



# Business Improvement Team

## Team Plan 2015/16

Team Manager: **Tom Bowring**

Service Plan: Resources

Date signed off: 30/06/2015

Signed off by: **Alan Jenkins**

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## Team Overview – Business Improvement Team

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The Business Improvement team performs a number of key roles for the Council as follows:

- **Procurement:** The team performs the role of the Council's corporate procurement team. The team is responsible for providing specific procurement advice to service areas, undertaking and supporting procurement activity, maintaining the Council's Oracle iProcurement system and coordinating associated strategies, policies and guidance information.
- **Insurance:** The team performs the role of insurance management for the Council. This involves the management of insurance arrangements for Council property, staff and other assets. The team is responsible for providing information and advice on managing insurance related matters, as well as administering insurance claims and liaising with insurers.
- **Business Improvement Activities:** The team performs a range of other roles relating to business improvement, including project and programme management, business analysis, strategy as well as policy and guidance development.

**Our Team's broad functions are:**

### Procurement

- Developing strategy, policy and guidance to support service departments.
- Undertaking and supporting procurement activities in line with the Council's procedures and Constitution.
- Maintaining the Oracle iProcurement system.
- Contributing to collaborative procurement arrangements, including the Welsh Purchasing Consortium and the National Procurement Service.
- Implementing innovative procurement solutions, including the use of the electronic procurement arrangements.

### Insurance

- Managing the Council's insurance requirements for all assets.
- Administering claims made against the Council, in conjunction with the Council's insurance broker and providers.
- Providing information and guidance to Council departments and schools on insurance and risk related matters.

## **Business Improvement**

- Providing programme and project management resources to Council departments and initiatives.
- Providing business analysis skills and resources to Council projects and initiatives, including workshop facilitation, requirements capture and documentation, issue and opportunity identification.
- Promotion, use and maintenance of guidance information, including guidance on project management and business improvement.

## Our Contribution to Service Plan priorities 2014/15

Our contribution to the Service Plan priorities last year:

What did we do in 2014-15?	What outcomes have been achieved as a result of these actions?	How did our team contribute? Where appropriate, what did we learn?
<p>Service Objective 1: We have worked in partnership with Cardiff and Vale Health Board to integrate some pilot services through the implementation of a shared telephony with the Cardiff and Vale UHB Communications Hub.</p>	<p>During 2014, we successfully completed a Podiatry pilot to implement shared telephony services with Cardiff and Vale University Health Board. As a result of this work, missed appointments has halved from 25% to 12%. It has delivered savings for the Podiatry department and the pilot generated an income of £10K for C1V that consequently has helped to lower our operating costs. The Vale's Community Resource referral service was launched where now both Council and Health Board staff have been trained to handle enquiries using both Council and Health Board ICT applications.</p>	<p>The BIT provided project management support to the Social Services Collaborative Working Programme. The customer contact projects were funded by the Intermediate Care Fund grant and in addition to supporting the programme, workshops were facilitated to assist in the design of processes for this workstream.</p> <p>The outcome of this project for the team was developing our collaborative working skills.</p>
<p>Service Objective 2: We have explored and progressed a variety of opportunities to work collaboratively within the Vale and on a regional basis in order to drive forward improvements to services, support innovation and deliver savings.</p>	<p>We have progressed a variety of collaborative arrangements that include Regulatory Services, integration of health and social care, the merger of the CCTV service with Bridgend and the implementation of a regional Adoption Service. Many of these collaborative arrangements are still in development, so the full realisation of this work is still yet to be fully achieved. However, to date these collaborative arrangements have enabled us to build greater service resilience and made business process improvements. Over time it is anticipated that these collaborative arrangements will provide</p>	<p>The BIT provided dedicated project support to the Regulatory Services project, including the coordination of the project plan, risk and issue log in addition to coordinating reports to the three Councils and assistance in preparing the legal agreement.</p> <p>Contributing to this project resulted in the BIT gaining greater understanding of collaborative working projects, including the legal arrangements that underpin such projects and the "softer" skills/requirements, including the identification and management of relationships</p>

