

## **Item: 6**

### **Policy and Resources Committee: 29 November 2021.**

### **Improvement Support Team – Annual Report.**

### **Report by Chief Executive.**

## **1. Purpose of Report**

To provide an annual update on the Improvement Support Team for 2020/21 and priorities for 2021/22.

## **2. Recommendations**

The Committee is invited to note:

### **2.1.**

That, on 18 February 2020, when considering a review of the Change Programme, the Policy and Resources Committee recommended:

- That the projects [listed in section 3.1 of this report] be approved as priorities for the Change Team.
- That the Change Team be renamed the Improvement Support Team, with the purpose to support services in the delivery of projects, improvements and initiatives; be they incremental or transformational in nature
- That the Improvement Support Team be established on a permanent basis.

### **2.2.**

That, due to the urgent support required for the Orkney Partnership's Children's Services' Improvement Plan, arising from the joint inspection of children and young people in need of care and protection, the Senior Management Team adjusted the priorities for the Change Team referred to above.

### **2.3.**

That the undernoted projects were supported by the Improvement Support Team during 2020/21:

- Orkney Partnership's Children's Services' Improvement Plan.
- Grounds Maintenance.
- Customer Services Platform.
- Electronic Document and Records Management System.

## **2.4.**

That, recently, the capacity of the Improvement Support Team has been expanded to enable the team to reinstate parked projects and support other priorities of the Senior Management Team.

## **2.5.**

That the undernoted projects are the most significant areas of support for the Improvement Support Team during 2021/22:

- Orkney Partnership's Children's Services' Improvement Plan.
- Grounds Maintenance.
- Customer Services Platform.
- Electronic Document and Records Management System.
- Our People Our Plan.
- Replacement Information Management System for New Horizons.

## **2.6.**

That, as part of the budget setting process for 2020/21, the Senior Management Team agreed 13 projects for progressing to Project Initiation Documents with a view to achieving efficiencies, which will be reviewed for achievability.

## **2.7.**

That the Our People Our Plan priority project, the 13 Project Initiation Documents and the revised 'Change Programme' are to be collectively 'badged' together as a single Senior Management Team improvement agenda.

# **3. Improvement Support Team**

## **3.1.**

On 18 February 2020, when considering a review of the Change Programme, the Policy and Resources Committee recommended:

- That the undernoted projects be approved as priorities for the Change Team:
  - Purchasing and Procurement (CR02).
  - Modernising IT (CR06) (including system development projects, namely Customer Service Platform (P0023), HR System Development (P0027) and Integra System Development (P0176)).
  - Ground Maintenance (support and co-ordination of stage 1) (P0311).
  - Electronic Document and Records Management System (EDRMS) (P0314).
  - Strategic Data Warehouse (stage 1 related to Customer Service Platform project) (P0305).
  - Internal communications review (P0310).

- Controls for Household Waste Recycling Centres (P0309).
- Roads, Waste and Environmental Services efficiencies (P0317), including Discovery (review of current New Horizon system) and Implementation (New Horizon replacement, dependant on review findings).
- That the Change Team be renamed the Improvement Support Team, with the purpose to support services in the delivery of projects, improvements and initiatives; be they incremental or transformational in nature.
- That the Improvement Support Team be established on a permanent basis, initially comprising the following posts:

### **3.2.**

The purpose of the Improvement Support Team is to support services in the delivery of projects, improvements, and initiatives; be they incremental or transformational in nature. This is achieved by providing capacity and expertise. This includes building the organisation's capability in project management, improvement, and change management. A collaborative approach is taken to project delivery with co-design and co-creation at the centre of what the team does.

### **3.3.**

The Improvement Programme Manager reports quarterly to the Senior Management Team. A bi-annual report will be produced by the Programme Manager for the benefit of the Senior Management Team, Elected Members, External Audit, and other relevant parties. This was not completed during 2020/21 due to resourcing and pandemic related challenges. The annual report is scrutinised by the Policy and Resources Committee and the annual report for 2020/21 is attached as Appendix 1 to this report.

### **3.4.**

The Improvement Support Team reports to the Head of Executive Support and is led by the Improvement Programme Manager. The current team is made up of:

- 1 full-time equivalent (FTE) post of Improvement Programme Manager: permanent, filled.
- 1.5 FTE posts of Business Improvement Officer: permanent, filled.
- 1 FTE post of Systems Developer and Business Intelligence Analyst: permanent, filled from November 2021.
- 2 FTE posts of Project Officer: temporary, filled from September 2021.

