

**Note to:** Corporate Improvement Board  
**From:** Richard Quayle, Hilary Mitchell  
**Date:** 18 August 09

## Project Management

**Purpose:** To make recommendations to the Corporate Improvement Board on:

1. Projects that require a PID (Project Initiation Document) or project brief and
2. The process for monitoring and approving these projects

The aim of this process is to ensure members and management understand the status of projects whilst not being overburdened with excessive reports or controls.

**Project Approach:**

1. Appendix A lists the projects and milestones within the Corporate Improvement Plan and makes recommendations on which require a PID or project brief. This is summarised at the end of this report.
2. Where a project brief has been recommended, it is either because the size of the project does not require a full PID, or because a PID will be created later in the project after detailed planning has taken place.
3. A project manager and sponsor will be appointed to each project. Where required a project team will also be formed.
4. PIDs and project briefs will generally require approval from:
  - a. Senior supplier e.g. IT – to ensure deliverable and inline with IT strategy
  - b. Senior user - to ensure meets users requirements
  - c. Sponsor - to ensure meets business requirements
  - d. Performance Improvement / Procurement – to ensure process is followed
  - e. Corporate Improvement Board
5. The PID / project brief will cover (depending on nature of project) - the benefits, objectives, costs, delivery plan / timescales, resources needed, communication requirements, project controls and risks of the project.
6. Key project documents will be made available on the IT network ([\\cbc-shareserv\project](#)). Where projects require authorisation but would be adversely affected by waiting for the next Corporate Improvement Board, feedback will be requested by email giving at least 5 working days to respond.
7. After a project has been completed an End Project Report will be supplied to the Corporate Improvement Board. This report will show how the project performed against the PID / project brief.
8. Apart from the PID/project brief and end project report, the Corporate Improvement Board will not receive project updates unless the project is not expected to deliver according to the PID / project brief.
9. Sponsors will be responsible for projects (including reporting to Corporate Improvement Board) with the assigned project manager looking after the day to day running of them.
10. Performance Improvement are available to provide project guidance and have a project manager available to support priority projects.
11. Templates for project documents are available for project managers e.g. PID, project brief and end project reports. Templates can be adapted to meet requirements of the project.
12. The table on the following page shows recommended PIDs / briefs with expected dates
13. All completed PIDs / briefs will be available on the IT network ([\\cbc-shareserv\project](#)). New PIDs/briefs will be circulated for approval.

Corporate Improvement Plan Link	Owner	Brief / PID	PID / Project Brief due date					
			Complete	Aug 09	Sep-09	Oct-09	Nov-09	Dec-09
• Achieve compliance with new government security standards to continue to ensure protection of personal data by Sept 09	JC	COCO PID						
• Launch 2 new locality boards with detailed action plans by Dec 09	JB	Locality Working PID						
• Create a workforce plan to deliver this by Apr 10	HM	Project Brief						
<i>Searching for Best Value</i>	JC	Time Management project						
• Implement the Improvement and Development Agency (IDeA) marketplace across Council leading to 70% of suppliers procuring electronically with us by March 10	PG	Marketplace PID						
• Improvements to public space at Mount Pleasant and the Civic Quarter in Whitehaven will be complete by Jan 10	JB	PID in place						
• Introduce area based street cleaning teams to better respond to local litter problems by Jun 09	CC	Project brief has been created for Cleansing project that will support delivery of milestone.						
• Increase quality of customer experience	JS	Service Change project brief						
<ul style="list-style-type: none"> <li>Use technology better in delivering services;</li> <li>- customers able to submit planning applications on line</li> <li>- 20 service request forms available on line</li> <li>- corporate complaints system in place</li> </ul>	JS	Call recording project brief						
		Telephony queue brief						
		CRM enhancements PID						
	PG	PID completed for MIS						
	JS	Self service PID						
	JS	Complaints system project brief						
• Understand the profile of our customers better, and plan to ensure we meet their needs by Dec 09	HM	LLPG PID Customer Profiling project brief						
• Move more of our services to our customer services department, our first point of contact, by Mar 10	JS	CSDA project brief						
• Arrange for 3 projects to help Incapacity Benefit claimants to improve skills and confidence	JB	Project brief						
• Work with businesses and community groups to create and deliver a marketing strategy for Whitehaven by Mar 10	JB	PID						
• Improve tourist numbers through tourism development and marketing by the Western Lake District Tourism Partnership by Mar 10	JB	PID's being developed by tourism partnership, some may be available this financial year						
• Offer business support grants for at least 6 existing businesses to enable them to take on local people and stay in Copeland by Mar 10.	JB	PID						
• Secure funding for first phase of Sports Village at Pow Beck by Mar 10	JB / CC (BC)	PID						
• Agree Conservation Management plan to preserve Whitehaven's historic assets by Sept 09	JB / PG	PID						

