

**South Ayrshire Council**

**Report by Director of Communities and Transformation  
to Cabinet  
of 20 January 2026**

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**Subject: Business Support Model**

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**1. Purpose**

- 1.1 The purpose of the report is to update Members on the Business Support Model project and changes to service delivery responsibilities which will be reflected in an updated Scheme of Delegation at a later date.

**2. Recommendation**

**2.1 It is recommended that the Cabinet:**

- 2.1.1 notes the Business Support Model Business Case including proposed benefits, approved by the Council's Transformation Board on 17 December 2025 at Annex 1;**
- 2.1.2 notes changes to staffing and line management arrangements as a result of the implementation of the new Business Support model, shown at page 8 of the Business Case;**
- 2.1.3 notes that requirements to amend the Scheme of Delegation (SoD) to reflect changed organisational responsibilities for Business Support will be considered as part of the next SoD quarterly review; and**
- 2.1.4 agrees a progress update report be provided to Cabinet in January 2027 including benefits realisation.**

**3. Background**

- 3.1 The Transformation Board and '*Shaping Our Future Council*' (SOFC) programme of work were established in June 2024. It is a 5 year programme, and the projects reflect the Council's agreed priority areas for transformation (our workforce; our technology; our assets and; our delivery model).
- 3.2 The Transformation Board - chaired by the Chief Executive - is the officer group with delegated authority for developing and progressing the work of the programme and projects and The Board has authority to allocate seed funding of up to £200,000 from the Transformation Fund to support transformation activity.

- 3.3 On 28th October 2025, Cabinet noted an update on the Business Support Model transformation project. Extensive work has been undertaken with Directorates and services across the Council in the last 18 months to baseline and develop the proposals, including a task analysis exercise, a review of the existing management and staffing model and the processes and systems in place for delivering business support and subsequent cost to the Council.
- 3.4 The Improvement Service's 2017 *'Report on the Centralisation of Business Support Functions'* conducted research to assist with a review of business support in Councils and public bodies. This included data from the Local Government Benchmarking Framework (LGBF) and case studies from councils across the UK that have implemented a centralised business support model. Most Councils in Scotland have moved to centralised Business Support models following a period of review, generating improvements and efficiencies.
- 3.5 Benchmarking with other Local Authorities demonstrates the Councils current model of business support does not provide Best Value, either in terms of cost or quality of delivery. This is mainly due to the management model in place and a lack of adoption of consistent business support processes across the Council leading to duplication, error and inefficiency. There are currently around 20 budget holders for business support across 5 council Directorates, and a total annual spend of c.£13.7M. There are opportunities to better utilise the Councils investment in technology and automate processes to provide a more efficient business support service that meets the needs of the Council and supports its financial sustainability.
- 3.6 The Business Case at Annex 1 outlines the 'to-be' Business Support model – the optimal model for implementation that will deliver against stakeholder expectations, taking into account risk, time and cost factors. The Business Case was approved by the Council's Transformation Board on 17 December 2025.

#### **4. Detail**

- 4.1 Cabinet are asked to note the Business Support Model Business Case and proposed benefits at Annex 1; including the qualitative improvements that will be achieved in business support delivery through the implementation of the new model; the benefits for staff working in business support roles in terms of training and career development offered by the new model; and the benefits for the organisation in terms of cost efficiencies and achievement of Best Value objectives. Service Level Agreements (SLA's) between recipient services and the Business Support Service as referenced in the Business Case, commits the KPI's the new service will operate to.
- 4.2 Cabinet are asked to note changes to staffing and line management arrangements as a result of the implementation of the new Business Support Model and detailed within the Business Case. The Business Case defines the criteria that will be used to identify the roles in scope of the new service. The Transformation Board and Chief Executive will confirm the individual roles transferring to new line management arrangements by April 2026.
- 4.3 Cabinet are requested to note that any changes to the Scheme of Delegation required to reflect updated organisational remits and responsibilities for Business Support will be considered within the next quarterly review of the SoD.
- 4.4 Cabinet are asked to agree that an update report be provided to Cabinet in January 2027 including details on implementation progress and any benefits realised.

## **5. Legal and Procurement Implications**

- 5.1 There are no legal implications arising from this report.
- 5.2 There are no procurement implications arising from this report.

## **6. Financial Implications**

- 6.1 At a meeting of South Ayrshire Council on 11th November 2025, elected members considered the 2026-27 Budget Strategy and Budget Update and noted proposed savings from the Councils transformation programme. This includes efficiency savings in FY2026/2027 of £220,000 – which are the proposed year 1 savings from the Business Support Model project as articulated in the Business Case.
- 6.2 The cashable benefits proposed are considered conservative at this point in comparison to the experience of other Local Authorities who have implemented similar models and achieved significant savings and improvements. Productivity gains for subsequent financial years will be proposed once the new Model has embedded.
- 6.3 The proposals confirm consolidation of business support budgets for FY2026/2027 across three Council Directorates and services – Communities & Transformation, Chief Executive's and Housing, Operations and Development Directorates. Finance officer resource will be required to assist this process.

## **7. Human Resources Implications**

- 7.1 There are no changes proposed to current business support arrangements in either the Health and Social Care or Education directorates as those Directorates already have the preferred Directorate business support model in place.
- 7.2 Service staff within the Chief Executive (CE) and Housing, Operations and Development (HOD) Directorates will no longer have budgetary or line management responsibilities for business support. Instead, all responsibilities for corporate business support will transfer to the Communities and Transformation (C&T) Directorate and new corporate business Support Service under new management arrangements. Given the responsibilities of the new corporate Business Support service and synergies with other Council services responsible for assisting customers, utilising technology in service delivery and those that are focussed on making improvements to the Councils delivery model – the new Business Support service will form part of the Transformation service cluster within the C&T Directorate.
- 7.3 Line management of staff transferring into the new service will be provided through a new Business Support Coordinator role to support staff through the transition period and identify ongoing improvements and productivity gains once the new service is in delivery. The management model for the service will enable clear career pathways and progression opportunities for staff who wish to progress their business support career, linked to training and development opportunities via the Digital Skills programme proposed.

- 7.4 A key dependency for successful benefits realisation is the commitment to and application of the 'no new recruitment' principle to business support delivery posts within CE, HOD and C&T Directorates during transition to the new model.
- 7.5 Productivity gains will be made in the first year of implementation equating to approximately 6 full time equivalent posts, which is attuned with current leaver levels from these types of roles within the Council. Roles identified as no longer required in FY2026/2027 will be removed permanently from the staffing structure through natural attrition where possible. Managing change would apply in any other circumstances.
- 7.6 Discussions are ongoing with staff and Trade Unions on the roles that will be in scope of the new service and any changes to current line management arrangements. Individuals transferring to new line management arrangements will be confirmed by the Transformation Board and Chief Executive by April 2026.

## **8. Risk**

### **8.1 *Risk Implications of Adopting the Recommendations***

- 8.1.1 A Risk Register is in place for the Business Support Model project. Risks are managed in accordance with the Transformation Risk Management Strategy.
- 8.1.2 3 medium risks and 1 low scoring risk have been identified in relation to implementation and are reflected in the Business Case.

### **8.2 *Risk Implications of Rejecting the Recommendations***

- 8.2.1 Not implementing the Business Case recommendations will jeopardise the Council's ability to realise the cashable benefits of the project and negatively impact the budget position for FY2026/2027 and subsequent years.
- 8.2.2 Rejecting the recommendations may negatively affect the reputation of the Council and its ability to secure Best Value in the delivery of services.

## **9. Integrated Impact Assessment (incorporating Equalities)**

- 9.1 The Integrated Impact Assessment has been provided at Appendix 7 of Annex 1.

## **10. Sustainable Development Implications**

- 10.1 ***Considering Strategic Environmental Assessment (SEA)*** - This report does not propose or seek approval for a plan, policy, programme or strategy or document otherwise described which could be considered to constitute a plan, programme, policy or strategy.

## **11. Options Appraisal**

- 11.1 An options appraisal has been carried out in relation to the subject matter of this report and can be found within the Business Case in Annex 1. The following table summarises the options considered by the Transformation Board.

<b>Option</b>	<b>Description</b>	<b>Ranking</b>
1. No change	Services progress continuous improvement via existing Service (Re)Design and other existing mechanisms	4
2. Centralised Business Support function	One corporate Business Support service for the entire Council	2
3. Directorate-level Business Support functions	Preferred option – Three Business Support functions	1
4. Incorporated as a workstream within the Corporate Services Target Operating Model project	<i>This project has since been removed from the 'Shaping Our Future Council' portfolio</i>	3

11.2 Option 3 has been selected as it best meets the success criteria identified. Its ability to realise cashable benefits as a result of productivity gains at an organisational level score high, and benefits realisation is considered rapid (within the next financial year). The cost to deliver is considered low. It is a progressive approach, incorporating good practice that already exists within the Council and will lead to better opportunities for ensuring technology and automation are embedded within service delivery, realising qualitative and quantitative improvements in business support delivery across Directorates.

## **12. Link to Council Plan**

12.1 The matters referred to in this report contribute to Priority 1, 2 and 3 of the Council Plan: Spaces and Place; Live/ Work/ Learn; Civic and Community Pride.

## **13. Link to Shaping Our Future Council**                      **Yes**                      **No**

13.1 The matters referred to in this report contribute to the Council's transformation priority area(s): our workforce; our technology; our assets; our delivery model and will deliver cashable/ qualitative/ quantitative benefits. A Benefits Tracker is provided within the Business Case at Annex 1.

## **14. Results of Consultation**

14.1 There has been no public consultation on the contents of this report.

14.2 Consultation has taken place with Councillor Brian Connolly, Council Leader and Policy Lead for Economy and Strategy, and Councillor Ian Davis, Policy Lead for Finance and Corporate Services, and the contents of this report reflect any feedback provided.

**15/**

## 15. Next Steps for Decision Tracking Purposes

- 15.1 If the recommendations above are approved by Members, the Director of Communities and Transformation will ensure that all necessary steps are taken to ensure full implementation of the decision within the following timescales, with the completion status reported to the Cabinet in the 'Council and Cabinet Decision Log' at each of its meetings until such time as the decision is fully implemented:

<b><i>Implementation</i></b>	<b><i>Due date</i></b>	<b><i>Managed by</i></b>
Confirm roles transferring to the new corporate Business Support service	31 March 2026	Transformation Board (Chief Executive)
Operational agreements in place between corporate Business Support service and recipient services	31 July 2026	Service Lead – Customer Services
Report back to Cabinet on implementation progress of the Business Support Model project including benefits	31 January 2027	Assistant Director - Transformation

**Background Papers**    **Report to South Ayrshire Council of 6 March 2024 – [Shaping Our Future Council](#)**

**Report to Cabinet of 29 October 2024 – [Shaping Our Future Council Update](#)**

**Report to Audit and Governance Panel of 26 March 2025 Transformation - [Best Value Thematic Work in South Ayrshire Council 2024/25](#)**


**Report to Service and Partnerships Performance Panel of 16 September 2025 - [Shaping Our Future Council](#)**

**Report to Cabinet of 28 October 2025 – [Shaping Our Future Council](#)**

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**Date: 9 January 2026**

<b>TRANSFORMATION</b>		 <small>Comhairle Siorrachd Àir a Deas</small> <small>Making a Difference Every Day</small>											
<b>BUSINESS CASE</b>													
<b>Proposed project title:</b>	Business Support Model												
<b>Senior Responsible Officer:</b>	Stephen Penman, Chief Executive On approval of the Business Case, the SRO responsible for implementation will become Louise Reid, Assistant Director – Transformation												
<b>Business lead:</b>	Wendy Wesson, Chief HR Advisor On approval of the Business Case the Business Lead will become Gillian Farrell, Service Lead – Customer Services.												
<b>Portfolio Holder engagement:</b>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Portfolio Holders: Councillor Brian Connolly and Councillor Ian Davis.												
<b>Proposed by:</b>	Chief Executive and Director of Communities and Transformation												
<b>Proposal date:</b>	20 <sup>th</sup> November 2025												
<b>Financial overview</b>													
<b>Proposal type:</b>	<input checked="" type="checkbox"/> Proposal will provide a financial return to Council <input checked="" type="checkbox"/> Proposal will improve a process or introduce a new way of working <input checked="" type="checkbox"/> Proposal supports/maintains Service operations or BAU activities												
<b>Financial summary:</b>	<p>Through the implementation of a new Business Support Model, productivity gains are anticipated relating to a reduction in duplicated administrative and clerical tasks; improved processes; utilising technology to replace manual processes and therefore an increased pace and accuracy of business support task completion. Immediately, productivity gains will be made in the first year of implementation and have been monetised and presented in terms of FTEs. Posts identified as no longer required in FY2026/2027 will be removed permanently from the staffing structure through natural attrition where possible. The post-project evaluation will identify opportunities for further phases and productivity gains and support our commitment to Best Value and continuous improvement.</p> <table border="1" data-bbox="459 1487 1434 1980"> <tbody> <tr> <td>Recurring saving (annual):</td> <td>Savings of £220,000 are anticipated in FY2026/2027. Further productivity gains will be quantified for subsequent financial years once the new Model has been implemented.</td> </tr> <tr> <td>First year of saving:</td> <td>FY2026/2027</td> </tr> <tr> <td>Recurring investment (annual cost):</td> <td>N/A</td> </tr> <tr> <td>Non-recurring investment (one-off cost):</td> <td>£155,000</td> </tr> <tr> <td>Income generation - new revenue (annual):</td> <td>N/A</td> </tr> </tbody> </table>			Recurring saving (annual):	Savings of £220,000 are anticipated in FY2026/2027. Further productivity gains will be quantified for subsequent financial years once the new Model has been implemented.	First year of saving:	FY2026/2027	Recurring investment (annual cost):	N/A	Non-recurring investment (one-off cost):	£155,000	Income generation - new revenue (annual):	N/A
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Non-recurring investment (one-off cost):	£155,000												
Income generation - new revenue (annual):	N/A												
<b>Multi-year financial return:</b>	Further productivity gains are anticipated in subsequent financial years and will be quantified and realised once the new Model has embedded. This will be												

< <i>Applicable where project delivers savings over multiple years</i> >	as a result of business support processes becoming standardised and more efficient. Projected gains are considered <b>conservative</b> at this point in comparison to the experience of other Local Authorities who have implemented similar models.
<b>Project overview</b>	
<b>Background:</b>	<p><u>1.Overview</u></p> <p>On 28th August 2024, the Transformation Board approved the Business Support Model Project Brief at <a href="#">Appendix 1</a> giving officers the authority to develop a Business Case for presentation at a later date to the Board - to propose a transformation in the way the Council delivers business support services.</p> <p>At the time, there were 425 employees undertaking a business support role in the Council. The Project Brief outlined that with the introduction of new ways of working, M365, Oracle Fusion and through the delivery of transformation projects, a more streamlined and efficient delivery of administrative and clerical tasks is available and therefore there is a requirement to review processes and resources associated with delivery of these functions to ensure the Council continues to meet its Best Value obligations, in terms of Value for Money, quality and avoiding duplication of costs.</p> <p><u>2.Discovery phase</u></p> <p>Business support services are the internal processes and activities that keep the Council running. They don't directly deliver products or services, but they enable core operational services to do their work efficiently and aim to deliver best value to internal customers.</p> <p>Often referred to as 'back-office services' – they encompass important administrative and support functions.</p> <p>A baseline (the 'as-is' model) has been developed including the tasks, activities, management model and costs in relation to Business Support functions across the Council. All Directorates were included in the review in the discovery phase.</p> <p>The 'to-be' model presents how Business Support will be right sized and delivered to meet the future needs of the council and its customers.</p> <p>The Business Case proposes changes to the current approach to reflect the impact of the Councils investment in new technology, process automation and changing requirements for business support from customers.</p> <p>There are close synergies with the Telephony upgrade project, process automation (approved by Cabinet in March 2025), developing Customer Contact model, Our Future Workforce and the project supports Service Re-design principles.</p> <p><u>3.Benchmarking our practice</u></p> <p>As an organisation, South Ayrshire Council spends annually approximately £13.7M on Business Support. The Council have never undertaken a strategic review of how business support is provided across all service delivery areas and whether it provides value for money comparative to other Local Authorities. With a challenging fiscal position and drive towards financial sustainability, a statutory obligation to achieve best value, and with the</p>

resource in place to undertake a review and drive business change activity, now is the right time to do so.

