

Project Initiation Document (PID)*Project number*

P171

<i>Project</i>	Corporate Business Support Team
<i>Manager</i>	Christine Ferrigi, Business Support Manager
<i>Sponsor</i>	Paula Maginnis, Assistant Director – People Team and Business Support
<i>Corporate Plan 2018</i>	Aim 3.1 Implement People Strategy Programme Year Two Aim 3.4.2 Implementing New Ways of Working

Project purpose

<i>Definition</i>	<p>To complete a review of the Council's various Business Support functions to build a centralised, high performing, Corporate Business Support Team as per the COM, using the outcome of the DMA assessment for a new structure.</p> <p>Carrying out a Business Support review and building a Corporate Business Support Team will create an agile, resilient workforce as well as increase performance and productivity. The review will reduce operating costs by streamlining processes, developing best practices, removing duplication of work and removing ineffective tasks that do not add value to the organisation.</p> <p>This project will support various other programmes and strategies. The Service Accommodation Programme (P160) by maximising space as well as enabling various methods of working, the People Strategy Programme (P106) and Customer Service Programme (P001) by having the right volume of people and tasks in the right places and the Technology Strategy (TBC) by observing and reporting improvements to ICT Management, then working alongside ICT to implement change.</p>
<i>Mandate</i>	Project Charter agreed by Transformation Programme Board.
<i>Background information and impact assessment</i>	<p>The organisation currently has a Directorate and Service structure, where business support is inconsistently duplicated in various places, this is inherently ineffective and inefficient, including the layers of management required to manage the work of such a model.</p> <p>As the People Strategy Programme will remove the Directorate structure and the Customer Service Programme seeks to bring all customer contact together, it is logical to centralise the Business Support function and to review the Business Support processes to ensure they are fit for our customers and the future.</p>
<i>Approach</i>	<p>The Business Support Manager will work alongside the lead of the Customer Service Programme and Managers around the business to review where tasks sit under the Common Operating Model.</p> <p>Once reviewed, those areas that are confirmed as Business Support will gradually be withdrawn Directorate by Directorate to the Corporate Business Support Team.</p> <p>The Business Support Manager will use internal resource, (current Admin staff across the organisation and the Project Improvement Officer) to map</p>

current processes, identify improvements and implement best practices that are fit for our customers, services provided and the future operating model.

Due to the high volume of processes to be mapped they will prioritised by identifying risk, quick wins and duplicated tasks first. The improvements made will either save time, reduce cost, remove duplication, reduce handovers or reduce risk.

As processes are reviewed, improvements are found and 'to be' processes are written, areas where training and upskilling are required will be identified and an inclusive training and development programme that fits in alongside business as usual will be put in place.

The next step will be to use time studies, existing data and staff participation to look at current performance and ensure we have the correct volume of staff V workload. This will enable SMART targets, set appropriate standards of performance, improve the ability to monitor performance and aid us when agreeing Service Level Agreements. This will also give staff a clear sense of direction and consistency.

Time studies will also assist in reviewing the Business Support structure, staff hours and patterns of work to ensure they fit the current and future organisation needs.

During the review a checklist (Appendix 1) of areas to review within each team will be used, to ensure consistency throughout the review.

We will work with ICT to develop and deliver the digitalisation of processes, by making sure arrangements are in place for the ongoing development and maintenance of systems to meet operational and customer demands as well as ensure we are getting the maximum out of systems already in place.

The capacity of Team Managers and Business Support staff will be kept under constant review as they will be running business as usual throughout the periods of change.

Once all Business Support is withdrawn from Directorates and under the Corporate Business Support Team, the management and team structure will be reviewed.

Business case

The function of Business Support is inconsistent throughout the Council. There are numerous areas of Business Support within each Directorate; many tasks are duplicated, following different processes.

There are areas where workloads do not match FTE, there is either too much work V FTE and there is a backlog of work or not enough work V FTE and staff are not as productive as they could be.

There are also areas where one member of staff knows how to complete certain tasks, which leaves the organisation at risk if that individual is not in the office. Resilience will be required going forward.

Business Support staff currently spend time on tasks that are outdated and do not add value to the business, stopping these tasks will save time to work on important tasks for our customers.