Corporate Improvement Plan - Sponsors and Portfolio Holders

Transformational Leadership

Project and Milestones	Owner	Portfolio Holder	Comments	Significant Department / Service Plan Links	Requires brief/PID?	Project Comment
<b>Helping to reduce our carbon footprint (1.3)</b>	<b>JB</b>					
• A Copeland Climate Change implementation plan developed by Sept 09 to reduce our carbon footprint	JB	Cllr Allan Holliday	Working group has been set up contributing to the implementation plan. It will be going to members by the end of Sept 09.	• Development Strategy	No	Milestone is creation of a plan.
• Reduce the fuel consumption of our street cleaning team by 5000 litres of diesel by Mar 10	CC	Cllr Allan Holliday	Reduced travel through area based cleansing working project. Baseline is 2008/9.	• Waste • PIT	Yes	Project brief has been created for Cleansing project which will support delivery of milestone.
• Half of garden waste collected from households will be composted locally in 09/10	CC	Cllr Allan Holliday	Garden waste is going to a new business in Sandwith rather than through to Carlisle.	• Waste	No	
• Improve the energy rating of at least 2 public buildings by Mar 10	PG	Leader Cllr Elaine Woodburn	We are required to assess, publicise, and improve the energy performance of our buildings.	• Contracts and Property	No	Delivered as part of standard department work
• A purchasing policy to be in place which ensures we purchase goods and services in a sustainable way by Sept 09	PG	Leader Cllr Elaine Woodburn	Refers to sustainability in procurement process e.g. spending locally to support local economy.	• Contracts and Property	No	
<b>Information security project (1.3)</b>	<b>JC</b>					
• Achieve compliance with new government security standards to continue to ensure protection of personal data by Sept 09	JC	Leader Cllr Elaine Woodburn	The Council needs to comply with the Government Connect "Code of Connection" standard (COCO) by Sept 09 in order to maintain connection to DWP. This project will affect all staff and members.	• ICT • HR / Performance Improvement • Revenue & Benefits	Yes	PID to be created in August
<b>More effective, efficient revenue &amp; benefit service (1.4)</b>	<b>JS</b>					
• A business case for a shared revenue & benefit service will be produced by Sept 09	JS	Deputy Leader Cllr George Clements	The business case for a shared revenue and benefits service with Carlisle City Council and Allerdale Borough Council will go to Executive for approval in Sept 09.	• Customer Services	No	Milestone is delivery of a business case
• Implementation plan for revenue and benefit shared service prepared for Mar 10	JS	Deputy Leader Cllr George Clements	Subject to member approval of the shared service business case, an implementation plan will be created by March 10.	• Customer Services	No	Milestone is delivery of a plan
<b>Work effectively with others to meet the needs of Copeland (1.4)</b>	<b>JB</b>					
• Create a strategy for the delivery of shared services by June 09	KP	Leader Cllr Elaine Woodburn			No	
• Help develop new West Cumbria Vision Partnership by June 09	FM	Cllr Cath Giel		• Development Strategy	No	
• Administer the West Cumbria Managing Radioactive Waste Safely partnership and agree work programme with the Department for Energy and Climate Change by May 09	FM	Leader Cllr Elaine Woodburn			No	
• Review the operation of the partnership arrangements between the Council and its local strategic partners by June 09	JB	Leader Cllr Elaine Woodburn	Corporate Team subgroup set up lead by JB.	• Development Strategy	No	
• Launch 2 new locality boards with detailed action plans by Dec 09	JB	Leader Cllr Elaine Woodburn	Locality working project working with Cumbria County Council, Cumbria Association of Local Councils and the Local Strategic Partnership.	• Development Strategy • Policy & Performance • Democratic Services	Yes	PID to be created Sept 09
<b>Deliver a workforce strategy that shapes the Council to meet the needs of the future (1.5)</b>	<b>HM</b>					
• The shape of the Council, its role and purpose to meet the needs of the future - to be established by July 09	FM	Cllr John Bowman	Work is ongoing between Corporate Team and the Executive to develop vision of the shape of the Council, role and purpose		No	
• Create a workforce plan to deliver this by Apr 10	HM	Cllr John Bowman	Workforce plan to meet the needs of the future	• Human Resources	Yes	Brief to be created Dec 09
<b>Improve our performance (1.5)</b>	<b>FM</b>					
• Achieve an improved Use of Resources score, aiming for level 2 by Mar 10	KP	Leader Cllr Elaine Woodburn	Use of Resources judgement under CAA now involves examination of management arrangements involving every service.	• Finance & MIS - Time Mgt Project • Policy & Performance - Time Mgt Project / Project Mgt Framework / Support Searching for Best Value (SfBV) service reviews	Yes	Brief for Time Management project drafted. To be completed Sept 09.
• 35% of our performance indicators are in the upper quartile by Mar 10 (against upper quartile set in 08/09)	KP	Cllr John Bowman	This will include all BVPI's being monitored by CBC. In future years this is likely to include National Indicators once a baseline has been established.		No	
• 80% of our Performance Indicators will improve from 08/09 to 09/10	KP	Cllr John Bowman	This will include all BVPI's being monitored by CBC. In future years this is likely to include National Indicators once a baseline has been established.		No	
<b>Improve our financial management (1.5)</b>	<b>JC</b>					
• Our financial statements will be prepared to meet the statutory timetable – June 09	JC	Leader Cllr Elaine Woodburn	Detailed timetable in place. Regular updates being given to Audit Committee as well as progress monitoring to directors.	• Finance & MIS	No	
• A new financial procedures manual will be in place by Sept 09	JC	Leader Cllr Elaine Woodburn	Loose leaf manual regularly updated covering key processes and general information for managers and members.	• Finance & MIS	No	
• Implement the Improvement and Development Agency (IDeA) marketplace across Council leading to 70% of suppliers procuring electronically with us by March 10	PG	Leader Cllr Elaine Woodburn	To create efficiencies and enable better monitoring of our spending through purchasing using electronic means	• Contracts and Property • Accountancy - Extract supplier & spend from Financial Mgt System • ICT - develop catalogue	Yes	PID has been created
<b>Improve community involvement in decision making (1.6)</b>	<b>MJ</b>					
• Encourage volunteering to achieve 10% increase in community involvement through volunteering by Mar 11	MJ	Cllr John Bowman	NI 6 (participation in regular volunteering) is captured in place survey, 10% increase is between 08/09-10/11. Milestone needs to report on new volunteering this financial year.	• Legal & Democratic Services • Development Strategy • Leisure & Environmental Services	No	
• Carry out a review of our Parish Charter commitments by Oct 09	KP	Cllr Norman Williams		• Legal & Democratic Services	No	