The Improvement Service's *'Report on the Centralisation of Business Support Functions'* 2017 ([at Appendix 2](#)), conducted research to assist with a review of business support in Councils and public bodies. Data derived from the Local Government Benchmarking Framework (LGBF) was also provided. Case studies were brought together from various councils across the UK that have implemented a centralised business support model. The report concluded:

- At the time, 70% of councils queried have some sort of centralised business support model (this is now deemed to be higher)
- 1 out of 11 Councils queried at the time included school administration in their centralised business support model.
- Most Councils queried operated their centralised business support model around functional areas.
- Automation, digitisation and a move to self-service have been highlighted as helping to realise savings.
- Cluster models, where admin support is pooled across a number of schools, and/or standardisation of procedures across school administration have been rolled out by the majority of councils queried.
- Virtual centralisation / providing a more customer and value-driven service were two of the key themes discussed as being important in the future of support services.

Many Councils in Scotland have moved to centralised Business Support models following a period of review.

#### North Ayrshire Council

- A centralised business support team carries out activity for Education, Legal, Housing, Finance, Revenues and Benefits, Building Services.
- The team complete activities such as raising PO's, scanning, printing, room bookings, complaints processing, FoI, SARs.
- Service Level Agreements are in place between the business support team and the Services they support.
- Operating Plans are produced each year which detail the activity that will be undertaken for each Service.

#### West Dunbartonshire Council

- The Council began their centralised model in 2016, bringing all administrative and clerical posts (with exception of HSCP and on-site school staff) into the one business support team.
- Since 2016, the new team has been able to reduce cost by £700,000 and FTE from 140 to 80 FTE.
- Feedback from the Council highlights a number of crucial factors in being able to deliver this new way of working, including, strong leadership from the Chief Executive and project owner, ability to streamline existing processes and opportunities to make more effective use of technology.

- West Dunbartonshire also simplified the grading structure in the team, moving from multiple salary grades to just 3 in the new team.

#### 4.i) South Ayrshire Council - Business support task analysis

A business support task analysis exercise has been carried out across the Council. The activities undertaken by staff at SAC operating in a business support role are wide and varied. It includes but is not limited to: basic data input and processing, issuing and responding to email enquiries, processing of accounts, invoices and purchase orders. These can be tasks that are done routinely or reactively, take less than five minutes or last over two hours. In general, though, the tasks will be administrative in nature but are necessary and important for the functioning of statutory and non-statutory services.

The task analysis for SAC shows that:

- Data input and processing, often using a CRM, accounts for around 40% of business support activity
- Meeting related administration accounts for 15% of business support staff time
- There are two main systems used to support tasks: M365 and Oracle Fusion
- There are staff carrying out similar and duplicate activity in different Services and Directorates
- Business support staff in the same Directorate can complete the same task on behalf of a service, but take different times to complete it and follow different processes when completing the task.

#### 4.ii) South Ayrshire Council – Business support human resource

Business support posts span grades from level 1 up to level 11 including team leader posts. Level 4 and level 5 make up the largest share of posts at 138 and 134 posts.

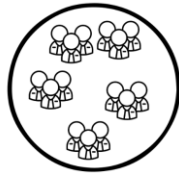
Overall, across the Council and all Directorates, as at 27<sup>th</sup> August 2025 there are approximately 425 FTE's that perform an administrative/ clerical role. This is approximately 13,132 hours per week business support resource (assuming 1 FTE works 35 hours per week over 52 work weeks with 6 weeks off).

#### 4.iii) South Ayrshire Council – Business support management model

Currently, Council staff who provide these types of activity are fragmented in some directorates yet consolidated in others (fig 1). In Health and Social Care and Education, business support is consolidated in distinct teams that support each directorate. Here, these teams carry out the main business support functions and report into the one Service Lead.

Across other Directorates, the picture is more fragmented, with business support activity being delivered at the Service level, rather than the Directorate.

*Figure 1:*



HSCP/Education



Other Directorates

This is not the picture across other local authorities. Instead, there are alternative delivery models where one, or two, consolidated teams provide a business support function to all directorates. There is no forum for sharing Business Support best practice within the Council.

#### 4.iv) South Ayrshire Council – the cost to deliver business support

Benchmarking with other Local Authorities demonstrates South Ayrshire Council's cost to deliver is relatively high at c.£13.7million per annum (or £122.78 per resident based on ONS population estimates 2021 of 111,580 in South Ayrshire).

This can be attributed to the current Business Support management and delivery model in operation where there is evidence of duplication of tasks and resource.

In the 2017 IS report, it was reported that West Dunbartonshire Council implemented a new business support model in 2017 and have reduced FTE from 140 to 80 and generated savings equating to £700,000.

#### 5. Synergies and interdependencies across the 'Shaping Our Future Council' portfolio

This project supports the 'Our Delivery Model' and 'Our Workforce' transformation priority areas, specifically: '*Good data and analytics identify areas for improvement and transformation*'; '*Our processes and procedures are effective and efficient*' and; '*Resources are deployed to avoid duplication, maximise partnership working and to achieve value for money for the public pound*'.

The outputs of the Business Support Model project are closely linked to other projects on the Council's transformation programme:

- *Applications rationalisation* – Sweating our technology assets and retiring and disinvesting in those that don't help us to meet our core business objectives. Removing duplication and reducing cost to deliver. Bringing teams together who perform similar tasks will enable a view to be taken of where there may be duplication of systems used by teams.
- *Process automation* – automating processes to improve efficiency, remove manual error and realise productivity gains. The task analysis activity which administrative and clerical staff completed asked staff to identify where automation could improve tasks. Over 50 tasks currently being carried out by staff in a business support function were highlighted as ones which could be improved by process automation.
- *Customer Contact* – this project will improve the customer experience by introducing a single point of contact and the implementation of a new Customer Relationship Management (CRM) system. The project

	<p>will improve self-serve and information sharing, remove duplication and inefficient practices, and improve the overall customer experience.</p> <ul style="list-style-type: none"> <li>• <i>Service Re-Design</i> – Re-designing Council services to meet objectives and strategic plans and goals.</li> <li>• <i>Our Future Workforce</i> – Development and delivery of the workforce plan</li> <li>• <i>Asset Review and Challenge</i> – fluctuations in staffing levels impact on Council corporate estate requirements</li> </ul>
<p><b>Purpose:</b> &lt; Tick all that apply &gt;</p>	<p><input checked="" type="checkbox"/> Mandatory  <input checked="" type="checkbox"/> Legislative  <input checked="" type="checkbox"/> Service improvement</p> <p>The Local Government in Scotland Act 2003 places a statutory duty on South Ayrshire Council and all local authorities to make arrangements to secure Best Value; including the securing of continuous improvement in performance while maintaining an appropriate balance between quality and cost.</p> <p>The Council spends a significant amount of public funds resourcing business support delivery, yet there is no evidence to demonstrate the current offer provides Best Value in service delivery, nor meets an approach that supports continuous improvement. Duplication and inconsistencies have been identified. Digital skills is an area identified for organisational improvement, particularly for those staff using digital platforms day to day as a requirement of their role.</p> <p>This Business Case seeks approval of the proposed ‘to be’ Business Support model for implementation which will support Best Value objectives.</p> <p>1. <u>Key Features of the ‘to-be’ model</u></p> <p>In August 2025, the Transformation Board considered the options appraisal where 4 options were reviewed; Option 1 – no change; Option 2 – Centralised Business Support function; Option 3 – Directorate level Business support functions and; Option 4 - Business Support Model is incorporated as a workstream within the Corporate Services Target Operating Model.</p> <p>The Transformation Board agreed to progress with development of Option 3 - a Directorate Business Support model, comprising three Business Support Directorates; i) Health &amp; Social Care; ii) Education; and; iii) the consolidation of business support across the Chief Executive’s directorate, Housing, Operations and Development (HOD) and Communities and Transformation (C&amp;T) to create one single Corporate Business Support directorate.</p> <p>The recommended ‘to-be’ model referenced in the Options Appraisal scores highest of the options reviewed and best meets the success criteria identified. Its ability to realise cashable benefits as a result of productivity gains at an organisational level scores high, and benefits realisation is considered rapid (within the next financial year). The cost to deliver is considered low.</p> <p>It is viewed as a progressive approach, incorporating good practice that already exists within the Council. It will lead to better opportunities for ensuring technology and automation are embedded within service delivery and realise qualitative and quantitative improvements in business support delivery at an organisational level. It differs from the fully centralised model of Business Support that other Councils have in place (Option 2) in that it does not propose all business support tasks and roles are incorporated within the new service,</p>

however, Option 3 could be used as a stepping stone to Option 2 in the future, should there be a desire from stakeholders.

## 2. A Service Level Agreement (SLA) for a new corporate Business Support service

The Transformation Board agreed: *“Directors, or an assigned individual, would take responsibility for their Business Support budget and can then methodically and systematically explore/drive Directorate change, and that could be either through more effective Directorate Service (Re)Design, introduction/development of a Directorate Business Support team, or other approaches. Resource could be pooled across multiple services and would still give staff opportunities to learn new areas of service delivery.”*

During the engagement period, consultation has taken place with staff and services to identify what a new corporate Business Support service would provide. Those views have been reflected, along with information from the task analysis and from other Councils Business Support service SLA’s and a Business Support Charter has been developed at [Appendix 3](#). This will form the basis of the commitment from the Council’s changed approach to services within the Chief Exec, HOD and C&T Directorates on minimum expectations around provision from the new corporate Business Support Service.

The new service and staff will benefit from accessing the Digital Skills training programme being proposed for 2026.

## 3. The new Management Model for a corporate Business Support service

There is **no change** proposed to the management model for business support roles in either the HSCP or Education directorates through the implementation of the project as those Directorates already have this model in place. Stakeholders from both Directorates have advised a watching brief and further engagement once the new corporate Business Support service has embedded to review any desire for further centralisation. This would be considered as a new project or new phase of the project and is not covered in this Business Case.

Given the responsibilities of the new corporate Business Support service, and synergies with other Council services responsible for assisting customers, utilising technology in service delivery and those that are focussed on making improvements to the Councils delivery model – it is proposed the new Business Support service forms part of the Transformation service cluster within the Communities and Transformation Directorate.

Managers from other services within the Chief Executive’s directorate, Housing, Operations and Development and Communities and Transformation directorates will no longer have responsibility for Business Support delivery at a service or team level.

Upon approval from Cabinet, Service management responsibility for the new Business Support service will be delegated to the Service Lead for Customer

Services, reporting into the Assistant Director – Transformation and Director – Communities and Transformation.

Line management will be provided by a new Business Support Coordinator role. This is a temporary 23 month role supported by the Transformation Fund. The role will be responsible for supporting adoption of the new model and supporting staff and identifying further improvements and productivity gains ongoing across the new service.

The management model for the service will provide clear career pathways and progression opportunities for staff who wish to progress their business support career, linked to training and development opportunities via the proposed Digital Skills programme.

A diagram of the updated management structure is provided at [Appendix 4](#)

*The assumption in the short-term is there will be no immediate physical movement proposed of the location of Business Support roles in scope of the new Business Support service. All Council staff now have a digital footprint and are able to work from any Council locality (and from home where appropriate to the work style allocated to the role). However, consultation with staff will take place where roles are deemed required to be based in a specific locale, or where work-styles require to be amended, dependent on the needs of the service and Council.*

#### 4. Criteria for tasks and roles that will be deemed in scope of the new service

The data from the task analysis exercise indicates the following:

- Data input (processing CRM) accounts for 40% of identified business support tasks.
- One quarter of all tasks take between 0 and 5 minutes.
- Over one third of tasks take between 30mins and 2 hours.
- While there are over 50 systems in use, M365 and Fusion are used to deliver well over half of all identified tasks.
- Across all staff in a business support function, M365 products are the most commonly used.
- There are several similar activities being undertaken across Services.
- Services have different processes for the same objectives, e.g. raising purchase orders, administering timesheets and contacting suppliers for payment. There are different timescales for completion across services depending on the process applied.

The Council's ongoing investment in technology including M365 and Oracle Fusion; implementation of process automation and consideration of generative AI applications and early proposals to implement a CRM and new customer assistance model will bring further efficiencies in the way business support is delivered across the Council.

The criteria for decision making – to assess whether an admin/ clerical role is considered in scope for inclusion within the new Business Support service – is presented below at Fig.2.

Fig. 2

In-scope	Out-of-scope
<p><b>Administrative and clerical support</b> Roles where administrative activities such as record keeping/filing/photocopying, meeting and event management and diary and document support make up a significant part of the work.</p> <p><b>Basic data input/processing</b> Roles where these administrative activities make up a significant part of the work. This may include entering data in a consistent, repeatable way to a corporate digital solution.</p> <p><b>Telephone enquiries</b> Roles where they may be required to answer basic queries, direct calls or arrange call-backs.</p> <p><b>Reception duties</b> Roles that are required to attend a front desk to assist with basic (non-specialist) enquiries, directing the public or taking cash payments.</p> <p><b>Customer and client correspondence</b> Roles where the activities include issuing and responding to non-specialist email enquiries, directing enquiries from a central mailbox, issuing of letters.</p> <p><b>Corporate applications</b> Roles that predominantly make use of standard, corporate digital solutions in their day-to-day activities. This might include, but is not limited to, processing of invoices and purchases in Fusion or activities using Microsoft 365.</p>	<p><b>Quasi-judicial or regulatory roles</b></p> <p><b>Specialist functions</b></p> <p><b>Elected member services</b></p> <p><i>*Admin/ clerical roles within Education and HSCP are currently out of scope as the 'to-be' model is already in place in those Directorates.</i></p>

Discussions are ongoing with services and managers and the individual roles that will be incorporated within the new corporate Business Support service will be confirmed and agreed by the Council's Transformation Board and Chief Executive by April 2026.

5. Benefits of the new model

Proposed qualitative, quantitative and cashable benefits will be realised by the project.

*Qualitative benefits* - The implementation of the new Directorate Business Support Model will lead to:

- Increased quality of output and reduction of error through the implementation of standardised operating procedures (SOP's)
- Increased quality of output and reduction of error through application of automated processes where feasible
- A flexible resourcing response that is better able to respond to business support needs of services (e.g. such as when staff are absent or on leave). Resource can be pooled and prioritised at the most critical times.
- Increased confidence, skills and career pathway opportunities from the uptake of Digital Skills training and peer learning – *this benefit is realised as a result of the Digital Skills Programme*

*Quantitative benefits* – The project will maximise the Councils investment in technology through increased utilisation of technology to deliver business support solutions. This will be measured through staff surveys, service planning and the PDR process.

*Cashable* – Through productivity gains.

By nominating a single accountable budget holder with control of spend across each Business Support directorate, budgets can be better managed and controlled and a more responsive model of business support provided to business-critical areas.

In the local authorities that have been engaged with as part of the research for this project, a consistent approach to the management of staff and budgets has emerged. In establishing the new model, two key phases will take place: firstly, the pooling of budgets linked to roles in scope of the new corporate business support function. This will be progressed following confirmation of the in-scope roles and moving the FTE costs to one budget heading. Officers from the Transformation service will work with Finance and HR officers to complete the budget consolidation exercise.

Secondly, a new team structure will be implemented by the Service Lead to oversee the new service. The Service Lead has performance and budgetary responsibility for the new corporate Business Support service. A new Business Support Coordinator will be responsible for line management of the posts that have transferred to the new service structure and will be responsible for identifying continuous improvement initiatives.

By eradicating duplication, better deploying and automating and standardising processes identified in the task analysis, productivity gains can be made.