	cost-effective solutions to service delivery and contribute towards making efficiency savings.	between councils.  The BIT contributed to the development of the business case for the Regional Adoption Service.
Service Objective 4: We have improved how we support and engage with our staff to provide services at the highest possible standard.	We have achieved this through developing a HR Strategy that includes a Training and Development Strategy to ensure staff feel supported and engaged. We have also supported managers to better support their staff through providing Change Management Training .We successfully held a 2nd Annual Workforce Planning Conference that enabled us to identify key workforce planning issues for the Council in the short to medium term. This has helped to define the HR/Workforce implications of the Reshaping Services agenda.	The BIT has worked with colleagues from HR to define the Organisational Development workstream within the Reshaping Services programme, in recognition of the importance of this work to achieving the overall aim and objectives of the transformational change programme.
Service Objective 3: We continue to exercise a robust approach to financial management and control in a challenging climate of change and uncertainty.	During 2014/15, we successfully achieved our targeted savings of £1.18 million as a Directorate. We have established an effective mechanism for monitoring budgets and savings via the Scrutiny process. We are now entering the third year of a successful partnership arrangement with Bridgend for the provision of shared internal audit services. We have developed a Business Improvement Toolkit for managers to use to support the identification and delivery of financial savings targets. The toolkit enables us to develop Business Improvement skills across the workforce and supports our Business Improvement Partners to focus on high value	The BIT has developed a programme to support the management of the Social Services budget savings and this has contributed to the corporate approach to monitoring savings.  The BIT has documented the processes we use in a toolkit which is available on Staffnet to assist colleagues in undertaking business improvement projects. This was a useful reflective process and will support the development of the team's skills by cross-fertilising knowledge amongst team members. The availability of the toolkit will also help to develop organisational capability and capacity

	projects.	in this area. We have learned that we do not have to do everything <i>for</i> colleagues – we can provide advice and guidance to enable them to help themselves.
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## Our Team Plan 2015/16

<b>Service Outcome 1:</b>		<b>Residents are confident in accessing our services and are engaged with their local community.</b>						
<b>Objective 2:</b>		<b>To deliver seamless services to our customers, by working in partnership and engaging our residents in decision-making and service improvement.</b>						
<b>Ref.</b>	<b>During 2015-16 we plan to:</b>	<b>Success Criteria/ Outcomes we'll achieve from this action are:</b>	<b>High, Medium or Low priority</b>	<b>Officer responsible for achieving this action</b>	<b>Start date</b>	<b>Finish date</b>	<b>How will the work be resourced?</b>	<b>Progress</b>
RS/A089	<p>Submit to Council for consideration a draft revised Council Constitution:</p> <p>Develop and publish on Staffnet a Procurement Code of Practice relating to the new Financial Procedure Rules.</p>	<p>Council's Constitution reflects the new Welsh Model version and provides for new requirements arising out of the Local Government (Wales) Measure 2011 and associated legislation. Council's decision making processes enable increased public participation:</p> <p>Staff are aware of the correct procurement arrangements to use in line with the new Constitution.</p>	High	Tom Bowring/ Rosalie Malcolm/ Yvette Campbell	01/04/2015	31/03/2016	This work will be completed internally by a Procurement Officer, with contributions from other BIT colleagues.	For future monitoring of plan

RS/A122 (CL8)	<p>Promote sustainable development ensuring that sustainability factors are taken into account in decision making and that the Council complies with forthcoming legislation on sustainable development:</p> <p>Include references to sustainable development (including the Future Generations Bill) in Reshaping Services documentation.</p>	<p>Staff understand the implications of the new legislation and the Council is prepared for implementing any necessary changes:</p> <p>Reshaping Services project documentation identified and considers relevant sustainable development issues.</p>	High	Tom Bowring	01/04/2015	31/03/2016	This work will be undertaken internally as part of the development of Reshaping Services documentation (business case template and guidance).	References to the Future Generations Bill Sustainable Development considerations have been incorporated (where applicable) into the business case documentation – High Level Options Appraisal Critical Success Factors.
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<b>Service Outcome 2:</b>		<b>The Vale community benefits from the Council's sound and transparent decision-making through effective management of resources.</b>						
<b>Objective 3:</b>		<b>To optimise our resources, exercise robust financial management and provide effective relevant services and facilities.</b>						
<b>Ref.</b>	<b>During 2015-16 we plan to:</b>	<b>Success Criteria/ Outcomes we'll achieve from this action are:</b>	<b>High, Medium or Low priority</b>	<b>Officer responsible for achieving this action</b>	<b>Start date</b>	<b>Finish date</b>	<b>How will the work be resourced?</b>	<b>Progress</b>
RS/A102 (CL4)	To support the delivery of the regionalisation of Regulatory Services across the three local authorities:  The BIT will continue to provide (albeit at a reduced level) project support activities, including advice and support on requirements capture and reporting.	Implementation of a regionalised service that is cost-effective and sustainable into the longer term.	High	Tom Bowring/ James Rees/ Dan Beynon	01/04/2015	31/03/2016	The support of a Business Improvement Partner will continue as part of the portfolio of supported projects.	For future monitoring of plan
RS/A109	Commence the review of service areas contained in tranche one of the programme by documenting business cases to consider the full range of opportunities presented by each area:  Develop business case documentation (template and guidance).	We identify and deliver cash savings to support delivery of the reshaping services agenda and facilitate new ways of working.  The current savings target associated with tranche one projects is	High	Tom Bowring/ James Rees/ Rebecca Quinn/ Dan Beynon/ Matthew Curtis	01/04/2015	31/03/2016	The BIT will provide direct resources to the range of tranche one projects in addition to the programme team of corporate services	Business case documentation developed and published following training sessions.  Options appraisal process