Promoting Quality of Life

Project and Milestones	Owner	Portfolio Holder	Comments	Significant Department / Service Plan Links	Requires brief/PID?	Project Comment
<b>Improve the living environment (2.1)</b>	<b>CC</b>					
• Take action against 6 dilapidated buildings during 09/10	PG/JB	Cllr Geoff Blackwell	To either restore or demolish eye sore buildings in Copeland.	• Development Operations • Development Strategy	No	
• Improvements to public space at Mount Pleasant and the Civic Quarter in Whitehaven will be complete by Jan 10	JB	Cllr Cath Giel	Project framework is in place with the project management being carried out by Westlakes.	• Development Strategy • Development Operations • Leisure & Environmental Services	Yes	PID in place
• Introduce area based street cleaning teams to better respond to local litter problems by Jun 09	CC	Cllr Allan Holliday		• Waste • PIT	Yes	Project brief has been created for Cleansing project which will support delivery of milestone.
<b>Improve local environmental sustainability (2.1)</b>	<b>JB</b>					

Corporate Improvement Plan - Sponsors and Portfolio Holders

• A framework for sustainable development in the borough will be developed by Mar 10	JB	Cllr Geoff Blackwell	Part of the Local Development Framework work programme	• Development Strategy	No	LDF already has plan
• Introduce a policy for brownfield site use with priority employment & housing sites by Mar 10	JB	Cllr Geoff Blackwell	Working with key partners including homes and communities agency	• Development Strategy	No	
<b>Reduce household waste to landfill (2.1)</b>	CC					
• Increase recycling of household waste from 35% to 38% by Mar 10	CC	Cllr Allan Holliday		• Waste	No	
• Reduce total waste by at least 10 kg per household by Mar 10	CC	Cllr Allan Holliday		• Waste	No	
<b>Promote healthier lifestyles (2.2)</b>	CC					
• Promote healthier lifestyles through work with at least 6 community groups or 6 projects by Mar 10	CC	Cllr Norman Williams		• Leisure & Environmental Services • Development Strategy	No	
• We will jointly fund a post with NHS Cumbria to support health improvements in priority areas and our own workforce by July 09	CC	Cllr Norman Williams		• Leisure & Environmental Services • Development Strategy	No	
<b>Increase opportunities for physical activity (2.3)</b>	CC					
• Deliver our sport and physical alliance projects by Mar 10 (including Rambling for life and Cleator Moor physical activity motivator)	CC	Cllr Hugh Branney		• Cultural Services	No	
• Support local clubs to improve access to sporting opportunities by helping 20 clubs to achieve Clubmark during 09/10	CC	Cllr Hugh Branney		• Cultural Services	No	
• Help create 2 new play areas in Gosforth and Seascale by Mar 10	CC	Cllr Hugh Branney		• Open Spaces	No	
<b>Ensure we meet the needs of a diverse community (2.4)</b>	MJ					
• Revise our race equality scheme by July 09	MJ	Cllr Norman Williams	Consulting on a revised draft. To go to Full Council by end of July 09.	• Legal & Democratic Services	No	
• Refurbish Phoenix court to make it accessible to all users by Dec 09	PG	Leader Cllr Elaine Woodburn	Referbishment and DDA accessibility works at Phoenix court phase 2 (Cleator Moor)	• Development Operations	No	
• Council gain Equality & Diversity level 'Achieving' by Mar 10	MJ	Cllr Norman Williams	Currently hold Equality Standard level 2. In order to gain 'Achieving' the Council will complete Equality Impact Assessments across all services and carry out actions identified.	• Legal & Democratic Services	No	Using Key Lines of Enquiry.
<b>Improve life chances of children and young people (2.4)</b>	CC					
• Free access to leisure facilities for vulnerable children by July 09	CC	Cllr Hugh Branney	Includes children looked after by foster parents, in homes or where parenting orders are in place.	• Cultural Services	No	
• Extend the range of activities provided through our summer activities programme by Sept 09	CC	Cllr Hugh Branney	To be extended to include activities such as mountain biking, fishing and boxing.	• Cultural Services	No	