6 significant areas of opportunity have been identified through the task analysis:

- Data processing
- Processing of PO's and invoices
- Timesheets
- Booking travel and meeting arrangements
- FOI and Complaints
- Photocopying, printing, filing

	<p>It is estimated productivity gains of at least 185 hours per week can be achieved by improving and standardising these processes across the new service; which is the equivalent to approximately 6 FTE based on assumptions applied (assuming 1 FTE works 35 hours per week over 52 work weeks with 6 weeks off) and is monetised to £220,000 of savings in year 1. (This is considered conservative in comparison to efficiencies achieved by other local authorities in implementing similar business support models.)</p> <p>Where possible the saving would be achieved through natural attrition – staff leaving positions - and is attuned with current leaver levels from these types of posts within the council. Managing change would apply in any other circumstances. A key dependency is the commitment and application of the ‘no new recruitment’ principle to business support posts from the HOD, CEX and C&amp;T directorates.</p>
<p><b>Appendix 3</b> <b>Objectives/deliverables:</b></p>	<p>The overall objective is to provide an improved approach to Business Support which provides Best Value for the Council including more streamlined processes, greater adoption and application of technology and the right sized resource that can be flexed to respond to organisational need.</p> <p>The project will deliver the following outputs:</p> <p>Output 1 – Implementation Group established and operating providing delivery direction to the project (November 2025)</p> <p>Output 2 – Approval of the Business Case - Transformation Board (December 2025)</p> <p>Output 3 – Cabinet approval of the updated organisational structure to include Business Support (January 2026)</p> <p>Output 4 – Changes to organisational structure communicated. Coordinator Job Description approved. Any changes made to JD for Service Lead (January 2026)</p> <p>Output 5 – Business Support Coordinator appointed (March 2026)</p> <p>Output 6 – Confirmation of roles transferring to new Corporate Business Support service and approval by Chief Executive/ Transformation Board (April 2026)</p> <p>Output 7 – Work completed by Human Resources and Finance to consolidate budgets and transfer posts in the line management structure (May 2026)</p> <p>Output 8 - Operational agreements in place between newly formed corporate business support service and the services it supports within Chief Executives, HOD and C&amp;T directorates (July 2026)</p> <p>Output 9 - Embed the new structure and improve service outputs (December 2026), focussing on:</p> <ul style="list-style-type: none"> <li>• Creating standard approaches to common tasks, e.g. timesheets, invoice processing and administration</li> <li>• Maximising the use of available technology to improve the way we work</li> <li>• Reducing the number of system applications that are used to complement standard ways of working.</li> </ul>

	<p>Output 10 – complete post-project evaluation and consider opportunities with stakeholders for further phase (March 2027)</p> <p><i>*A key output of the project is the principle of ‘no recruitment’ to the new corporate Business Support Service, unless in exceptional circumstances. If a member of staff leaves, then the new model would be expected to ensure the SLA can be delivered with existing resource.</i></p>
<b>Constraints:</b>	<ul style="list-style-type: none"> <li>• Resistance from staff where there are changes to line management reporting arrangements</li> <li>• Resistance from managers – perceived loss of control of resources or budgets</li> <li>• Resource constraints – requirements from support services to allocate time to support transition to new model</li> </ul>
<b>Dependencies:</b>	<ul style="list-style-type: none"> <li>• ‘No new recruitment’ principle is applied to business support posts that become vacant in year 1 formerly within HOD, CEX and C&amp;T directorates.</li> <li>• Leadership: the project will require active leadership and the authority to implement change across affected posts and Services</li> <li>• Buy-in and support from senior members of staff to support the delivery of the project and roll out of the new model</li> <li>• Approval from elected members to agree changes to the Councils organisational structure</li> <li>• Input from HR/ payroll and finance to transfer posts into the new structure.</li> <li>• Implementation of the Digital Skills programme, process automation and other transformation initiatives to support improvements</li> </ul>
<b>Transformation alignment</b>	
<b>Priority area:</b>	<p> <input type="checkbox"/> Assets  <input checked="" type="checkbox"/> Delivery Model  <input type="checkbox"/> Workforce  <input type="checkbox"/> Technology – Foundations<sup>1</sup>  <input type="checkbox"/> Technology – Transform<sup>2</sup> </p> <p><sup>1</sup> Centred on maintaining service operations or growing the scope of a service or application.  <sup>2</sup> Moves the business into new ways of working.</p>
<b>Strategic fit:</b>	<p>Council Plan</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Priority One - Spaces and Places</li> <li><input type="checkbox"/> Priority Two - Live, Work, Learn</li> <li><input type="checkbox"/> Priority Three - Civic and Community Pride</li> <li><input checked="" type="checkbox"/> Enabling Services</li> </ul> <p>Workforce Plan</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Theme – Plan</li> <li><input type="checkbox"/> Theme – Attract</li> <li><input type="checkbox"/> Theme – Train</li> <li><input type="checkbox"/> Theme – Employ</li> <li><input type="checkbox"/> Theme – Nurture</li> </ul>

	<input type="checkbox"/> Digital and ICT Strategy <input type="checkbox"/> Legislative requirement...(please state) <input type="checkbox"/> Other...(please state)
<b>Strategic objectives:</b>	<p>The South Ayrshire Council Plan 2023 – 2028 sets out that “We would not be able to achieve successful outcomes for our communities without the support of our enabling services. While rarely involved in frontline service delivery, it is critical that these services continue to be run efficiently and effectively to allow our outcomes and priorities to be achieved.”</p> <p>Business support services underpin delivery of all our council services and are an enabler in meeting all Council priorities. The project supports the Councils commitment to Best Value and continuous improvement.</p>
<b>Project finances and procurement</b>	
<b>Costs:</b>	£155,000 – Temporary Business Support Coordinator (Level 13) for 23 months.
<b>Funding plan:</b>	Transformation <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Transformation Fund</li> <li><input type="checkbox"/> Workforce Change Fund</li> </ul> ICT Capital Investment Programme <ul style="list-style-type: none"> <li><input type="checkbox"/> G19702</li> <li><input type="checkbox"/> G19703</li> <li><input type="checkbox"/> G19704</li> <li><input type="checkbox"/> G19705</li> <li><input type="checkbox"/> Other (state)</li> </ul> <input type="checkbox"/> Service (state) <input type="checkbox"/> Other (state)
<b>Return on investment:</b>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No...(state reason why) <input checked="" type="checkbox"/> Financial <input type="checkbox"/> Non-financial Savings from productivity gains (removal of duplication and improved efficiency of delivery.)
<b>Budget implications:</b>	Not applicable
<b>Procurement:</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> Not applicable
<b>Procurement implications:</b>	There are no procurement implications.
<b>Benefits</b>	
<b>Benefits:</b>	There will be cashable and non-cashable (quantitative and qualitative) benefits realised by the project. The Business Support Model project is enabled by the Digital Skills programme, supporting staff to develop confidence and competence in the adoption of new technologies (including AI), adapt to new more streamlined ways of working, and increasingly identify new opportunities for utilising

	<p>technology in service delivery leading to improvements and efficiencies, and lessen the need for human, manual interactions.</p> <p>The Benefits Tracker is provided at <a href="#">Appendix 5</a></p>
<b>Disbenefits:</b>	<p>There are no foreseen disbenefits associated with the project.</p> <p>The Project Lead and PMO are responsible for ensuring other transformation projects do not ‘double count’ any savings.</p>
<b>Benefits owner:</b>	<p>The Business Lead will be the Service Lead responsible for corporate Business Support services in the changed organisational structure.</p>
<b>Project options</b>	
	<input checked="" type="checkbox"/> Applicable <input type="checkbox"/> Not applicable
<b>Options appraisal:</b>	<p><b>Option 1</b></p> <p>No change - Services progress continuous improvement via existing Service (Re)Design and other existing mechanisms</p> <p><b>Option 2</b></p> <p>Centralised Business Support function</p> <p><b>Option3</b></p> <p>Directorate-level Business Support functions (<i>Preferred option</i>)</p> <p><b>Option 4</b></p> <p>Business Support Model is incorporated as a workstream within the Corporate Services Target Operating Model project</p> <p><i>*The full Options Appraisal is attached at <a href="#">Appendix 6</a></i></p>
<b>Workforce</b>	
	<input checked="" type="checkbox"/> Applicable <input type="checkbox"/> Not applicable
<b>HR involved/consulted:</b>	<input checked="" type="checkbox"/> Required <input type="checkbox"/> Not required
<b>HSCP consulted:</b> <Impact on their statutory WFP >	<input type="checkbox"/> Required <input checked="" type="checkbox"/> Not required
<b>Staffing number impact:</b>	<input type="checkbox"/> None <input type="checkbox"/> Additional <input checked="" type="checkbox"/> Reduction
<b>Other transformation:</b>	<ul style="list-style-type: none"> <li>• Applications Rationalisation</li> <li>• Process Automation</li> <li>• Customer Contact</li> <li>• Service Re-Design</li> <li>• Our Future Workforce</li> <li>• Asset Review and Challenge</li> <li>• Digital Skills Programme</li> </ul>
<b>Technology</b>	
	<input type="checkbox"/> Applicable <input checked="" type="checkbox"/> Not applicable
<b>Alignment:</b>	<input type="checkbox"/> Enterprise Architecture Principles <input type="checkbox"/> Technology standards

	<input type="checkbox"/> Cyber security standards
<b>Cyber risk assessment:</b>	<input type="checkbox"/> Required <input type="checkbox"/> Not required
<b>Delivery model:</b>	<input type="checkbox"/> In-house <input type="checkbox"/> Managed service <input type="checkbox"/> Cloud – Software as a Service (SaaS) <input type="checkbox"/> Cloud – Platform as a Service (PaaS) <input type="checkbox"/> Other (please state)
<b>Systems retired following introduction:</b>	This will be identified via the Applications Rationalisation Programme.
<b>Legal, consultation and legislative</b>	
<b>Legal:</b> < Has advice been sought from Legal Services? >	<input type="checkbox"/> Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> Not applicable
<b>Consultation:</b>	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> Not applicable
<b>TU involved/consulted:</b>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> Not applicable Engagement meetings attended with Trade Unions; 8 <sup>th</sup> September 2025 and 8 <sup>th</sup> December 2025.
<b>Data protection (DPIA):</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> Not applicable
<b>Implications:</b>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Not required/not applicable (please state reason)  The Integrated Impact Assessment is included at <a href="#">Appendix 7</a>
<b>Participatory Budgeting:</b>	<input type="checkbox"/> Considered/adopted <input checked="" type="checkbox"/> No
<b>Subsidy control:</b>	<input type="checkbox"/> Yes, exempt <input type="checkbox"/> Yes, not exempt <input checked="" type="checkbox"/> Not applicable
<b>Other:</b>	Not applicable
<b>Intellectual Property Rights (IPR):</b>	Not applicable.
<b>Delivery planning and risk mitigation</b>	

<p><b>Project plan:</b></p>	<p>The Business Support Model Implementation Group (the Project Board) will oversee the day-to-day implementation of the new Business Support Model from mobilisation to transition and transformation. The Group will be formalised upon approval of the Business Case and Chaired by the SRO, or Business Lead where the SRO is not available. The Group will have representation from relevant corporate and support services. The Terms of Reference is attached. Where issues or decisions cannot be taken within the remit of the Project Board, these will be escalated to the Transformation Board.</p> <p>The Business Support Model Implementation Group Terms of Reference is included at <a href="#">Appendix 8</a></p> <p>A high-level Project Plan is provided which will be monitored by the Project Lead and Implementation Group. The Project Plan is included at <a href="#">Appendix 9</a>.</p>		
<p><b>Possible resource required:</b></p>	<p><i>Service</i></p>	<p><i>Stage</i></p>	<p><i>Support Responsibilities</i></p>
	<p>HR and Payroll</p>	<p>Mobilisation</p>	<p>Make system updates to reflect transfer of posts to new service and line management structure</p>
	<p>Finance</p>	<p>Mobilisation and Transition</p>	<p>Complete the budget consolidation exercise to form new corporate Business Support Service budget Reflect changes in other service budgets</p>
	<p>Organisational Development</p>	<p>Mobilisation</p>	<p>Training and development (particularly digital skills)</p>
	<p>All services and managers</p>	<p>Mobilisation</p>	<p>Work with the project to implement changes to the organisational and staffing structure</p>
	<p>Transformation</p>	<p>Mobilisation and transition</p>	<p>Support the organisational change process</p>
<p><b>High level risk review:</b></p>	<p>The Risk Register is attached at <a href="#">Appendix 10</a></p>		
<p><b>Sign-off – Delivery Group</b></p>			
<p><b>Recommendation:</b></p>	<p>Proceed to the Transformation Board for approval; recommended the project progresses with development of Option 3 - a Directorate Business Support model, comprising three Business Support Directorates; i) Health &amp; Social Care; ii) Education; and; iii) the consolidation of business support across the Chief Executive’s directorate, Housing, Operations and Development (HOD) and Communities and Transformation (C&amp;T) to create one single Corporate Business Support directorate.</p>		

<b>Technology project approval:</b>	<input type="checkbox"/> Yes (Technology) <ul style="list-style-type: none"> <li><input type="checkbox"/> Approve preferred option and proceed to delivery</li> <li><input type="checkbox"/> Take to Board for visibility</li> <li><input type="checkbox"/> Approve - Board sign-off</li> </ul> <input type="checkbox"/> No – project not to be taken forward <input type="checkbox"/> Further review needed – proposal to be resubmitted
<b>Approval to proceed:</b>	<input checked="" type="checkbox"/> Service Lead - Transformation <input checked="" type="checkbox"/> Assistant Director - Transformation
<b>Date:</b>	2 <sup>nd</sup> December 2025
<b>Transformation Board approval</b>	
<input checked="" type="checkbox"/> Applicable <input type="checkbox"/> Not applicable <sup>3</sup>	
<b>Date of approval:</b>	17 <sup>th</sup> December 2025
<b>Board decision and agreed actions:</b>	<input checked="" type="checkbox"/> Yes – approve preferred option and proceed to next Phase <input type="checkbox"/> Yes – Cabinet approval required (value > £200k) <input type="checkbox"/> No – project not to be taken forward <input type="checkbox"/> Further review needed – proposal to be resubmitted <input checked="" type="checkbox"/> Conditional approval of preferred option – proceed to next phase, subject to the following: The next phase relies on Cabinet approval of organisational structure changes.
<b>Cabinet approval (proposal cost &gt; £200,000)</b>	
<input checked="" type="checkbox"/> Applicable <input type="checkbox"/> Not applicable	
<b>Date of approval:</b>	20 <sup>th</sup> January 2026
<b>Cabinet decision and agreed actions:</b>	<input type="checkbox"/> Yes – approve preferred option and proceed to next Phase <input type="checkbox"/> No – project not to be taken forward <input type="checkbox"/> Further review needed – proposal to be resubmitted <input type="checkbox"/> Conditional approval of preferred option – proceed to next phase, subject to the following:
<b>PMO</b>	
<b>Project reference number:</b>	

<sup>3</sup> Only valid for specific Technology projects being funded from ICT capital investment programme.

Proposed Project Title:	Business Support Model	Proposer:	James Andrew
Submission Date:	24/7/24	Senior Responsible Officer:	Mike Newall
Priority Area:	Our Workforce	Project Reference:	TP-2025-OW002

### Project Description

*Give a brief description of the project and why it is being proposed, and how the delivery supports the Council's Transformation strategy.*

This project will see a transformation in the way the Council delivers its Business Support function and includes **all** administrative and clerical duties and tasks.

There are approximately 425 employees (across more than 40 differently titled roles) who undertake a business support role. With the introduction of new ways of working, M365, Oracle Fusion and through the delivery of transformation projects, this will bring more streamlined and efficient delivery of administrative and clerical tasks and a requirement to review human resources associated with delivery of these functions.

The project will provide the 'as-is' Business Support model including the tasks and activities undertaken by Business Support functions and associated costs. It will also propose any changes to Business Support tasks or requirements impacted by new technology, process automation or changing requirements from customers. It will propose the 'to-be' model – how Business Support will be right sized and delivered to meet the future needs of the council and customers. It supports the 'Our Workforce' Transformation strategy, specifically '*our people are productive and have the right skills to deliver our services*'.

It is proposed the initial scope for this project extends across all Directorates.

### Project Objectives

*The objectives of a project or programme are what is required to be delivered. Objectives can be defined in terms of outputs, outcomes or benefits or any combination of the three and are essentially the scope of the project.*

There is no baseline data that confirms the frequency, duration, tools used, or priority of business support activities. The project will develop the baseline that allows measurable benefits to be defined and delivered.

The Council needs to develop a future business support model that is informed by accurate data and meaningful narrative; therefore, the initial objective of the project will be to liaise with services to gather and validate a range of information and then theme accordingly. That will assist future modelling and options appraisals, and identify opportunities linked to associated Transformation projects such as Process Automation, Customer Assistance Model, and the Contact Telephony Platform.

Information from other Councils and the Improvement Service indicates the scale of this project will take 1-2 years to fully embed and requires significant service and employee input.

The proposed high-level milestones and time-line aim to deliver the following (using Service Design tools and methods where relevant) –

- From a business support perspective, understanding who does what, why, when, and how.
- Involvement of services and employees (and Trade Unions) in co-designing a revised model.
- Options and associated measurable benefits for the Transformation Board to review. Options may include centralised and 'hub' approaches to business support oversight and staff deployment.
- Implementation of the agreed business model with clear and specific headcount targets and expectations, that is then driven forward at pace by the model's management structure with ongoing assistance from Transformation.
- Alignment, where applicable, with the Flexible Working Programme project (which will further explore 4-day week, term-time contracts, and flexible retirement).

