

# Corporate Services

## Project Initiation Document



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## 1. INTRODUCTION

The purpose of this document is to define the scope of the Corporate Services (CS) Project, the deliverables and/ or outcomes which will be produced as a result of the project and the timescales the project will be delivered by.

The PID will provide assurance to the Public Health Reform Programme Board (PB) that the project has a sound basis and the document will also act as a foundation document against which the Senior Responsible Owner (SRO) and PB can monitor progress.

Approval of the PID is sought from the PB, together with authorisation to proceed with the project.

### 1.1. Project Objectives

The CS Project Objectives have been identified as follows:

- **Objective 1** - Establish a project team to identify and then scope out opportunities for the provision of corporate services to support Public Health Scotland (PHS), identifying those services currently provided on a shared basis and any new corporate services to be offered on a shared basis by November 2018.
- **Objective 2** - Set out baseline costs for all services by November 2018, including rationale for retaining specific services 'in-house'.
- **Objective 3** - Assess feasibility and define how related services and processes should be split between any corporate services provider and PHS. Produce options and timescales for the provision of all new arrangements and develop related framework document(s) by January 2018.
- **Objective 4** - Build and test the processes and technologies that will support operation of all corporate services (shared or 'in-house'), including policy and procedure documents, user guides, training materials and related role descriptions by April 2019.
- **Objective 5** - In partnership with the HR project and in accordance with the content of the NHSScotland Staff Governance Standard and Organisational Change Policy, engage with all staff who are affected by the potential introduction of corporate services, plan and implement necessary organisational change processes for staff and train staff as needed in any new processes and technology from Spring 2019 until the project closes.
- **Objective 6** - Implement and roll out the new arrangements and support related transition arrangements through to vesting day of 1 December 2019.

### 1.2. Outline Project Deliverables and/or Desired Outcomes

The Public Health Reform programme is committed to a shared services provision within Public Health Scotland (PHS), in line with the foundations established by the Christie Commission.

The programme SROs have agreed that to support the delivery of its core functions, PHS will require support from a number of key corporate functions that are currently delivered by staff in NSS and Health Scotland.

The following functions have been identified as shared services functions: Finance; Payroll; Local IT<sup>1</sup>; Human Resources<sup>2</sup>; Local Procurement; Programme and Project Management; Operational Facilities Management (including accommodation); Legal Services.

Further work will be required to more fully define what is included within each of these functions. Additional corporate shared services functions may also be identified during the project.

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<sup>1</sup> To be delivered in partnership with the IT project.

<sup>2</sup> To be delivered in partnership with the HR project.

Given that PHS will have a key role in transforming the public health landscape in the widest sense, as well as engaging with the public about what they can do to stay healthy and counter threats to their health, the proposal is that the communications, engagement and marketing function should be a core service of PHS and should be delivered in-house.

### **1.3. Outline Project Deliverables and/or Desired Outcomes**

The following deliverables will be required:

#### **Project Management**

- Project plan
- Risk log
- Monthly progress reports
- Project closure report

#### **Objective 1**

- Deliverable 1 - Project Team terms of reference by end November 2018
- Deliverable 2 – Documentation outlining scope and opportunities for the provision of corporate services to support Public Health Scotland (PHS), identifying those services currently provided on a shared basis and any new corporate services to be offered on a shared basis

#### **Objective 2**

- Deliverable 3 – Documentation outlining baseline costs for all services, including rationale for retaining specific services 'in-house'.

#### **Objective 3**

- Deliverable 4 – Documentation outlining the feasibility and definition as to how related services and processes should be split between any corporate services provider and PHS.
- Deliverable 5 – Documentation describing the identified options, timescales, risks, benefits and costs associated with the provision of all new arrangements.

#### **Objective 4**

- Deliverable 6 – Related framework document(s).
- Deliverable 7 – Documentation outlining the approach and timelines for testing the processes and technologies that will support operation of all corporate services (shared or 'in-house').
- Deliverable 8 – Draft and final policy and procedure documents, user guides, training materials and related role descriptions and transition plan.