Some processes are high risk due to the amount of room for human error, which causes complaints and concern for staff involved in the processes. Human error cannot be fully removed, but it can be minimised by updating ICT and reviewing processes so that minimal handovers and staff are involved in a process.

Following an initial assessment there are more efficient ways of providing business support to the organisation. Many more tasks can be automated in a consistent way, therefore increasing productivity across the Council.

Once reviewed there may be tasks that can shift to the Business Support Team to free up the time of Technical staff to improve their productivity, performance and customer lead times.

Reviewing and introducing regularly measured SLA's will increase individuals performance and ensure we are maximising productivity as well as improving internal and external customer satisfaction.

Reviewing processes and finding best practices will provide staff with one version of facts to work to, that we all agree on. This gives staff a clear sense of direction and support to make the best decisions.

Working together as one team and breaking down internal barriers will give us the opportunity to create a flexible, agile and resilient workforce within a challenging environment where staff feel valued and supported, with the customer at the heart of everything we do.

In scope

All administrative and clerical functions and tasks undertaken within the five directorates (i.e. including the Office of the Chief Executive).

- General administration and clerical functions, including satellite office administrative tasks.
- Word Processing team
- Executive Assistants
- Document and information management, scanning, filing and retrieval.
- Purchase Orders and invoice processing
- Post
- Booking resources eg. meeting rooms
- Contract management eg. stationery
- Phone bills and re-charging
- Petty cash

Links to other plans, dependencies and constraints

- People Strategy Programme (P106)
COM restructure and DMA structure
- Customer Service Programme (P001)
- Service Accommodation Programme (P160)
- Technology Strategy – particularly Northgate Assure and Achieve Service.
- Back Scanning Projects
- iTrent full roll out

<i>Out of scope</i>	<p>Professional and technical duties.</p> <ul style="list-style-type: none"> • Customer service • Accommodation • Shared services [P108] • Reprographics Review [P050] but may be in-scope subject to review • Accountancy and finance, including debt recovery • Democratic services • Electoral services • Licensing services • Car parking services • ICT and FM services • Online bookings (within customer service) • Recruitment and Training administration – subject to the capabilities of iTrent
<i>Assumptions</i>	<p>It is likely that once processes are streamlined, best practices are found and SMART targets are put in place, staff performance and customer service will improve.</p> <p>It is also likely that there will be additional capacity within teams, which means that permanent staff members are able to efficiently manage workloads and staff currently on FTC may not have their contracts renewed once they expire.</p> <p>Staff within the Business Support Team that retire, leave EFDC or move to different areas of the organisation may not be replaced as we will look to work smarter before recruiting.</p> <p>Challenging work, with flexible working should attract a diverse group of staff.</p>

	<i>Benefit</i>	<i>Measure</i>
<i>Business benefits</i>	Improved, efficient and effective processes	<p>Best practices in place.</p> <p>Risks minimised, time saved, costs reduced, duplication removed, handovers reduced and risk reduced.</p> <p>Baselines for the above will be identified throughout project, team by team.</p>
	Improved team and individual performance	<p>On or above target for KPI's and SLA's.</p> <p>Lead times for task completion decrease.</p> <p>Baselines for the above will be identified throughout project, team by team.</p>
	Increased resilience of workforce	<p>All staff completed training and upskilling programme and have taken on new areas of work.</p>

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Improved stakeholder service	SLA's already in place are reviewed and targets are hit. Areas without SLA's in place have SLA's agreed, put in place and targets are hit. Feedback from stakeholder satisfaction surveys.
Reduced operating costs	Reduction of overall operation costs. Reductions TBC towards the end of the project.
Improved flexible workforce	There are currently 35 JD's, this will decrease by 65%.

