on AMR in these countries.

**3.21** In Chapter 6, we provide an assessment of the corporate governance arrangements in place for the agency. However, it is worth commenting in this section on M&E that Wilton Park's Advisory Council (WPAC) has a committee

on M&E. While we acknowledge the good work that the committee does and the historic reasons on how this evolved, we find its positioning in an advisory body somewhat incongruous. While it is not formally the reporting mechanism on M&E, it implicitly has this status as there is no formal report on M&E made to the Board. We view monitoring and evaluation as a primary responsibility of the executive. We would suggest therefore that the agency's internal M&E group submits an M&E report to the Board, through executive management. This would enable the Board to use that data to assess the agency's performance and for them to provide feedback on whether the quality and breadth of M&E data sufficiently enables it to

undertake that task. The same reporting should also be made available to WPAC, as it supports them in carrying out their role as defined in the Framework Document. In the same way, we would expect WPAC to provide feedback to the executive on whether the M&E data was robust and of sufficient quality to support them in their work. As part of the agency's work in refreshing its evaluation and impact processes, we would suggest that the Chief Executive and the Chair of WPAC (who is also the Chair of the Wilton Park Board) review if the WPAC committee on M&E is still required.

**3.22** Although Wilton Park has undoubtedly contributed to and helped progress a number of UK foreign (and broader HMG) policy priorities over

## Case Study

### *Security and Peacebuilding*

In May 2017, Wilton Park hosted a conference on Clearance of Improvised Explosive Devices (IEDs) in the Middle East, in partnership with the FCO's UK Mission to the UN in Geneva and Ministry of Defence. This reflected not only the increasing prominence of IEDs and demining on the disarmament and security policy agenda but also the UK's ambition to provide leadership in this area. The May meeting successfully and uniquely brought together a range of actors (donor countries, the commercial sector, humanitarian community and military demining operators) in a single discussion. It enabled these discrete sectors to explore how they could work more collaboratively and effectively in this policy area and helped build a stronger constituency from which to press for greater global action. The event helped cement the UK's leadership and credibility. Following the meeting, the UK, with support from other partners, successfully called on the UN Mine Action Service (UNMAS) to hold an inclusive consultation on the establishment of IED Disposal Standards to be employed by demining operators under UN auspices. In May 2018, Wilton Park hosted a further event for the mine action community which again brought together a wide and diverse range of partners, including the FCO's Minister of State, the Rt. Hon. Alistair Burt MP. It explored how the international community could achieve the aspiration of states parties to the Anti-Personnel Landmine



Convention (APLC) of a mine free world by 2025. These events have increased the UK's political leverage on demining issues internationally and Wilton Park's convening role has enabled those partners to come together outside the formal setting of an inter-governmental process to see how they can best work together to realise the aspiration of a mine-free world.

*The Wilton Park event was a "turning point in discussions on IED and mine action issues". Representative from the Mines Advisory Group*



## Case Study

### ***Forced Displacement and Migration***

In advance of the World Humanitarian Summit in May 2016, Wilton Park hosted a high level forum on New Approaches to Protracted Forced Displacement, which was co-hosted by the (former) UK Secretary of State for International Development, Rt. Hon. Justine Greening MP, President Jim Kim of the World Bank and United Nations High Commissioner for Refugees, Filippo Grandi. The Forum convened countries from Africa, Asia, and the Middle East together with donors, UN agencies, NGOs and the private sector with the aim of building consensus on the need for a new approach to protracted forced displacement.

The Forum agreed a set of five principles as the foundation for a new approach to deliver better outcomes for refugees, internally displaced people and vulnerable local populations and host countries. These principles became known as the “Wilton Park Principles”. The consensus reached at Wilton Park contributed to the successful outcome achieved at the World Humanitarian Summit in Turkey. The Wilton Park Principles are widely cited in academic literature and across the humanitarian and development community for framing a new global approach to work on protracted forced displacement. Following the Summit, the UN General Assembly hosted a High Level Summit on Refugees and Migrants in September the same year. The Declaration endorsed by Heads of State and Government at



that meeting committed all Member States to agree a new Global Compact on Migration (GCM).

Negotiations concluded on the GCM in July 2018 and will be adopted by Member States at a conference in Marrakech in December 2018. In advance of that high level meeting, Wilton Park will be hosting a further meeting in October to explore ways to translate the political commitments in the GCM into practical actions. The event will again bring together a diverse range of actors from multilateral and regional bodies (e.g. AU, EU and UN agencies) as well as philanthropic foundations, civil society organisations, the private sector and representatives from origin, transit and destination countries.

the years, we found it difficult to quickly identify a strong set of examples of where and how the events it had run had made an impact. In the following pages, we provide two case studies which illustrate the impact of Wilton Park’s events in two discrete policy areas. We would suggest Wilton Park establish a light-touch central repository of examples which records events it has delivered that have had a clear impact on a policy area. This would equip the agency with a stronger narrative and a clearer articulation of its value and effectiveness.

## **Wilton Park USA**

**3.23** The Wilton Park USA Foundation (WP USA Foundation) was set up in 2006/7 as a result of contacts between Wilton Park’s then Chief Executive and a group of US citizens who had taken part in and were inspired by Wilton Park conferences and considered themselves “Friends of Wilton Park”. The Foundation is an informal organisation with US charity status, led by a volunteer Board.

**3.24** In 2014, the then Chief Executive, judged that the relationship between Wilton Park UK (WPUK) and the WP USA Foundation was not delivering in a way that benefited Wilton Park, so



he made efforts to revitalise the link, appointing the Head of Woods International LLC as the new Board Chair. WPUK and the WP USA Foundation agreed to establish a Hub on a pilot basis. A part-time Programme Manager (PM) was recruited to manage the day to day running of the Hub and Wilton Park-branded events in Washington.

**3.25** There is a strong consensus among stakeholders that the concept of Wilton Park having reach into the US is a valuable one. However, many agreed that the current model is not fit for purpose. Wilton Park and the USA Foundation should determine the shape, remit and strategic alignment of the US Hub by end financial year 2018/19. In doing so, we **recommend** they formalise their existing agreement by establishing a contract with clear governance and reporting structures.

### **Remit**

**3.26** The Hub's mandate as set out in its "Phase II Business Plan (2015-2017)" is "to promote the effectiveness and cohesion of the UK-US foreign affairs axis through:

- > Ensuring consistent, high level, and relevant participation of Americans in all Wilton Park events; and
- > Securing US-based funding for Wilton Park events in the US and support for Wilton Park events in the UK and elsewhere."

**3.27** The Hub works closely with the British Embassy in Washington DC and partners in the US to deliver Wilton Park-branded events, almost exclusively in DC. The WP USA Foundation Board has an extensive contact network and is keen to extend Wilton Park's reach beyond DC. However, there is little synergy between the Hub and Programme Directors in the UK, and the high potential of the Hub and associated networks is not being fully realised. We suggest that the Hub is brought more formally into Wilton's Park's architecture and its remit is more aligned with Wilton Park strategic priorities. We believe a useful starting point could be to designate one of the Senior Programme Directors or another senior member of staff as sponsor of the Hub.

### **Delivery Model**

**3.28** Events are designed by the WPUSA Chair in consultation with partners and where appropriate, with input from the USA Board, Wilton Park's

Head of Corporate Planning and/or Wilton Park PD colleagues and for some events, with the British Embassy in Washington. WPUSA aim to run a series of events based around themes, rather than one-off events. This approach keeps the conversation dynamic and helps ideas develop.

**3.29** Events tend to be short breakfast, lunch, dinner or coffee "round tables" as these are cost effective and more suited to the local market. The Hub aims to host two or three half day "salons" per year and has, on occasion, organised short residential events. The Hub has arranged speakers and organised short functions for a number of defence related visits and events hosted by British Embassy Washington. They have also been involved in a series of Global Nutrition and Digital Health events.

### **Governance and Management**

**3.30** There are Terms of Reference (ToRs) for the WP USA Foundation Board, which were last updated in June 2017. There are no time limits for the ToRs or Board membership. We note that of the eight Board members, two are women.

**3.31** There is currently no formal contract between the USA Foundation and Wilton Park for the Hub. The following documents expired in September 2017:

- > Phase II of the Hub pilot, 2015-2017; and
- > The US Hub Business Plan.

The USA Foundation, Hub and Wilton Park have agreed to continue working together without a formal agreement for the course of this year, while the new Chief Executive reviews the work of the Hub. This approach has been endorsed by Wilton Park's Board.

**3.32** The current operating model for the Hub is to secure sponsorship on an event by event basis. Having only one part time employee and a volunteer Board means that it has not yet been able to generate regular additional income for itself or for Wilton Park UK.

**3.33** Wilton Park funds the Hub at a cost of approximately £35k per year to cover the PM's part time salary and the Hub's running costs. There is currently no formal mechanism for the Hub to report financial data on events to WPUK and there is no evidence to show how the Hub is contributing to the development of the agency's

business. We strongly advise Wilton Park and the Hub examine the current funding structure and introduce formal financial reporting mechanisms. We also note that given Wilton Park's financial constraints (operating within +/- 1% on annual costs), generating excess income beyond that which could be used to develop more events in-year, could further complicate the agency's financial management (see Chapter 4 for further details).

**3.34** The PM is not employed directly by Wilton Park (he is remunerated by Woods International LLC) and whilst he is supported by Wilton Park's Head of Corporate Planning and Chair of the WP USA Foundation, he is not formally managed under the FCO appraisal process. We advise that a formal appraisal of the Programme Manager's performance is introduced and suggest that the FCO's appraisal model might be used as a basis for that.

**3.35** The Hub does not feature in Wilton Park's Business Plan and is mentioned only in passing in the Annual Report. We suggest that the Hub's contribution is included in future publications of both documents.

### ***A model for the future?***

**3.36** Wilton Park is looking to increase the number of branded events held overseas, where the dialogue is genuinely improved by being anchored in the regions as well as to encourage greater diversity of participants and a broader reach. If Wilton Park and the WP USA Foundation are able to successfully demonstrate proof of concept, and get the operating model and governance structures right, it could be a model which could be replicated, albeit in a limited and strategic way, in other parts of the globe. This may be an attractive proposition to the FCO as it deploys its soft power assets in support of HMG's Global Britain agenda.

# Chapter 4: Funding Model

This section covers Wilton Park’s funding model, including the commercial operations at Wiston House. It explores the funding constraints that come with Executive Agency status and the balance between policy and commercial events.

## Funding model

**4.1** The review team found that Wilton Park takes appropriate steps to ensure effective systems of financial management and internal controls are in place. As an Executive Agency of the FCO, Wilton Park’s budgets are consolidated into those of its sponsor department, FCO Communications Directorate. Formal, central government-wide spending controls apply to Wilton Park as they do to the FCO.