### **3.5.**

Performance management is a core part of the team's approach to project delivery. The approach, detailed in section 2.4 of Appendix 1 to this report, will be implemented as the work of the team returns to business as usual during 2021/22. The approach focuses on outcomes and benefits at a project level which are combined and summarised at a programme level. Taking this approach will provide a layered thread connecting the strategic through to operational project delivery.

This will improve delivery and the ability to provide oversight and monitoring progress at a project and programme level.

### **3.6.**

A core principle of the team is self-evaluation and service feedback. The practices of reflection, learning and improvement are built into the team's ethos and approaches. These are detailed in section 2.5 of Appendix 1.

## **4. 2020/21: a year in review**

### **4.1.**

The priorities recommended for approval by the Policy and Resources Committee on 18 February 2020 are detailed in section 3.1 of Appendix 1.

### **4.2.**

Due to the urgent support required for the Orkney Partnership's Children's Services' Improvement Plan (arising from the joint inspection of children and young people in need of care and protection), the Senior Management Team adjusted these priorities. This resulted in several projects being temporarily parked.

### **4.3.**

Support from the Improvement Support Team therefore focused on:

- Orkney Partnership's Children's Services' Improvement Plan.
- Grounds Maintenance.
- Customer Service Platform.
- Electronic Document and Records Management System.

### **4.4.**

The Orkney Partnership's Children's Services' Improvement Plan was the most significant commitment during 2020/21 taking up most of the team's capacity. Support was provided in several areas which helped the Partnership to progress improvements. This improvement was validated during the Care Inspectorate led Progress Review which reported in August 2021.

### **4.5.**

The Grounds Maintenance project was progressed with a final report being considered by the Policy and Resources Committee on 22 June 2021 and the recommendations subsequently approved by Council. This is enabling the procurement of a new grounds' maintenance contract.

#### **4.6.**

The Customer Service Platform was an important tool during 2020/21 with MyOrkney going live in March 2020 to support the pandemic response. The platform was used heavily to develop public and business forms required as a result of the pandemic. The project has now closed and has transitioned to business-as-usual development from 1 April 2021. For simplicity future reporting for the platform will be through the Improvement Support Team.

#### **4.7.**

The Electronic Document and Records Management System project was paused due to the pandemic and restarted at a reduced pace in May 2020. The project focused on solution development and piloting (stage two).

### **5. Priorities for 2021/22**

#### **5.1.**

The initial priorities for 2021/22 were the same as those in 2020/21. On 3 March 2021, the Senior Management Team agreed that two temporary Project Officers could be recruited to enable the team to reinitiate parked projects. This proposal is affordable within the current budget and within the team's establishment (5.5 full-time equivalent ).

#### **5.2.**

Furthermore, the additional capacity has helped to co-ordinate the support, progress and reporting of the Senior Management Team priorities (Our People Our Plan). The capacity can support the Senior Management Team's Project Initiation Documents or undertake tasks in relation to these as determined by the Senior Management Team.

#### **5.3.**

Additional details of the Improvement Support Team supported projects for 2021/22 can be found in section 4 of Appendix 1. The following projects are the most significant areas for 2021/22, all of which are actively being worked on.

- Orkney Partnership's Children's Services' Improvement Plan.
- Grounds Maintenance (report approved)
- Customer Services Platform (CSP): business as usual development
- Electronic Document and Records Management System.
- Our People Our Plan.
- Replacement Information Management System for New Horizons

## 5.4.

The proposals and next steps in this section are not without associated risks, including:

- Service support and leadership.
- Impact on political decision making due to 2022 local elections.

## 6. Consolidated Improvement Agenda

### 6.1.

Audit Scotland's Annual Audit Plan 2020/21, considered by the Monitoring and Audit Committee on 1 April 2021, highlighted the following:

<b>Audit Risk</b>	<b>Source of assurance</b>	<b>Planned audit work</b>
<p>Longer term savings options for a number of years the council has identified a funding gap, the most recent long-term financial strategy showing a cumulative funding gap of £65.7 million, based on realistic assumptions. However, there are currently no options developed to allow the council to close the gap.</p> <p>In April 2016 the council approved a change programme which would generate £3.8 million in efficiency savings between 2017/18 and 2020/21 following an evaluation of business processes. The Improvement Support Team was refreshed in February 2020 but with new challenges in 2020, there has been no update on progress in meeting the savings targets. It is not clear how the change programme will lead to the generation of the savings required over the long term.</p> <p>There is a risk that the council does not take a long-term view when creating savings plans.</p>	<p>The council plan to provide a range of options/choices for members to consider. These will provide a range of short, medium and long terms savings options.</p>	<p>Review and comment on the appropriateness of process implemented to generate the council's option appraisals.</p> <p>We will review the operation and scrutiny of the revised change programme.</p> <p>We will review emerging long-term financial strategies to see how a balanced budget is to be achieved.</p>

## **6.2.**

The Change Programme should therefore be reviewed to determine whether the remainder of the savings targets are achievable through the original scoped projects. It may be found that the existing Change Programme projects are no longer viable and should be recommended to be closed.

## **6.3.**

As part of the budget setting process for 2020/21, the Senior Management Team identified 13 projects listed below for working up as Project Initiation Documents (PIDs) and has since agreed the timescale and format to take these projects forward. Each PID includes the potential scope for savings that could be delivered. These PIDs represent the next stage of the Change Programme.

- Property Portfolio Rationalisation.
- Economic Development Service Redesign.
- Fleet review.
- Marine Services – Business Investment Plan.
- Commercial Waste Service – review.
- Domestic Waste Service – review.
- St Magnus Cathedral Charging Scheme.
- Cultural Donation Schemes.
- Leisure Services Review.
- Life-long Learning Offer.
- Introducing a 'Contributing to Your Support' Policy.
- Transportation Service – Strategic Transportation Services.
- Third Sector Commissioning Review.

## **6.4.**

The Senior Management Team will undertake this review and agreed that Senior Management Team priorities (Our People Our Plan), reviewed Project Initiation Documents and the revised 'Change Programme' will be collectively 'badged' together as a single improvement agenda. Savings will be aggregated to facilitate oversight and monitoring of progress.

## **7. Corporate Governance**

This report relates to the Council complying with governance and scrutiny and therefore does not directly support and contribute to improved outcomes for communities as outlined in the Council Plan and the Local Outcomes Improvement Plan.

## **8. Financial Implications**

### **8.1.**

There are no immediate financial implications arising from the recommendations of this report, which are for noting and scrutiny.

### **8.2.**

At section 6, the report identifies that the Improvement Support Team will be supporting delivery of the 13 Senior Management Team projects identified for working up as Project Initiation Documents to provide budget savings.

### **8.3.**

The Change Programme was initially established with the aim of realising some significant financial efficiencies. The ambitious initial targets and revised targets are recorded in Section 5 of the annual report, attached as Appendix 1.

## **9. Legal Aspects**

The support to the Council provided by the Improvement Support Team helps the Council to meet its statutory obligations to achieve best value.

## **10. Contact Officers**

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## **11. Appendix**

Appendix 1: Improvement Support Team Annual Report 2020/21





**ORKNEY**  
ISLANDS COUNCIL

# Improvement Support Team Annual Report 2020/21

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The purpose of this report is to provide an annual update on the Council's Improvement Support Team for the year 2020/21 and to look forward into the priorities for 2021/22. This includes:

- An overview of the Improvement Support Team.
- A summary of progress in 2020/21.
- A summary of priorities for 2021/22.
- An update on the Change Programme financial summary.
- SMT recommendations for the Change Programme.

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## 2 The Improvement Support Team

At Policy and Resources Committee on 18 February 2020 the Improvement Support Team (the team) was established as a permanent team.

This section provides:

- An overview of the purpose and governance of the team.
- Details of the team's approach to performance management.
- An outline of the team's approach to feedback and self-evaluation.
- Clarification on the team's linkage with the Change Programme.

### 2.1 Purpose

The purpose of the team is to support services in the delivery of projects, improvements, and initiatives; be they incremental or transformational in nature. This is achieved by providing capacity and expertise. This includes building the organisation's capability in project management, improvement, and change management. A collaborative approach is taken to project delivery with co-design and co-creation at the centre of what the team does.

The team's activities fall into three core areas:

- Project support.
- Activities support.
- Building capability.