Equality Impact Assessment

Is this a new policy (or decision) or a change to an existing policy, practice or project?	Yes, change to policy.
Describe the main aims, objectives and purpose of the policy (or decision)	See Business Case above.
What outcome(s) are you hoping to achieve (ie decommissioning or commissioning a service)?	See Business Case above.
Does or will the policy or decision affect: <ul style="list-style-type: none"> • service users • employees • the wider community or groups of people, particularly where there are areas of known inequalities? 	Initial assessment identifies eighty two staff as being in roles that fall into scope of the Business Support review. The list and figures are subject to change throughout the review, meaning the equality impact will continually be reviewed.
Will the policy or decision influence how organisations operate?	Yes – see Business Case above.
Will the policy or decision involve substantial changes in resources?	Existing resources will be reallocated accordingly. Some savings are likely to be achieved.
Is this policy or decision associated with any of the Council's other policies and how, if	

applicable, does the proposed policy support corporate outcomes?	Yes, see links above.			
What does the information tell you about those groups identified?	Table below has detailed information around the groups impacted.			
	Characteristic	Group	Number	Percentage
	Gender	Female	71	87
		Male	11	13
	Age	16 – 24	13	16
		25 – 34	9	11
		35 – 44	5	6
		45 – 54	23	28
		55 – 64	23	28
		65+	5	6
		Unknown	4	5
	Nationality	British	15	18
		English	10	12
		Unknown	57	70
	Ethnic origin	White - English/Welsh/Scottish/Northern Irish/British	57	70
		White other	1	1
		Black/Black British/African	1	1
Mixed - Any other Mixed/Multiple background		1	1	
Unknown		22	27	
Religion	Christian	36	44	
	Any other	1	1	
	No religion	4	5	
	Do not wish to disclose	18	22	
	Unknown	23	28	
Considered disabled	Yes	6	7	
	No	66	81	
	Unknown	10	12	
Sexual orientation	Heterosexual	38	47	
	Gay	1	1	
	Do not wish to disclose	20	24	
	Unknown	23	28	
Have you consulted or involved those groups that are likely to be affected by the policy or decision you want to implement? If so, what were their views and	Initial briefings have taken place with the existing Business Support staff, the next briefing is scheduled. See project Communication Strategy below.			

how have their views influenced your decision?	
If you have not consulted or engaged with communities that are likely to be affected by the policy or decision, give details about when you intend to carry out consultation or provide reasons for why you feel this is not necessary:	See project Communication Strategy below.

Use this section to assess any potential impact on equality groups based on what you now know.		
Description of impact	Nature of impact Positive, neutral, adverse (explain why)	Extent of impact Low, medium, high (use L, M or H)
Age	The review will involve a range of staff across the authority regardless of characteristic. The impact will not be known until the results of the review are known and the associated decisions are taken to implement any recommendations.	
Disability		
Gender		
Gender reassignment		
Marriage/civil partnership		
Pregnancy/maternity		
Race		
Religion/belief		
Sexual orientation		

Does the EqIA indicate that the policy or decision would have a medium or high adverse impact on one or more equality groups?	No x	See comment above
	Yes <input type="checkbox"/>	If 'YES', use the action plan to describe the adverse impacts and what mitigating actions you could put in place.

Action plan to address and monitor adverse impacts		
What are the potential adverse impacts?	What are the mitigating actions?	Date they will be achieved.

N/A at this stage		
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Project team

<i>Role</i>	<i>Name</i>	<i>Responsibilities</i>
Assistant Director – People Team & Business Support	Paula Maginnis	Project Sponsor
Head of Business Transformation	David Bailey	Programme Lead
Business Support Manager	Christine Ferrigi	Project Manager
Business Support Directorate Team Managers/Team Leaders/Deputies	TBC	Ad hoc involvement in tasks such as process mapping
Project Improvement Officer	TBC	Project Support

Project plan

Key deliverables, milestones and acceptance criteria

<i>Key deliverable</i>	<i>Start date</i>	<i>End date</i>	<i>Lead officer</i>	<i>Acceptance criteria</i>
Meet with all Directors and Asst Directors to discuss Business Support Review	January 2018	January 2018	Christine Ferrigi	Meetings have taken place
Create review checklist (Appendix 1)	January 2018	January 2018	Christine Ferrigi	Checklist in place
Meet with appropriate Neighbourhood Managers and Team Leaders to discuss Business Support Review and in scope roles	23 rd January 2018	5 th March 2018	Christine Ferrigi	Meetings have taken place, in scope roles confirmed
Meet with appropriate Resources Managers and Team Leaders to discuss Business Support Review and in scope roles	January 2018	February 2018	Christine Ferrigi	Meetings have taken place, in scope roles confirmed
Review current Neighbourhood business support tasks	February 2018	February 2018	Christine Ferrigi	Tasks reviewed, added to matrix and prioritised for process mapping
Withdraw Neighbourhood Support Teams from Directorate to Corporate Business Support Team	28 th February 2018	31 st March 2018	Christine Ferrigi	There are two separate Business Support teams, this will be a gradual move