In 2017/18 Wilton Park’s revenue was approximately £5.9m, this included:

- > A core grant from the FCO (£750k), which includes a ring-fenced amount of capital to cover maintenance (£250k);
- > An ODA grant (£1.4million) received through the FCO;
- > Sponsorship income for individual events earned from the FCO and other

government departments, NGOs, academia, foundations and the private sector; and

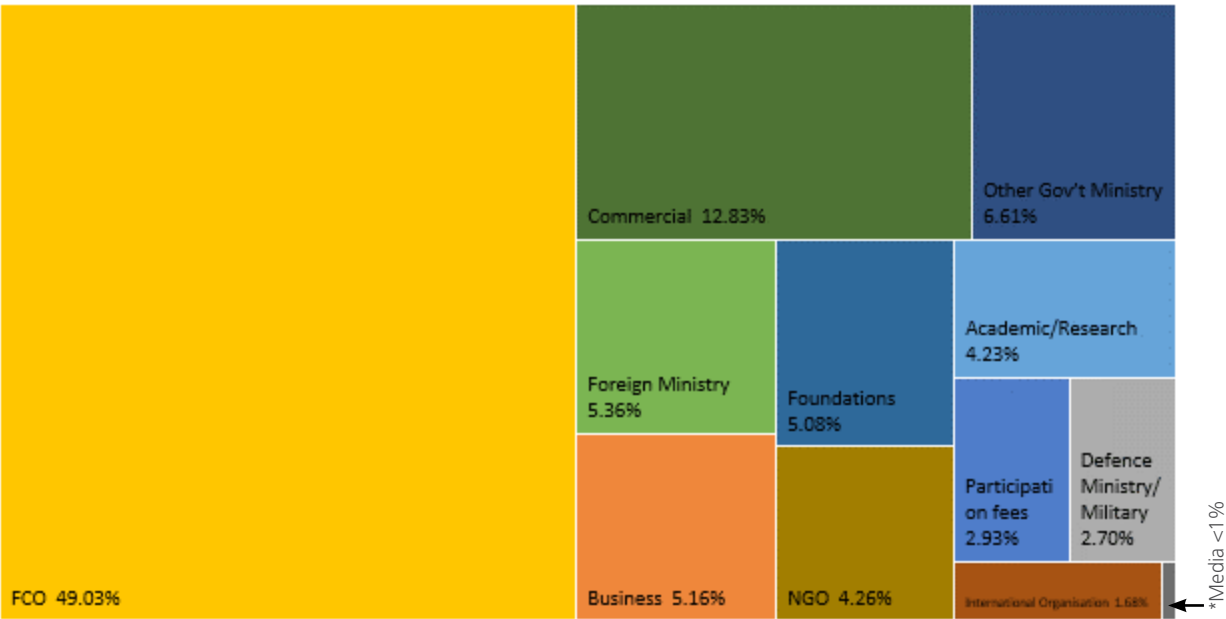
- > Wiston House commercial business e.g. weddings, private meetings and corporate conferences.

## FCO core-funding

**4.2** As the sponsor department, it is right that the FCO provides core funding (admin from Communications Directorate and capital from Finance Directorate) and we **recommend** that, all things being equal with the FCO’s budget allocations and priorities, the FCO retain its current level of core contributions to Wilton Park over the next 3 year spending round.

**4.3** FCO core admin funding helps to provide “seed money” with which Wilton Park can get events off the ground. As an income generating body, this helps enable the agency to plan a more even spread of events throughout the year. However, the constraints of this model, as set out in paragraphs 4.16—4.18 below, and the fact that funders tend to schedule events in the latter half of the FY, does mean that there is a concertina-effect with a number of events usually being

WILTON PARK INCOME BY FUNDING PARTNER, 2017/18



squeezed in at the end of each financial year, which places a significant strain on the organisation.

**4.4** Communication Directorate has helped to ease the pressure by managing the risk through the ODA allocation. In December 2016 and December 2017 the directorate gave Wilton Park the green light to plan to spend up to £500K of their expected £1.4 million ODA allocation within Q1 and Q 2 of the next FY. In addition, the FCO has managed to give Wilton Park indicative budget allocations for core funding, ODA and capital expenditure for 24 months (FY 2018/19 and 2019/20). Both measures should provide adequate reassurance for Wilton Park and help spread business more evenly across the year, rather than back-load events in Q3 and 4. However, they will still rely on other partners (including FCO directorates) to run events earlier in the financial year.

**4.5** A part of the FCO's core funding (approximately £250k per annum, £256K in 17/18) is for capital expenditure and is ring-fenced partly to cover maintenance of the Grade 1 listed building. This has remained stable for the past 17 years. However, we believe that there is a strong case for a time-bound additional uplift in this allocation to meet the current maintenance and security requirements, which are behind schedule. Not only does the FCO have an obligation to meet its responsibilities in satisfactorily maintaining a Grade 1 listed building but it needs to ensure that the accommodation and services provided are commensurate with a prestigious institution which plays a small but important part in projecting the UK's soft power.

**4.6** In August 2018, Wilton Park submitted a Capital Expenditure bid and Business Case, setting out a rolling maintenance programme (with estimated costs) for Wiston House. We **recommend** that, if resources permit, Finance Directorate support this plan within this financial year (2018/19). As part of this, we would propose that Wilton Park draw up an asset management plan along with a prioritised order of work.

## Official Development Assistance (ODA)

**4.7** The £1.4 million per year ODA grant was introduced in financial year 2016/17. The funds must be used for events that are clearly in line with FCO strategic priorities and reflect

a uniquely foreign-policy based approach to development assistance. The use of the ODA funds must also fit OECD criteria using the same allocation process as DFID and the FCO.

**4.8** This significant funding stream allows the FCO to further its ODA objectives through policy dialogues and capacity building, enabling participants to attend events, who might otherwise not be in a position to. It also provides Wilton Park with a more predictable cash flow at the start of each financial year, allowing the policy and operations teams to plan activity across the FY. In 2017/18 Wilton Park used ODA to fund 34 (57%) events, nine of which were overseas. However, the risk of an over-reliance on ODA which is not guaranteed year on year has been identified by Wilton Park. This strengthens the need for Wilton Park to broaden its funding base, which is covered below and in Chapter 3.

**4.9** The review team judge that Wilton Park is following clear systems and processes to ensure spending of ODA is within OECD guidelines. We would support the continuation of an allocation of ODA funding for the agency but this is contingent on the broader ODA allocation which the FCO receives. Wilton Park submits an ODA report as part of its Annual Report, which it lays before Parliament. The review team notes that Wilton Park ran a one-day Workshop for staff on ODA in 2016 and suggests the agency consider running a refresher course, in particular for new Programme Directors.

## Other Sponsorship streams

**4.10** Beyond the ODA grant and FCO core and non-core funding, there is a clear need for the agency, as recommended by Stokes in 2015, to broaden its partner base "in other markets focussing sharply on those with high income potential". Our analysis of the trends over the past three financial years (i.e. since the Stokes Review) on which sectors are funding Wilton Park events shows that the overall funding picture has remained reasonably static. FCO and other Foreign Ministry funding has continued to account for around 40-45% of event funding over that period. A notable exception to this is the funding from foundations, which doubled over the three financial years, showing a continued upward trajectory. Similarly for the NGO sector, where the percentage of their funding doubled in the past

two years and accounted for 10% of funding for all Wilton Park events in 2017/18. There is therefore considerable more scope to broaden the funding base. The new Chief Executive has made it clear in the new business plan that the agency needs to:

- > Develop new and multi-year partnerships; and
- > Deepen partnerships with the private sector.

The review team fully endorses that approach, which reflects our own findings and conclusions.

**4.11** In order to secure funding for its events and to establish a formal relationship with an events partner, Wilton Park agrees a contract with funding organisations. Such contracts helpfully set out responsibilities of the various parties as well as any legal or financial liabilities. While in most cases such contracts were in place, we found that this was not always the case where the FCO or other UK Government Departments is the principal funding partner. As an Executive Agency, Wilton Park is often seen as an “in-house” resource for the FCO and HMG more widely, which can lend itself to a naturally more informal set of working arrangements. However, where financial commitments are being made, it is important for both Wilton Park and the funding partner that this is underpinned by a formal contract. This is particularly important in the context of cancellation fees, as cancellations can have a significant impact on the agency’s ability to meet its delivery and income targets.

**4.12** As the service provider, it is the agency’s responsibility to ensure that it has adequate contractual arrangements with its funding partners. However, it is equally incumbent on funding partners to meet their obligations.

We **recommend** therefore that Wilton Park consistently apply its policy of establishing a contract with all financial partners of Wilton Park events and that Communication Directorate, in consultation with Commercial Directorate in the FCO, remind Directorates on an annual basis of their contractual and financial obligations when using Wilton Park’s services.

## Commercial business (Wiston House)

**4.13** In addition to Wilton Park events, the team runs a commercial arm. Wiston House is available for private or corporate events (e.g. weddings, conferences, and banqueting events). The revenue is used to supplement the income generated from Wilton Park events (which are the priority) and contributes to Wiston House running costs. It is managed separately by Wilton Park employees, with accounts consolidated by formal financial reporting mechanisms. The two sides of the operation work closely together to ensure effective diary management of events.

**4.14** In 2017/18, income from Wiston House commercial activities was £770k from 61 commercial functions. In 2016/17, income from Wiston House commercial activities was £899k from 77 commercial functions. While there was an overall decrease in revenue in 2017/18, the average net revenue increased by 8% to £12.6k per event as opposed to £11.7k per event in 2016/17.

**4.15** The decrease in the number of commercial events is the result of a strategic shift to larger, more targeted commercial activity, which impacts less on the condition of the house. Whilst this was largely seen as a positive step by key stakeholders some thought there was

	2015/16	2016/17	2017/18	2018/19 (forecast)
Number of commercial events	87	77	61	65
Average net revenue per commercial event	£10,195.40	£11,675.00	£12,622.00	£13,538.00
Total income from commercial events	£887,000.00	£899,000.00	£770,000.00	£880,000.00
Net revenue per commercial event % difference year on year	N/A	14.51%	8.12%	7.25%



opportunity and capacity to target more corporate business through specific marketing campaigns. In 2018/19 the commercial arm trialled an online virtual venue finder to promote Wiston House and boost income, which has proved useful. We would encourage the agency to continue to explore these commercial opportunities.

## Approach to financial risk

**4.16** HM Treasury requires the FCO to manage its annual budget within a margin of +/-1%.

The FCO passes this on to all holders of budgets consolidated into its accounts (i.e. arm's-length bodies and Diplomatic Posts overseas). This is not dissimilar to the budgeting constraints faced by other Central Government departments and other public institutions running annualised budgets.

**4.17** The +/-1% requirement was described by Wilton Park staff as a 'limiting' target, which risks putting them in a position, near year end, where they might have to make business decisions based on "balancing their books" rather than on strategic alignment or impact. It makes scheduling and programming of events over a financial year particularly challenging. As set out in paragraph 4.4 above, Communication Directorate is trying to ease the pressure through advance funding notification as well as funding events at the end of financial years, to help Wilton Park land within the 1% threshold. Wilton Park staff and management were very seized of the tight budget space in which they operate. One interviewee at the agency said "one event could make or break us." For example, Wiston House may turn away commercial business towards the end of a financial year to minimise the risk of going over the 1% threshold. But if a planned Wilton Park event was then cancelled, it would put the agency under pressure to quickly identify funds to prevent an underspend. Wilton Park's budget is reflected in Communication Directorate's budget, so Wilton Park's outturn, whether that be a breakeven, surplus or deficit has to be accommodated within directorate's budget outturn, which again needs to fall within a 1% margin. The +/-1% requirement and the inability to roll funds into the next financial year prevents Wilton Park from using a surplus, for example, to maintain Wiston House or use it as funding to develop other policy events.

**4.18** Wilton Park has consistently demonstrated its ability to manage the financial risks identified in its Annual Report and Accounts 2017-18<sup>7</sup> and to land its budget within the +/-1% target. However, given the issues set out in the above paragraphs, we would recommend that Wilton Park, the FCO's Communication Directorate and Finance Directorate agree to manage this target with a higher level of risk tolerance. For example, the FCO may wish to retain the -1% deficit but extend the surplus ceiling to around 3%.

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<sup>7</sup> <https://www.wiltonpark.org.uk/about-us/publications/annual-reports/>

# Chapter 5: Efficiency

This section covers the efficiency and effectiveness of Wilton Park’s operating model and explores outsourcing and shared services. We examine how Wilton Park delivers its corporate service function and how effectively it meets its responsibilities in managing the estate.