#### Project support

- Supporting project and improvement delivery
- Including project management, general support and improvement expertise

#### Activities support

- Completion of specific pieces of work, e.g. research and analysis
- Organisation and facilitation of workshops, training, meetings, or events

#### Building capability

- Influence and lead approaches in project management, improvement, and change management
- Achieved through facilitation, coaching, mentoring, and training

### 2.2 Governance

Governance and scrutiny of the team and its portfolio of projects is delivered through the Council's Senior Management Team (SMT). It includes the three critical core aspects:

- Priorities | the new workload priorities for the team.
- Progress monitoring | reporting of progress and review of existing priorities.
- Delivery review | scrutiny of what is delivered by the team.

The Improvement Programme Manager reports quarterly to SMT covering the above.


A bi-annual report will be produced by the Programme Manager for the benefit of SMT, Elected Members, External Audit, and other relevant parties. This was not completed during 2020/21 due to resourcing and pandemic related challenges. This report is the first of the bi-annual reports for 2021/22. The annual report is scrutinised through Policy and Resources Committee.

Initial requests for support should go through the Improvement Programme Manager for scoping prior to presentation at SMT.

Full details of the team's governance approach are available from the Improvement Programme Manager ([improvement.support@orkney.gov.uk](mailto:improvement.support@orkney.gov.uk)).

### 2.3 Team structure

The Improvement Support Team reports to the Head of Executive Support and is led by the Improvement Programme Manager. The current team is made up of:

	1 FTE Improvement Programme Manager: <i>permanent, filled</i>
	1.5 FTE Business Improvement Officers: <i>permanent, filled</i>
	1 FTE Systems Developer and Business Intelligence Analyst: <i>permanent, filled</i>
	2 FTE Project Officers: <i>temporary, filled</i>

### 2.4 Performance management approach

Performance management is a core part of the team's approach to project delivery. The approach below will be implemented as the work of the team returns to business as usual during 2021/22.

As part of the planning process each priority must have clearly identified outcomes and benefits with related performance measures defined during scoping. This should be understood before the priority is approved by SMT for initiation. The level of these should be relevant and proportionate to the scope of the priority.

At an Improvement Programme level, the outcomes and benefits should be clearly aggregated and documented within the quarterly updates to SMT and the biannual report.

Work on the Improvement Support Team priorities, together with the Project Initiation Documents (PIDS) and SMT priorities, needs to be collated and the cost / benefits presented in a specific, measurable, realistic, achievable plan to articulate an overview of how a range of savings/income options will be developed for members to consider in the short, medium, and longer term.

Taking this approach will provide a layered thread connecting the strategic through to operational projects delivery.

## 2.5 Self-evaluation and service feedback

A core principle of the team is self-evaluation; reflection, learning and improvement are built into the team's ethos and approaches.

Specifically, this includes:

- ✓ Time for retrospection built into regular meetings.
- ✓ Learning, and the use of lessons, as core aspect of project management.
- ✓ Continuous improvement of team approaches.

Equally important are the steps taken to close projects once completed. As part of the project close out process the team will:

- ✓ Capture learning from the project and include it in the project close out report.
- ✓ Arrange for a survey of focus groups with supported services, and core stakeholders as relevant and proportionate.
  - This will allow the team to assess 'customer satisfaction', impact of delivery and the spread of team approaches.

## 2.6 Linkage to the Change Programme

The Change Programme is owned by the Council's Senior Management Team (SMT). Reviews and projects are led by a member of the Corporate Management Team.

The Improvement Support Team supports several Change Programme projects in the same way it supports other service priorities. In both cases the team does not own the project but simply supports the relevant service in its delivery.

A Change Programme financial summary and review can be found in section 5.

### 3 2020/21: a year in review

#### 3.1 Approved priorities 2020/21

The following priorities were approved at Policy and Resources Committee on 18 February 2020.

Corporate projects:

- Purchasing and Procurement (CR02) | 30 September 2020.
- Modernising IT (CR06) (includes system development projects):
  - Customer Service Platform (P0023) | 31 December 2020.
  - HR System Development (P0027) | 30 June 2020.
  - Integra System Development (P0176) | 30 June 2020.
- Grounds Maintenance (P0311) | 31 March 2020.
- Electronic Document and Records Management System (EDRMS) (P0314) | 31 March 2021.
- Strategic Data Warehouse (stage 1 related to CSP project) (P0305) | 31 December 2020.
- Internal communications review (P0310) | 31 March 2020.