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<i>Key deliverable</i>	<i>Start date</i>	<i>End date</i>	<i>Lead officer</i>	<i>Acceptance criteria</i>
Review current Resources business support tasks	1 st March 2018	1 st March 2018	Christine Ferrigi	Tasks reviewed, added to matrix and prioritised for process mapping
TPB to agree PID	7 th March 2018	7 th March 2018	Christine Ferrigi	PID agreed
Staff briefing for those on Business Support Review in scope list	9 th March 2018	9 th March 2018	Christine Ferrigi & Paula Maginnis	Briefing taken place. Staff impacted by BS review have an understanding of why/how/when
Current Neighbourhood support processes mapped	12 th March 2018	30 th April 2018	Christine Ferrigi/Team Manager/Staff	Processes mapped
Current Resources support processes mapped	12 th March 2018	30 th April 2018	Christine Ferrigi/Team Manager/Staff	Processes mapped
Current Neighbourhood processes reviewed and 'to be' best practices and processes agreed	12 th March 2018	30 th April 2018	Christine Ferrigi/Team Manager/Staff	Best practises found. New processes mapped
Current Resources processes reviewed and 'to be' best practices and processes agreed	12 th March 2018	30 th April 2018	Christine Ferrigi/Team Manager/Staff	Best practises found. New processes mapped.
Training/upskilling needs identified and training schedule put in place	12 th March 2018	30 th April 2018	Christine Ferrigi/Team Manager	Training schedule in place
Withdraw Resources Support Teams from Directorate to Corporate Business Support Team	14 th March 2018	14 th March 2018	Christine Ferrigi	There are two separate Business Support teams, this will be a gradual move
Review learning points before continuing to next Directorate	31 st March 2018	31 st March 2018	Christine Ferrigi	Steps in place to avoid repeating things that did not go so well first time round
Meet with appropriate Governance Managers and Team Leaders to discuss Business Support Review and in scope roles	April 2018	April 2018	Christine Ferrigi	Meetings have taken place, in scope roles confirmed

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<i>Key deliverable</i>	<i>Start date</i>	<i>End date</i>	<i>Lead officer</i>	<i>Acceptance criteria</i>
Review Governance business support tasks	April 2018	April 2018	Christine Ferrigi	Tasks reviewed, added to matrix and prioritised for process mapping
Withdraw Governance Support Team from Directorate to Business Support Team	May 2018	May 2018	Christine Ferrigi	There are several Business Support teams, this will be a gradual move
Current Governance support processes mapped	May 2018	31 st July 2018	Christine Ferrigi/Team Manager/Staff	Process mapped
Current Governance support processes reviewed and 'to be' best practices and processes found	May 2018	31 st July 2018	Christine Ferrigi/Team Manager/Staff	Best practises found. New processes mapped
Training/upskilling needs identified and training schedule put in place	May 2018	31 st July 2018	Christine Ferrigi/Team Manager	Training schedule in place
Review learning points before continuing to next Directorate	27 th June 2018	27 th June 2018	Christine Ferrigi	Steps in place to avoid repeating things that did not go so well first time round
Meet with appropriate Communities Managers and Team Leaders to discuss Business Support Review and in scope roles	16 th July 2018	31 st July 2018	Christine Ferrigi	Meetings have taken place, in scope roles confirmed
Review Communities business support tasks	16 th July 2018	31 st July 2018	Christine Ferrigi	Tasks reviewed, added to matrix and prioritised for process mapping
Withdraw Communities Support Teams from Directorate to Business Support Team	August 2018	Sept 2018	Christine Ferrigi	There are several Business Support teams, this will be a gradual move
Current Communities support processes mapped	August 2018	Oct 2018	Christine Ferrigi/Team Manager/Staff	Processes mapped
Current Communities support processes reviewed and to be best practices and processes found	August 2018	Oct 2018	Christine Ferrigi/Team Manager/Staff	Best practises found. New processes mapped
Training/upskilling needs identified and training schedule put in place	August 2018	Oct 2018	Christine Ferrigi/Team Manager	Training schedule in place