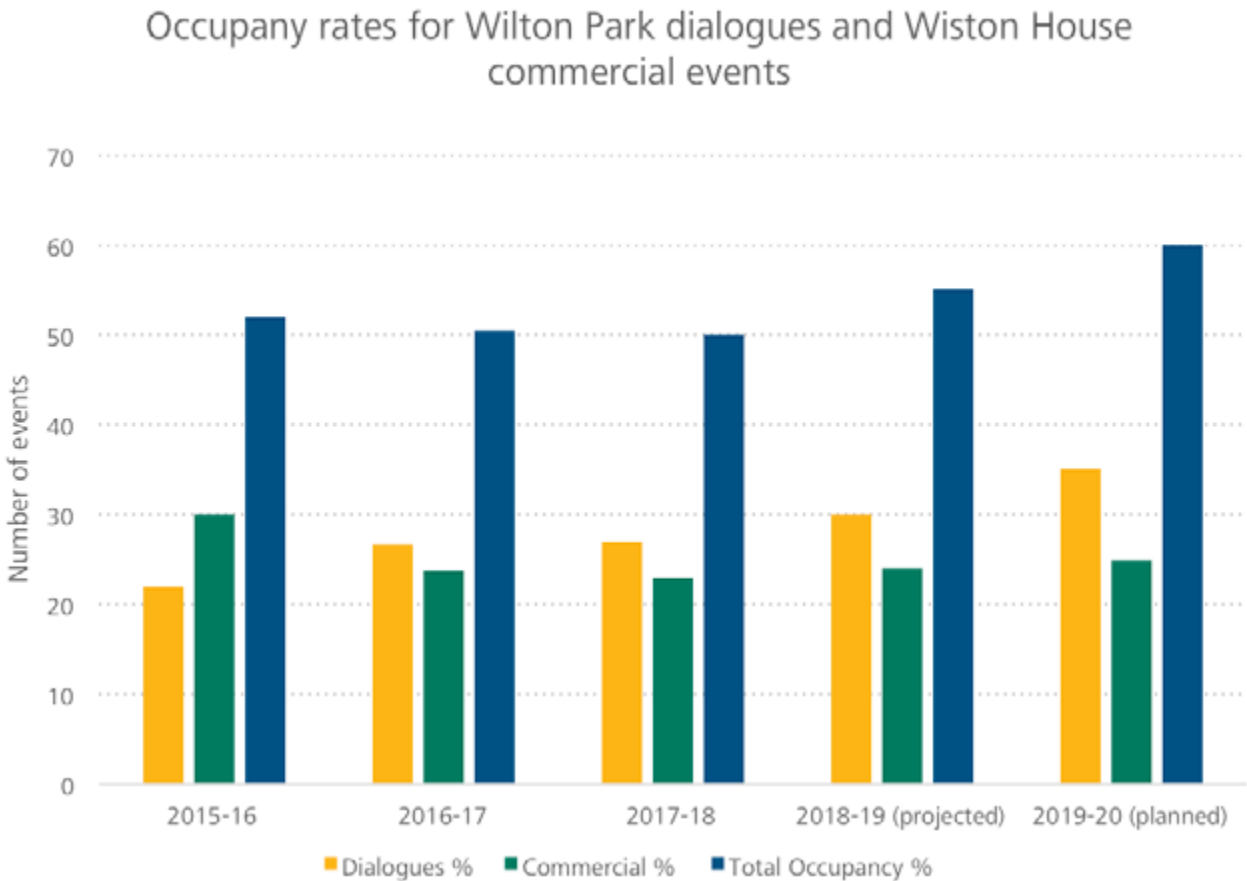
## Efficiency savings

**5.1** The Stokes Review recommended a review of outsourcing opportunities and a drive to reduce event delivery costs. The report suggested benchmarking or setting a 20% cost reduction target by 2016/17. As Wilton Park generates its income and is not allocated a set budget each financial year, it asserts that its business model does not enable it to reduce its costs by 20%, particularly when it is simultaneously raising more income to do more events and to maximise use of the estate.

**5.2** However, we note that as part of the agency’s annual zero based review, it sets a number of efficiency targets which it has made

good progress on over the period from 2014/15. These targets are published in their business plan and in their annual report, which is laid before Parliament. Below are some indicative examples of efficiencies which have been realised during the lifetime of Wilton Park’s current business plan.

- > Net income per FTE head has increased by 20% from £56,500 to £68,000;
- > The number of events per Programme Director has increased by 45% from 8.4 to 12;
- > The ratio of Operations staff costs to income (relating to accommodation and meals) has reduced from 64% in 2014-15 to 49% in 2017-18;
- > The number of events per FTE head has increased by 18% from 0.74 to 0.84;



## Workforce

**5.3** Wilton Park has 87 employees, which equates to 76.9 FTE. This is an increase of 4.8 FTE staff since the Stokes Review. There has been an increase in income in this time resulting from a commensurate rise in events. For example, the agency's gross income increased by almost 20 % between FY2015/16 to 2017/18. Although there has been an overall increase in headcount in that time, the efficiencies realised above (e.g. the number of events being delivered per PD) demonstrate how the agency is delivering its work more efficiently and at better value for money.

## Occupancy Rates

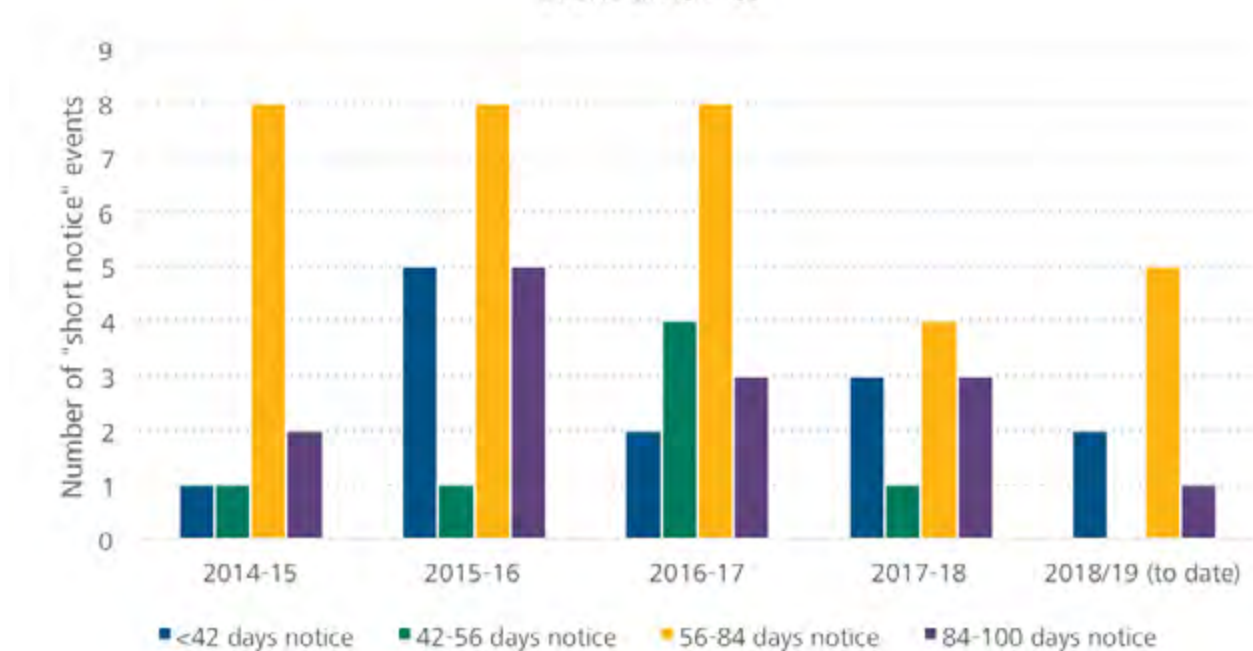
**5.4** The total occupancy rate for both Wilton Park dialogues and Wiston House commercial events is around 50% each year. However, there is an upward trajectory from an occupancy rate of 52% in 2015/16 towards a 2019/20 target of 60%.

**5.5** As noted in Chapter 3, the review team believe Wilton Park has the capacity to increase utilisation of the house but we recognise that there are factors which means a ceiling of around 60% would be optimal. In terms of current usage, Wilton Park hosted 3,234 people over 60 dialogues in West Sussex (and an additional 13 conferences held at overseas locations) in 2017/18. In the same year, Wiston House hosted 61 commercial events

(mainly weddings). This represents an average of 2.3 events per week when participants/guests are physically present in the building in West Sussex. On the days where there are no events the teams are researching, planning, raising sponsorship/ business, preparing for future events, working through feedback and monitoring and evaluation of past events. Staff also need to take annual leave and work on learning and development activity.

**5.6** It is also important to note that utilisation has to be balanced against the need for Wilton Park to retain its capability to respond quickly to changing and emerging political priorities, which means they need to retain space in their schedule to accommodate this. Wilton Park typically allows at least 100 (calendar) days to plan and deliver a dialogue. The timing is worked out from the date on which a dialogue is agreed and assigned a Wilton Park conference code, to the first day of the event itself. A good lead in time of at least 100 days enables Wilton Park teams to work efficiently and effectively with partners to develop a concept and/or programme, identify and agree the appropriate speakers and participants, and ensure they have enough time to make their travel arrangements and for some, the UK visa application process. Within this 100 day timeline, staff will also be delivering other events in parallel. Most events, especially annual or those that are part of a series have this long lead in time but can still be

Event timelines



subject to changes. However, between 10 and 20 dialogues each year are arranged at shorter notice as demonstrated in the chart below.

**5.7** Another factor is the wear and tear on the building as set out in Chapter 4. The commercial arm of the organisation has already started to look at hosting fewer but larger, higher quality events which generate greater income but seek to minimise potential depreciation to the fabric of the house.

## Outsourcing and shared services

**5.8** Wilton Park continues to explore options for outsourcing and shared services where it is viable given the nature of its EA status (Cabinet Office guidance states EAs are to be staffed by civil servants), its business model (i.e. it's a small agency) and where there is demonstrable evidence that outsourcing will deliver better value for money.

**5.9** Security and cleaning services are outsourced to private companies. Catering services are not. All mealtimes and breaks play an important role in Wilton Park dialogues. As set out in Chapter 2, they are part of the programme, providing opportunities for participants to continue their discussions in a more relaxed setting, away from the conference table. It is important that the quality of the food and its preparation is of a sufficiently high standard, commensurate with the nature of the surroundings and the events.

**5.10** The in-house catering team (5.6 FTE, plus one apprentice) manage the catering of all Wilton Park conferences and Wiston House commercial events efficiently and in accordance with Health and Safety rules, HMG procurement policies (e.g. supplier management) and HMG sustainability policies (e.g. plastics). Menus are carefully planned taking into consideration guests' dietary requirements and using predominantly locally sourced produce (including from the kitchen garden, which reduces their costs). The cost<sup>8</sup> of providing all meals and refreshments to each conference participant, per day is approximately £98, which represents excellent value for money. The review team consulted an external commercial catering provider who confirmed that Wilton Park's costs were competitive. A private company providing these services would naturally include a profit margin in

their costs and many would additionally charge a management fee for a contract of this type. We judge that these factors would significantly increase costs for Wilton Park and we therefore propose that the provision of catering services is kept in house.

**5.11** At the Goring family's request, the Wiston House gardens are maintained by two gardeners employed by the Wiston Estate. Wilton Park pays the Wiston Estate for their services on a monthly basis (£60k per annum). The arrangement is not formalised through a service agreement, but is recorded as a clause in the lease. The review team suggest that Wilton Park and the FCO's Estates Department (within Estates and Security Directorate) and Wiston Estate look at this with a view to establishing a contract to regularise the services and their costs.

**5.12** The review team considered whether efficiencies could be made by running Wilton Park conferences without Wiston House as its home. Annex H compares the accommodation, conference facilities and catering costs of hosting an event at Wiston House, compared with three other venues. This comparison demonstrates that Wiston House is very competitive.

**5.13** It should be noted that aside from these costs, other commercial venues would not offer the same level of flexibility (of use and exclusive access), security (of premises and staff) and privacy. In addition, the concomitant costs of using a commercial venue e.g. cancellation fees, would have to be factored into budget planning. A non-residential model would significantly detract from the Wilton Park product and brand and residential events in larger towns and cities would likely diminish one of its key attributes of providing space for groups to be together, fully focused and present for the duration of an event.

**5.14** Giving up Wiston House in favour of event by event venues would incur other costs. The FCO would be responsible for the cost of removing its property from the estate as well as dilapidation costs as per the lease. Staff costs are also a factor. The FCO would likely incur redundancy costs for Wiston House commercial staff. Policy and Operations staff would need to move (the FCO does not have capacity or expertise to absorb these roles), thus incurring relocation costs. Some

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<sup>8</sup> "Costs" include staff salaries (kitchen and serving) as well as supplies of food and drink.

staff may choose to leave, giving the FCO a costly and time consuming recruitment exercise. This in turn would potentially have a short term adverse financial effect on income generation whilst new officers were brought in and took time to get up to speed. For example, Wilton Park estimate that there would be a loss of £50k per annum in the short term for each change in senior programme staff.