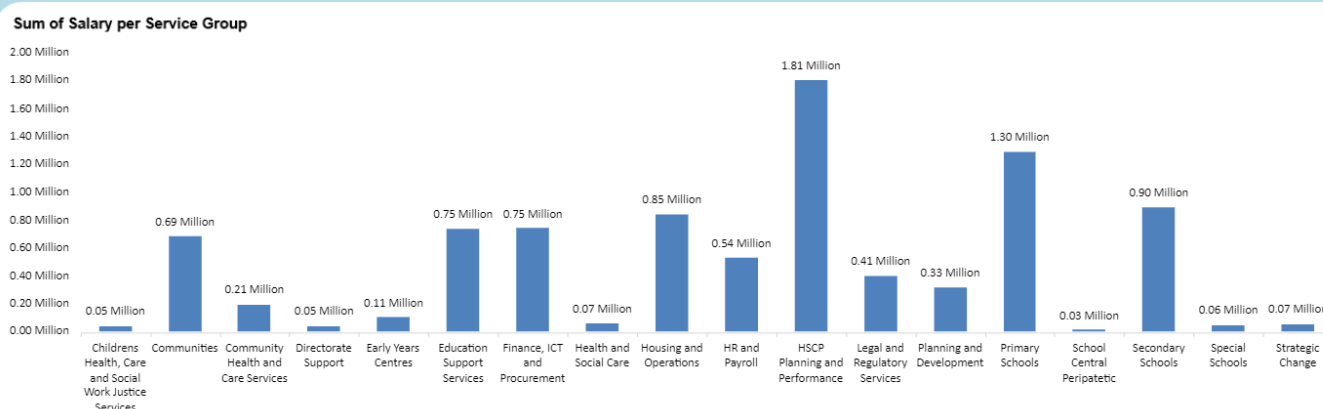
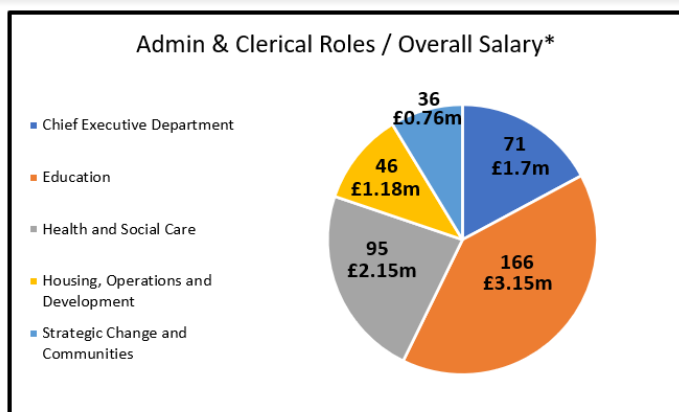
### Anticipated Benefits

*What is the change that will be delivered by the project and how will this be measured and monitored?*

As the project moves out of Discovery and Define stages, the changes required will become clearer with regular updates provided to the Board.

Anticipated outcomes include reduction in task duplication, cessation of tasks that add no value, and full utilisation of productivity tools that require less staff input. This will result in a reduced headcount required to deliver business support.

The current 'base' salary costs\* across all directorates and per service area are below. For example, If the scope is services within the CE/HOD/SCC, then a 20% reduction (purely an example) in headcount would equate to a base annual salary saving of £0.725m. If the scope was extended to all directorates, it would equate to £1.8m.



Job descriptions and job titles will be reviewed to define a coherent and smaller number of role types, with an increased exposure to a wider range of tasks and services. This will enable clearer career pathways for business support employees, and make roles more attractive for any future recruitment and aid retention as employees can see logical progression.

A revised model will aim to deploy staff to assist with key corporate activities. For those services delivering critical functions at certain points during the year, that may result in an increase in skilled business support staff to support them through temporary/seasonal peaks.

**\*Indicative - based on an Oracle payroll report of roles with the term 'administration' and 'clerkal'. Excludes on-costs/non-core/overtime. Discovery stages will confirm exact number and definition of roles in scope and all related costs.**

## Dependencies and Constraints

*What needs to be in place before the project can be delivered? Does delivery of this project contribute to other transformation deliverables?*

Dependencies and constraints will be more clearly defined as the project develops, however the following may likely apply –

### Dependencies –

- A business support management structure that will take the lead in progressing the required changes and ensuring benefits realisation.
- Engagement from Services and employees.

- Progression and implementation of associated Transformation projects such as Process Automation, Customer Assistance Model, Customer Telephony.
- An approved Flexible Working Programme that further considers early and flexible retirement opportunities, flexible working, and reduced hours.
- Re-deployment opportunities via the managing change framework.

**Constraints**

- Oracle Fusion and the extent to which the system can help facilitate a revised business model.
- Productivity tools licence costs.

**Resources Required**

*What resources will be required to deliver the project? You should consider funding and source, people resource (whether this will be in-house or external, delivery, enabling and service staff) and whether requirements are recurring or one off.*

The current resource identified is the Project Lead and x1 Transformation Officer.

The scale and scope of this project is significant and will likely require further involvement from the Transformation service including Business Analysts and Project Managers.

Representatives from HR and Finance will be required to provide data and related guidance at key points throughout and should form part of the project team.

Tailored communications plan developed with assistance from Public Affairs.

Finally, to aid the Discovery stage, a nominated representative(s) from in-scope services will be required to help gather and validate a range of data and information.

**Key Stakeholders**

*Who will have an interest or will be potentially affected by the outputs from this project? (e.g., customers, users, suppliers, external stakeholders)?*

- Business Support Employees
- Service Leads
- Trade Unions
- ELT
- Elected Members
- ICT
- Chief Executive (*within a Returning Officer context, there is an expectation and reliance on business support employees to support elections*)

**High Level Milestones & Timeline**

*What are the high-level milestones and any key dates?*

**Stage 1 – Discovery**

*Baseline (Aug-Sept 2024)*

- Confirm scope of teams/services in-scope
- Oracle mapping.
- Annual cost across all in-scope services.
- External benchmarking.
- Review job descriptions.

*User Insight (Sep – Dec 2024)*

- Understand landscape/volume and scope of admin activities – service engagement.
- Understand landscape/volume and scope of admin activities – employee engagement (TU’s also)

Stage 1 progress update and proposed Stage 2 activities provided to Board.

**Stage 2 – Define**

*Analysis and Problem Framing (Jan – March 2025)*

- Theme and map activities (time, resource, skills etc.).
- Define opportunities for consolidation and streamlining, including links to Transformation projects such as Customer Contact and Process Automation.

**Initial Risk to Delivery**

*What risks have initially been identified that could affect successful delivery?*

Risks will be further defined during Stages 1-3, but will likely include the below –

**Project**

- The corporate ‘no compulsory redundancy’ policy may impact on scale, scope, and speed of model implementation. (It is recognised that HR are proposing to revise this as part a policy review.)
- Any revised model would need to align with the ICT Fusion ‘adopt not adapt’ strategy.

**Stakeholders**

- Services may not engage (potential protectionism and territorialism) and at the pace required.

- *Align job description to generic job family evaluation.*

Stage 2 progress update and proposed Stage 3 activities provided to Board.

### **Stage 3 – Develop**

March 2025 – June 2025

#### Collaborate and co-create

- *Ideation*
- *Co-design with service, employees, and TU's.*

*Stage 3 progress update with Business case and options appraisal on delivery models presented to TRB. (Note - Stage 4 cannot proceed properly fully until model/management in place structurally, and it is assumed this may take several months.)*

### **Stage 4 – Deliver**

*Implement and iterate (Sept – Jan 2025)*

- *Embed model.*
- *Further identify streamlining opportunities.*
- *Benefits realisation reporting/tracking*

- Services' starting position may be that existing business support is already at a bare minimum and cannot be reduced further.
- Challenged by Trade Unions if correct processes (including employee engagement) are not followed fully.
- Business Support roles are significant pathways for apprenticeships. A reduced business support headcount/requirement may impact on the Council's wider apprenticeship scheme, external funding, and ability to evidence positive outcomes.

#### Project Team

- Transformation will be 'front and centre' of this significant workforce project. It must be viewed as a priority project for the wider Transformation service.
- Currently only 1 Transformation Officer will be in post as Discovery commences.
- Lack of enhanced Excel skills within Project Team to collate and present the range of data and information gathered – for example Excel Dashboards and Power Query (and potentially Power BI).

## **Strategic Alignment**

*How does this proposal contribute to 'Shaping Our Future Council' or the Council's wider strategic objectives and Plan?*

It supports the following Transformation priorities-

- **'Our Workforce'** - our people are productive and have the right skills to deliver our services.
- **'Our Technology'** - digital by default/business needs driving technological change.
- **'Our Delivery Model'** – change is underpinned by good data and analytics/ effective and efficient processes and procedures/ reduce duplication.

It is also supporting the Council's **strategic workforce planning**, which Audit Scotland has recommended includes *'performance measures and targets to monitor the impact of its workforce planning approach with data on future skills and capacity projections or any plans for various scenarios detailed.'*

## **Investment**

Anticipated Cost:

Costs to be defined as the project progresses. However anticipated costs may include –

- Training and qualifications for business support employees

## **Resourcing**

Anticipated Duration:

Resourcing requirements will fluctuate during the 4 defined stages; however, the anticipated duration of the project is

	as part of a clearer career pathway and skills programme.		approximately 18 months (dependent on the agreed scope).
Funding Source:	TBC	Proposed Project Lead:	James Andrew

<b>Sign-Off (to be completed by the PMO)</b>			
Decision:	Approved	Reviewed By:	Transformation Delivery Group
Reviewed Date:	7 <sup>th</sup> August 2024	Reference:	
Comments:			
Decision:	Approved	Reviewed By:	Transformation Board
Reviewed Date:	21 <sup>st</sup> August 2024	Reference:	<u>20240828 Transformation Board Minutes, see ref 6.5.</u>
Comments:	<p>GH accepted the need to streamline business support staffing, but raised concerns regarding employment, or potential loss of employment, given the use of the word “rightsized” in the Brief, to local people of South Ayrshire and the knock-on effects this could have.</p> <p>MN acknowledged these concerns given the level of employment opportunities presented to the local area by the Council.</p> <p>SMcC clarified that “right-sizing” the business support roles across the organisation does not necessarily mean a reduction and provided the ICT Services restructure from a few years ago, as an example.</p> <p>The Transformation Board approved this project brief, confirming the project can now proceed to Business Case stage.</p>		



# Report on the Centralisation of Business Support Functions

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# Background

As part of ad hoc support provided to a council, the Business Analysis team at the Improvement Service conducted research to assist with a review of centralisation of business support functions, with particular emphasis on the model adopted for school administration.

A variety of councils across Scotland were contacted and research was conducted into the models employed. Data derived from the Local Government Benchmarking Framework (LGBF) and additional information related to LGBF data was also provided to provide greater background detail and further considerations.

Case studies were then brought together from various councils across the UK that have implemented a centralised business support model.

# Local Government Benchmarking Framework Considerations

The following are notes of key points highlighted at the 2017 LGBF Support Services event:

## Prioritise value-adding services

Prioritisation was an important theme in discussing support services, with many councils stating that a key aspect of reducing costs in delivering support services is to phase-out any services that do not add value and focus instead on those that do.

## Links to strategic priorities

Ensure that services are linked to the council's wider strategic priorities (e.g. Local Outcome Improvement Plan). To help decide on how best to transform services, plan to align services with strategic values and phase-out services that do not.

## Virtual centralisation

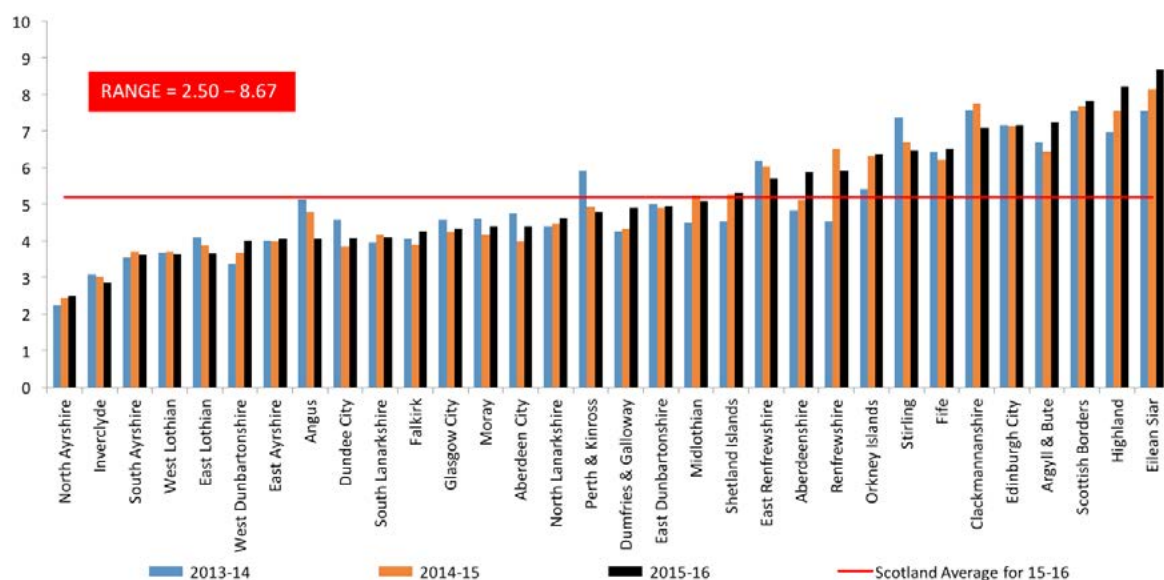
Increased centralisation was a clear theme, including 'virtual' centralisation whereby there are common staff and a common task pool, but teams can still sit within services.

## Customer-focussed service redesign

There is a move to away from transactional models to value add/customer-focussed systems.

In some areas, the redesign and restructure may lead to increased costs in the short term due to initial set up costs, but it is anticipated greater savings will be realised over the longer term (albeit these may be realised across other services).

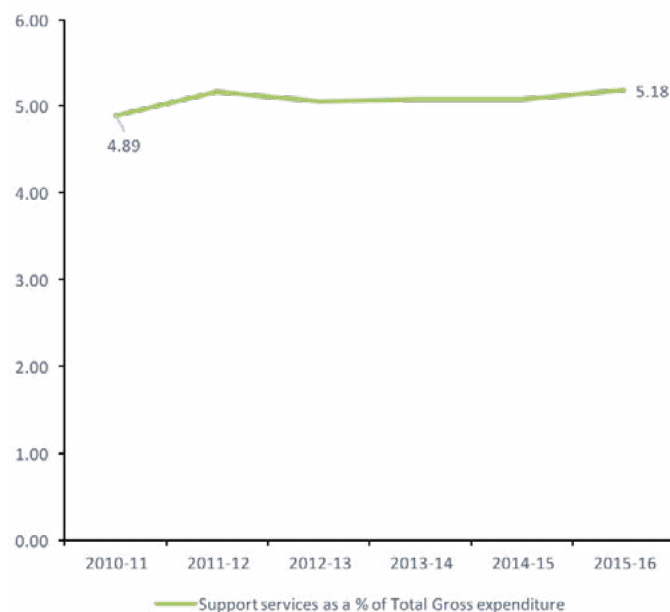
**Fig 1. Support Services as a Percentage of Total Gross Expenditure**



Reasons behind the differences in support services spending as a percentage of total gross expenditure across local authority areas:

- the way support services are structured;
- asset management: i.e. shared or reduced buildings and offices;
- level and type of staffing;
- level of automation and digitisation;
- level and type of data intelligence used: i.e. collecting and using data/business information to target efficiency savings or make improvements;
- political/strategic priorities; and
- what is included in support services costs.

**Fig 2. Support Services as a Percentage of Total General Fund**



In relation to the chart above, the overall support service spend is reducing at a slightly lower rate than total general fund, and there has been 0.1% increase in the last year. Support services spending consistently makes up around 5% of the total general fund.

# Case Study: Glasgow City Council

## Population of Local Authority

615,100 (mid-2016 estimate)

## Staff

700 HQ and school staff were moved as part of the model.

## Model

Business support was centralised in 2014 and all admin staff were transferred. Operating a locality model, they have three hubs with staff at each. All admin and clerical staff moved to Central Business Support management on the same day in 2014. Processes were moved on a phased basis to the centralised model, starting with regional pilots to gain confidence.

Centralisation lends itself to economies of scale but lower volume, more specialist work is delivered at local level.

Among other things, savings were realised through process improvement opportunities and new ways of working were seized through LEAN strategy. The project also saw a decrease in manual/paper processes and channel shift towards online forms.

## School Involvement

Including school administration in a centralised support model has been beneficial but the process is ever-evolving and consideration needs to be had to some services that are better delivered at a local, school level. In some circumstances, where processes had establishment understanding and an element of uniqueness, there was a need to move processes back to a locality cluster pool model.

Making sure you know local requirements is key to mitigate loss of on-the-ground knowledge of staff.

Online school payments considered at a corporate level, however, this is on hold pending the potential outcome of universal free school meals.

Consideration was had around staff contracts and leave, for example, education staff only worked term-time. This is a potentially complex task that should be considered in any centralisation of business support. All new staff in education are now recruited on a 52-week contract, which is future proofing the model.



No issues experienced with budget/recharge and accounting. When there was a requirement for additional hours, headteachers could buy extra hours. Now staff managed locally and so there has been a change in contractual hours.