Service projects:

- Controls for Household Waste Recycling Centres (P0309) | 31 March 2020.
- Replacement Information Management System for New Horizons (P0317):
  - Discovery (review of current New Horizon system) | 31 March 2020.
  - Implementation (New Horizon replacement, dependant on review findings).

#### 3.2 Revised priorities

With COVID-19, and support for the Orkney Partnership Children's Services Improvement Plan, there has been a significant adjustment of the team's priorities with several projects being temporarily parked. This reprioritisation has been approved by the SMT.

The following priorities were paused during 2020/21:

- Purchasing and Procurement (CR02).
- Modernising IT | CR06.
  - Driver documents checks process reengineering.
- Strategic Data Warehouse (stage 1 related to CSP project) (P0305).
- Internal Communications Review (P0310).
- Controls for Household Waste Recycling Centres (P0309).
- D&I Information Management System replacement project (P0317).

The following projects progressed. They have their own dedicated resource, outwith the Improvement Support Team and are led by the Financial Systems Manager.

- HR System Development (P0027) | 30 June 2020.
- Integra System Development (P0176) | 30 June 2020.

Support from the Improvement Support Team therefore focused on:

- Orkney Partnership Children’s Services Improvement Plan | P0318.
- Electronic Document and Records Management System (EDRMS) | P0314.
- Grounds Maintenance | P0311.
- Customer Service Platform (CSP) | P0023.

### 3.3 Delivery in 2020/21

Project	2020/21 update
<p>Orkney Partnership Children’s Services Improvement Plan   P0318</p> <p>Owner: Chief Officers Group</p> <p>Not in original portfolio of approved projects.</p> <p>Support started 20 February 2020. Support to be reviewed August 2021.</p>	<p>Supported delivery areas included:</p> <ul style="list-style-type: none"> <li>• General improvement plan management.</li> <li>• Organisation and facilitation of numerous multi-agency events and workshops.</li> <li>• Development of guidance, procedures, and templates.</li> <li>• Facilitation of improvement activities.</li> </ul>
<p>Grounds Maintenance   P0311</p> <p>Owner: Hayley Green</p> <p>Project management, analysis and facilitation support provided by the team.</p>	<ul style="list-style-type: none"> <li>• Completion of data and options analysis.</li> <li>• A year’s extension to contracts agreed with contractors to enable D&amp;I to consider an in-house option. <ul style="list-style-type: none"> <li>○ In house option found not to be viable at this time.</li> </ul> </li> <li>• Report completed for discussion at a Member Officer Working Group on 21 May 2021 and submission to P&amp;R Committee (22 June 2021).</li> </ul>
<p>Electronic Document and Records Management System (EDRMS)   P0314</p> <p>Owner: Gavin Mitchell</p> <p>Project completion: 31 March 2023</p>	<p>Project Team in place led by the Improvement Programme Manager as named Project Manager.</p> <ul style="list-style-type: none"> <li>• Project was paused due to COVID-19 and restarted in May 2020.</li> <li>• Stage two (piloting) in progress.</li> </ul>

Project	2020/21 update
<p>Customer Service Platform (CSP)   P0023</p> <p>Owner: Karen Greaves</p> <p>Project team in place led by the Customer Services Manager.</p> <p>Support provided by the team at a programme and project management level.</p>	<ul style="list-style-type: none"> <li>• MyOrkney went live March 2020 to support pandemic response.</li> <li>• Platform used heavily to develop COVID-19 required public and business forms.</li> <li>• The project has transitioned to business-as-usual development from 01 April 2021.</li> <li>• As a result, this project is reported as being complete under the Improvement Support Team.</li> </ul>
<p>HR System Development   P0027</p> <p>Owner: Andrew Groundwater</p> <p>Please note sickness absence entry is currently live with <i>CEX, CS, OHAC, Housing and Homelessness</i> and <i>Marine Services</i>.</p> <p>Project team in place led by the Financial Systems Manager.</p>	<ul style="list-style-type: none"> <li>• Project team have supported COVID-19 adjusted process requirements.</li> <li>• Rollout of sickness absence entry in <i>CEX, CS, OHAC, Housing and Homelessness</i> and <i>Marine Services</i>.</li> <li>• Development of dashboard view for performance indicators.</li> <li>• Development completed of absence management process (automatic emails when triggers are hit, recording of management interventions) (all services).</li> </ul>
<p>Integra System Development   P0176</p> <p>Owner: Gareth Waterson</p> <p>Please note P2P is currently live with <i>OHAC, CEX, CS</i> (excluding some smaller school kitchens), <i>EL&amp;H</i> and <i>D&amp;I</i>.</p> <p>Project team in place led by the Financial Systems Manager.</p>	<ul style="list-style-type: none"> <li>• Project team supported COVID-19 adjusted process requirements.</li> <li>• Production of training videos completed and available on iLearn.</li> <li>• Live in all areas apart from school kitchens.</li> <li>• D&amp;I live in all areas with a modified process for areas that use New Horizons.</li> </ul>
<p>Modernising IT   CR06</p> <p>Owner: Hayley Green</p> <p>The Team provided project management, solution development and implementation support with members of the Corporate Admin Group.</p>	<ul style="list-style-type: none"> <li>• New meeting rooms bookings went live March 2021.</li> </ul>