**5.15** As part of an expanded Wilton Park product range (see Chapter 3), there is merit in hosting events in different locations where it makes sense to do so. However, it is important that Wilton Park has a base. If Wilton Park were to have no “home”, with events held in ever changing locations, our view is that the Wilton Park brand would likely erode over time, which could diminish its product quality and convening power. But, as made clear in Chapter 3, the review team supports the agency diversifying its product range, which includes the delivery of events elsewhere—both in the UK and overseas.

**5.16** As part of broadening its product range, we understand that Wilton Park intends to increase the number of smaller scale events it holds in London. The review team suggest that Wilton Park continues to engage with the FCO’s Protocol Directorate to explore ways to maximise the conference provision across the FCO’s estate in London (e.g. Lancaster House, Durbar Court, and the FCO’s Fine Rooms). Use of these locations would reinforce Wilton Park’s prestigious brand. Wilton Park and Protocol could explore whether offering their clients, for example, a package of events held at both locations would make business sense. Wiston House could also explore sharing resources with, for example, Lancaster House on proactive marketing for commercial events e.g. in the corporate sector.

**5.17** The review team notes that Wilton Park has set up a “Task and Finish Group” whose remit is to examine how the organisation might be able to deliver more efficiencies in its business processes and transactions. The group has representatives from each section of the business, working together to understand, and question and challenge current processes from event conception to delivery. Work started in May 2018 and the group will report back to the Senior Management Team in late July 2018 with conclusions and recommendations for streamlining processes. The review team welcomes this initiative and suggests that, if successful,

the Task and Finish Group model be used to examine other areas of Wilton Park’s business.

**5.18** The review team is confident that Wilton Park has embedded efficiency into its behaviours as is expected of an Executive Agency. It has made good progress across a range of efficiency targets since the last review. The Board and FCO play an important role in ensuring that Wilton Park continues to identify and deliver further efficiencies and stretch targets. Set against the background of a challenging economic climate, the prospect of another spending round in the near future, Wilton Park will need to continue to demonstrate it is making efficiencies where it can and delivering good value for money for the British taxpayer.

## Corporate services

**5.19** Wilton Park manages most corporate services in-house with support and advice from the FCO’s Estates and Security Directorate, Finance Directorate, HR, Knowledge and Technology Directorate. The FCO manages Wilton Park’s payroll which is permitted by Wilton Park’s Executive Agency status and is more cost effective than out sourcing or employing payroll staff.

**5.20** The HR function was transferred on 1 April 2018 from the agency’s Corporate Services to the Operations Team and is now overseen by Wilton Park’s Chief Operating Officer. The agency currently employs one part-time (0.8%) C4 HR manager (CIPD Associate member). However, the review team welcomes Wilton Park’s intention to reinforce this function, through the recruitment of two extra members of staff (one C4 and one B3). Whilst it is good practice to offer opportunities in-house, we advise Wilton Park tests the wider market by running internal and external campaigns simultaneously and recruit an experienced HR professional (in at least one of the two new roles) to further professionalise its HR function.

**5.21** The review team notes that the FCO’s Internal Audit Department and the National Audit Office reported some concerns around Wilton Park’s handling of off-payroll payments in 2017 (now resolved) as well as some policy concerns around the appropriate use of the Recruitment and Retention Allowance. Whilst we appreciate the challenge around pay and reward, Wilton Park is legally part of the FCO



and should therefore follow the FCO's pay terms<sup>9</sup>. We would advise the following:

- > That Wilton Park HR and Corporate Service teams update their knowledge of FCO and wider government policies and ensure compliance with the appropriate controls and ensure they are up-dated as and when appropriate.
- > Wilton Park and FCO's Communication Directorate with support from FCO Finance Directorate and FCO HR re-visit the Wilton Park/FCO Framework Document (as recommended in Chapter 6), especially Section 17 which does not currently provide enough clarity on pay and reward.
- > FCO's HR Directorate hold regular meetings (perhaps quarterly) with Wilton Park to ensure they are aware of and apply Civil Service-wide human resource policy and practice.

**5.22** Wilton Park hosts a number of intern/apprenticeship schemes. They work with Northbrook College (local college) and 3aaa Apprenticeships (a national training provider) to offer a variety of apprenticeships and currently hosts two: an Apprentice Chef and a Digital Media Apprentice. The agency is in the process of transforming its intern programme to a two-year Graduate Associate Scheme for up to four graduates starting in autumn 2018. In addition, Wilton Park is currently hosting a second secondee from the Civil Service Fast Stream under the Cabinet Office's Digital, Data and Technology programme. Cabinet Office staff running this programme have been impressed with the agency's programme for secondees. The review team endorses Wilton Park's commitment to providing youth development opportunities, which supports the Government wider ambition on apprenticeships.

## IT and Digital Technology

**5.23** There are three IT systems in use at Wilton Park. A small number of staff have access to the FCO's IT system. All staff use the Wilton Park IT, including the Customer Relationship Management system (KIM) and many have access to the Wiston House ("front of house") system if required

for their job roles. The front of house system was purchased in 2017 and is working well for Wiston House events. However, Wilton Park's KIM system is reaching the end of its serviceable life and needs replacing. The agency has an IT and Digital Team which is scoping options for a successor system that is more efficient and better meets their business requirements. We would encourage the team to explore with the FCO's Knowledge and Technology Directorate if they are able to support them in this work.

**5.24** In line with the FCO's Digital Strategy, we believe there is an opportunity for Wilton Park to benefit from digitising some of its business processes e.g. event registration. We **recommend** that Wilton Park undertake an assessment how digital technology could be used more effectively in the agency's business processes e.g. by engaging the FCO Digital Transformation Unit. This could usefully inform the Digital Transformation Roadmap which the agency is currently developing.

## Estate management

**5.25** Wiston House and the grounds in its immediate vicinity are leased to the FCO by the Wiston Estate, owned and managed by the Goring family.

**5.26** The Gorings are satisfied that the house and grounds are generally well cared for. Whilst they understand the need for commercial activity at Wiston House, which helps maintain the property, they view Wilton Park events as the primary focus and business of the house. The family is proud of its connection with Wilton Park and the contribution the latter plays in responding to international challenges of the day.

**5.27** The division of responsibility between Wilton Park and the Wiston Estate for maintenance of the house and grounds is set out in the lease. It is a symbiotic relationship and requires regular communication and cooperation. The relationship between Wiston Estate and the Wilton Park team is currently strong. Richard Goring (who runs the Wiston Estate) has quarterly meetings with Wilton Park's Chief Operating Officer (COO) and Estate Team. Together they review on-going work and discuss any issues. The Wilton

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<sup>9</sup> Executive Agencies: A Guide for Departments (March, 2018)



Park team provide the Estate with aggregated and non-attributable feedback from conference participants on the house and gardens.

**5.28** Whilst Wilton Park's COO and Corporate Services team manage the house and grounds on a day to day basis, the FCO Estates and Security Directorate (ESD) and Facilities Management Client Unit (FMCU) teams have an oversight role. The Wilton Park team has a close relationship with the FCO's estates arm of ESD and FMCU. They provide Wilton Park with regular advice and guidance to ensure compliance with HMG policies such as Sustainability and Listed Building status issues.

**5.29** While the overall estate is, on the surface, in reasonable condition the review team is aware that there is a significant programme of maintenance and renovation work on the house and outer accommodation that needs to be carried out. The flat-lining of Wilton Park's capital expenditure budget in recent years has meant that the agency has rightly had to prioritise its programme of work. However, there are a few areas that now need to be urgently addressed (e.g. the boilers). It is for this reason that we have put forward the recommendation in paragraph 4.6. In our experience, extensive delays to this kind of work mean the cost of remedial action becomes ever more expensive, which does not represent good value for money.

**5.30** As part of the Government's industrial strategy to drive regional growth, it is looking to relocate arm's-length bodies and other public sector functions out of London and the surrounding areas. In August 2017, as part

of this policy, the Cabinet Office asked the FCO to submit a return on Wilton Park for the Public Bodies Relocation Data Commission. The FCO's ESD concluded that given Wilton Park's operational and specialist connection with Wiston House in West Sussex, they were satisfied that there is a sound operational requirement to remain in the region as the specialist property is fundamentally related to its core function. The review team concur with that assessment.

**5.31** In 2017, Wilton Park (in consultation with and approval by ESD) commissioned an external review of its security procedures and systems. Following recommendations made, the agency has renegotiated its security contract to provide 24/7 guarding services and has upgraded the CCTV systems. The process adhered to government procurement policy, including the need to demonstrate value for money. It has submitted a business case to the FCO for funds to carry out the remaining recommendations.

## Environment and Sustainability

**5.32** The review team noted that Wilton Park has taken action to source food responsibly and reduce food waste. Wilton Park's catering team plan menus around seasonal and, where possible, locally sourced produce. Suppliers have been asked to reduce plastic packaging for delivery. Herbs and some seasonal fruits (e.g. apples) from Wiston's own kitchen garden are used where possible. This not only helps maintain quality but is also cost effective.

**5.33** In line with the FCO's drive to reduce single use plastics, Wilton Park is similarly looking at

ways it can reduce its environmental impact in this area. For example, they no longer use plastic straws and water for drinking is filtered on site and served to guests in glassware rather than disposable plastic. Wilton Park intend later this year to move to re-fillable dispensers for soaps, body wash etc. rather than single use plastic bottles.

**5.34** FMCU has recently (26 July 2018) undertaken a full environmental management assessment of Wiston House and will be presenting its findings and recommendations shortly.

**5.35** The review team is therefore satisfied that Wilton Park is managing the house and gardens efficiently and effectively and that it is meeting its commitments, including those set by central government.

## **Lease Arrangements**

**5.36** The lease on Wiston House expires in March 2027. There is an opportunity to break the lease in March 2022. Both the FCO and the Goring Family need to signal their intentions twelve months in advance of the lease break and expiration points. Whilst the review team **recommends** that Wiston House remain Wilton Park's home under the current leasing arrangements, we **recommend** that Communication Directorate and Estates and Security Directorate in consultation with Wilton Park allow sufficient time to consider whether or not to invoke the break clause on the Wiston House lease in March 2022. We suggest the FCO form an agreed view by end January 2021.

# Chapter 6: Governance

This section looks at Wilton Park's governance arrangements, including the agency's governing and advisory bodies as well as the relationship between the Sponsor Department and Wilton Park.

## Background

**6.1** The Cabinet Office guide for Departments on Executive Agencies<sup>10</sup> defines corporate governance as "the way in which organisations are directed, controlled and led. It defines relationships and the distribution of rights and responsibilities among those who work with and in the organisation, determines the rules and procedures through which the organisation's objectives are set, and provides the means of attaining those objectives and monitoring performance. Importantly, it defines where accountability lies throughout the organisation".