<b>Increase quality of customer experience (2.5)</b>	JS				Yes	Service Change project brief to be complete Aug 09
• Start to respond to the results of the Place Survey of residents' satisfaction by June 09	KP	Cllr John Bowman		• Policy & Performance	No	
• Offer customer care training for all employees Mar 10	HM	Cllr John Bowman		• Policy & Performance	No	
• Use technology better in delivering services;	JS	Leader Cllr Elaine Woodburn		• Customer Services - Telephony enhancements to record calls & improve queue handling • Policy & Performance - project support for telephony enhancements • ICT - Telephony delivery	Yes	Call recording brief completed Telephony queue brief to be completed Sept 09 CRM enhancements PID to be completed Oct 09
- customers able to submit planning applications on line	PG		Implementation of new MIS Headway software which will allow customers to submit and view planning applications and undertake reviews.	• Development Operations • Legal & Democratic Services • ICT	Yes	PID completed for MIS
- 20 service request forms available on line	JS		20 self-service request forms to be available on the Council website. This project will consider the business cases for developing the CRM and Revs & Bens system to generate on line forms. If business cases are not successful, alternative options will be considered for creating the self service request forms.	• Customer Services • Policy & Performance - PIT & project mgt support • ICT	Yes	PID for self service to be completed Oct 09
- corporate complaints system in place by Mar 10	JS		Ensure new corporate complaints system is used by services across the Council to record and monitor complaints. Ensure complaints are used to improve services.	• Customer Services	Yes	Brief completed for complaints system
<b>Improve customer access to council services (2.5)</b>	JS			• Customer Services / PIT - Monitor National Indicator 14 (measuring how often customers unnecessarily contact the Council due to a failing by the Council) and identify improvements	No	
• Create an Access to Service Strategy by Sept 09	JS	Deputy Leader Cllr George Clements	Agree the corporate vision for Access to Services.	• Customer Services	No	
• Understand the profile of our customers better, and plan to ensure we meet their needs by Dec 09	HM	Cllr John Bowman / Deputy Leader Cllr George Clements	Develop capacity to understand customer profile and customer needs better. Customer segmentation data to be in place with a plan by December 09.  In order to link properties across systems the addresses within the CRM will be linked to the Gazetteer.	• Policy & Performance - CRM to use Gazetteer / Customer profiles • Customer Services - CRM to use Gazetteer / Customer profiles • Development Strategy - Customer profiles • Leisure & Environmental Services - Customer profiles	Yes	LLPG project brief completed Customer Profiling project brief completed
• Move more of our services to our customer services department, our first point of contact, by Mar 10	JS	Deputy Leader Cllr George Clements	Agree and implement 5 priority Customer Service Delivery Agreements (CSDA's). CSDA's define the responsibilities between Copeland Direct and another department where delivering a service to a customer.	• Customer Services • PIT • 5 priority services to be confirmed	Yes	CSDA project brief drafted
<b>Reduce crime and disorder and help people feel safe (2.6)</b>	JB					
• Set up and support at least 3 local safety groups by Mar 10	JB	Cllr Norman Williams		• Development Strategy	No	
• Identify good practice and community safety issues in service planning by Mar 10	JB	Cllr Norman Williams		• Development Strategy	No	
• Work with the Crime and Disorder Reduction Partnership to reduce fear of crime in Copeland so that 80% of people feel safe by Mar 11	JB	Cllr Norman Williams	Section 17 work programme involves training members and service audits. Representation on CDRP appropriate to Copelands needs and capacity.  This will be calculated by taking an average of 2 questions asked in the place survey - feelings of safety at night and feelings of safety during the day.	• Development Strategy	No	