Communication with headteachers in schools, holding sounding boards with them helped to gain buy-in and discuss which services to centralise. There was an element of risk management involved – knowing which services to centralise and which to keep in schools. These discussions were key in understanding this.

Processes/good practice in terms of centralisation has been:

- Pupil absence reporting line
- Events and meeting management – JSTs, Attendance Council, Early Years and Admission panels
- Enrolments and placing requests
- System admin support eg. password resets, SEEMIS support
- Absence management support – SAP Data Input for early years and MI
- SAP variable input – supply teacher
- SAP Data Input for all establishments
- Pilot for Primary Turnaround
- Electronic supply teacher timesheet
- Census preparation and data clean up
- Maintenance of staff records on click n go
- Annual data checks

In terms of the creation of a Pupil Absence Reporting Line, taking phone calls from parents/guardians and recording pupil absence:

- There was a need to liaise with school staff as appropriate to manage exceptions.
- Lines open at 8 am and over 20 FTE freed up within schools.
- First-time answer rate of 92%.
- Weekly call average of 7000.

### Savings/Benefits

- Reduction in errors and greater cohesion.

- Resilience and service continuity – no single point of failure.
- Increase in quality.
- High volume and high transaction work provides economies of scale.
- Centralisation allowed standard measures and targets to be introduced.
- Full project to deliver Tomorrow's Support Services recognised £5 million in savings.
- Improved customer experiences.

### Lessons Learned

Flexibility and understanding the organisation is key, rather than mirroring departmental siloes.

There may be costs associated with purchasing software licences for more staff, but this helps make a more resilient workforce and is key in providing a centralised model and realising savings overall.

Consideration must be had in how staff prioritise their workload – how do you prioritise important tasks across various departments all with conflicting deadlines?

Ensure you have a well-considered exceptions process, understand the organisation and know what needs to be dealt with at a local level. E.g. some services, such as social work minute taking, are more specialist and so an exception may be required. Exceptions also required to the standard process, such as flagging where a school absence has been reported X amount of times so the issue is dealt with at a local level.

Engaging with the trade unions can take time and needs to be factored in to the project plan.

The roll out was quick. Ideally, more time would have been taken but this was outwith control.

# Case Study: Fife Council

## Population of Local Authority

370,300 (mid-2016 estimate).

## Staff

In terms of staff structure sizes for Business Support, Fife have a current establishment of around 660 staff, 550 FTE.



## Model

Fife have implemented a centralised business support model. The model that Fife opted for was around functional areas under a programme called 3S (Shared Support Services). This resulted in all staff within Services becoming centralised within functions. These functions are Business Support, BTS (IT), HR and Finance.

Initially due to the economies of scale that bigger Business Support teams presented, savings were realised from good vacancy management, with some projects delivering some other smaller savings. However, Fife have several improvement projects in relation to improved processes, removal of duplication, and channel shift away from traditional forms of contact. There is also review of management support, note taking etc. taking place.

## School Involvement

Fife did not include school support staff in the centralisation programme. There was a review undertaken, and a decision taken not to complete that area of work as management costs would have been prohibitive.

## Savings/Benefits

Fife Council have already achieved savings of approximately £3.3 million, with an expectation of a further £2.7 million being delivered.

# Case Study: Highland Council

## Population of Local Authority

234,800 (mid-2016 estimate)

## Staff

750 FTE staff were within the scope of the project. Operated on a no-compulsory redundancy basis, with reduction in staff numbers due to natural staff turnover.



## Model

Managed as a Programme of work in accordance with Microsoft Project and Prince2, the Programme designed and delivered the creation of a single Business Support Organisation to provide consistent and responsive admin support across services for current operations and through periods of change.

Specifically, Highland Council Business Support deliver the following functions:

- Human Resources (HR) Administration - Managing recruitment, contracts, attendance and employee records.
- Purchasing and Financial Transactions - Ordering and payment, purchase card administration, raising debtor invoices and recharges.
- Travel Desk - Arranging all business travel (rail, air, bus, ferry and car hire) and accommodation for Council staff and elected Members.
- Electronic Processing - Scanning, indexing and handling a range of documents from applications to correspondence.
- Educational Maintenance Allowance - Assessing and determining claims and resolving any resulting enquiries.
- Management Support - Diary and meetings management, document and presentation support.
- Information Management - Record creation, retrieval, storage and disposal, website management.
- Facilities Management - Office management, meeting rooms management and maintenance.
- Finance Systems Administration - System administration responsibilities for all Finance Service systems.
- Training & Development - Capturing and managing training needs, arranging relevant

courses and also delivering in-house council tax and benefit courses.

- Civic Duties - Helping to provide civic support including assisting in the organisation of major events.
- Single Business Support Organisation was from service-specific admin teams, avoiding duplication (reduced numbers of staff), consistency in how work is carried out (standard processes) and increased resilience in covering workload.
- Includes the redesign of processes such as HR and Payroll related.

### School Involvement

School administration was outwith the scope of the project.

### Savings/Benefits

The main benefits of the project were:

- Cashable Savings Target = £2.3 million
- Business Support organisational and process change= £2.355 million delivered
- Avoiding duplication (reduced numbers of staff)
- Consistency in how work is carried out (standard processes)
- Increased resilience in covering workload
- Stopping advertising vacancies in press and other media, with all posts being advertised through myjobscotland = £0.154 million delivered
- Payroll Savings (staff, postage, printing costs) = £27k saving from printing. Work is continuing to quantify all cashable savings and benefits from avoidance of double keying and checking of data.
- HR/Payroll Self-Serve phased across services, reducing effort from duplicated data input and improving access to information for staff and managers (online payslips, absence information and expenses) – 97% of all staff access the self-serve system.

### Lessons Learned

Where reliant on ICT technical solutions, don't underestimate the development time and issues that can arise – ensure ICT provider(s) can respond timeously.

Breakdown the programme into manageable tranches and avoid too many dependencies on the “critical path”.

For process redesign, ensure greater emphasis on thinking ahead to making change in the business (i.e. see from user perspective. How will new ways of working work in practice?).

Account for work and effort required to turnaround existing poor and inconsistent practices and processes that have been in place for “years” - these may only be identified when redesign and testing automation and standardisation of previously uncontrolled processes.

# Case Study: Dundee City Council

## Population of Local Authority

148,210 (NRS 2015 mid-year population estimate)

## Staff

They have around 450 staff in their centralised business support model.

## Model

Centralised business support model is based around functions. They have a central team and locally-based centralised support.

Savings were delivered using a mix of process improvement, streamlining and no replacement of posts. No compulsory redundancies were made, model was built around staff leaving or retiring, which has shaped the model and streamlining is done around this.

## School Involvement

There is no plan to centralise school admins.

They have admin officers in schools that are centrally managed (but not centrally pooled) with the aim of having standardised processes, but all other administration is managed directly by the schools.

## Savings/Benefits

The council have a greater overview of other services, enabling them to do things differently. This has had a positive impact in a variety of ways (e.g. identifying other roles for staff, where there is a need to work more flexibly, for example).

£1.3 million savings achieved in over three years. The centralisation project is still evolving organically and it will take time to make all changes.

## Lessons Learned

Getting people on board is a slow process. Communication and working with people is key. Culture and people's perceptions are important and not to be underestimated. Tackling culture change and staff perception of the project (even if this is misinformed) are important. Briefing sessions with staff are key in the effective dialogue with staff.



# Case Study: City of Edinburgh Council

## Population of Local Authority

507,200 (mid-2016 estimate)



## Staff

1150 staff within project scope, 50% business support and 50% contact centre and transactional services such as income and benefits processing. Ratio in business support is 1 senior manager to 110 staff. Team leader ratio is 1 to 14 FTE average.

## Model

Centralised and city-wide business support to all areas except schools.

Business Support is one strand of the Customer division - Transactional and Front Facing Customer Services are the other strands in the division. Business support covers approximately 70 city-wide functions and is also transitioning with Services move to localities working. The same service level agreements where applicable across the system keep work standardised.

## School Involvement

School administration has not been centralised.

## Savings/Benefits

20% savings achieved in year 1, mainly due to reworking management spans of control, and 30% savings expected by April 2018 for the whole Customer division project due to improvement initiatives releasing savings from a Customer Projects Programme of works.

Cross-trained staff and standardised processes to make support to departments more resilient.

To help achieve benefits, we are looking at process automation and new ways of working, for example, eradicating paper documents and wet signature documents and moving to more structured digital forms

There has been a move to self-service (including a travel booking system, room booking system, payment kiosks and targeted text messaging linked to payment methods and also continuing to consider more self-service systems).

## Lessons Learned

The culture around business support needs to be considered – how are business support viewed and are changes to the culture required?

Consider any implications of other service reviews occurring concurrently and the pressures they face.

Need to consider any knock-on effect on other parts of the organisation when moving job roles and ensure that expectations of those involved are managed effectively and solutions agreed.

Buy-in and communication with all staff is key.

Focus on new ways of working as the old ways of working are not always sustainable and challenge the status quo

# Case Study: Kirklees Council

## Population of Local Authority

437,000 (mid-2016 estimate)



## Model

Innovation and Efficiency Programme, which comprised of the following three aspects:

1. Senior management review – council wide management restructuring to reduce the number of directors, assistant directors and service heads through voluntary redundancy and retirements;
2. Unifying support services – setting up a new central unit, to reduce the number of staff required while retaining some links to departments, and automating HR and payroll functions; and
3. Business support review – by introducing a common approach to back office functions across the council and giving each directorate a series of tools (e.g. for generic job descriptions) to enable more flexibility in the deployment of administrative and secretarial staff between departments with oversight from a small central team.

## School Involvement

Does not appear to have been included in scope of review.

## Savings/Benefits

Innovation and Efficiency Programme had £20 million of direct savings over 3 years together with an estimated £60 million of indirect savings resulting from a more strategic approach, more efficient systems and processes, and less duplication throughout the authority. Note that specific savings attributable to the unification of support services only is not available.

## Lessons Learned

Reduction in number of secretarial staff through the introduction of generic job descriptions and flexible deployment across departments was met with considerable resistance from secretarial staff, their managers and trade unions, delaying the project 1 year. To overcome this, revised proposals were produced with more clarity about the objectives of the exercise and a set of principles about how these would be achieved.

Business support review briefings were cascaded through managers. In hindsight, direct briefings would have been better, as shown by one briefing with all business support staff in the Town Hall, albeit it late in the process.

Emphasis on cultural and organisational change – as opposed to simply making cuts – helped to secure all-party approval, as well as motivating senior and middle managers and other staff affected by the changes.

Some of the savings, particularly in relation to the business support review took longer to realise than expected, mainly because of industrial relations and staff communication. The process improvements and ‘back-office’ savings represent around 50 per cent of the total required and enabled Kirklees to protect frontline services.

It’s key to show how making the savings and efficiencies required contributes to the bigger picture – e.g. by helping to drive transformational change (as in a ‘One Council’ approach) which in turn improves the quality and efficiency of public services for citizens and communities.

Ensure there is clear visible leadership for the initiative – from politicians and senior management – and that this senior leadership send out consistent messages.

Communicate with staff and trade unions from the outset in an open and transparent way – and allow time for the results of consultations to be used and proposals to be refined.

Build in skills development to ensure structural and process change is accompanied by behavioural change to make ‘new ways of working’ a reality.

Develop community engagement processes that are inclusive and credible and can influence priorities and how savings are made.

# Case Study: Dumfries and Galloway Council

## Population of Local Authority

149,500 (mid-2016 estimate)

## Staff

Original scope covered all admin and clerical support with total staff of 400. Staff costs account for 92% of all expenditure.



## Model

When considering the review, the review team engaged with staff through roadshows, focus groups, workshops, questionnaires. Their key aim is to streamline processes and procedures and to remove manual input as far as possible and support self-service.

The following is a diagram of the model:



## Council-wide

Bringing common transactional activities from various locations into 'business hubs' based on the six big business processes:

- Payroll administration;
- Absence administration;
- Invoicing – both purchase and sales;
- Purchasing of services and goods;
- General admin – letters, report writing, minute taking etc; and
- Data input – electronic records & system updates.

The main business processes will be completed in business hubs, for example payroll. Currently elements of payroll, mostly additions to pay – overtime, standby payments – are processed in directorates by business support staff and deductions and checks – tax, NI – are processed by Pay and Employment services. The aim is to bring together the payroll element into one team and co-locate if possible, meaning the process would be completed end-to-end by one team. The model could then be replicated for other business processes. The aim is for business hubs to be flexible in location and not centred in Nithsdale.

### **Directorate**

Where there is a specific requirement for more specialist support, this is hosted within the directorate/service.

There is a need to keep the connection between both staff groups to allow the end to end journey for customers and allow business support staff to develop the knowledge and understanding of the task in hand. The types of activities are: burial administration, child protection support, housing support and court elements – solicitor support. Through a single structure the model allows pooled resources of on-site teams to provide business support, allowing the sharing of knowledge through developing staff to gain experience in these tasks and increasing the number of staff with knowledge of the jobs required. Only a small number of staff had the knowledge of these activities meaning there was a single point of failure if staff leave or take sick leave.

### **Locality**

The aim is to provide professional business support to services at a local level through satellite offices or partnership centres.

The model will provide a single location in the council wards to provide business support to the council's services and partner organisations – NHS, third sector and local businesses. The support will be a business bureau type where the infrastructure services and businesses need through first point of contact for clients, management support, meeting room support, mail

handling support, private office facilities and a professional address all through a virtual office environment.

### Customer Contact

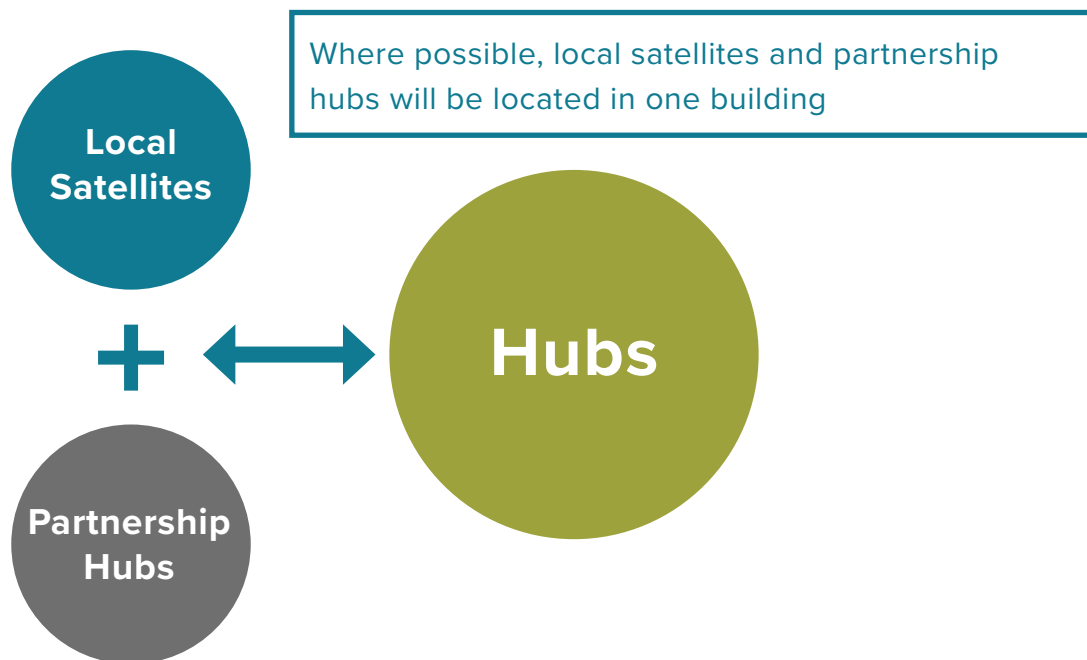
The provision of a single point of contact for customers.

Easily accessible one locality hubs co-located with all relevant council services - social work services staff, benefits staff, homeless staff planning staff and partners - citizen advice service and registered social landlords. Providing customers with a complete service.

### Hubs and Satellites Model

The business support design below illustrates business hubs providing business activities predominately from the council-wide pillars - payroll, absence management – these are multi-skilled resource teams delivering cross-council administration activities and co-located in a reduced number of buildings in conjunction with the Dumfries asset plan and future asset plans.

Business support satellites are local offices providing professional business support, predominately business activities from the directorate and locality pillar and where possible will be located in the same building as partnership hubs.



Key issues the review aimed to address:

- Enhance training needs to build capacity and minimise impact of management reductions

through new models of professional support.

- Remove overlap in all business support service to drive efficiencies.
- The impact of reduction in council services, activity and funding;
- Improved business processes using integrated IT systems to provide data for evidence based decisions.
- Further alignment of business process activities to provide a consistent approach and support to customers.

### School Involvement

This is not something that was included in the review.