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<i>Key deliverable</i>	<i>Start date</i>	<i>End date</i>	<i>Lead officer</i>	<i>Acceptance criteria</i>
Corporate Business Support Team Structure reviewed and designed to ensure it is fit for purpose/future as per COM and DMA.	28 th Sept 2018	31 st Oct 2018	Christine Ferrigi	Agreed by Management Board
Corporate Business Support Team Structure implemented	1 st Nov 2018	1 st Nov 2018	Christine Ferrigi	Structure in place
SLA's reviewed or created	December 2018	December 2018	Christine Ferrigi	Desired standards of service reached
Create internal Stakeholder engagement plan	December 2018	December 2018	Christine Ferrigi	Internal surveys, meetings, teleconferences. Issues addressed, improvements made as necessary
Complete any outstanding Project actions before closure preparations	Jan 2019	14 th March 2019	Christine Ferrigi	All Project objectives and expected outcomes complete
Reflect on successes and learning points for Project closure	25 th March 2019	29 th March 2019	Christine Ferrigi	Demonstrate improvements and learning points, report to TPB to agree closure
Corporate Business Support Team running at a business as usual state	29 th March 2019	29 th March 2019	Christine Ferrigi	Business Support Review changes completed, TPB agree project closure

Headline plan to be provided by Pentana

Budget plan

<i>Period</i>	<i>2018-19</i>	<i>2019/20</i>	<i>Comments</i>
<i>Revenue</i>			Can be met within existing resources.
<i>Capital</i>			
<i>Savings</i>	xxxx	xxxx	Efficiency savings to be confirmed towards the end of the project.
<i>Totals</i>			

Communication management strategy

<i>Stakeholder</i>	<i>Needs</i>	<i>Communications</i>
Staff	Information Consultation	District Lines/Staff Briefings Email/letters/documents
Leadership Team	Information Consultation	Meetings/Presentations Email/letters/documents
Management Board	Decisions	Meetings/Presentations
Members	Decisions	Meetings/Presentations
Trade Unions	Information Consultation	Meetings/Presentations Email/letters/documents
Internal stakeholders	Information Consultation	Meetings/Presentations Email/letters/documents
Project Manager for Customer Service Programme	Information Consultation	Meetings/Presentations Email/letters/documents

Risk log

<i>Description</i>	<i>Likelihood</i>	<i>Impact</i>	<i>Score</i>	<i>Control measures</i>
Change not accepted by Employees impacted by review, due to engagement. Employees may continue to work to previous processes.	B High	3 Minor	B3 High	Ref to Comms plan above. Employees will be involved in tasks throughout the Project lifecycle, such as Process Mapping. Line Managers will ensure new processes are followed.
Capacity of the Project Team.	D Low	1 Major	D1 Low	Keep capacity under constant review and ask for additional resources if required.
Business Support service level decreases during periods of change.	D Low	2 Moderate	D2 Low	Keep capacity and service levels under constant review.
Programme delayed.	D Low	1 Major	D1 Low	Communicate constraints with Project Sponsor/Programme Lead/TPB.
Loss of key staff from Project Team.	D Low	2 Moderate	D2 Low	Have all notes, documents and decisions etc. accessible for others.
Recruitment and retention issues during interim period.	D Low	2 Moderate	D2 Low	Be transparent with existing staff and applicants.

Project approval

<i>Role</i>	<i>Name / signature</i>	<i>Date</i>	<i>Version</i>
Project Manager			1.0
Project Sponsor			1.0

Version control

<i>Version</i>	<i>Date</i>	<i>Author</i>	<i>Nature of / reason for changes</i>
V1.0	02/03/2018	Christine Ferrigi	

Distribution

<i>Role</i>	<i>Name</i>	<i>Date</i>	<i>Version</i>