## 4 Priorities for 2021/22

### 4.1 Recruitment

The initial priorities for 2021/22 are the same as those in 2020/21. At SMT on 03 March 2021 it was agreed that two temporary Project Officers could be recruited. This is to enable the team to reinitiate parked projects. This proposal is affordable within the current budget and within the team’s establishment (5.5 FTE).

Furthermore, the additional capacity can help to co-ordinate the support, progress and reporting of the PIDs / SMT priorities (Our People Our Plan), or undertake tasks in relation to these as determined by SMT.

It would be the intention to review the composition of the team ahead of March 2022 and consider the continuation of the temporary secondment approach or to establish a permanent team. This will be informed by the project improvement work required at that stage.

The team recruited a Systems Developer and Business Intelligence Analyst in October 2021. This was approved at Policy and Resources Committee on 18 February 2020. This has been delayed until now due to COVID and operational considerations.

### 4.2 Planned next steps

This section provides brief next steps for the Improvement Support Team’s portfolio of projects. Original end dates provided are those detailed in the Change Team report to Policy and Resources Committee on 18 February 2020.

### 4.3 Active projects

Project	Next steps
Orkney Partnership Children’s Services Improvement Plan   P0318  Owner: Chief Officers Group Status: <b>Active</b>  Support started 20 February 2020 Support to be reviewed August 2021.	Not in original portfolio of approved projects. <ul style="list-style-type: none"> <li>Continued support for OHAC and the Orkney Partnership.</li> <li>Supporting the Care Inspectorate led Progress Review.</li> </ul>
Grounds maintenance   P0311  Owner: Hayley Green Status: <b>Active</b>  Original end date: 31 March 2021 Revised end date: 31 March 2022	<ul style="list-style-type: none"> <li>Last Member Officer Working Group took place on 21 May 2021.</li> <li>Report to P&amp;R Committee (22 June 2021) was approved.</li> <li>Project close out from an IST perspective Summer 2021.</li> </ul>



Project	Next steps
<p>Electronic Document and Records Management System (EDRMS)   P0314</p> <p>Owner: Gavin Mitchell Status: <b>Active</b></p> <p>Original end date: 31 March 2023 Revised end date: 31 March 2023</p>	<ul style="list-style-type: none"> <li>• Completion of Stage 2 (piloting).</li> <li>• A Business Improvement Officer started as Assistant Project Manager on 01 April 2021. This is already having a positive impact on the project and is addressing challenges within the project.</li> </ul> <p>The current EDRMS Project Officer has resigned. A new Project Officer has been recruited with start date to be confirmed.</p>
<p>Customer Service Platform (CSP)   P0023</p> <p>Owner: Karen Greaves Status: <b>Active</b></p> <p>Developer funding extended to: 30 September 2021</p> <p>Project team in place led by the Customer Services Manager.</p>	<p>Moved to business-as-usual development from 01 April 2021 with reporting through the Improvement Support Team.</p> <ul style="list-style-type: none"> <li>• Development priorities to be reviewed quarterly with reporting to SMT through this report.</li> <li>• Current priorities cover: <ul style="list-style-type: none"> <li>○ Governance and prioritisation.</li> <li>○ Sustainability.</li> <li>○ Technical debt.</li> <li>○ Process development.</li> </ul> </li> </ul>
<p>HR System Development   P0027</p> <p>Owner: Andrew Groundwater Status: <b>Active</b></p> <p>Original end date: 30 June 2020 Extended to: 30 September 2022</p> <p>Project team in place led by the Financial Systems Manager.</p>	<ul style="list-style-type: none"> <li>• Roll out will continue on a service area by service area basis throughout the D&amp;I and EL&amp;H directorates.</li> <li>• Project extended to 30 September 2022.</li> </ul> <p>Recommendation that this project is removed from list of Improvement Support Team supported projects.</p>
<p>Integra System Development   P0176</p> <p>Owner: Gareth Waterson Status: <b>Active</b></p> <p>Original end date: 30 June 2020 Extended to: 30 September 2021</p> <p>Project team in place led by the Financial Systems Manager.</p>	<ul style="list-style-type: none"> <li>• Continue roll out to school kitchens.</li> <li>• Project close out.</li> </ul> <p>The project is on schedule for completion by 30 September 2021.</p>