Promoting Prosperity

Project and Milestones	Owner	Portfolio Holder	Comments	Significant Department / Service Plan Links	Requires brief/PID?	Project Comment
Creating sufficient and diverse jobs (3.1)	JB					

Corporate Improvement Plan - Sponsors and Portfolio Holders

• Deliver against the Council's 10 year job target of 5000 new jobs between 2002 and 2012.	JB	Cllr Cath Giel	Delivering against the regeneration plan containing key projects.	• Development Strategy	No	Within regen plan
• Implement a Copeland regeneration delivery plan linked to Britain's Energy Coast here in West Cumbria by Mar 10	JB / PG	Leader Cllr Elaine Woodburn / Cllr Cath Giel		• Development Strategy • Development Operations	No	Within regen plan
<b>Improving Skills and Education in our community (3.2)</b>	<b>JB</b>					
• Agree plans for the Dalton Institute and its links to the National Nuclear Laboratory	FM	Leader Cllr Elaine Woodburn			No	
• Support the completion of UCLAN's extension at Westlakes	FM / PG	Cllr Cath Giel		• Development Strategy • Development Operations	No	
• Improve educational attainment by working with partners to secure confirmation of additional funding for Copeland schools	JB	Cllr Cath Giel		• Development Strategy • Leisure & Environmental Services	No	Ongoing work
• Arrange for 3 projects to help Incapacity Benefit claimants to improve skills and confidence and continue the Pathways to Art scheme for 200 people by Mar 10	JB	Cllr Hugh Branney		• Development Strategy	Yes	Project brief completed
	CC		Registers are validated by the Job Centre	• Leisure & Environmental Services	No	
• Ensure we have an appropriately skilled workforce through employee development, graduate and work experience placements by Mar 10	HM	Cllr John Bowman	Delivery of learning and development plan 2009/10	• Human Resources	No	
<b>Housing to meet the needs of the future (3.3)</b>	<b>JB</b>					
• Establish the current housing need in the borough by Sept 09	JB	Deputy Leader Cllr George Clements	Completed strategic housing assessment containing conclusions going into strategic housing plan.	• Development Strategy	No	Covered by housing improvement plan
• Agree a strategic housing plan to help meet these needs by Sept 09	JB	Deputy Leader Cllr George Clements	Copeland specific plan (with target dates) that sits under the housing strategy.	• Development Strategy	No	Covered by housing improvement plan
• Bring 60 private sector properties up to a decent standard by Apr 10 with the use of home renewal financial assistance	JB	Deputy Leader Cllr George Clements	Mixture of council and government money to offer assistance and interest free loans.	• Development Strategy	No	Covered by housing improvement plan
• Work with partners to help achieve decent homes standard for registered social landlords	JB	Deputy Leader Cllr George Clements	2 out of the 3 main Registered Social Landlords (RSL's) will meet standard by 2010, the 3rd has been granted an extention by the regulatory body until 2013.	• Development Strategy	No	Covered by housing improvement plan
<b>Good roads and public transport (3.4)</b>	<b>JB</b>					
• Agree our infrastructure levy and planning gain requirements for future developments by Mar 10	JB	Cllr Cath Giel	Part of the Local Development Framework process	• Development Strategy	No	Part of LDF
<b>Support development of health facilities (3.5)</b>	<b>PG</b>					
• Lobby to secure commitment to a health campus by Mar 10	PG	Cllr Cath Giel	To ensure a health campus in Copeland complementing new hospital and RND (medical) at Westlakes	• Development Operations • Development Strategy	No	
• Work with North Cumbria University Hospitals Trust to submit planning applications for hospitals in Whitehaven and Millom by Mar 10	PG	Cllr Cath Giel		• Development Operations	No	
<b>Economic sustainability (3.6)</b>	<b>JB</b>					
• Work with businesses and community groups to create and deliver a marketing strategy for Whitehaven by Mar 10	JB	Cllr Cath Giel		• Development Strategy	Yes	PID to be created Dec 09
• Improve tourist numbers through tourism development and marketing by the Western Lake District Tourism Partnership by Mar 10	JB	Cllr Hugh Branney	By improving partnership leading to increase in visitors.	• Development Strategy	Yes	PID's being developed by tourism partnership it is possible that some will be available this financial year
• The Beacon will attract 46000 visitors, inspire 4000 children through curriculum linked activities and deliver talks to 70 groups by Mar 10	PG	Cllr Hugh Branney	To develop the Beacon's educational and outreach programmes	• Development Operations	No	
• Develop project plan to boost Copeland web based employment sector by Mar 10	JB	Cllr Cath Giel	Encourage and support businesses to use web and home based working.	• Development Strategy	No	Milestone is creation of a plan.
• Offer at least 6 projects to reduce worklessness including redundancy support initiatives by Mar 10	JB	Cllr Cath Giel	Implementing worklessness framework using worklessness fund.	• Development Strategy	No	N/A as milstone is implementing worklessness framework
• Offer business support grants for at least 6 existing businesses to enable them to take on local people and stay in Copeland by Mar 10.	JB	Cllr Cath Giel	Use of LABGI (Local Authority Business Growth Incentives) to set up business grants.	• Development Strategy	Yes	PID to be created Aug 09
• Secure funding for first phase of Sports Village at Pow Beck by Mar 10	JB / CC (BC)	Cllr Cath Giel		• Development Strategy • Leisure & Environmental Services	Yes	PID to be created Dec 09
• Influence content of National Policy Statement on Electricity Transmission to support nuclear new build in Copeland by Mar 10	FM	Leader Cllr Elaine Woodburn		• Development Operations • Development Strategy	No	
• Work to ensure the infrastructure is in place for a new nuclear power station, and ensure that public consultation is undertaken and communicated by Mar 10	FM	Leader Cllr Elaine Woodburn		• Development Operations • Development Strategy	No	
• Support the knowledge based economy development at Westlakes Science and Technology Park by Mar 10	FM	Cllr Cath Giel		• Development Operations • Development Strategy	No	
<b>Regeneration of Whitehaven town centre (3.6)</b>	<b>PG</b>					
• Support the development of planning applications in Whitehaven for new office space, retail store and a harbour side hotel by Mar 10.	PG	Cllr Geoff Blackwell	Delivery of Albion Square, Ginn's depot and the harbourside hotel are key priorities in the Development delivery plan.	• Development Operations	No	
• Agree Conservation Management plan to preserve Whitehaven's historic assets by Sept 09	JB	Cllr Geoff Blackwell		• Development Strategy • Development Operations	Yes	PID to be created Sept 09