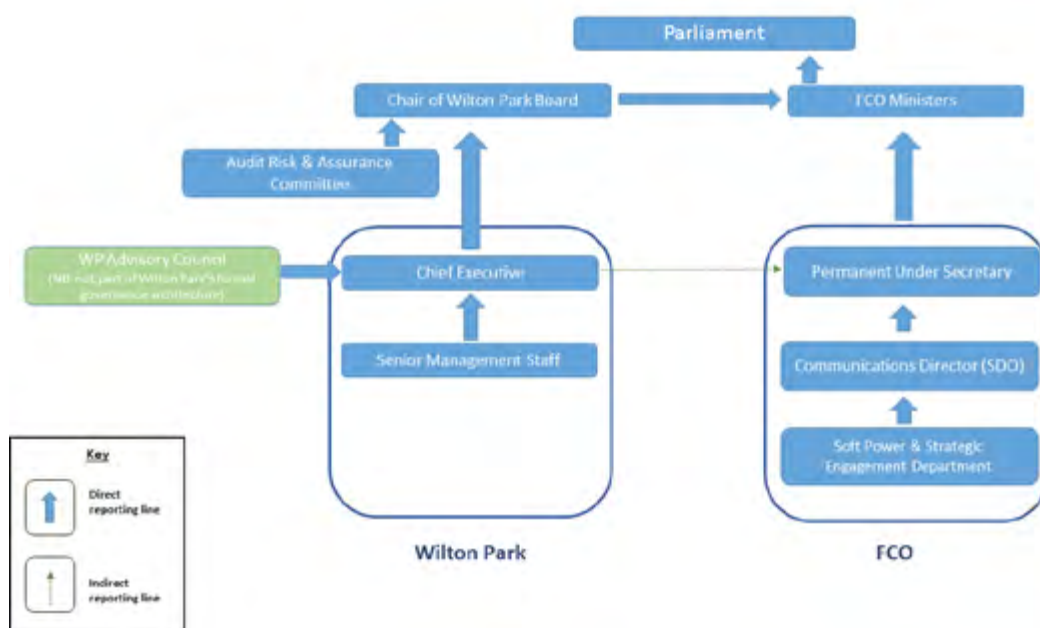
**6.2** In assessing the agency's governance arrangements, the review team applied the Principles of Good Corporate Governance as set out in the above Cabinet Office guidance. Our judgement is that Wilton Park generally has a robust set of governance arrangements in place which

complies with the Cabinet Office guidelines on the Principles of Good Corporate Governance. Given the size and income of the organisation, the governance requirements are arguably proportionately heavier than is necessary but this is managed by a pragmatic working relationship between the FCO, Wilton Park and its governing body.

## Wilton Park Board

**6.3** Wilton Park's Board consists of eight members—four non-executives, one of whom chairs the Board, three FCO representatives and the Chief Executive of Wilton Park. The Board meets five times a year. We judge that the Board is an appropriate size for the organisation and has a good mix of skills, knowledge and experience. As set out in the Framework Document, it is part of the Chair's responsibility to ensure "the Board has a balance of skills appropriate to directing Wilton Park's business". Wilton Park staff provide the secretariat to the Board and ensure that a Board pack is prepared in advance of each meeting, which includes the agenda, minutes and other relevant papers to the discussion. We found these were well presented and circulated

## Wilton Park's Governance and Accountability structure





in a timely fashion although packs were large in size (between 70-80 pages on average). We would encourage Wilton Park to explore with the Board and the sponsor department if there is scope to further streamline the Board pack.

**6.4** Our stakeholder feedback suggested that the Board was effective in holding executive management to account and in providing experienced leadership and quality advice on strategy and the agency's programmatic work. From a compliance perspective, we note that the agency's Board members receive a formal induction process organised by Wilton Park and that the Code of Conduct for Board Members of Public Bodies is observed. There are clear rules and procedures in place for managing conflicts of interest. For example, the Chair of the Board asks about conflicts of interest at the beginning of each meeting and this is recorded in the Board's minutes. We note that the last Board effectiveness review was undertaken by the Chair in March 2016. We recommend that the new Chair carry out an effectiveness review within a year of assuming their post.

**6.5** The Wilton Park Board has seen a number of changes in the past two years with the arrival of two new Non-Executive Directors and two new FCO members to the Board. The current Chair of the Board, Iain Ferguson, is also in the process of being replaced at the end of a nine year tenure. Although the review team has not looked at the detail of the current recruitment process, feedback from the sponsor department and Wilton Park confirm that the process has been formal, rigorous and transparent. During this period of change, the agency has also had an interim Chief Executive (from March 2017) before the formal appointment of the new Chief Executive in December 2017. We commend the Board, Wilton Park and the sponsor department for managing this protracted transition so seamlessly.

### **Wilton Park Advisory Council (WPAC)**

**6.6** The Council was established in 1949 and is led by the Chair of the Wilton Park Board. Its task is to ensure that the agency meets the highest intellectual standards and maintains its reputation as a global centre of excellence. The Council checks that the agency's programmes are relevant to global issues. It meets twice a year and members

are appointed for a three year term with the possibility of serving a second three year term. There are currently 17 members on the Council. They are an experienced group of individuals who have come from a range of sectors (e.g. politics, business, diplomacy and academia).

**6.7** Our consultation with stakeholders reflected that the Council's work was well regarded and made a helpful contribution to the work of the agency, particularly in identifying current themes or policy challenges where Wilton Park could add value. In assessing the group's current size and composition, we found that 17 members was particularly large for a council with its remit serving a relatively small organisation. The size of the Council is also linked to the issue of membership, where the two term limit policy (making 6 years in total) is not routinely being adhered to. Two members have served on the Council for 13 years and a number of other members have had their tenure extended beyond two terms. There appears to be very little rotation off the Council which does not represent best governance practice. We recommend that the Executive Management, in consultation with the Board and WPAC, should determine if there should be a limited number of members serving on the Council. We would also recommend that the practice of routinely extending members ceases and those who have already served two terms (or longer) should not have their membership renewed unless there are compelling reasons for them to remain. The opportunity to review existing arrangements will also allow the Board and executive management to assess whether they currently have the right mix of skills, diversity and experience on the Council. This is an area of work that the Chief Executive may wish to prioritise with the incoming Chair of the Board.

**6.8** On a point of process, we have some concerns that the current practice of recruiting and appointing members to the Council is not sufficiently in line with our understanding of the arrangements set out in the Framework Document. It stipulates that:

*"The appointments and term extensions are made by the Chair on the agreement of the FCO and Wilton Park Board".*

FCO representatives are routinely present at Board meetings, and we understand that when a nomination is presented, if there are no objections it is deemed to be agreed. We believe that the



reference to the “agreement of the FCO” in the Framework Document implies a clear separation between the function of the Board and FCO officials acting in their Sponsor Department capacity. We understand that there was a previous informal agreement between the Board’s Chair and a former SDO in the FCO on the appointment process. However, we believe there should be a clearer audit trail in decision making, with the FCO’s Senior Departmental Officer having ultimate responsibility within the FCO to agree these appointments. One model which would provide for a more robust arrangement is where the nomination is initially agreed by the Board and for the Chair to then write to the SDO seeking the FCO’s formal agreement. This would allow time for greater scrutiny and any wider enquiries or consultation that the FCO might need to make. We **recommend** the FCO produce an annex to the Framework Document on this issue, which sets out the process more clearly and helps avoid ambiguity. In short, there needs to be a separation in time from when the Board discusses and takes a view on an appointment and when the SDO is formally approached to agree that appointment.

**6.9** While it is not explicitly set out in the Framework Document, we would expect individuals who have a proper interest in the Council or that can legitimately contribute to its work are able to attend Council meetings in an observer capacity. It is important that FCO staff, particularly those from the sponsor department, periodically attend so they are able to effectively discharge their oversight function.

## **Audit and Risk Assurance Committee**

**6.10** In line with the principles of good corporate governance, Wilton Park has an Audit and Risk Assurance Committee (ARAC), which sits under the Board. It is chaired by Iain Morgan, one of the Board’s Non-Executive Directors (NEDs), and is supported by two other NEDs on the Wilton Park Board. The Committee meets at least three times a year and has Terms of Reference agreed for its work. The FCO’s Internal Audit Department (IAD) provide the internal audit function for Wilton Park. In their annual report to the Chief Executive, the agency achieved a “substantial assurance” audit opinion. This is a commendable achievement and reflects well on the responsiveness of executive management, the

Board and also on the role ARAC has played in ensuring that the governance, risk management and control environment is adequate and effective.

## **Relationship between the FCO and Wilton Park**

### ***Structure and Background***

**6.11** The Soft Power and External Affairs Department (SPEAD) in the FCO’s Communication Directorate is responsible for overseeing and managing the FCO’s relationship with Wilton Park. The Director of Communication Directorate has been designated the Senior Departmental Officer (SDO) for the institutional relationship with Wilton Park. The SDO has the responsibility of ensuring that the FCO and Wilton Park have a clear understanding of each other’s objectives, methods of working and that there is effective collaboration between the two. SPEAD has a Senior Desk Officer (C5/SEO level), who manages day-to-day engagement with Wilton Park. Their homologue in Wilton Park is the Chief of Staff (D6/Grade 7 level), who has previously worked in the Foreign Office and therefore has a good understanding of the FCO and how it operates.

**6.12** As part of our review we interviewed a number of staff in Wilton Park and the FCO to seek their views on the relationship between the agency and the Sponsor Department. Based on that consultation and the review team’s own observational assessment, our judgement is that the sponsor team provides appropriate oversight and scrutiny of, and support and assistance to, Wilton Park. We would like to qualify this by noting some concerns by stakeholders around the level of engagement from FCO senior management in Wilton Park’s work. The detail to this is set out in paragraphs 6.14 and 6.15 below. While we recognise those concerns, our overarching assessment is that there is a very constructive and mutually supportive dynamic between the sponsor team and Wilton Park which is underpinned by regular and ongoing dialogue.

### ***Framework Document***

**6.13** In line with corporate governance best practice, there is a Framework Document in place which sets out clearly the aims, objectives and functions of the agency and the respective roles and responsibilities of the minister, the Sponsoring Department and Wilton Park. The document

is consistent with the guidance set out in HM Treasury's Managing Public Money handbook. Although the Framework was recently reviewed (in April 2017), we **recommend** the sponsor department and agency undertake a further light-touch review, once the new Chair of the Board is in place. There are three main reasons for this. The first recognises that there have been a number of changes among key personnel since the document was last agreed. There is a new SDO, Chief Executive and Board Chair, who will want to assure themselves that it is fit for purpose and that it individually and collectively meets their needs. The second reason is that it provides an opportunity to address some of more specific areas highlighted earlier in this report (e.g. on appointments to WPAC and clarity on HR policy issues). Thirdly, it will also be able to incorporate the new guidance on Executive Agencies, which the Cabinet Office issued in March 2018.

### ***Senior level engagement***

**6.14** As set out earlier in this chapter, there are three FCO senior managers on the Wilton Park Board—the Senior Departmental Officer, the Chief Operating Officer and the Director for Strategy. Other FCO staff (e.g. from SPEAD and the Office of the Communication Director) also attend Board meetings on an ad-hoc basis. In the other direction, the Chief Executive of Wilton Park attends the FCO Permanent Under-Secretary's weekly meeting with FCO Directors. The Chief Executive also presented at the FCO Management Board meeting in early June (2018).

**6.15** In the course of consultations with key stakeholders from Wilton Park, the Wilton Park Board and the FCO there was a recurring perception that the FCO's senior level engagement with the agency and attention to the overall relationship was not as good as it had been in the recent past. Stakeholders cited, for example, inconsistent participation in Wilton Park Board meetings and a feeling that Communication Directorate deprioritise the relationship with smaller arm's-length bodies (like Wilton Park) to handle more pressing media priorities. As acknowledged elsewhere in this report, there have been significant personnel changes at Wilton Park and in its Board. At the same time, there have also been changes in the sponsor department too as well as a succession of crises to be managed

(e.g. natural disasters and the chemical attack in Salisbury). During the course of this four month review, there have been three different SDOs. We judge that this lack of continuity is also likely to be a contributing factor to a perception that senior managers in the FCO are less engaged in Wilton Park's work. The return of the (permanent) Communication Director (currently on extended leave) in the new year and the arrival of a new Head of SPEAD, may provide an opportunity to review whether the SDO role should continue to be undertaken by the Communications Director or if this could be equally carried out by the Head of SPEAD, which is also a senior management position.