#### **Objective 5**

- Deliverable 9 – Documentation outlining an approach and timeline for staff engagement, organisational development, training and implementation of corporate services to PHS.

#### **Objective 6**

- Deliverable 10 – Documentation outlining a benefits realisation plan, timescales and owners.

### **1.4. Constraints**

A number of constraints have been identified and have been added to the Project Risk Register.

- Time: Staff engagement will need to align with the timescales set for delivery.
- Cost: Activities to support delivery need to be aligned with the budget available.
- Resource (PHR Team): Finite PHR Team resource available to support delivery
- Resource (external): Commissions work competing with existing resources

## 1.5. Project Scope (and any exclusions)

<b><u>In Scope:</u></b>	<b><u>Out of Scope:</u></b>
<u>Organisations:</u> Scottish Government COSLA NHS Health Scotland National Services Scotland Local Government NHS Scotland	<u>Organisations:</u> All other Organisations not listed as in scope
<u>Divisions / Departments:</u> NSS Business Services NSS IT NSS Procurement NSS HR NSS Central Legal Office NSS Programme Management Services HS HR HS Finance HS Procurement HS IT HS Project and Programme function	<u>Divisions/Departments:</u> All other Divisions/Departments not listed as in scope
<u>Groups:</u> NSS Corporate functions HS Corporate functions Staff working within the areas above	<u>Groups:</u> All other Groups not listed as in scope
<u>Processes:</u> All HR processes All Finance processes All IT processes All Procurement processes	<u>Processes:</u> All other Processes not listed as in scope
<u>Systems:</u> All HR systems All Finance systems All IT systems All Procurement systems Local government	<u>Systems:</u> Delivery of the project is fundamentally based on ensuring that opportunities remain open for local government to provide elements of corporate services to PHS.

## 2. PROJECT DEFINITION

### 2.1. Method of Approach

The project will follow standard Project Management methodology.

### 2.2. Assumptions

The following assumptions have been made which the programme will actively try to manage:

- The programme will deliver to the dates outlined by COSLA/Scottish Government.
- The new public health body will be established in 2019.
- There will be sufficient resource available to undertake the work required.
- On vesting day, in terms of accommodation, the majority of staff will make use of existing arrangements initially and until a solution is identified that better meets the needs of the organisation (PHS).

### 2.3. Stakeholders

All key stakeholders will be managed in line with the PHR communications and engagement strategy. Engagement of staff will form a key part of the project, in line with the staff governance standards.