### Savings/Benefits

Savings Option	Effect	2017-18 Proposed Saving	2018-19 Proposed Saving	2019-20 Proposed Saving
Option 3	Through bringing together transactional activities into teams based in hubs develops economies of scale so bringing capacity in the business support staff working week. This allows for the reduction of 40 posts through non-backfilling of vacant posts and releasing staff through EVRS			
	Savings from EVRS	£379,000	£379,000	£379,000
	Savings from Vacancy Management	£479,000	£479,000	£479,000
	<b>Total Savings</b>	<b>£858,000</b>	<b>£858,000</b>	<b>£858,000</b>

### Lessons Learned

- Sustainability and future proof business support through releasing capacity by removing

replication and identifying the right people to carry out activities in the right place.

- Technology - providing a single Customer Relationship Management (CRM) system that interfaces with the required core back office systems. All service area staff must become more self-sufficient through ICT improvements with existing systems and utilising mobile technology interfacing to back office systems.
- Initial efficiencies and quick win examples of where directorates overlapped in the main processes:
  - o Purchasing Administration – using PECOS previously undertaken by different people in directorates. Moved to a council-wide team purchasing goods and services.
  - o Absence Administration – previously over 10,000 transactions in absence and annual leave recording for EEI staff alone with similar numbers in the other three directorates, also pupil absence recorded by various staff in different school locations in CYPLL so move to a council wide team to administer absence and annual leave.
  - o Payroll Administration/Processing – over 40,000 payroll transactions previously completed by EEI, over 3000 completed in CYPLL. Moved to a council wide team to administer payroll.
- Through utilising better technology i.e. email, electronic information management, system improvements, managers have become more self-sufficient so reducing the need for the basic business support activities such as typing, filing, photocopying and updating systems.
- The new structure developing and implementing Team Planning, service standards and performance indicators to provide evidence to their customers of a quality service.
- Staff Development - introducing clear personal development standards to provide improved opportunities and upskilling of staff.
- Agile and Mobile Working - The new model will allow business support staff to work differently, including more flexible working patterns outwith the normal 9 to 5 and virtual teams including working from home allowing staff to have a better work life balance that meets the needs of both the service and the individual e.g. in EEI Business

## Councils Not Operating a Centralised Business Support Model

Looked into a centralised model six years ago but decided to not implement due to considerations over amount of savings achievable. We operate a cluster model and reviewed and streamlined the function.

A review is planned to look at centralisation but nothing currently in place. School support is based around clusters model and staff shared around as needed. Unlikely that this would be included in a review of centralised business support.

Currently operating a shared service centre and centralised functions for IT.

Something that may be considered but concept is still to be developed. Currently have education and social care admin integration.

# Summary

- Eleven out of thirteen councils responded to the request for information.
- 70% of councils queried have some sort of centralised business support model.
- 1 out of 11 councils queried have included school administration in their centralised business support model.
- Some councils that did not operate centralised business support suggested that they would consider it or are planning a review.
- However, a clear majority of councils with centralised support were not considering incorporating school administration. Reasons cited were:
  - Too costly;
  - The benefits foreseen are not great enough;
  - Didn't think it would work practically; and
  - Operate cluster models instead, where admins are pooled for use across several schools.
- Most councils queried operated their centralised business support model around functional areas.
- Automation, digitisation and a move to self-service have been highlighted as helping to realise savings.
- Cluster models, where admins are pooled across a number of schools, and/or standardisation of procedures across school administration have been rolled out by the majority of councils queried.
- Virtual centralisation / providing a more customer and value-driven service were two of the key themes discussed as being important in the future of support services.
- Key to successfully incorporating school administration into a centralised business support model is understanding the organisation and taking a flexible, agile approach.

The Business Analysis team is part of the Improvement Service, providing support to local government across Scotland. If you would like more information, contact the business analysis team on [ba@improvementservice.org.uk](mailto:ba@improvementservice.org.uk).

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## Business Support - Service Level Agreement

### 1. Purpose

This SLA sets out the minimum service standards, responsibilities, and performance expectations for the Corporate Business Support Service. It ensures clarity of service delivery, accountability, and alignment with the Council’s transformation objectives and Best Value obligations.

### 2. Scope

The SLA applies to all administrative and clerical support services delivered by the Corporate Business Support team to the Chief Executive’s Directorate, Housing, Operations & Development (HOD), and Communities & Transformation (C&T).

### 3. Services covered

- Data Processing: CRM updates, timesheet administration.
- Financial Administration: processing purchase orders and invoices in Oracle Fusion.
- Meeting and Travel Management: booking rooms, travel arrangements.
- Customer Correspondence: managing central mailboxes, issuing letters, responding to non-specialist queries.
- Document Management: filing, scanning, printing.
- FOI and Complaints Support: assisting with statutory requests.

### 4. Roles and responsibilities

- Corporate Business Support Team: deliver agreed services within defined timelines and quality standards.
- Directorates: provide accurate information and timely approvals to enable efficient processing.
- Governance Board: monitor SLA compliance and resolve escalated issues.

### 5. Performance Standards (KPIs)

<i>Standard</i>	<i>Activity</i>	<i>KPI</i>
<b>Timeliness</b>	Daily tasks completion	95% of daily tasks (e.g., mail processing, inbox monitoring, complaint logging) completed within the same working day.
<b>Timeliness</b>	Weekly tasks completion	95% of weekly tasks (e.g., rotas, reports) completed by end of the week.
<b>Timeliness</b>	Fortnightly tasks completion	95% of fortnightly tasks (e.g. stationery orders) completed within 10 working days.
<b>Timeliness</b>	Monthly tasks completion	100% of monthly tasks (e.g., Scottish Government returns) completed by month-end.
<b>Timeliness</b>	Annual tasks completion	100% of annual tasks (e.g., audits, guide updates) completed by agreed deadlines.
<b>Accuracy</b>	Data entry accuracy	98% accuracy for entries in CRM, Oracle Fusion and other systems.

## Business Support Model – Business Case – Appendix 3

<b>Accuracy</b>	Financial processing accuracy	100% compliance with audit requirements.
<b>Responsiveness</b>	Inbox queries	90% of queries acknowledged within 2 working days.
<b>Responsiveness</b>	Complaint handling	95% of complaints logged and acknowledged within 1 working day.
<b>Compliance</b>	Statutory deadlines	100% compliance for requests, standard processing and documentation.
<b>Customer Service</b>	Booking requests	95% of catering/room bookings confirmed within 2 working days.
<b>Customer Service</b>	Customer satisfaction	Achieve 80% positive feedback in quarterly surveys

### 6. Reporting and review

- Monthly performance reports reviewed by the Service Lead.
- Quarterly SLA review meetings with Directorate representatives.
- Continuous improvement actions agreed where targets are not met.

### 7. Escalation process

- Operational issues unresolved within 5 working days escalated to Business Support Coordinator.
- Persistent breaches escalated to Service Lead and/or Assistant Director – Transformation.

### 8. Governance

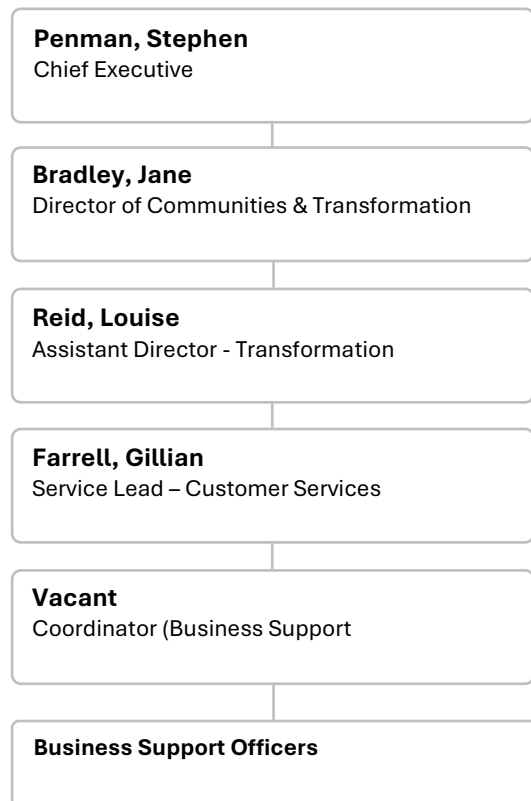
- SLA compliance monitored by the Governance Board.
- Annual review of SLA and service performance.

### 9. Duration and review cycle

- Effective from July 2026; reviewed annually or following significant changes to service delivery.

## Business Support – proposed management structure

Proposed management structure for a corporate Business Support service.



### Senior Leadership – Director of Communities and Transformation

- Delegated powers of authority
- Accountable at a senior level

### Service Leadership – Service Lead (Customer Services)

- Provides service delivery leadership.
- Ensures alignment with council priorities and Best Value principles.
- Oversees governance, performance monitoring, and resource allocation.

### Operational Coordination – Coordinator (Business Support)

- Manages day-to-day operations and work allocations
- Coordinate workloads, monitor SLA's, and ensure compliance with standards.
- Act as the link between staff, senior management and recipient services.

### Service delivery – Business Support Officers

- Handle tasks requiring digital skills.
- Support process improvement and digital adoption.
- Deliver transactional and administrative tasks (e.g., scheduling, document management, data entry).
- Provide flexible support across services based on demand.
- Act as the first point of contact for internal queries.



# Transformation Portfolio Project Benefits Realisation Tracker



Project/Programme Title:	Business Support Model
Priority Area:	Our Delivery Model
Project Lead:	Transformation Coordinator - Our Workforce
Business Lead:	Gillian Farrell - Service Lead Customer Services
SRO:	Louise Reid - Assistant Director - Transformation

Project Benefits Owner:	Gillian Farrell
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Project Stage:	Mobilisation
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Last Reviewed Date:	18/12/2025
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[Sheet 2: Benefits Register](#)

[Sheet 3: Benefits Tracker](#)

[Template Guidance](#)

[Benefit Type Guidance](#)

Anticipated Cashable Benefit Value	Expected Budget Reduction
£220,000.00	£220,000.00
Realised Cashable Benefit Value	Actual Budget Implication
£0.00	£0.00

## Project Benefits Register

### Business Support Model

Benefit ID	Benefit Type	Benefit Category	Benefit Name	Benefit Description	Status	Benefits Owner	Beneficiary	Enabler	Anticipated Benefit Start Date	Baseline Measurement	Indicator	Baseline Description	Baseline Date	Baseline Source	Realisation Target Value	Target Description	Realisation Target Date	Method for measuring benefit	Frequency of Measurement
BF-001	Cashable	Productivity Gain	Improved timescales for Business Support task completion	Time taken to complete business support tasks is improved through more efficient and automated processes	Open	Service Lead - Customer Services & Business Support	Council	Service Lead as defined budget holder(s). All posts in scope transferred to new corporate Business Support structure.	01-Apr-26	Time	Minutes gained monetised to FTE's	Time gained will be measured and monetised	01-May-25	Task Analysis	Minimum of 185 hours per week annualised	From the task analysis, it is estimated productivity gains of at least 185 hours per week can be achieved through the introduction of the new model with improved standardised processes and better utilisation of technology.	31-Mar-27	Task Analysis	Quarterly
BF-002	Non-Cashable	Qualitative	Increased quality of output and reduction of error	Standardisation of task completion	Open	Service Lead - Customer Services & Business Support	Services	Standardised Operating Procedures (SOP) for task completion	01-Apr-26	Number and type of procedure	No. of SOPs implemented	SOPs implemented will be counted and documented	01-May-26	Service Plan	TBC	Opportunities for SOPs will be identified in the new Service Plan and reviewed and evaluated on an ongoing basis as part of continuous improvement	TBC	Service Plan reporting	Quarterly
BF-003	Non-Cashable	Qualitative	Increased quality of output and reduction of error	Increased application of automated processes	Open	Service Lead - Customer Services & Business Support	Services	Utilisation of automated processes	01-Apr-26	Number and type of process	No. of processes automated	Automated processes will be counted and documented	01-May-26	Service Plan	TBC	Opportunities for automating processes will be identified in the new Service Plan and reviewed and evaluated on an ongoing basis as part of continuous improvement	TBC	Service Plan reporting	Quarterly
BF-004	Non-Cashable	Qualitative	More flexible resourcing response than current offer	Resources deployed according to business need and priority	Open	Service Lead - Customer Services & Business Support	Services	Human resource can be deployed and utilised according to business need	01-Apr-26	Qualitative feedback	Satisfaction score and suggestions for improvement	Feedback from services will be analysed to assess areas of improvement	01-Sep-26	Surveys and feedback	TBC	Satisfaction % as well as qualitative feedback will be analysed to identify areas for improvement	31-Mar-27	Service Plan reporting	Quarterly
BF-005	Non-Cashable	Quantitative	Increase in corporate technology adoption and utilisation rates	Maximise the Councils investment in technology through increased utilisation in delivering business support solutions	Open	Service Lead - Customer Services & Business Support	Council	Digital Skills Training Programme, introduction of SOPs	01-Jul-26	Number	Number of staff utilising available technology suites	Technology utilised by role and task	01-Sep-26	Staff surveys/ self-assessment/ PDR's	TBC	Increase in utilisation of technology to complete tasks and undertake business support role	31-Mar-27	PDR's, Service Plan	6 monthly
BF-006	Non-Cashable	Qualitative	Business Support staff Digital Skills Confidence	Employees are more confident to embrace and utilise digital solutions.	Open	Bernie Sanderson	Employees	Digital skills training programme	01-May-26	2022/23 Digital Skills Survey	SCVO digital confidence question set	The survey confirms levels of employee digital confidence related to Communication, Transacting, Handling Information, Problem Solving, Safe and Legal	01-Jun-23	MS Forms	Increase in the percentage of 'can do this' responses	Overall increase in percentage, but especially in Communication, Handling Information, and Problem Solving	01-Jul-27	Online confidence surveys aligned to SCVO Essential Skills/Digital and Data Capability Framework set. May include Forms and Trickle.	6 monthly

The Options Appraisal follows a 5 step process. Each step of the process is detailed in subsequent sheets in this spreadsheet

[Step 1: Defining the objectives](#)

[Step 2: Identifying the options](#)

[Step 3: Establishing the success criteria](#)

[Step 4: Undertaking the appraisal](#)

[Step 5: Confirming the preferred option](#)

Objectives define what we want to achieve from the project. It helps show what the intention of the project is and whether or not it is heading in the right direction: in essence, the objectives tell the story of the project.

**Objective 1** Understand and baseline the 'as-is' including tasks and activities undertaken by business support functions and associated costs

*An overview of the task analysis and the employee engagement sessions can be found in the summary presentation.*

**Objective 2** Define the 'to-be' model that will provide a more efficient and effective business support offer for the Council embedding technology and automation within service delivery

**Objective 3** Planning and implementation of the preferred model/ option

**Objective 4** Cashable benefits linked to productivity savings

**Objective 5** Business support qualitative improvements

This section details what options have been identified for delivering the project. These options will be appraised against the success criteria.

Option 1 No change - Services progress continuous improvement via existing Service (Re)Design and other existing mechanisms

Option 2 Centralised Business Support function

Option 3 Directorate-level Business Support functions

Option 4 Business Support Model is incorporated as a workstream within the Corporate Services Target Operating Model project

The success criteria is what each of the options will be measured against. Success criteria must therefore be linked to the objectives of the project and appraise each option with the objectives in mind.

<b>Criteria 1</b>	Ability to realise qualitative and quantitative improvements in business support delivery at an organisational level. <i>Based on the employee engagement sessions -</i> <i>-Qualitative examples include a greater sense of worth and appreciation, progression opportunities, right information at the right time to complete the task, skills enhancement, systems designed with and not for employees, maintaining a positive impact on the community, and a sense of identity.</i> <i>-Quantitative examples include a reduction in task volume/time/duplication/errors/low value tasks, and deadlines being met.</i>
<b>Criteria 2</b>	Ability to realise cashable benefits as a result of productivity gains <i>A 10% reduction in overall business support would equate to approximately £1m*</i>
<b>Criteria 3</b>	Ensures technology and automation are embedded within service delivery
<b>Criteria 4</b>	Low cost to deliver
<b>Criteria 5</b>	Rapid benefits realisation
<b>Criteria 6</b>	Overall risk associated with delivery option <i>(score of 5 = least risk)</i>

*\*Base salary costs (phase 1 task analysis)- full financial costs will be presented within the business case.*

The appraisal table is outlined below, showing the options of delivery horizontally at row 3 and the success criteria vertically in column C. A score is allocated to each option in how well it can achieve the success criteria. In this case, no weighting of scores is provided.