### ***Strategic Fit***

**6.16** Separate to the issues identified above, some stakeholders questioned whether Communication Directorate was the right Directorate in the FCO to manage the institutional relationship with Wilton Park. This was not a reflection on how well the Directorate managed the relationship but rather an issue of strategic fit. In our view, the only other Directorate which could provide a good fit with Wilton Park's work is the Department's Strategy Directorate. Its Director also sits on the Wilton Park Board and the Directorate's work on a cross-spectrum of foreign policy issues and emerging threats and challenges would align well with the agency's work. However, we also see merit in Communication Directorate retaining its oversight role. In addition to managing the relationship with Wilton Park, it is also the lead Directorate for a number of other of arm's-length bodies (but not all) with which the FCO has formal responsibility e.g. British Council and the Marshall Aid Commemoration Commission. Keeping these ALBs under one Directorate could help ensure a coherent FCO approach to its ALBs and also provide an institutional repository of knowledge on central policy on arm's-length bodies, from which other Directorates could also benefit. While it is a matter for FCO senior management to determine if and how this is taken forward, we would suggest that any initial discussion take place between the relevant Directors, in consultation with the Chief Operating Officer and, where appropriate, the Permanent Under-Secretary.

## ***Future Engagement***

**6.17** Until June this year, when the current Chief Executive presented to the Management Board, there was no agreement in place on how often the FCO's Management Board should include Wilton Park on its agenda. The review team understand that this has now been set for an annual discussion. Given the size and sensitivity of the agency, we believe this is adequate and in line with the principles of good corporate governance.

**6.18** Chapter 3 highlighted the need for Wilton Park to be better understood within the Foreign Office—what it is, what it does and how it can support delivery of foreign policy objectives. FCO senior managers tended, on the whole, to have a good understanding of Wilton Park. More junior staff, even at middle management level, were either vaguely aware of Wilton Park or saw it as something that was reserved for senior management. Tackling this, is a shared responsibility between FCO and the agency. We have seen some good examples of previous pilot projects which were developed to work on this. Communication Directorate has a clear role to play in advising and supporting Wilton Park to deliver its strategic comms plan in this area. Part of that work must include concrete ways in which Wilton Park can operationalise its ambition for the FCO to maximise the agency as an internal resource.

**6.19** Under the FCO's Diplomacy 20:20 reform programme, there is a renewed emphasis on supporting inward and outward secondments and the value that brings to participating organisations. We believe there would be value in a member of Wilton Park staff being seconded to the FCO and vice versa. It would provide a good opportunity to deepen further the relationship between Wilton Park and the FCO and a vehicle through which they can address the challenges outlined in the paragraph above. We would encourage both organisations to explore this bilaterally and with the FCO's Secondments Unit to see what opportunities might exist.

# Chapter 7: Culture, Diversity and Values

This section examines the culture, organisational diversity and values of Wilton Park, including the agency's staff survey results.

## Culture

**7.1** Wilton Park, like other arm's-length bodies, is included in the annual civil service-wide staff survey exercise. The response rate in the agency to the survey was 77%, which is 11% higher than the average across the civil service. This reflects well on the organisation which, at the time of the survey, was undergoing leadership change and a period of uncertainty. However, its scores on Bullying Harassment and Discrimination (BHD) were up on the previous year (by 3% to 14%) and Learning & Development (L&D) scores remained low but with a commendable 13% improvement on the previous year. We suggest that Wilton Park's Staff Engagement Group (SEG) continue to lead on the response to staff survey results, and develop their action plan with the Senior Management Team. This will continue to help the agency understand where it is doing well, where it needs to improve, and ensure that staff are consulted and understand the follow-up action being taken.

**7.2** The review team noted that there are a number of internal corporate groups in Wilton Park, such as the Strategic Sustainability Group and the Staff Committee. These groups provide employees with the opportunity to make a broader corporate contribution to the agency's work and help build expertise beyond people's immediate work responsibilities.

**7.3** The review team found Wilton Park staff to be hard-working and committed, the feedback from those staff interviewed was positive about their work at Wilton Park and this is reflected in the low staff turnover. Staff feel they are treated fairly and enjoy the close, family-like atmosphere and they feel privileged to work in such a beautiful setting. Staff were universally positive about the new Chief Executive, her consultative working style and her vision for the agency.

## Organisational diversity

**7.4** Wilton Park, like all employers in the UK, is bound by the Equality Act 2010. As a public sector body it has a responsibility to ensure it creates a diverse workforce—of people and views—which reflects and serves the UK in the 21<sup>st</sup> century. Wilton Park reports to the Civil Service Commission quarterly on recruitment and completes an annual Civil Service Survey reporting on gender, pay and ethnicity. Through these returns we have identified that only four of its 87 permanent employees (including the CEO), come from BAME backgrounds. This is low and compares to 12.7% BAME staff which make up the FCO's UK-based cadre. We would encourage Wilton Park to consider developing a plan, as part of its overall strategy, on how it can improve in this area. The FCO's Diversity and Inclusion Team should be able to assist the agency in that work.

**7.5** More positively, its gender profile reflects that a significant proportion of its staff are women (around 75%) with the agency's new Chief Executive becoming the first woman to lead the agency. The review team requested Gender Pay Gap data from Wilton Park. Current data was not available as they do not routinely record information in that way. However, the Chief Operating Officer said they would be undertaking some work on this issue. The review team would encourage Wilton Park to undertake a review within FY 2018/19 and present those findings to the FCO and Cabinet Office.

**7.6** Age is also a protected characteristic under equality legislation. The review team noted a references to "bringing in younger staff" in Wilton Park's Business and Financial Plan for 2018/19. We recognise that the workforce of Wilton Park is relatively static but would encourage the agency to ensure that it continues to recruit, retain and promote people in line with Civil Service best practice.

**7.7** We would encourage Wilton Park's Learning & Development committee to encourage all staff to complete relevant diversity and inclusion training on Civil Service Learning (e.g. Becoming Disability Confident and Mental Health at

Work). We **recommend** that the module on Unconscious Bias be made mandatory, in line with the FCO mandatory training requirements.

**7.8** Whilst there are currently nine part-time employees at Wilton Park, other flexible or atypical working models such as remote working are not the norm. Some ad-hoc home working is permitted providing employees and Line Managers agree terms in advance. Wilton Park have recently produced a flexible working policy which is aligned with that of the FCO. This policy takes into account the wider Civil Service policy, Wilton Park values and recognises that the operating environment dictates that not all Wilton Park staff can work flexibly e.g. Chefs, Receptionists, and Duty Managers. We would encourage Wilton Park to promote this policy and ensure that staff are aware of the procedures they need to follow if they wish to apply for more formalised flexible working arrangements.

## Values

**7.9** In the latest iteration of the Strategic Plan, we note the addition of the “Wilton Park Values” (see graphic below). Work started on this in mid-2017 and, following consultation with all staff, the Values were formally launched in spring 2018. This is a welcome initiative, which importantly provides a framework for the kind of culture and behaviours that Wilton Park not only expects in the interaction between its own employees but also the way that they engage with their guests.

### Wilton Park’s Values





# Annex A: Tailored Review of Wilton Park: Terms of Reference

## 1. Background

Wilton Park (WP) is an Executive Agency (EA) of the FCO. It has been an EA since 1991. WP acts as HMG's independent convenor of neutral and discreet dialogue on the UK's strategic foreign policy priorities (and those of its friends and allies). It shapes and convenes events linking a global network of experts from a range of sectors, including academia, the military, civil society, business, politicians and diplomats.

As a front-line resource for the FCO and wider Government, WP's purpose is to support HMG's strategic priorities, with particular reference to the FCO's Single Departmental Plan (2015-2020). WP is also a resource for a wide range of international partners and actors keen to explore issues of international importance.

WP has been prioritised as a Tier 3 organisation for this Review, which reflects the relatively small size of the agency. Its overall income is approximately £5.8 million per annum. The FCO provides annual core and capital funding which total £500k and £250k respectively for the 2017-18 financial year. Wilton Park also received £1.4 million of additional Overseas Development Assistance (ODA) programme money in 2017-18. The remainder of Wilton Park's income is generated from FCO directorates, other government departments, foreign ministries, NGOs and the private sector. WP employs 74 FTE staff.

WP's core objectives, as stipulated in its Framework Document are to:

- > Contribute to analysing, understanding and advancing the agenda on international issues;
- > Contribute to the achievement of HMG priorities and inform the policy-making of HMG and the international community; and
- > Support the FCO in pursuit of its objectives (to protect our people, project our global influence and promote our prosperity).

This Tailored Review is happening now as planned in the Implementation Plan of the 2015 Stokes Review of Wilton Park.

## 2. Objective of the Review

Good government requires public bodies that are efficient, effective and accountable. The Government's approach to public bodies' reform for 2015 to 2020 builds on the successes of the 2010 to 2015 Public Bodies Reform Programme. This new approach is based on a two-tier approach to transformation: a programme of cross-departmental, functional reviews coordinated by the Cabinet Office, coupled with ongoing, robust 'tailored reviews' led by departments with Cabinet Office oversight and challenge. For the first time, these reviews will now include executive agencies and non-ministerial departments. The aim of all such Reviews is to provide a robust challenge to and assurance on the continuing need for the organisation in question—both in function and form.

If it is agreed that WP should be retained, the Review will assess in particular:

- > WP's **capacity for delivering more effectively and efficiently**, including identifying the potential for further efficiency savings. The Review will include an assessment of the performance of WP, or assurance that processes are in place for making such assessments; and
- > The **control and governance arrangements** in place to ensure WP and the FCO are complying with recognised principles of good corporate governance.

## 3. 2015 Stokes Review

The 2015 Stokes Review of Wilton Park formed the following conclusions:

That WP makes a significant contribution to the FCO's policy and policy implementation across a range of issues, as well as providing networking

and soft power benefits. It offers greatest value when deploying its core attributes of convening power and skilled facilitation for neutral discussion focused on policy-related outcomes.

That the agency's inconsistent profile belied the wide relevance of its services, the impact it could make and the value it could offer.

That Executive Agency status placed some limitations on Wilton Park's financial management, but offered a clear advantage over other options in the balance it enabled between association with the FCO and neutrality. Notwithstanding the problems of distance, WP's core activity remained rooted in Wiston House at least in the immediate future.

Finally, it concluded that if WP could successfully exploit the potential for a larger market, it had the capacity for a significant increase in utilisation, which would help place it in a stronger financial footing. It found additional scope for efficiency savings driven by changes to the financial model and potential for significant reductions in the cost of event delivery.

The WP Board, including its FCO representatives, agreed (at the October 2017 Board meeting) progress made on the recommendations of the Stokes Review. This was set out in a Review Implementation Plan. The Plan sets out how WP took action on the 41 recommendations, which were grouped into:

- > Overall conclusions and 11 primary recommendations;
- > 7 main and 11 secondary recommendations on WP's contribution to FCO objectives;
- > 4 recommendations on our EA status;
- > 7 recommendations on further scope for improvement; and
- > 2 recommendations on control and governance arrangements.

This Review will consider the progress made against the recommendations of the 2015 Stokes Review of WP and financial flexibilities and long range budgeting.

#### 4. Scope

The Review will be proportionate to WP's size and specialised nature. The FCO accordingly

intends to adopt a light touch approach to overseeing delivery of the Review. It will examine WP's current functions, which are to:

- > Help achieve HMG's strategic foreign policy priorities by bringing together policy makers, opinion formers and expert practitioners to focus on practical challenges and policy delivery;
- > Continue to help strengthen the UK's reputation for resolving international problems through dialogue;
- > Continue to enhance the UK's ability to engage with, inter alia, a network of governments, civil society organisations, and the private sector;
- > Build new contacts with and develop the networks of alumni from events by focusing on those who are likely to become the successor generation of opinion formers and policy makers; and
- > Continue to foster a strong and diverse community of investors and sponsors drawn from the private and not-for-profit sectors.

The Review will address:

- > How each of these functions contributes to WP, FCO and HMG core business and whether they are (all) still needed;
- > If the Review finds the functions continue to be needed, how each should/can best be delivered, including an analysis of the current model;
- > Ensuring WP is operating in line with Cabinet Office guidance on corporate governance.
- > The potential impact of exiting the EU on Wilton Park's model;
- > The significance of WP's location in light of Cabinet Office's relocation programme;
- > The current diversity of the organisation;
- > The potential for the use of shared services;
- > The sustainability of the current funding model, including the ability to generate commercial income; and
- > The impact of ODA/non-ODA funding balance has on the themes of WP events.

