Report

Report subject   **:** Admin Business Support Integration

Report to   **:** The Cabinet

Date   **:** Wednesday 15 November 2006

Author   **:** Helen Frances, Head of Customer Services

Cabinet Member for Resources :   Councillor Culver

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1. Introduction:

The council depends on a range of administrative functions in order to deliver services. These duties are currently carried out separately by each unit, according to their requirements. The efficiency of this way of working was originally challenged at the Senior Management Awaydays in October 2005, and led to the formulation of a project to integrate the administrative functions that support council business into a team or teams that could provide effective and efficient support across the council. Three phases of work have been identified. Phase 1 is outlined in the Project Initiation Document (PID) and can be described as the preparation and piloting phase. Phase 2 will focus on implementing work from Phase 1 across the whole council. Phase 3 would commence once staff return to the newly opened Bourne Hill. The attached PID outlines phase one of this work, with a target efficiency of £100k in 2008/09. Future phases (and associated savings) will be agreed with Management Team at appropriate review points, and when the council relocates in centralised offices, further efficiencies would be anticipated.

2. Principles

The project is designed to deliver savings based on more efficient ways of working, and more efficient shared use of admin resource. It is predicated that:

- There will be no reduction in service quality
- There will be a thorough consideration of staffing and personnel matters
- The relocation of responsibilities will take account of the pressures of decant
- Administrative processes will be reviewed to ensure efficiency and better use of existing systems, including the development of the intranet
- Process recommendations and associated savings will be clearly auditable

3. **Project Approach and Resourcing:**

The attached PID outlines phase one of the project, with a completion date of September 2007. A cross-cutting team with representatives from all the relevant disciplines has been assembled, and the work will be supported by two additional members of staff, appointed for one year contracts utilising resources in the Building Capacity Fund. In year one, the work will develop a reusable framework, and will focus on three units.

4. **Next Steps:**

It is proposed that the Improving Customer Services Board is tasked with monitoring progress on the project and that progress towards achieving the identified savings will be reported by the Head of Financial Services in the quarterly Performance Monitoring reports.

5. **Recommendations:**

Cabinet is requested to:

1. Note the PID.
2. Request that the Improving Customer Services Board monitors progress on the project and reports any relevant issues to Cabinet.

6. **Implications:**

Financial: This initiative is designed to achieve cashable savings of £100,000 towards the overall savings of £582,000 for the office project. Although the overall target for staff savings of £344,000 has been factored into the Council's medium term financial strategy, to date some £135,000 had not been specifically identified to particular workstreams. Therefore if the recommendation is approved the vast majority of the savings will have been identified.

IT: None anticipated.

Legal & Human Rights: None.

Personnel: Human Resource implications of the proposal will need to be carefully considered with due regard to employment legislation and in accordance with council policies and procedures. Timescales in relation to the desired cost savings that can be achieved may need to be amended in order to ensure compliance.

A number of HR toolkits including the soon to be launched Development Framework, Remodelling and Organisational Restructuring procedures are designed to facilitate employee and organisational development throughout Salisbury District Council, and once the outcomes of the pilots of these toolkits have been evaluated, it is hoped that this work will benefit ABS.

Job analysis is the major tool that will need to be applied to the ABS project in order to identify and manage issues relating to roles affected by this project. This is a complex and time consuming activity and allocation of resource required to undertake this work is likely to prove challenging. The promotion of equality and fairness will be via the use of our established policies and procedures.

Delivery of the project's aims and objectives arising from people related issues will be complex given the number of change management issues encompassed around the facilitation of structure change.

Community Safety: None.

Environmental: None.

Wards Affected: All.

PROJECT INITIATION DOCUMENT

Project	**Administration Business Support Team Project - Phase One**
Authors	**Helen Frances, Stewart Agland**
Programme Board/ Strategic Owners	**Helen Frances, Stewart Agland**
Project Manager/ Project Owner	**Debbie Cameron**
Project Team Members	**Phil Bellas, Matthew Tiller, Andrea Glover, Debbie Cameron, BI senior support officer, Tom James, Carolyn Johannesen, Malcolm Lewin**
Date	**13 October 2006**
Version	**1.3**

1. **Introduction**
    This project will provide more efficient and streamlined administrative support arrangements for the council and will be delivered in phases. This PID outlines the scope of the first phase. This will work with three units to develop a reusable framework. Phase 2 and 3 (and associated savings) will be scoped with Management Team during summer 2007. The work has been authorised by Management Team following consultation with Service Unit Head (SUH) via an initial SUH working group.

2. **Project Justification/Strategic Purpose of Project**
    To help the council utilise technology, process improvement and revised management arrangements related to administration to identify savings of a minimum of £100k by the end of August 2007 and to identify further work to deliver more savings in the following two years without diminishing the quality of administrative support to council services.

    The project vision is to increase the efficiency of the current administrative arrangements to deliver consistent administrative support to all units within the council through a series of streamlined processes. It is aligned to the following council priorities:

    2.1. **Office centralisation -** providing a seamless and centralised office support function in the new offices

    2.2. **Meeting the financial challenge** - utilising the tools introduced by E-Government to align business practices across a range of administrative functions, standardising the use of key systems and processes and achieving an initial cashable saving of £100k from 2008/09 onwards which will contribute towards the overall savings of £582k for the Office Project.

    2.3. **Improving the performance of the council** - providing access to all units to an efficient and responsive administrative support team whose priorities are agreed in line with corporate requirements.