	<p>Support options appraisal.</p> <p>Support business case development.</p> <p>Support project reporting (to Programme Board and Cabinet).</p> <p>Support implementation of tranche one.</p>	£5.595million.					colleagues. Projects will be led and managed from within service areas.	underway.
RS/A110	<p>Begin work on the corporate projects work stream to consider a corporate response to demand management, effectiveness of spend, working with Town and Community Councils and income generation:</p> <p>Develop demand management principles and apply to Social Services &amp; Well-Being Act and customer relations processes as case studies for publication and use by service areas.</p> <p>Identify “quick win” demand management projects.</p> <p>Provide support to the</p>	We identify and deliver cash savings to support delivery of the reshaping services agenda and facilitate new ways of working.	High	Tom Bowring/ James Rees/ Rebecca Quinn/ Dan Beynon/ Matthew Curtis	01/04/2015	31/03/2016	The BIT will provide direct resources to the range of corporate projects in addition to the programme team of corporate services colleagues. Projects will be led and managed from within service areas.	<p>Demand management principles and case studies developed for Social Services and Well-Being Act.</p> <p>Scoping work underway with customer relations (demand management).</p> <p>Town and Community Councils expression of interest letter sent.</p>

	<p>Town and Community Councils workstream to develop expressions of interest and potential areas for project development.</p> <p>Support the development and delivery of effectiveness of spend projects.</p> <p>Income management – please refer to RS/A114.</p>							
RS/A111	<p>Undertake organisational development activities to support the programme and its projects:</p> <p>Develop, commission and deliver training in the use of the business case documentation and alternative service delivery models for Reshaping Services projects.</p> <p>Monitor and respond to training needs identified by projects as the programme progresses.</p>	<p>We identify and deliver cash savings to support delivery of the reshaping services agenda and facilitate new ways of working.</p> <p>Staff are aware of the business case development process and documentation.</p> <p>Staff are aware of a range of alternative delivery models and able to appraise the applicability of each for service reviews.</p>	High	Tom Bowring	01/04/2015	31/03/2016	This action will be undertaken within existing resources as part of the BI Manager's role as programme manager for the Reshaping Services programme.	Training delivered in business case documentation/ development and alternative delivery models.

RS/A112	<p>Undertake a review of management and leadership competencies including an increased requirement for commissioning, contracting, collaboration and project management skills:</p> <p>Contribute to this work by providing information and support on its various aspects as part of the Reshaping Services programme.</p>	<p>We identify and deliver cash savings to support delivery of the reshaping services agenda and facilitate new ways of working.</p>	High	Tom Bowring	01/04/2015	31/03/2016	<p>This action will be undertaken within existing resources as part of the BI Manager's role as programme manager for the Reshaping Services programme.</p>	<p>Collaborative working guidance notes produced.</p>
RS/A113	<p>Undertake a review of office accommodation/non-office accommodation, facilities management and corporate buildings:</p> <p>Develop proposals for Space Phase 2 (Provincial House and Civic Offices).</p> <p>If proposals approved, plan and contribute to project managing the relocation of staff from Provincial House.</p> <p>Develop and implement</p>	<p>We identify and deliver cash savings to support delivery of the reshaping services agenda and facilitate new ways of working.</p> <p>For property related Reshaping Services projects, there is a savings target of £100k in 2015/16 and £525k in 2016/17.</p>	High	Tom Bowring/ Rebecca Quinn	01/04/2015	31/03/2016	<p>The support of a Business Improvement Partner will continue as part of the portfolio of supported projects.</p>	<p>Proposals for changes to facilities management (cleaning and security services) have been developed and are being reported to Cabinet (July 2015).</p> <p>Proposals are under development for Space</p>