Devolution issues do not directly impact WP, and have therefore not been included in the Review's scope.

## 4.1 Efficiency

The Review will consider, if, how and where further efficiencies can be made within WP, including continued focus on wider, civil service drives for efficiencies. It will examine WP's current operational structure, corporate functions and unit/transactional costs and progress made as a result of the 2015 Review. Proposals to deliver new or additional efficiency savings should be set out clearly in the final report.

## 4.2 Effectiveness

The Review will look at the effectiveness of WP, principally:

- > The suitability of WP's priorities in relation to FCO's Single Departmental Plan, government commitments and in supporting work of other government departments;
- > The effectiveness of its current strategy;
- > The effectiveness of WP's use of resources to deliver against its objectives; and
- > How the impact of WP is measured and evaluated.

## 4.3 The Robustness and Transparency of WP's Governance

The effectiveness of WP's Board (including the Audit and Risk Committee) will be considered in the Review, including:

- > The role of the Board in setting and monitoring the strategy of WP and how this is assessed;
- > Whether governance controls in place follow the principles set out in the 'Partnerships with arm's length bodies: code of good practice'; and
- > The relationship between WP and the FCO.

**Scoping pack to include:** Stokes Review Implementation Plan; the Framework Document; Annual Report; 2016-20 Corporate Plan; 2018-19 Annual Business Plan (as per Stokes Review rec 1); WP Priority Outcomes

Document; Organograms; key Stakeholder lists; Governance papers; 2017 Staff Survey results.

### **Review Team**

The Review Team comprises of FCO officials from outside the Sponsor Team. The team will formally take up their roles on 19th March 2018.

Mark Rush—Team Leader; Kathryn Lindsay—Senior Project Officer

The Review Team are responsible for launching the Review by Written Ministerial Statement, consulting stakeholders, gathering evidence, analysing results, writing the report and disseminating its results.

### **Methodology**

The Review will begin in April 2018 and end by July 2018. An FCO SMS member of staff will have oversight of the interim findings to ensure the review is robust and rigorous. The Review Team will consult him/her throughout the process and will maintain regular discussions with the Cabinet Office Public Bodies Reform Team. The methodology will include:

- > Conduct desk research of key documents;
- > Call for evidence with relevant stakeholders followed by meetings to explore some of the issues in more detail;
- > Conduct site visits to WP to speak to staff members to gain an in-depth understanding of how the EA operates;
- > Consult with FCO policy colleagues, Whitehall partners and sponsors to inform and support the Review; and
- > Work with relevant FCO policy/financial leads to provide advice on analytical, financial, legal and policy aspects to make sure any recommendations are robust and achievable.

### **Ministerial Approval**

The Minister for the Constitution will sign off the Terms of Reference.

FCO Ministers will have the opportunity to comment on the scope of the Review and will sign off the final report and recommendations.

# Annex B: Membership of the Review Team and Critical Friends Group

## ***Review Team***

**Role:** To carry out the review, including setting the Terms of Reference, gathering and analysing evidence, and forming recommendations.

### **Mark Rush**

Lead Reviewer, Projects Task Force, FCO

### **Kathryn Lindsay**

Senior Project Officer, Projects Task Force, FCO

### **Lia Suguimoto Magor**

Project Officer, Projects Task Force, FCO

### **Nicola Thistlethwaite**

Assistant Project Officer, Projects Task Force, FCO

## ***Critical Friends Group (CFG)***

**Role:** To challenge the scope, assumptions, methodology and emerging conclusions of the review to ensure that the final report was based on solid evidence and fair evaluation.

Members of the Critical Friends Group were appointed in a personal capacity and did not represent any interest group or particular body.

### **Corinne Kitsell**

CFG Chair, Deputy Director & UN Co-ordinator, FCO

### **Robert Deane**

Head of Knowledge Management Department, FCO

### **Alastair King-Smith**

Head of International Counter-Extremism Group, FCO

### **Phillippa Makepeace**

Head of Consular Assistance Department, FCO

# Annex C: Sources of Evidence

FCO Board papers

FCO Internal Reporting/Correspondence

FCO Single Departmental Plan 2018-19

Hansard

Previous Reviews—Hargreaves Review (2009); Checkpoint Review (2011); Stokes Review (2015)

Tailored Review Team's Online Stakeholder Survey

Tailored Review Teams Stakeholder Interviews—HMG staff

Tailored Review Teams Stakeholder Interviews—FCO staff

Tailored Review Teams Stakeholder Interviews—Wilton Park dialogue participants

Tailored Review Teams Stakeholder Interviews—Wilton Park Staff

Wilton Park Advisory Council papers

Wilton Park Board papers

Wilton Park Annual Report and accounts 2015-16

Wilton Park Annual Report and accounts 2016-17

Wilton Park Annual Report and accounts 2017-18

Wilton Park Business Plan 2018-19

Wilton Park Framework Document

Wilton Park Monitoring & Evaluation data

Wilton Park Strategic Plan 18-19

Wilton Park Website



# Annex D: Stakeholder Engagement

This annex records the individuals or organisations who were consulted as part of the review, including those who were either interviewed and/or provided a response to the online questionnaire on the review.

## Sector: Academia/Research (inc. Think Tanks)

Academy Sciences Malaysia
Center for Disease Dynamics, Economics & Policy
Chatham House
Christian Medical College Vellore
Freie Universität Berlin
GeoPoll
Global Alliance for Livestock Veterinary Medicines (GALVmed)
Go governance institute vienna
Hong Kong University
Institute of Tropical Medicine Pedro Kouri (IPK)
Lebanese American University (LAU)
Makerere University College of Health Sciences
Matej Bel University
Oxtrad
Philadelphia University Jordan
Polish Institute of International Affairs
SAMS
United Nations University
University College London
University of Cambridge
University of Health Sciences
University of Oxford
University of Siena
University of Surrey
University of Sussex
Wellcome Trust
Zhjiang University

## Sector: Business

Airbus Defence & Space
Andart Global
BT plc
The Depository Trust and Clearing Corporation (DTCC)
Dynasafe MineTech Ltd
Fenix Insight Ltd
Macquarie Group
Optima Group
Oracle
Polaris
QinetiQ
Questers Global Group
Strathfillan Consultancy

Telstra

## Foreign & Commonwealth Office

British Embassy Havana

British Embassy Washington

Chief Operating Officer

Communication Directorate

Directorate for Defence & International Security (DDIS)

FCO Services (FCOS)

Finance Directorate

Internal Audit Department (IAD)

Multilateral Policy Directorate

Permanent Under Secretary

Strategy Directorate

UK Mission to the United Nations, Geneva

## Foreign Ministries

Canada (Global Affairs)

Germany (Federal Foreign Office)

Mexico (Permanent Representative to the UN)

Pakistan Ministry of Foreign Affairs

US Department of State

## Foundations

Adyan Foundation

Alliance to Stop Slavery and End Trafficking

Ambassadors for life for community development

British-Hispanic Foundation

Jasmine Foundation

Secure World Foundation

The West Asia North Africa Institute (WANA)

## International Organisations

Council of Europe

ECOWAS

UN Anti-personnel Mine Ban Convention Implementation Support Unit

UN Mine Action Service (UNMAS)

World Health Organisation

## Media

The Economist

Financial Times

## NGOs

British Foreign Policy Group

The British Irish Chamber of Commerce

Campaign For Popular Education (CAMPE)

Centro Nacional de Servicios de Diagnóstico en Salud Animal SENASICA

Change Britain

Conflict Prevention and Early Warning Center Bucharest

Ethical Trading Initiative

Gender & Mine Action Programme (Geneva)

Halo Trust
Humanity & Inclusion UK
iMMAP
International Campaign to Ban Landmines (ICBL)
LaborVoices
Mercy Corps
MEUSAC
Responsible Use of Medicines in Agriculture Alliance
<b>Other Government Ministries and Agencies</b>
British Council
Canadian Space Agency
China National Space Administration
Defence Forces Ireland
Department for International Development (UK)
Department of Health and Social Care (UK)
MOD/ Royal Air Force (UK)
Ministry of Health Kenya
Ministry Of Health Tanzania
National Institute of Health, Thailand
U.S. Department of Labor
<b>Parliament &amp; Political</b>
FCO Minister of State for Asia and the Pacific
Baroness Northover
<b>Wilton Park</b>
Senior Management Team
Policy Team
Operations Team
Delivery Team
Corporate Services Team
<b>Wilton Park (other)</b>
Audit and Risk Assurance Committee
Wilton Park Advisory Council
Wilton Park Board

# Annex E: FCO and Wilton Park Priorities



## FCO priorities and Wilton Park (2017-2018)

Wilton Park's purpose: to support British strategic foreign policy objectives by providing a neutral, discreet and secure forum to convene international opinion formers and policy makers to address and resolve global issues critical to the national security and prosperity of Britain and her allies, and consequently project British values and influence.



### FCO strategic objectives to 2020

#### Protect our people

Safeguard our national security by countering terrorism, extremism, weapons proliferation, and other state and non-state threats in cooperation with allies and partners. Assist British people living, travelling and working around the world when they are most in need.

#### Project our global influence

Protect and promote the values and influence of Global Britain, strengthening our partnerships and the rules-based international system. Support good governance, democracy, rule of law and human rights; prevent and resolve conflict; and build stability overseas.

#### Promote our prosperity

Promote our prosperity by opening markets, driving economic reform, championing British business, and supporting free trade and sustainable global growth.

### Wilton Park strategic objectives to 2020

Secure policy and funding partners to enable it to focus on these strategic objectives in all its events, with a special emphasis on conflict and post-conflict states, the application of the rule of law, and the delivery of the sustainable development goals in vulnerable nations.

### Priorities for 2017-18

#### Security threats

- Continuing to address the causes of radicalisation and explore ways of preventing violent extremism, particularly amongst young people.
- Developing effective strategies to constrain weapons proliferation.
- Pursuing opportunities for dialogue about and between Gulf States and MENA countries.
- Promoting approaches to address issues around cyber, including security and norms in cyber space

#### Europe

- Developing bilateral programmes with European partners.
- Supporting DExEU to achieve negotiating objectives of exit. Supporting preparations for a future outside the EU.
- Helping to advance British national foreign, security and defence policy within the EU1.5.

#### Euro-Atlantic security

- Developing our programme to support a strengthened, more cohesive NATO. Supporting UK leadership based on a close transatlantic relationship and engagement with European allies.
- Using effective dialogue to improve engagement with and on Russia to improve understanding of security challenges and broaden regional experts' perspectives.
- Supporting work to develop effective deterrence strategies to meet Russian security challenges.
- Building a more resilient European neighbourhood. Responding to challenges to European security, particularly in the Ukraine and Western Balkans.

#### Conflict and stability

- Promoting good governance and human rights, reducing modern slavery and addressing migration. Developing programmes supporting regional stability in NSC priority countries including Afghanistan, Syria, Iraq, Libya, Somalia and Yemen.
- Work to strengthen the rules-based international system, including supporting engagement with the UNSG and UNSC.
- Working to address conflict resolution issues.
- Supporting Commonwealth members and outcomes of CHOGM 2018.