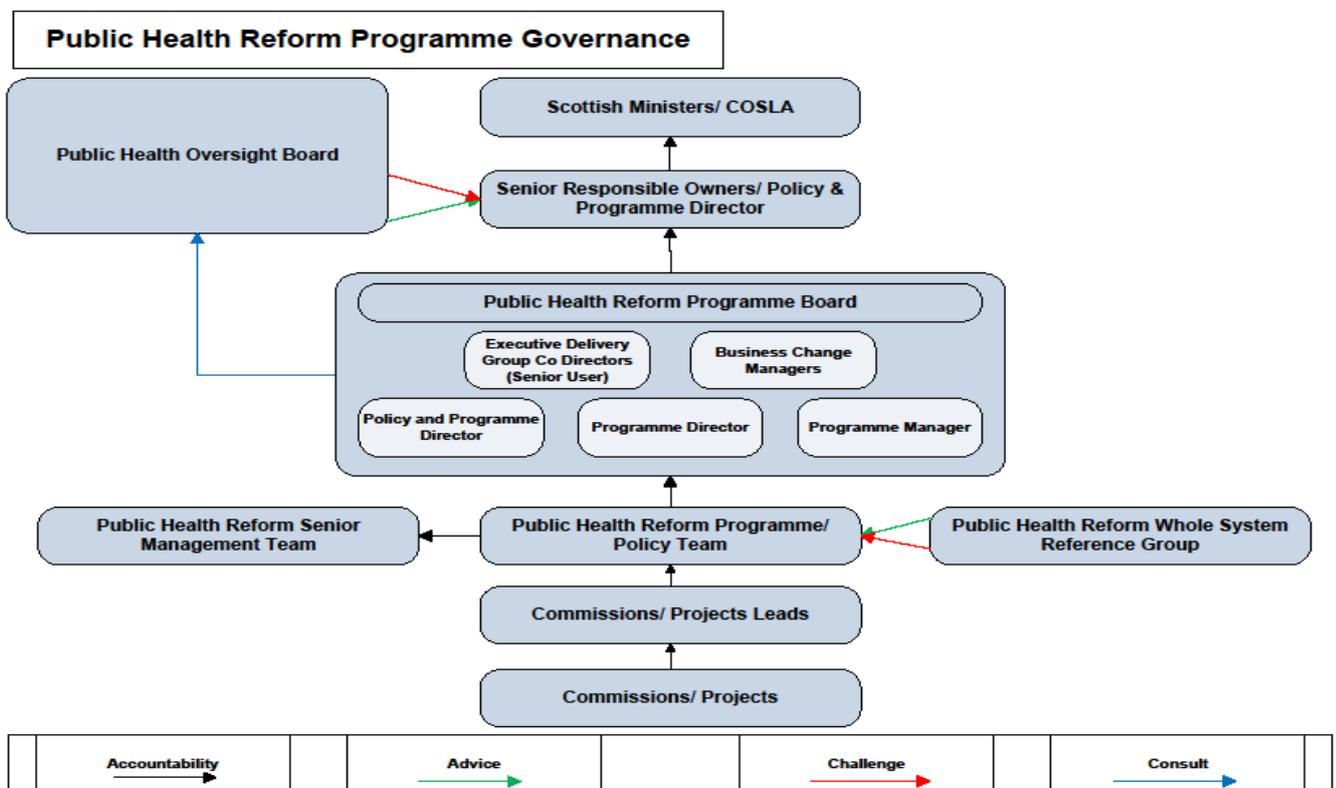
### 2.4. Dependencies

The PHR programme board recognise that some related commissions, project, programmes and strategies have been commissioned and are either underway or about to start. In order to ensure alignment, the programme board anticipate that this commission will link with and reflect (where appropriate) the work, evidence and related findings of the following strategies and programmes:

- PHR commissions/projects
- National Board Collaboration around Shared Services
- Any other NHS Scotland initiatives around Shared Services

### 2.5. Project Organisation Structure

This project forms part of the overall PHR Programme. The diagram below outlines the overall Programme Structure.



Members of the CS Project Team are listed below:

To be identified

## **2.6. Risk Management Strategy**

Risks will be managed in line with the PHR Programme risk management approach and reported to the Programme Board via the PHR Programme Team. The programme Risk Register, once created, will be regularly reviewed and updated by the Programme Team and SRO. Projects within the programme will have their own Risk Registers operating on the same basis and will be managed at project level in accordance with the agreed risk management approach, escalating to the programme where applicable.

## **2.7. Communication Strategy**

Communications for the CS project will be managed in line with the PHR communications and engagement strategy.

## **2.8. Project Quality Strategy**

To ensure all project deliverables and outputs will meet the expected quality requirements; a number of quality measures will be put in place across the project. These include:

- Product description(s) being agreed with the PHR programme team
- Regular updates to the PHR programme board

## **2.9. Project Controls**

The following project controls will be implemented to monitor progress and where necessary take remedial action should the project deviate from the agreed timescales or costs:

- Regular highlight reports to the PHR programme team

## **3. BUSINESS CASE**

A Business Case will produced for the PHR Programme.

## **4. PROJECT PLAN**

A project plan has been developed for the project and is embedded below:

In addition to the plan, a number of reporting milestones have been identified for the project which will be included in the overall PHR Programme Milestone chart.

## **5. RISK LOG**

All risks identified have been recorded on the CS risk log.

(insert risk log)