3. **Desired Outcomes**
    The project has been funded for Phase 1 and the specific outcomes relating to this stage are:

    3.1. Identify job clusters and roles that will be affected by the ABS project.
    3.2. Carry out a job description analysis and remodelling for the identified ABS roles.
    3.3. Identify and ameliorate any workforce issues that may arise from the ABS project work by ensuring any restructure is carried out in a consistent way that promotes equality and fairness

3.4. Identify the corporate administrative processes to be carried out by the ABS teams.

3.5. Establish an outline organisational structure for implementation on return to the new offices.

3.6. Put in place consistent and effective administrative processes to enhance service delivery utilising the relevant technology and identify and implement efficiencies.

3.7. Identify any issues surrounding the utilisation and development of E-government tools to ensure integration and efficiency targets can be met.

3.8. Implement a single workflow, storage and retrieval process for all corporate documents, customer correspondence etc to enable ABS teams to work effectively and efficiently and ensure all legislative issues are addressed.

3.9. Implement a corporate use of the outlook calendars to ensure a consistent process is utilised by all council staff.

3.10. Review the BPR postal reviews in light of the office decant and implementation of document scanning to create a centralised post scanning function and look to achieve 20% scanned correspondence by September 2007.

3.11. Collect relevant volumetrics to baseline current appropriate administrative processes and allow accurate identification of efficiency savings associated with the ABS project.

3.12. Ensure that the implementation of the ABS teams will allow the council to build capacity and meet the future requirement for organisational flexibility.

3.13. Put in place a communications plan to support the project.

3.14. Put a change management programme in place to support the ABS project.

Estimated Cashable Efficiency	Estimated Non-cashable Efficiency	Source	Measure method	When
£60k		Resource savings	Establishment list	Aug 07
£40k		New IT systems (Agresso)	Establishment list	Aug 07
	£2k	Intranet forms becoming available	'As is' and 'to be' volumetrics	Aug 07
£5k		Replacement of legacy systems with CRM/other corporate systems	Annual licence/support costs	Aug 07
	£5k	Process improvements	Volumetrics	Aug 07

4. Project Approach/Specification

Tasks	Lead	Budget Allocation	Budget Source	Resource Allocation	Resource Source	When
Job clustering	AG	N/A	N/A	N/A	PODS	Complete
Review of Administrative Establishment lists to finalise areas of work	AG	Nil	N/A	TBC	PODS/ CS	TBC
Communications plan	AG/CJ	Nil	N/A	15 days	MEDT/ PODS	End of November
Financial tracking mechanism	MT	Nil	N/A	10 days	FIN	End of November
List of Business Improvement process reviews required	DC/BI officer	Nil	N/A		CS	End of November
Risk Register	SA/HF/ DC	Nil	N/A		CS/DSU	TBC
Audit of IT systems currently in use	ML	Nil	N/A		IT	Mid November

Tasks	Lead	Budget Allocation	Budget Source	Resource Allocation	Resource Source	When
Audit of related project work to support outcomes	ML/DC/ TJ/PB	Nil	N/A		IT/CS/ DSU	Mid November
Identify 3 Service Units for pilot work during phase 1	AG/DC	Nil	N/A	1 day	POD/CS	October

5. Project Limitations
The project will not include Customer Access Strategy work, CRM integrations for delivering improved customer service eg Academy, other IT system integrations where there is no significant benefit to the implementation of the administration business support teams.

6. Project Analysis
As yet, it is difficult to ascertain the impact the decant of staff will have on the delivery of the council's business. This impact may also affect the delivery of some parts of this project where there are issues encountered surrounding the current administrative systems.

The work of POD and the delivery of the development framework project will impact on the delivery of the ABS project.

The ABS project may be significantly impacted by the timescales and costs associated with the integration between IT systems. Whilst it is recognised that the focus will be around the improved use of existing systems, there may well be a requirement for some systems to be integrated with others to make further efficiency savings in the longer term.

The LLPG project is currently behind schedule and this may well impact on the delivery of new processes through the administration business support teams. Close liaison with the new LLPG custodian should alleviate this issue and make it possible to work to a jointly agreed timescale if/where appropriate.

7. Budgets and Resources

Unit	Name	Role	Committed Resource
Democratic Services	Stewart Agland	Strategic owner	
Customer Services	Helen Frances	Strategic owner	
Customer Services	Debbie Cameron	BI Project Manager	
Customer Services	Vacant	Project Team Member	42 weeks
IT	Mark Perris	Project Team Member	TBC
IT	Malcolm Lewin	Project Team Member	
Democratic Services	Phil Bellas	Project Team Member	
POD	Andrea Glover	Project Team Member	Maternity leave during project
IT	Tom James	Project Team Member	
MEDT	Carolyn Johannesen	Project Team Member	
Financial Services	Matthew Tiller	Project Team Member	

An existing budget of £60k has been allocated for this work, however, no additional funding has been made available for new software or training. Project deliverables will focus on improved utilisation of existing systems and processes.

8. Project Timescale
Completion of Phase One of this project will be 1 September 2007.

9. Monitoring
The project will produce an update report every month to the project sponsors. The sponsors will summarise these for a quarterly report to Management Team and the Improving Customer Services Board. The project sponsors will also liaise with Service Unit Heads to clarify any issues or exceptions arising during the project lifespan.

10. Communication

The communications plan will be one of the early deliverables.

11. Risks

11.1. Project resources – the identified project personnel will in most cases be working on the project part time, and it is vital that each has sufficient time available to complete the required project tasks

11.2. Realisation of savings – given that savings will largely relate to part-posts units will require support from the project to achieve the agreed savings, and robust support arrangements for this are integral to the project.

11.3. Interdependencies – the project will need to work with other significant projects in the council, including office centralisation, t-government and the integrating customer service programme.

11.4. Decant will restrict the opportunities to maximise the benefits of this project in the early stages, and the project will need to be sensitive to both the constraints and the opportunities for administrative efficiencies during decant.