Other Targets

Description	Owner	Portfolio Holder	Comments
• Satisfaction with the way the Council runs things. Target 10% increase on 08/09 by Mar 11	FM / KP	Cllr John Bowman	Collected from Place survey so not available until Mar 11.
• Environment for a thriving third sector – 20% positive rating (LAA - NI 7)	JB	Cllr Cath Giel	
• Work with West Cumbria Strategic Partnership to deliver our Future Generation (Sustainable Communities Strategy) targets W1-14.	JB	Leader Cllr Elaine Woodburn	
• The Council will operate within a sustainable revenue budget that does not require reserves to support ongoing activities	JC	Leader Cllr Elaine Woodburn	Annual budget preparation cycle will inform members of budget and service options required to enable Council to operate in a sustainable budget.
• The Council will give good value for money by finding cash-releasing savings of 3% (NI 179)	HM	Leader Cllr Elaine Woodburn	
• Overall / general satisfaction with local area will be 85.6% (LAA – NI 5)	KP	Cllr John Bowman	
• Proportion of people who feel they can influence decisions in their locality 30.2% (LAA – NI 4)	MJ	Cllr John Bowman	
• 643kg residual household waste per household (LAA – NI 191)	CC	Cllr Allan Holliday	
• 8.76% cumulative per capita reduction in CO2 emissions between 07/08 and 09/10 (LAA – NI 186)	JB	Cllr Allan Holliday	
• Improved street and environmental cleanliness – litter 5%, detritus 10%, graffiti 1%, fly posting 0% (LAA – NI 195)	CC	Cllr Allan Holliday	
• Work with partners to Achieve Cumbria LAA targets for health related National Indicators NI 123, NI 39, NI40, NI 70, NI 50, NI 57, NI 112.	CC	Cllr Norman Williams	
• Young people's participation in positive activities 77.6% (LAA – NI 110)	CC	Cllr Hugh Branney	
• 80.3% of people believe people from different backgrounds get on well together in their local area (LAA – NI 1)	MJ	Cllr John Bowman	Equality Impact Assessments will be supporting this.