#### 4.4 Parked projects

Project	Next steps
<p>Modernising IT   CR06</p> <p>Owner: Hayley Green Status: <b>Parked</b></p> <p>Original end date: 31 December 2020 Revised end date: 31 March 2022</p>	<p>Complete reengineering of:</p> <ul style="list-style-type: none"> <li>• Driver documents checks process.</li> </ul>
<p>Purchasing and procurement   CR02</p> <p>Owner: Hayley Green Status: <b>Parked</b></p> <p>Original end date: 30 September 2020 Revised end date: 31 March 2022</p>	<ul style="list-style-type: none"> <li>• Delivery of a local stationery contract.</li> <li>• Creation and dissemination of lessons to purchasing officers across the council.</li> </ul>
<p>Strategic Data Warehouse   P0305 Stage 1   CSP pilot</p> <p>Owner: Alex Rodwell Status: <b>Parked</b></p> <p>Original end date: 31 December 2020 Revised end date: 31 March 2022</p>	<ul style="list-style-type: none"> <li>• Development of procurement brief for pilot area.</li> <li>• Manage delivery of the Strategic Data Warehouse Pilot.</li> </ul>
<p>Internal communications review   P0310</p> <p>Owner: Karen Greaves Status: <b>Parked</b></p> <p>Original end date: 31 March 2020 Revised end date: 31 March 2022</p>	<ul style="list-style-type: none"> <li>• Review complete and findings and recommendations report created.</li> <li>• Report to be reviewed and updated as required.</li> <li>• Once reviewed report to be submitted to SMT.</li> </ul>
<p>Controls for Household Waste Recycling Centres   P0309</p> <p>Owner: David Thomson Status: <b>Parked</b></p> <p>Original end date: 31 March 2020 Revised end date: 31 March 2022</p>	<ul style="list-style-type: none"> <li>• Permitting control and communications material substantively completed.</li> <li>• Parked due to COVID-19.</li> <li>• Re-initiation should include a review of rationale and anticipated outcomes.</li> <li>• Final testing to be completed.</li> <li>• Communication and phased go-live.</li> </ul>

Project	Next steps
<p>Replacement Information Management System for New Horizons   P0317            Stage 1   Discovery (review of current New Horizon system)</p> <p>Owner: David Thomson            Status: <b>Parked</b></p> <p>Original end date: 31 March 2020            Revised end date: 31 March 2022</p>	<ul style="list-style-type: none"> <li>• Discovery started and initial stakeholder fact finding completed.</li> <li>• Discovery sensemaking to be completed.</li> <li>• Development of an options appraisal.</li> <li>• Create project proposal.</li> </ul>

#### 4.5 Risk

The proposals and next steps in this section are not without associated risks. A summary of risks includes:

- Service support and leadership:
  - In addition to the team’s support, capacity and support is also required from services. Given the current environment and pressures there is a risk that services cannot spare the resources required to support project delivery.
  - Projects are owned by services and not the team. Given the current environment and management restructure there is a risk that the services are not able to provide the leadership required for successful project delivery.
  - **Action (SMT):** The Senior Management Team (SMT) agreed at SMT on 19 August 2021 that directorates will review the capacity available to engage with and support improvement activities.
- Impact on political decision making due to 2022 local elections.

## 5 Change Programme financial summary and review

This section provides a financial summary of the Programme and its associated projects. The table below shows the financial position as per the approved 2021/22 budget.