	<p>proposals to deliver savings from facilities management services (cleaning and security).</p> <p>Support the delivery (if approved) of projects relating to non-office assets.</p>							Phase 2.
RS/A114	<p>Co-ordinate a review of income generation opportunities corporately:</p> <p>Develop monitoring arrangements for projects that have been identified to date.</p> <p>Identify, evaluate and propose (if approved, implement), other income generating projects.</p>	<p>We are able to quantify income generation and opportunities across the Council.</p>	High	Tom Bowring/ James Rees/ Matthew Curtis	01/04/2015	31/03/2016	<p>The support of a Trainee Business Improvement Partner will continue as part of the portfolio of supported projects.</p>	
RS/A115	<p>Develop and implement a combined Communication and Engagement Plan to support the reshaping services agenda:</p> <p>Coordinate this action to ensure it is delivered and integrated within the Reshaping Services programme plan.</p>	<p>We effectively communicate change to our staff and empower them to feel involved in the process.</p> <p>The Communications and Engagement plan is embedded within the Reshaping Services</p>	High	Tom Bowring	01/04/2015	31/03/2016	<p>This action will be undertaken within existing resources as part of the BI Manager's role as programme manager for the Reshaping Services programme.</p>	

		programme.						
RS/A035	<p>Review and develop options for the delivery of procurement services across the Council:</p> <p>Assess the current situation in conjunction with the Value Wales Fitness Check (September 2015).</p> <p>Evaluate options for potential delivery arrangements (March 2016).</p>	An options appraisal on the most appropriate delivery structure for procurement is produced and preferred option progressed.	Medium	Alan Jenkins/ Tom Bowring	01/04/2015	31/03/2016	This action will be undertaken within existing resources and will be informed by the Value Wales Fitness Check process.	
RS/A121	<p>Implement key improvement areas/recommendations as identified by relevant regulatory reports.</p> <p>Contribute to the implementation of these areas as identified and required throughout the year.</p>	We can demonstrate progress and improved performance and outcomes in future regulatory reviews	High	Huw Isaac	April 2015	March 2016	Resource will be assigned from within the existing establishment to support this work if required.	
RS/A070	<p>Develop and implement a Staff Engagement Strategy in relation to reshaping services:</p> <p>Coordinate this action to ensure it is delivered and integrated within the Reshaping Services</p>	Employees feel appropriately informed and engaged in relation to the reshaping services agenda.	High	Tom Bowring	01/04/2015	31/03/2016	This action will be undertaken within existing resources as part of the BI Manager's role as programme manager for the	

	programme plan.						Reshaping Services programme.	
	<p>Implement e-procurement systems where appropriate within the Council.</p> <p>Implement e-Sourcing systems within transportation and social services if appropriate.</p> <p>Continue to contribute and use procurement analytics software provided by e-Bravo.</p> <p>Evaluate the potential to use e-Trading software.</p>	<p>Procurement processes are efficient, cashable efficiency savings are delivered and decisions are evidence based.</p>	Medium	Tom Bowring/ Rosalie Malcolm/ Yvette Campbell.	01/04/2015	31/03/2016	<p>The projects will be project managed by Steve Leat (ICT Procurement Officer) with corporate procurement colleagues contributing to the project team.</p> <p>The initiatives are supported by Value Wales and suppliers.</p>	<p>Scoping day for e-sourcing software has been held and preparations are underway for the implementation of this software for use in transportation and social services.</p> <p>Data has been supplied to e-Bravo for the spend analytics for 2014/15.</p>
-	<p>Re-tender property insurance contracts:</p> <p>Develop specification.</p> <p>Agree framework use.</p> <p>Run procurement exercise.</p> <p>Report and award contract.</p> <p>Manage any transition to</p>	<p>Property insurance arrangements are in place and provide adequate cover, with risk and cost evaluated.</p>	High	Alan Jenkins/ Tom Bowring/ Geraint Jones.	01/04/2015	31/03/2016	<p>This exercise will be undertaken by the Insurance &amp; Risk Officer and will be supported by the Council's Insurance Broker as part of the existing arrangement.</p>	<p>A project initiation document has been drafted.</p>

	new supplier (if appropriate).							
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