Corporate Improvement Plan - Sponsors and Portfolio Holders

• Meet LAA target for % of adults with learning disabilities in employment (LAA – NI 146)	JB	Cllr Cath Giel	
• Reduce the number of times customers contact the Council unnecessarily. Target 50% avoidable contact (NI 14)	JS	Deputy Leader Cllr George Clements	Use the CRM and back office sampling to understand how often customers unnecessarily contact the Council due to a failing by the Council.
• Increased satisfaction regarding complaints. Target 80%	JS	Deputy Leader Cllr George Clements	This relates to satisfaction with how the Customer Relations Officer handles complaints.
• Work with partners to achieve Cumbria LAA targets for crime National Indicators NI 19, NI 20, NI 30, NI 32, NI 41, NI 65	JB	Cllr Norman Williams	
• Working age people claiming out of work benefits in worse performing neighbourhoods. Target 29.9% (LAA – NI 153)	JB	Cllr Cath Giel	
• New business registration rate 55.7 per 10,000 (LAA – NI 171)	JB	Cllr Cath Giel	
• Work with partners to Achieve Cumbria LAA targets for educational National Indicators NI 106, NI 163, NI 165, NI 117.	CC	Cllr Cath Giel	
• 18 new affordable homes delivered between 08/9 and 09/10 (linked to LAA NI 154 & 155)	JB	Deputy Leader Cllr George Clements	
• 3.5% reduction in people killed or seriously injured in road traffic accidents between 08/09 and 09/10 (LAA – NI 47)	JB	Cllr Norman Williams	
• Principal roads where maintenance should be considered. Target 4% (LAA – NI 168)	JB	Cllr Cath Giel	
• 94% of rural households within 30mins of a key service centre by public transport (LAA – NI 175)	JB	Cllr Cath Giel	

# **COPELAND BOROUGH COUNCIL**



## **SERVICE CHANGE**

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## **PROJECT BRIEF**

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Version: 0.3  
Author: Bob Gerry  
Date: 7 August 2009

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## Project Brief

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### 1. **Background**

The Council is almost continually faced with a situation where one of its services has to change. This may result from one or more of a number of things, for example a change in legislation or policy, a change in the budget or an improvement project.

The aim of this project is to develop a simple methodology that can be used in any situation, where a change of service is being planned, no matter how small, to ensure that the likely impact of the change is considered and that those affected by the change, both customers and staff, are ALWAYS informed and, ideally, consulted PRIOR to that change taking place.

The results of introducing change without doing the above can be:

- A large increase in failure demand activities arising from customers contacting the Council to find out what's happening and why
- An increase in customer complaints
- Articles and letters in the Press criticising the Council often resulting in fire-fighting communications activity
- A deterioration in working relationships between departments because of, for example, unexpected additional work

### 2. **Outline Business Case**

This project will contribute directly to the Councils priorities:

- Giving everyone good customer service.

The benefits from undertaking this project are:

- The scope of any future changes will be understood and also the likely impact on customers and staff
- The implementation of a change to a service can be planned and communicated
- The likely impacts on stakeholders can be communicated and any concerns raised addressed prior to implementation
- Copeland Direct staff are aware of the change and can be pro-active in dealing with customer enquiries
- Avoidable contact (NI14) will be reduced
- Changes can be positively communicated prior to, during and after implementation
- Corrective actions resulting from failure demand, eg dealing with complaints or press releases, will be reduced thus reducing costs to the Council

### 3. **Project Definition**

#### ***Project Objectives***

- The objective of this project is to develop a standard methodology that can be used anywhere across the Council to ensure effective communication of planned service changes

#### ***Project Scope and Exclusions***

- The project will be generic by its nature but will look at some specific examples of good and bad practice to inform the solution.
- The procedure will only address the effective communication of proposed changes and is intended to supplement not replace any formal project management method, such as Prince2.
- The project will not look at political activities, however the results may also be useful in this context.



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## Project Brief

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### ***Outline of Project Deliverables / or Desired Outcomes***

- A documented procedure for service change
- A presentation to Managers' Group

### ***Constraints***

- The project should be completed within 8 weeks.

### ***Interfaces***

- None

### ***Approach***

The project will adopt a team-based workshop approach to designing the blueprint for change. It is suggested that the project team will include:

- PIT
- Communications
- Customer Services
- Customer Relations
- Representative from front line service units (ideally having just introduced a change or considering doing so)

The draft procedure will be presented to the Managers' Group for discussion and comment prior to being approved and issued.

## **4. Resource Requirements**

Project roles:

- Project Manager – Bob Gerry
- Sponsor – Jane Salt

The resources required are as follows:

- PIT team – facilitation of workshops; production of blueprint and presentation; overall project coordination
- Customer Services – to input on the issues they currently experience through poorly planned change and what they would like to see in future
- Communications – to input on options for communication and what is best suited to different types of change
- Customer Relations – to input regarding customer consultation and what causes complaints
- Front line service – ideally having just introduced a change or considering doing so

## **5. Project Costs**

No costs expected other than staff time.

## **6. Risks**

Risks will be identified, logged and managed during the project.

# **COPELAND BOROUGH COUNCIL**



## **COVALENT COMPLAINTS**

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## **END OF PROJECT REPORT**

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**Version:** 0.2  
**Author:** Kevin Long  
**Date:** 10-July-09

## End of Project Report

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### **1. Summary**

Overall the introduction of the Covalent Complaints Module project was very successful. This was due to the commitment and dedication to the project by the Customer Relations and Performance Officers.