Ref	Name	Original Target £000	Revised Target £000	Removed from budget £000	Required savings to achieve revised target £000
CR01	Property Asset Management	678.0	210.3	53	157.3
CR02	Procurement	256.0	256.0	125	131.0
CR03	Staff and Workforce Planning	310.0	2.0	0	2.0
CR04	Fees and Charges	210.0	429.8	416	13.8
CR05	Outsourcing and Partnerships No formal split of target by sub area	555.0	312.4	77.5	234.9
CR06	Modernising IT   Totals made up of the following breakdown	532.0	532.0	111.8	420.2
	<i>Customer Services Platform</i>	93.9	93.9	23.2	70.7
	<i>HR System Development</i>	55.6	55.6	6	49.6
	<i>Integra System Development</i>	74.4	74.4	0	74.4
	<i>Other CR06 savings</i>	308.1	308.1	82.6	225.5
CR07	Orkney's Learning Landscape Includes target for eLearning environment project	1,405.0	1,270.0	316.0	954.0
	Outwith Orkney Travel (PF0001)	211.4	211.4	134.6	76.8
	Pre-Review Activities	0.0	541.1	541.1	0.0
		4,157.4	3,765.0	1,775.0	1,990.0

This represents a change of £56,000 from 2020/21. £1,000 has been removed through CR02 and £55,000 through CR07.

### 5.1 Review and SMT PIDS

We are at a point where the Change Programme should be reviewed to determine whether the remainder of the required savings are achievable through the originally scoped projects. It may be found that the existing Change Programme projects are no longer viable and should be closed.

In Audit Scotland's 'Annual Audit Plan 2020/21' for Orkney Islands Council (dated April 2021) p.8 highlighted:

Audit Risk	Source of assurance	Planned audit work
<p>Longer term savings options For a number of years the council has identified a funding gap, the most recent long-term financial strategy showing a cumulative funding gap of £65.7 million, based on realistic assumptions. However, there are currently no options developed to allow the council to close the gap.</p> <p>In April 2016 the council approved a change programme which would generate £3.8 million in efficiency savings between 2017/18 and 2020/21 following an evaluation of business processes. The Improvement Support Team was refreshed in February 2020 but with new challenges in 2020, there has been no update on progress in meeting the savings targets. It is not clear how the change programme will lead to the generation of the savings required over the long term.</p> <p>There is a risk that the council does not take a long-term view when creating savings plans.</p>	<p>The council plan to provide a range of options/choices for members to consider. These will provide a range of short, medium and long terms savings options.</p>	<p>Review and comment on the appropriateness of process implemented to generate the council's option appraisals.</p> <p>We will review the operation and scrutiny of the revised change programme.</p> <p>We will review emerging long-term financial strategies to see how a balanced budget is to be achieved.</p>

In anticipation of this it is important for the Council to review the council wide Change Programme.

Prior to Lockdown, the SMT has identified 13 projects for working up as Project Initiation Documents (PIDS) and since agreed the timescale and format to take these projects forward. Each PID includes the potential scope for savings that could be delivered. These PIDS represent the next stage of the Change Programme. As such, as part of a review of Change Programme projects, it is recommended that these PIDS are collectively 'bannered' under the Change Programme. This provides a mechanism to clearly aggregate the savings while facilitating oversight and monitoring of progress.

## 5.2 SMT recommendations

At SMT on 19 August 2021 it was agreed that:

- SMT review the original ‘Change Programme’ projects and associated financial targets to ascertain the achievability of the stated outstanding savings targets attributed to each project.
  - The review should provide a recommendation as to whether the projects are either closed off or progressed to completion and formal approval by Council sought where necessary.
- The SMT priorities (Our People Our Plan), SMT PIDS and the revised ‘Change Programme’ be collectively ‘badged’ together as a single SMT improvement agenda with savings aggregated to facilitate oversight and monitoring of progress.
- That directorates will review the capacity available to engage with and support improvement activities.

## 6 Document control

Version	Status	Date	Amended by	Reason / overview
0.0.A	Draft	21 June 2021	AJR	First draft for QA
0.0.B	Draft	10 August 2021	KG	Second draft for KG review and input.
1.0	Live	16 August 2021	AJR	Live version for submission to SMT.
1.1	Live	30 August 2021	AJR	Updated version incorporating feedback on risk (section 4.5) and recommendations (section 5.2) from SMT on 19 August 2021.
1.2	Live	02 November 2021	AJR	Team structure updated to reflect recent recruitment (Sections 2.3 and 4.3). Update to project name (P0317) due to interim restructure by removing reference to D&I).