Success criteria

Options →	No change - Services progress continuous improvement via existing Service (Re)Design and other existing mechanisms	Centralised Business Support function	Directorate-level Business Support functions	Business Support Model is incorporated as a workstream within the Corporate Services Target Operating Model project
<b>1</b> Ability to realise qualitative and quantitative improvements in business support delivery at an organisational level	Maintaining the current arrangements will have limited impact on what can be achieved	A similar model to most other local authorities, a centralised business support will likely fulfill this criteria completely	This option is a first step to option 2, learning from how other Directorates have taken forward this approach.	This option incorporates centralised business support but within a more strategic approach thereby scoring higher.
<b>Score</b>	<b>2</b>	<b>4</b>	<b>3</b>	<b>5</b>
<b>2</b> Ability to realise cashable benefits as a result of productivity gains at an organisational level	Limited ability to deliver productivity gains in the current arrangements as outlined in the task analysis.	Given the duplication of tasks across the Council this option likely to fully deliver against this criteria	Cashable benefits should be delivered at the directorate level with this overview of task duplication. Scores lower than option 2 and 4	Given the duplication of tasks across the Council this option likely to fully deliver against this criteria
<b>Score</b>	<b>2</b>	<b>5</b>	<b>4</b>	<b>5</b>
<b>3</b> Ensures technology and automation are embedded within service delivery	A siloed approach of the status quo does not help promote this success criteria	Oversight of the use of technology in central function will enable rationalisation and increase technology efficiency	At a directorate level, there will be some opportunities to progress this success criteria	A strategic, whole Council approach will provide the best chance of delivering this criteria
<b>Score</b>	<b>2</b>	<b>4</b>	<b>3</b>	<b>5</b>
<b>4</b> Low cost to deliver	As no change, there is no cost to deliver. However, costs for maintaining the status quo will remain high and not support objectives	Costs associated with this model include new posts to oversee, training and managing change	This option scores high as it will be managed at a directorate level, with no external consultancy or posts required	Incorporating the project as part of the work of transformation partner would be additional cost.
<b>Score</b>	<b>2</b>	<b>2</b>	<b>4</b>	<b>2</b>
<b>5</b> Rapid benefits realisation	Status quo would not lead to any of the benefits that could be achieved in the other options	This option will take time to implement and benefit realisation occurring over the longer term	This option scores highest as most likely to be able to deliver benefits faster given that it is being done in a more manageable level	This option would take time to deliver as external support would require procurement.
<b>Score</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>1</b>
<b>6</b> Overall risk associated with delivery option (score of 5 = least risk)	With no change, there is limited risk to delivery.	Significant increase risk as will be managed with in-house expertise and will require total support and buy-in.	This scores higher than option 2 as it will be managed on a smaller scale	Utilising external support will reduce risk level, however, a venture of this nature is not without challenge.
<b>Score</b>	<b>3</b>	<b>2</b>	<b>3</b>	<b>1</b>
<b>Total Score</b>	<b>10</b>	<b>15</b>	<b>17</b>	<b>14</b>

**Score key** 1: Little / no impact      2: Limited impact      3: Likely to achieve some impact      4: Confident the option will fulfil most of criteria      5: Option is near certain to maximise this criteria

The recommendation is to proceed with option 3 - **Directorate-level Business Support functions**

- Scores higher than the status quo.
- Provides a more immediate catalyst for change.
- Allows change to come from within Directorates as they already understand their own business support activities, but reinforces budget holder responsibility for generating cashable savings.
- Would provide a logical 'stepping stone' to a centralised business support model (where required).

This section describes each of the options and the reason why it has been discounted. Justification is also provided for the reason to progress with the preferred option, explaining why this option is best.

Option	Description	Reason for score/ranking
1	No change - Services progress continuous improvement via existing Service (Re)Design and other existing mechanisms	This option proposes no change to the business support delivery model, with Service Leads continuing to have responsibility for service delivery, budget and resource arrangements. This option provides limited mechanism across services to ensure continuous improvement and that technological innovation is adopted and maximised. Service (Re)Design currently lacks coordination across the Council and misses opportunities for minimising task duplication and optimising performance, however it could if the process had oversight from the Transformation Board and expectations were more defined. The guidance does not need re-designed nor re-invented, the principles are sound but the corporate positioning and understanding may not be. The task analysis provides services with a strong starting point when considering the role of their business support function, and services can align opportunities with Transformation projects. However as it stands, there may be limited change.
2	Centralised Business Support function	Other Councils have implemented a centralised business support model with a distinct budget and management arrangements. The ability to realise cashable benefits is greatly enhanced when there is a single defined owner who has the potential to methodically and systematically explore and drive corporate change, improvements and efficiencies. Resource can also be pooled in this model to address sickness and vacancies across directorates and give staff opportunities to learn new areas of service delivery. There will likely be managing change implications and training requirements may be significant. (One drawback of this option is that specialisms could be lost and operatives become more generalised in their approach to business support delivery.) It is likely a new management post would be required at Service Lead level (there may also be an impact on existing business support management roles) and implementation benefits realisation timescales may be elongated.
3	Directorate-level Business Support functions	This option takes cognisance that Education and HSCP already have this in place, albeit in different forms, and therefore the remaining Directorates would adopt a similar approach. (Within Education the school clerical budget formally rests with headteachers, although vacancies come through Education Support Services and the staff themselves are line managed by the Admin Team Leaders.) Within this option, Directors or an assigned individual would take responsibility for their Business Support budget and can then methodically and systematically explore/drive Directorate change, and that could be either through more effective Directorate Service (Re)Design, introduction/development of a Directorate Business Support team, or other approaches. Resource could be pooled across multiple services and would still give staff opportunities to learn new areas of service delivery.
4	Business Support Model is incorporated as a workstream within the Corporate Services Target Operating Model project	This option would rely on external resource and experience to provide a best practice model that incorporates the needs of corporate and administrative requirements across the Council and maximises the technology investments the Council has made. However it would be aligned to wider project timescales (of which Business Support would be one element) and is dependent on the right Transformation partner (although the task analysis should let any partner hit the ground sooner). Return on investment cannot be defined at this stage, and it may take longer to implement change (although the change may be more impactful longer-term) which may add further anxiety and distress for Business Support employees. It is dependant on approvals for the development and delivery of a new Corporate Services TOM.

Business Support Model BC-Appendix 6 Approved Options Appraisal

Action (to ensure progression of BC)	Support/Input
Confirmation of budget owner(s) related to HSCP and Education.	<ul style="list-style-type: none"> <li>· ESS Service Lead</li> <li>· HSCP Business Support Senior Manager</li> </ul>
'Line by line' confirmation of roles to be included in a new, 3rd, directorate model that encompasses CE/C&T and HOD.	<ul style="list-style-type: none"> <li>· Finance</li> <li>· Project Lead</li> <li>· Service Leads</li> <li>· HR</li> </ul>
Confirmation of associated budget and staffing costs across HSCP, Education and the new directorate.	<ul style="list-style-type: none"> <li>· Finance</li> <li>· Project Lead</li> </ul>
Clarity on any managing change implications for phase 1 (even though phase 1 focuses on budget consolidation).	<ul style="list-style-type: none"> <li>· Project Lead</li> <li>· HR / OD</li> </ul>
Communication to business support employees.	<ul style="list-style-type: none"> <li>· Project Lead</li> </ul>
Presentation/overview to Service Leads.	<ul style="list-style-type: none"> <li>· Project Lead</li> </ul>
	<p>*PL - subject to resource/requires confirmation</p>

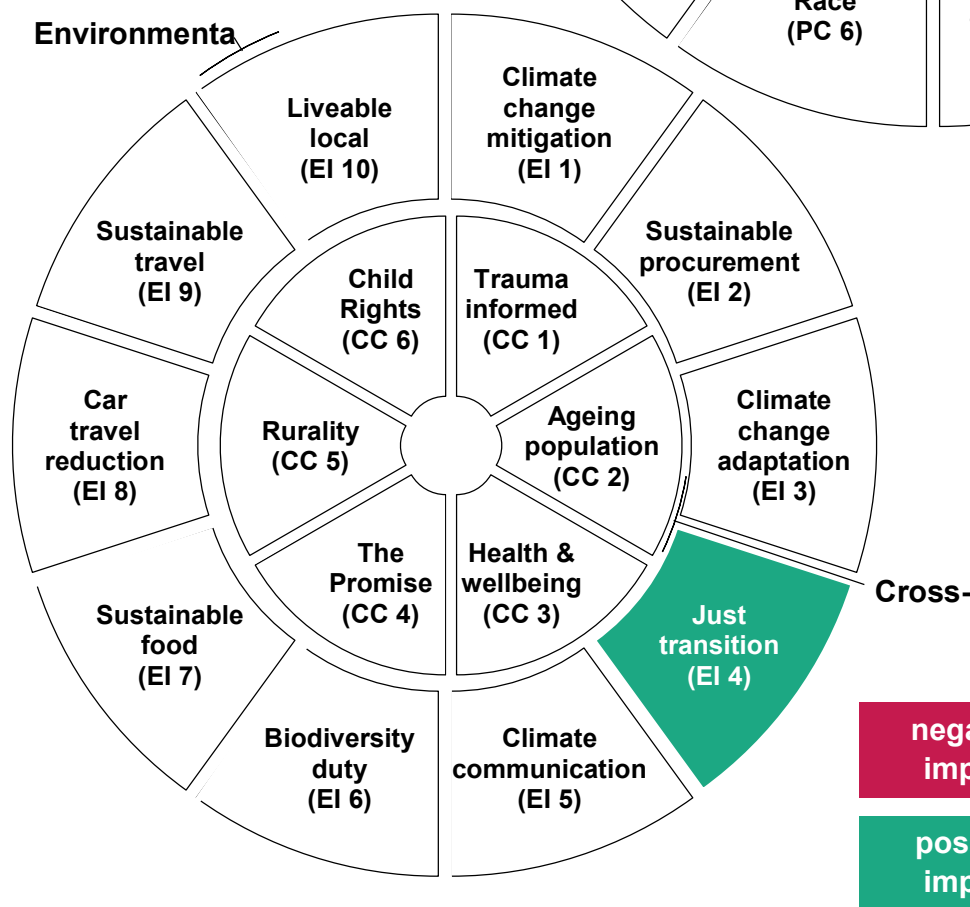
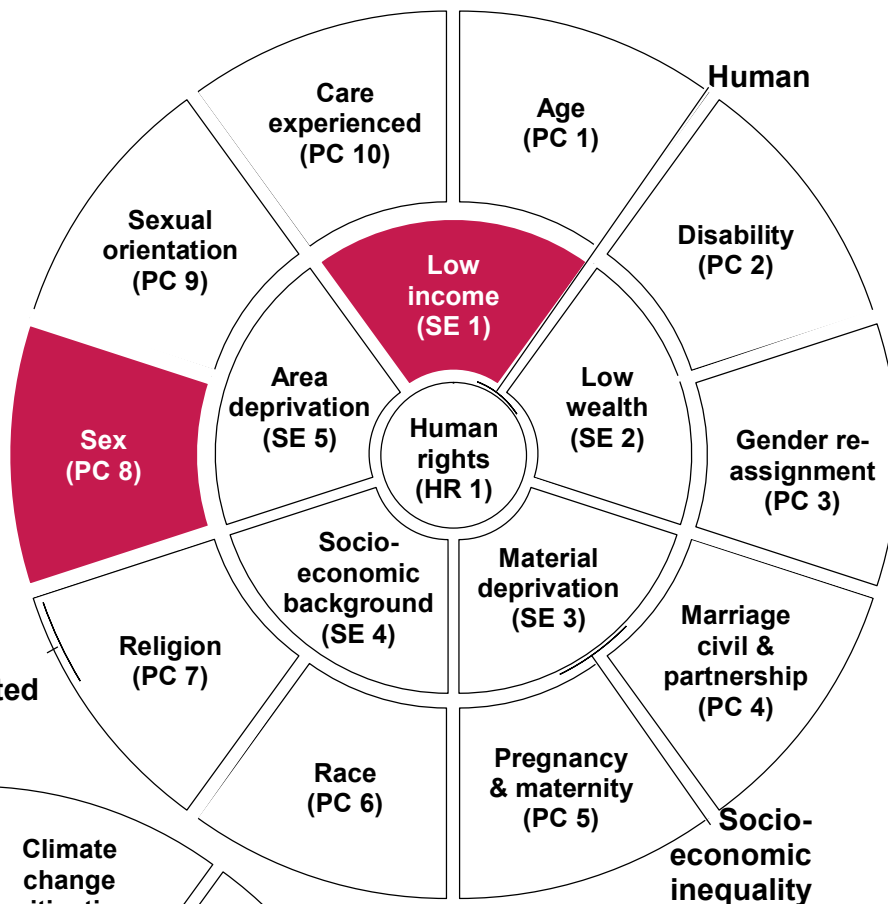
# Integrated Impact Assessment Summary Report



## Business Support Model transformation project

Completed by:  
Stewart McCall,  
Service Lead -  
Transformation,  
Transformation Service

Date started 20/11/25



To be implemented on:  
01/04/26  
Review date:  
31/01/26  
Oversight Panel:  
Cabinet

negative impact	uncertain / not clear
positive impact	no impact / not applicable

**Public sector equality duty**

Eliminating unlawful discrimination, harassment, and victimisation?

The new model applies changes based on role function, not personal characteristics, ensuring fair and consistent treatment.

Workforce changes will follow Managing Change policies and equality impact assessments, reducing risk of discriminatory practices.

Advancing equality of opportunity?

The project includes a Digital Skills Programme to support all staff in adapting to new technologies, helping ensure no group is disadvantaged by digital transformation.

Standardised processes and clear SLAs create equal access to support services across directorates.

Fostering good relations?

By consolidating business support and introducing common standards, the proposals encourage collaboration across services, reducing silo working.

Engagement with staff and Trade Unions during development promotes transparency and trust.

**Consultation declaration**

We confirm consultation has been carried out as part of this process.

**Mitigating Actions Required (re **negative** / unclear**

**EQUALITIES: impact on protected characteristics**

<b>PC 8</b>	Sex	No mitigations can be applied
-------------	-----	-------------------------------

Mitigating Actions Required (re **negative** / unclear impacts)

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**EQUALITIES: impact on socio-economic inequality**

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<b>SE 1</b>	Low Income / Income Poverty	No mitigations can be applied
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(CRWIA)? no

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SHAPING OUR FUTURE COUNCIL

# Transformation Portfolio

BUSINESS SUPPORT MODEL

IMPLEMENTATION GROUP

*TERMS OF REFERENCE*

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## Version Control

<b>Programme/Project Name</b>		Business Support Model		
<b>Project Lead</b>		Transformation Co-ordinator	<b>SRO</b>	Assistant Director - Transformation
<b>PMO Template Ver.</b>		2025-01	<b>Project Ref.</b>	
<b>Version</b>	<b>Version Date</b>	<b>Author</b>	<b>Description of Change</b>	<b>Status</b>
V1	13/11/2025	L Reid		
<b>Role/Function</b>	<b>Name</b>	<b>RACI</b>	<b>Issued Date</b>	<b>Outcome / Comment</b>
Assistant Director – Transformation (SRO)	Louise Reid	R		
Service Lead – Customer Services (Business Lead)	Gillian Farrell	C		
PMO Support Officer	Lindsay Young	C		
Director – Transformation & Communities	Jane Bradley	I		

# Implementation Group Overview

<b>Implementation Group Membership</b>	<p>The voting membership will consist of:</p> <ul style="list-style-type: none"> <li>▪ Assistant Director – Transformation</li> <li>▪ Service Lead – Customer Services</li> <li>▪ Transformation Coordinator – Delivery Model</li> <li>▪ Finance Coordinator</li> <li>▪ HR Coordinator</li> </ul> <p>Non-voting members:</p> <ul style="list-style-type: none"> <li>▪ Other operational services</li> <li>▪ PMO Support Officer – action and decision log</li> </ul>
<b>Attendees</b>	Other individuals and external advisors may be invited to attend for all or part of the meeting, as and when appropriate and necessary.
<b>Chair</b>	Assistant Director – Transformation
<b>Quorum</b>	4 members - at least one must be the SRO
<b>Reporting</b>	<ul style="list-style-type: none"> <li>• The PMO Support Officer will record an Action and Decision log which will be reviewed at each Implementation Group meeting</li> <li>• This will be made available to each member of the Group within 7 days after each meeting.</li> <li>• The Project Lead will produce a fortnightly update which is submitted to the PMO</li> </ul>
<b>Escalation</b>	Decisions that cannot be resolved at Project level will be escalated in line with formal escalation and change management arrangements in place to the Transformation Board.
<b>Meeting Frequency</b>	The Implementation Group will meet every 4 weeks, and on an ad-hoc basis as required.
<b>Accountability</b>	Senior Responsible Officers
<b>Financial Limits</b>	Decisions will be made in line with authority given to officers within the Scheme of delegation, Council's Financial Regulations and Standing Orders.