The key successes of the project:

- Within scope;
- Delivered comprehensive training to a wide audience across the council;
- Raised the profile and the importance of corporate complaints and in particular how this relates to good customer service;

### **2. Project Performance**

Outline of the main product deliverables in the PID against actual performance in the project.

Product	Target	Actual	Reasons
Covalent modified	23-Feb-09	30-Mar-09	Dependant on Version 9.0
Updated complaints process	23-Feb-09	26-Jan-09	
Covalent configuration and system set up	02-Mar-09	30-Mar-09	Dependant on Version 9.0
Staff trained	16-Mar-09	08-Apr-09	Reliant on Covalent
IT infrastructure	23-Feb-09	21-Jan-09	
CRM interface	02-Mar-09	09-Mar-09	
Go-live	23-Mar-09	30-Mar-09	Reliant on Covalent

At the start of the project a number of enhancements to the existing software were identified in order to make it user specific. It was fundamental to the project that these were implemented prior to the GO LIVE date to guarantee the training was relevant to the trainee's and ensure that they were equipped to get the most out of the system.

The majority of the requested enhancements to the software were addressed either through the Covalent system update (version 9.0) which was implemented prior to GO LIVE, internal administration or version 9.1. which was released 4 May 2009.

A major key factor of success was the training; this was delivered via 3 half day training sessions linked closely to our internal procedures.

As the training was identified as the key factor to the success of the project and given the fact that it coincided with the end of year holiday period it was felt necessary to provide training over a two week period in order to capture all relevant personnel.

The GO LIVE date of the project was rescheduled to coincide with the start of the financial year.

## End of Project Report

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Looking at whether the project was on time, within budget and delivered a quality end-product would, to a superficial level, give an idea of overall performance. Although the project delivered two out of three of these (the go-live date was a week later than scheduled) a more detailed analysis of project performance should look at the reasons that drove the implementation of the system in the first place. The drivers provide the baseline and comparing the end result against this will give a more detailed and accurate indication of the project's performance.

The drivers for a Corporate Complaints system are laid out in the following table and the way the project performed against each of them:

Baseline Driver (taken from PID)	Performance as part of the project
A corporate view of all complaints is available	The new complaints module has been rolled out to all departments allowing a central view of complaints to be available. Training has also been delivered to each department, and as part of the project the complaints procedure was reviewed and rewritten by the Customer Relations Officers. This new procedure was incorporated into the Covalent Complaints Module and communicated to departments prior the training sessions.
Improved services offered to customers through better use of this 'free' feedback from customers	As well as storing all complaints the Covalent module is able to produce reports. Using this information to improve service delivery is an important follow-on action once the project is closed down
Improved complaints service	<p>The Complaints module will support managers through the complaints process e.g. sending emails to remind them when deadlines are approaching. It will also provide a complete picture of all complaints and how they are being processed in order to make improvements.</p> <p>Managers were already using Covalent to monitor performance targets so the system was already familiar and accessible to them.</p>

### **3. Change Management**

Initially it was planned that training would be carried out over one day at a cost of £1k as the project progressed it became clear that in order to deliver a quality training programme and capture all users we would need to buy in an extra ½ day training which was funded from the corporate budget.

Getting the training right was essential. If the training was lacking and users were left feeling unsure about the purpose of the system, the correct way to interpret the complaints procedure and in turn not knowing how to use the system they simply wouldn't have used it.

## End of Project Report

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### **4. Lessons Learned**

- The trainer was already booked up for the ideal time to run the training course. By planning and contacting the trainer earlier we could have run the training at a time that didn't clash with high levels of annual leave.
- Asking Fergus McMorrow and Keith Parker to speak at the start of the training sessions proved worthwhile in raising the status of the project from being an exercise that's being carried out in Customer Services to one that affects the whole council.

### **5. Follow-On Actions**

- Additional training for new users including using the report function and in house refresher training for people who were trained originally;
- Helpdesk requests that couldn't be fulfilled by Covalent within the project timescales because they were dependant on later versions of the module that weren't planned until a later date;
- Identify improvements to service delivery from the data that's been gathered from complaints and held in the system;
- Review user usage at the end of August.
- Continue developing the system in house to maximize outcomes.

### **6. Post-Project Review**

The Customer Relations Officers meet with Stephen Fawcett on a regular and one-to-one basis to discuss issues of which complaints will feature amongst them. Any complaints can be raised with Jane Salt as head of customer services. So to that end there is a mechanism in place for the continuing development of the system and corporate complaints in general.

Following on from this report, the follow-on actions listed in section 5 should be included in these discussions.