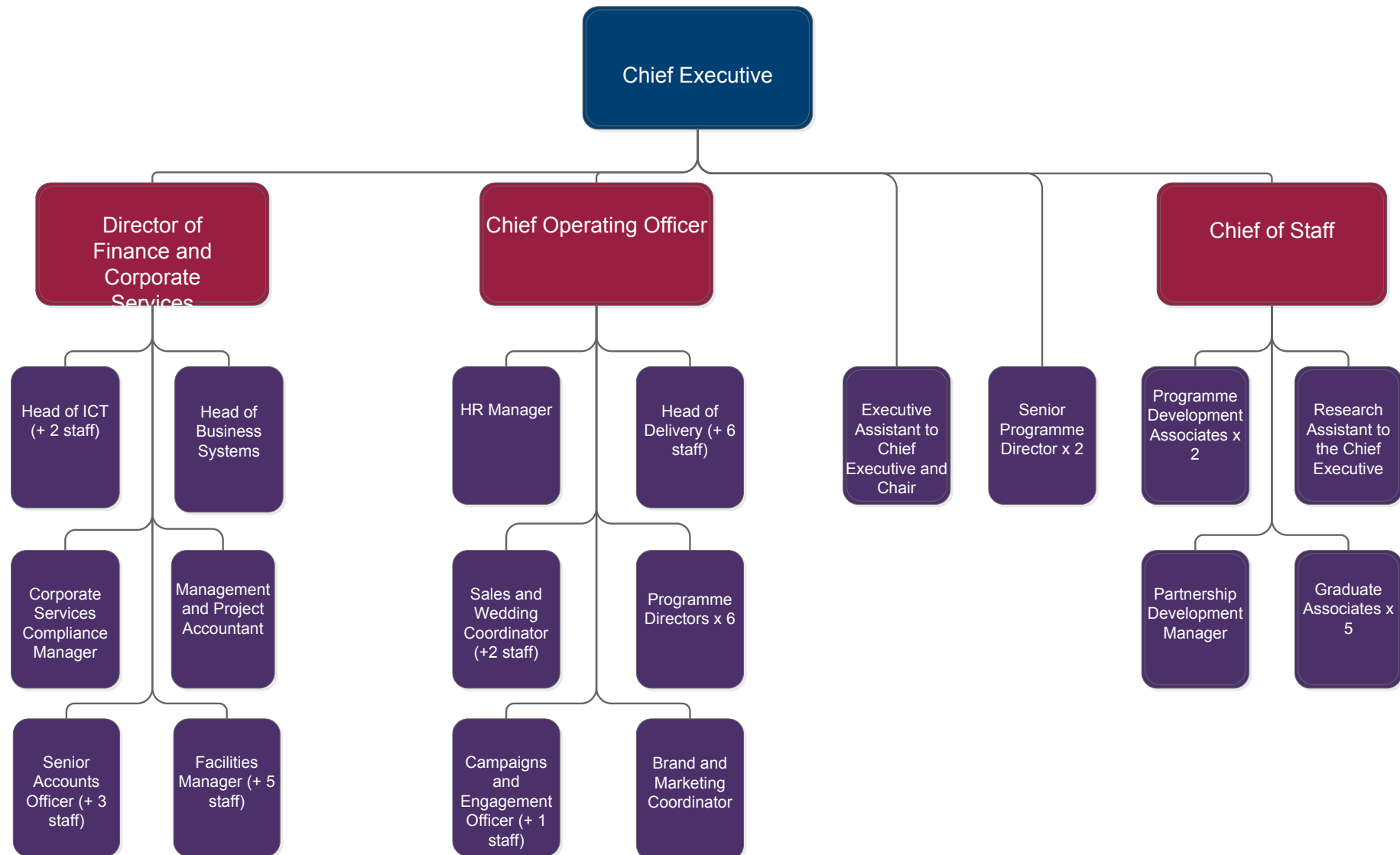
#### Economic diplomacy

- Convening global leadership of free trade and UK trade policy within the WTO and with future FTA partners.
- Supporting DIT and DExEU colleagues post Brexit and support UK companies to export and to bring in FDI.
- Promoting economic development, sustainable growth and better business environments in key markets, especially developing countries and emerging economies, with support from Posts and FCO programme funds.
- Continuing our work on global economic issues including global health, education and anti-corruption.
- Working to address the SDGs and the role of public-private partnerships.

#### Supporting #GlobalBritain

- Utilising Wilton Park's convening skills to support UK soft power and influence.
- Promotion of UK values through youth and leadership programmes.
- Promoting empowerment of women and ensuring diversity as a cross cutting theme.
- Using the US Hub as a bridge.

# Annex F: Wilton Park Organogram





# Annex G: List of Abbreviations

AI	Artificial Intelligence	SPEAD	Soft Power and External Affairs Department (FCO)
ALB	Arm's-length Body	ToRs	Terms of Reference
AMR	Antimicrobial resistance	UN	United Nations
ARAC	Audit & Risk Assurance Committee	WPAC	Wilton Park Advisory Council
BAME	Black, Asian & Minority Ethnic	WPUK	Wilton Park UK
BHD	Bullying, Harassment & Discrimination	WPUS	Wilton Park United States
CIPD	Chartered Institute of Personnel & Development		
COO	Chief Operating Officer		
DFID	Department for International Development		
EA	Executive Agency		
ESD	Estates & Security Department (FCO)		
FCO	Foreign & Commonwealth Office		
FMCU	Facilities Management Client Unit (FCO)		
FTE	Full Time Equivalent		
HMG	Her Majesty's Government		
HR	Human Resources		
IAD	Internal Audit Department		
KIM	Knowledge & Information Management		
KTD	Knowledge & Technology Department (FCO)		
L & D	Learning & Development		
M & E	Monitoring & Evaluation		
NDPB	Non-Departmental Public Body		
NED	Non-Executive Director		
NGOs	Non-governmental organisations		
NSCR	National Security Capability Review		
ODA	Official Development Assistance		
OECD	Organisation for Economic Co-operation and Development		
PDO	Programme Development Officer		
SDO	Senior Departmental Officer (FCO)		
SER	Standard Evaluation Report		
SPD	Senior Programme Director		

# Annex H: Venue Cost Comparison

The review team contacted three alternative venues to compare the costs of their conferencing services against those provided by Wilton Park at Wiston House and we are satisfied that they are within range, providing good value for money. The table below shows the detail.

It should be noted that these costs do not include the non-financial benefits that Wiston House provides, most of which the other venues do not:

A secure location with 24/7 security and UK government security cleared staff;

Single events with exclusive access to the venue for event participants only, ensuring dialogues remain secure and discreet;

A secluded location, enabling participants to focus on discussions and maximise their networking

opportunities without the distraction and pressure to attend other meetings or events.

An atmosphere created by the venue, and the Wilton Park staff which encourages participants to be open and frank and get the most from the opportunity the event allows.

<b>Wiston House, Steyning</b> West Sussex, BN44 3DZ	<b>Grange White Hall Hotel</b> Montague Street, London, WC1B 5BU	<b>Barnett Hill</b> Blackheath Lane, Guildford, GU5 0RF	<b>Leeds Castle</b> Maidstone, Kent, ME17 1PL	<b>Royal Holloway</b> University of London, Egham, Surrey
<b>Facilities</b>				
Four main conference rooms, the largest seating up to 75 people roundtable, or 110 theatre style 21 bedrooms in Wiston house and a further 28 bedrooms in the converted cottages, stables and outbuildings, all with ensuite facilities, 18 single and 31 double	Eight conference rooms, the largest holding up to 120 delegates in theatre style; 58 ensuite spacious guest rooms	Nine conference rooms, the largest holding up to 70 delegates in theatre style; 54 luxurious bedrooms	Conference rooms: Castle and Maidens Tower up to 80 in theatre style; Garden House up to 24 in theatre style; 42 bedrooms plus a further 22 bedrooms available in holiday cottages.	There are many conference rooms of a wide variety of sizes/capacities; The majority of the conference accommodation is located on the main campus and is a short walk to the conference facilities. There are a large number of rooms which are available during student vacations, they offer a mix of standard, ensuite and premium ensuite accommodation.

Wiston House, Steyning West Sussex, BN44 3DZ	Grange White Hall Hotel Montague Street, London, WC1B 5BU	Barnett Hill Blackheath Lane, Guildford, GU5 0RF	Leeds Castle Maidstone, Kent, ME17 1PL	Royal Holloway University of London, Egham, Surrey
Conference Package				
<p>24 hour rate including:</p> <ul style="list-style-type: none"> <li>• Conferences and meeting rooms</li> <li>• LCD projector &amp; screen</li> <li>• Conference stationery</li> <li>• Photographer for event "family" photo</li> <li>• Free Wi-Fi and use of laptops, audio/visual technical support, video conferencing</li> <li>• Interpreting services available (additional cost)</li> <li>• All meals and refreshments, prepared on site:</li> <li>• Tea/coffee/cold drinks and homemade biscuits on arrival</li> <li>• Mid-morning and afternoon tea/coffee/ cold drinks and homemade biscuits</li> <li>• Buffet or two course lunch with vegetarian alternative, tea/coffee/cold drink;</li> <li>• Evening receptions</li> <li>• Three course dinner with vegetarian alternative, wine, coffee and mints</li> <li>• Full English and continental breakfast</li> <li>• Chefs able to cater for religious and medical dietary requirements</li> <li>• Accommodation (including one room with disabled access) with free</li> <li>• Toiletries</li> <li>• Tea and coffee making facilities</li> <li>• Wi-Fi</li> <li>• TV</li> <li>• Wheelchair access</li> <li>• Selection of national and international newspapers</li> <li>• Free car parking</li> <li>• 90 minutes' drive from central London, 45 minutes from Gatwick, 90 minutes from Heathrow</li> <li>• Provision of 24/7 security and reception service (all WP staff are security cleared)</li> <li>• Unrestricted access to the public rooms, conservatory and gardens</li> <li>• Dry cleaning service (additional cost)</li> </ul>	<p>• 24 hour rate including:</p> <ul style="list-style-type: none"> <li>• Meeting room</li> <li>• LCD &amp; Screen</li> <li>• Plasma screen</li> <li>• Conference stationery</li> <li>• Arrival Tea, Coffee &amp; Pastries</li> <li>• Mid-morning Tea, Coffee &amp; Biscuits</li> <li>• Buffet lunch served in main restaurant</li> <li>• Afternoon tea, Coffee &amp; Cakes</li> <li>• Iced water</li> <li>• Accommodation</li> </ul>	<p>24 Hour Rate Including:</p> <ul style="list-style-type: none"> <li>• Meeting room</li> <li>• Support from a dedicated conference service team</li> <li>• Projector &amp; screen</li> <li>• Conference stationery</li> <li>• Water</li> <li>• Three course hot and cold buffet lunch with vegetarian options</li> <li>• Three course table d'hôtel dinner with vegetarian options</li> <li>• Full English and continental breakfast</li> <li>• Overnight accommodation including:</li> <li>• L'Occitane toiletries</li> <li>• Bluetooth audio device</li> <li>• Free Wi-Fi</li> <li>• Desk and well lit working area</li> <li>• Tea and coffee making facilities</li> <li>• Free Wi-Fi in meeting room and public areas</li> <li>• Free parking for delegates and a priority space for trainer or host</li> <li>• Unrestricted use of leisure facilities</li> </ul>	<p>24 Hour Rate Including:</p> <ul style="list-style-type: none"> <li>• Meeting Room</li> <li>• Conference stationery</li> <li>• Three-course dinner</li> <li>• Buffet lunch</li> <li>• Three servings of tea/coffee throughout the day</li> <li>• Still and sparkling water</li> <li>• Accommodation with breakfast</li> <li>• Free Wi-Fi</li> <li>• Free On-site parking</li> <li>• Use of the private garden (Maiden's Tower only)</li> </ul>	<p>24 Hour Rate includes:</p> <ul style="list-style-type: none"> <li>• Meeting room or lecture theatre</li> <li>• Dedicated conference assistant(s) for meetings with over 50 delegates</li> <li>• Basic AV equipment</li> <li>• Conference stationery</li> <li>• Morning teas and coffees served with Danish pastries</li> <li>• Lunch served with teas and coffees</li> <li>• Afternoon teas and coffees served with biscuits</li> <li>• Mineral water and mints</li> <li>• Three course self-service dinner with coffee and tea</li> <li>• Overnight accommodation and a full English breakfast</li> <li>• Free Wi-Fi</li> <li>• Free parking</li> </ul>

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<b>Price</b>				
24 hour rate £255 per person NB VAT does not apply to Wilton Park's services in respect of dialogue events. VAT is applied to Wiston House commercial events.	24 hour rate £275 + VAT per person	24 hour rate £189 + VAT per person	24 hour rate £325 + VAT per person	24-hour rate, standard room: from £111.25 inc. VAT 24-hour rate, single ensuite room: from £133 inc VAT 24-hour rate, premium double ensuite room (for single occupancy): from £147.50 inc. VAT



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