## Purpose

The Implementation Group is a governance body responsible for providing strategic direction, oversight and decision-making throughout the implementation of the Business Support Model. Overall, the Group brings together key individuals who are collectively responsible for steering the project to success, whilst ensuring it remains aligned with business objectives, delivers value in terms of cashable and non-cashable benefits, and adheres to the agreed constraints as outlined in the approved Business Case.

## Implementation Group Responsibilities

The Implementation Group delivery structure is an officer led governance group with the following responsibilities:

- a. Oversee the development and subsequent reviews of the Business Case and other project documentation.
- b. Allocate and commit sufficiently skilled resources to the project.
- c. Provide advice and recommendations to the Project Manager/ Lead as and when requested.
- d. Ensure the project continuously meets the needs and strategic objectives of the organisation, but also ensure interests of all relevant stakeholders are met.
- e. Ensure the project continues to make effective progress by reviewing and approving Stage Gates/Stage Boundaries, project plans, communication plans and scope change requests.
- f. Ensure benefits are planned for, monitored, and recognised to meet the project business case.
- g. Retain ownership of the delivery of these benefits even beyond the project lifecycle
- h. Manage risks, issues, changes, and exceptions which have been escalated to the Board through appropriately agreed escalation routes.
- i. Escalate any risks and issues which are deemed too critical to be dealt with at Implementation Group level, to the agreed appropriate authority, and ensure change requests are submitted and dealt with appropriately.
- j. Ensure effective communications on the project are circulated across the organisation, and beyond, where appropriate.

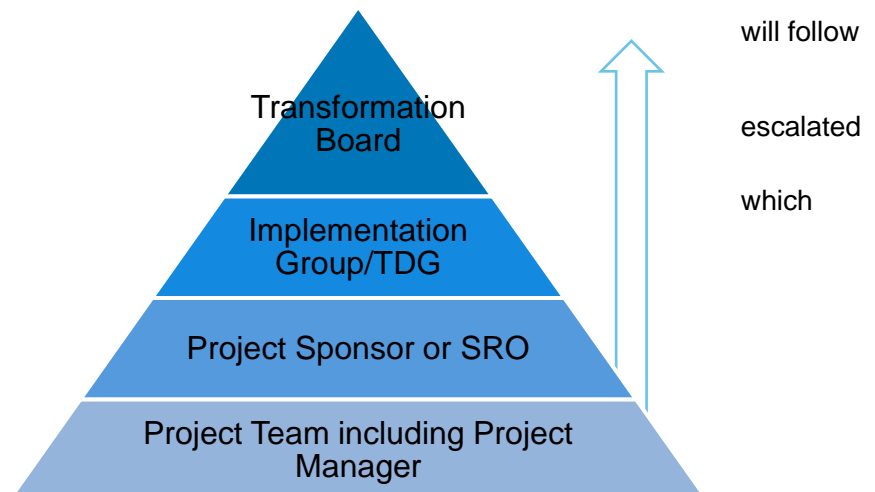
## Tolerances and Escalation

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The circumstances in which an item is escalated to and from the Implementation Group must comply with the Shaping our Future Council Change Management Approach and the defined tolerance levels.

In general, most changes or tolerances the escalation route in the diagram:

Some tolerances require to be to Cabinet, for example, if further Transformation Fund budget is required exceeds a total project budget of £200k.



## Behaviours Required from Implementation Group Members

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To be an effective Implementation Group member, it is essential to be aware and exercise the following behaviours:

### a. Accountability

- a. Members are accountable for the ultimate success or failure of the project. This means accepting and “demonstrating” ownership of the project.

### b. Effective Leadership

- a. Members should try to come to unified decisions to ensure the project has clear direction. This can involve difficult compromises. Board Members should work together as a team to achieve mutually agreed solutions, which is assisted by having clearly defined authority for decision making.
- b. Board Members should be willing to put team members’ needs above their individual needs and should take advice from project team members on resolving specific issues.

**c. Respectful and Supportive**

- a. Ensure project team members are valued, respected and everyone knows what they need to accomplish.
- b. Respond swiftly to requests or escalation of project exceptions from the project team or manager.
- c. Project Managers are not only responsible for the day-to-day delivery of this project but will likely be managing multiple projects at a time. Smooth delivery is assisted by Implementation Group Members demonstrating visible, effective, and sustained support by listening to concerns raised, remain accessible for consultations, advice, and guidance, participate in all formal Implementation Group Reviews, and respond promptly and constructively when matters are escalated.

**d. Effective Communication**

- a. Implementation Group members are responsible for being “project champions”.
- b. Ensure all effective communication channels for stakeholders are utilised.
- c. Ensure a communication management approach is agreed and executed to ensure effective and open, free channels of communication created.

## Appendix A: Roles and Responsibilities of Individual Members

Role	Responsibility
<b>Implementation Group Member (Collective Responsibility)</b>	<ul style="list-style-type: none"> <li>▪ Ensure the Implementation Group delivers on its responsibilities as set out in the Terms of Reference.</li> <li>▪ Prepare for meetings in advance, contribute to discussion items and support/challenge where necessary.</li> <li>▪ Work collaboratively as part of the Implementation Group to solve issues, overcome obstacles, maximise impact and ensure benefits realisation.</li> <li>▪ Act as advocates for the project.</li> <li>▪ Represent the needs of the business and stakeholders.</li> <li>▪ Act as a link between the project and the business.</li> <li>▪ Support the SRO and Project Manager to ensure the Board remains focused on the delivery of benefits and outcomes.</li> </ul>
<b>Senior Responsible Officer (SRO)</b> <i>Also known as the Project Sponsor</i>	<ul style="list-style-type: none"> <li>▪ Overall responsibility and accountability for the project.</li> <li>▪ Ensure strategic fit of project objectives and benefits with relevant strategies and wider vision.</li> <li>▪ Ensure the project is subject to review and assurance processes at appropriate stages.</li> <li>▪ Ensure the Implementation Group remains focused on delivering the benefits and outcomes set out in the business case.</li> <li>▪ Advocate for the project, ensuring the vision and outcomes are clearly understood by all involved.</li> <li>▪ Provide support to the Project Manager to mitigate risks and resolve issues, and make decisions promptly.</li> <li>▪ Act as a link between the Implementation Group, the Transformation Board, and other governing groups.</li> <li>▪ Ensure compliance with the Shaping our Future Council governance policies and procedures.</li> <li>▪ Follow the responsibilities listed in <a href="#">Appendix B</a>.</li> </ul>
<b>Business Lead</b>	<ul style="list-style-type: none"> <li>▪ Act as an SME from the relevant Service area.</li> <li>▪ Monitor and update benefits realisation tracker.</li> <li>▪ Assist in the preparation of project management products, and continue to update throughout the lifecycle of the project.</li> <li>▪ Take responsibility for the business outcomes expected from project delivery.</li> <li>▪ Follow the responsibilities listed in <a href="#">Appendix B</a>.</li> </ul>
<b>Project Manager</b>	<ul style="list-style-type: none"> <li>▪ Prepare bi-weekly or monthly project status reports for the Implementation Group and PMO.</li> <li>▪ Prepare agreed project baseline management products and agree them with the Implementation Group.</li> <li>▪ Maintain the risk and issue log and ensure lessons learnt are captured throughout the Project.</li> <li>▪ Manage dependencies and interfaces between this project and other projects/programmes.</li> <li>▪ Liaise with any external suppliers.</li> <li>▪ Lead, motivate and allocate tasks to the project team.</li> <li>▪ Ensure sufficient communication channels are in place.</li> </ul>

	<ul style="list-style-type: none"> <li>▪ Take responsibility for the overall progress of the project, ensuring corrective action is taken when necessary.</li> <li>▪ Ensure the project is delivered to standards outlined in the Business Case and expected benefits are delivered.</li> <li>▪ Follow the responsibilities listed in <u>Appendix B</u>.</li> </ul>
<b>Non-Voting Members</b>	<ul style="list-style-type: none"> <li>▪ Represent their business areas and act as a link between the business and the Implementation Group where required.</li> <li>▪ Provide relevant technical and/or other expertise/knowledge.</li> <li>▪ Provide a clear focus on benefits realisation.</li> <li>▪ Undertake any actions as agreed at the Implementation Group.</li> <li>▪ Prepare any necessary reports as required and present these to the Implementation Group.</li> </ul>

# Appendix B: Approved Portfolio Roles & Responsibilities

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The Transformation Board has overall responsibility and accountability for the Shaping our Future Council Transformation Portfolio. The Board has approved the following roles and responsibilities:

[20240501-05 Portfolio Roles and Responsibilities](#)

# Appendix C: Example Implementation Group Agenda

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**<Project Title>**  
**Implementation Group**  
**<Date>**  
**<Time>**  
**Microsoft Teams Meeting / Location**

---

**Board Attendees:**

Chair/SRO – Name (Ini.), Name (Ini.), Name (Ini.), Name (Ini.)

**Others as Needed:**

<Name | Designation>

<Name | Designation>

**Apologies:**

(Names / None)

## Agenda

1. Introductions/Apologies	<b>SRO</b>
2. Minutes and actions from previous meeting	<b>SRO</b>
3. Project Status <ul style="list-style-type: none"><li>a. Latest Dashboard Report</li><li>b. Current Risks and Issues</li><li>c. Dependencies</li><li>d. Current Budget Status</li></ul>	<b>PM</b>
4. For approval / ratification <ul style="list-style-type: none"><li>a. &lt;Report 1&gt;</li><li>b. &lt;Report 2&gt;</li><li>c. &lt;Report 3&gt;</li></ul>	<b>Author</b> <b>Author</b> <b>Author</b>
5. Potential Change Requests	<b>PM</b>
6. Forward Look	<b>PM</b>
7. Any Other Business	<b>All</b>
<b>Next Meeting: &lt;Date and Time&gt;</b>	

## Appendix D: Implementation Group Checklist Template

The following is a template that has been created as a quick reference for Implementation Group members to consider throughout the lifecycle of the project. Although all may not be relevant to the project, the checklist is a useful place to start. Each Group Member should be sent their own copy of the checklist for them to refer to and make notes throughout the duration of the project.

Topic	Description	Completed/Met	Notes
Benefits	The Implementation Group focuses on the outcome. The project is only justified if it realizes its benefits. The Implementation Group ensures that benefits are planned for, monitored, and recognized in order to meet the project business case.		
Budgets	The Implementation Group sets realistic budgets to enable the project objectives to be met. The Implementation Group prevents the project exceeding its budget.		
Business Communication	Business expectations are realistic. The Implementation Group maintains consistent, frequent, and high-quality communication through the life of the project with both the project team and interested parties.		
Decisions	The Implementation Group makes timely and unified decisions authorizing the project work to proceed or not.		
Delegate	Implementation Group members ensure delegate effectively.		
End Project Reviews	Implementation Group members ensure that end project review take place in order to learn from experience.		
Learn from experience	This principle is continuously applied throughout the life of the project.		
Project Brief	This is stable once approved.		
Implementation Group Meetings	These are timely and structured with a fixed agenda.		
Resource	The Implementation Group ensures that the right resources are in place and are involved in a timely manner.		
Risks	The Implementation Group properly understands all the risks involved.		
Timescales	Project timescales are consistent and realistic.		
Unified Direction	The Implementation Group has a unified front which will instil confidence in the project manager and wider stakeholder group.		

Business Support Model BC-Appendix 9 Project Plan

Project name	Business Support Model
Plan owner	Louise Reid
Project start date	05 March 2025
Project finish date	17 December 2027
Duration	878 days
% complete	31%
Exported on	18 November 2025

Task number	Bucket	Name	Depends on	Start	Finish	% complete	Priority	Milestone	Notes
1	Stage 2: Definition	Creation of Project site		05/03/2025	05/03/2025	100%	Medium	No	
2	Stage 2: Definition	Project Brief Approval (TDG)		07/08/2024	07/08/2024	100%	Medium	Yes	
3	Stage 2: Definition	Project Brief Approval (Transformation Board)		21/08/2024	21/08/2024	100%	Urgent	No	
4	Stage 2: Definition	Data analysis (Task Data) Part 1		08/07/2025	22/07/2025	100%	Medium	No	
5	Stage 2: Definition	Project Board established		03/11/2025	28/11/2025	0%	Important	No	
6	Stage 2: Definition	Data analysis Part 2 - Task analysis data - line by line	4FS	23/07/2025	17/09/2026	100%	Medium	No	
7	Stage 2: Definition	Engage with Service Leads		01/12/2025	27/02/2026	0%	Medium	No	Engage Service Leads to confirm change in representation from the Transformation service from the project and arrangements. A range 1 to 1's with Service Leads to discuss further the posts that fall into the scope criteria in Phase 1.
8	Stage 3: Initiation	Draft Business Case & Artefacts		31/10/2025	21/11/2025	100%	Important	No	
9	Stage 3: Initiation	Business Case Approval (TDG)		02/12/2025	02/12/2025	0%	Medium	Yes	
10	Stage 3: Initiation	Business Case Approval (Transformation Board)		17/12/2025	17/12/2025	0%	Important	Yes	
11	Stage 3: Initiation	Cabinet approval of the new organisational structure		20/01/2026	20/01/2026	0%	Medium	Yes	
12	Stage 4: Mobilisation	Confirm Project Budget Code	10FS	18/12/2025	06/01/2026	0%	Medium	No	
13	Stage 4: Mobilisation	Changes to organisational structure communicated	11FS	21/01/2026	30/01/2026	0%	Medium	No	
14	Stage 4: Mobilisation	Change to job description of Service Lead (if applicable)		01/01/2026	30/01/2026	0%	Medium	No	
15	Stage 4: Mobilisation	Business Support Coordinator job description approved		01/01/2026	30/01/2026	0%	Medium	No	Any changes made to job description for Service Lead
16	Stage 4: Mobilisation	Transformation Board approval of roles in scope		02/02/2026	24/04/2026	0%	Medium	Yes	Confirmation of roles in scope for new Corporate Business Support service and approval by Transformation Board
17	Stage 4: Mobilisation	Business Support Coordinator appointed	15FS	02/02/2026	31/03/2026	0%	Medium	No	
18	Stage 4: Mobilisation	Budget consolidation and role alignment		31/03/2026	29/05/2026	0%	Medium	No	Work completed by Human Resources and Finance to consolidate budgets and transfer posts in the line management structure
19	Stage 4: Mobilisation	Operational agreements between BS team and Services		01/06/2026	31/07/2026	0%	Medium	No	Operational agreements in place between newly formed business support team and the services it supports within Chief execs, HOD and C&T directorates
20	Stage 4: Mobilisation	Embed the new structure		01/04/2026	31/03/2027	0%	Medium	No	Embed the new structure and improve service outputs, focussing on: Creating standard approaches to common tasks, e.g. timesheets, invoice processing and administration · Maximising the use of available technology to improve the way we work · Reducing the number of system applications that are used to complement standard ways of working.
21	Stage 5: Execution and Delivery	Benefit Realisation Tracking (Short-Term)				0%	Medium	No	
22	Stage 6: Transition to BAU	Benefit Realisation Tracking (Long-Term)				0%	Medium	No	
23	Stage 7: Sustain & Closure	Complete PMO Closure Checklist				0%	Medium	No	
24	Stage 7: Sustain & Closure	Closure Report Sign-Off (SRO)				0%	Medium	No	
25	Stage 7: Sustain & Closure	Closure Report Sign-off (Transformation Board)				0%	Medium	No	
26	Stage 7: Sustain & Closure	Draft closure report				0%	Medium	No	
27	Stage 7: Sustain & Closure	Post Project Evaluation		01/03/2027	31/03/2027	0%	Medium	No	complete post-project evaluation and consider opportunities with stakeholders for further phase



# Transformation Portfolio Project Risk Register



<b>Project Title:</b>	Business Support Model
<b>Project Lead:</b>	Transformation Coordinator - Our Delivery Model
<b>Priority Area</b>	Our Delivery Model

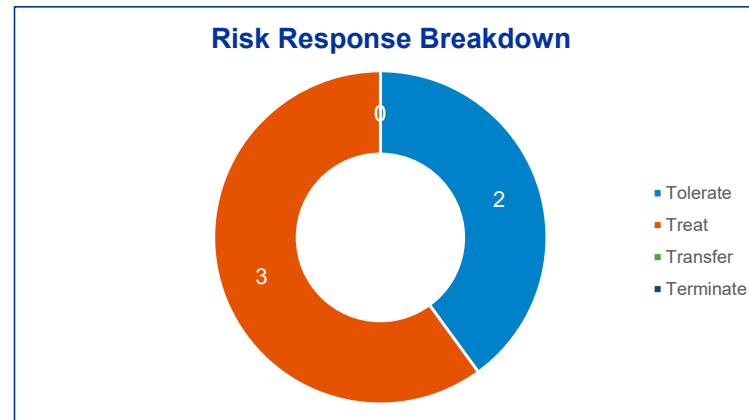
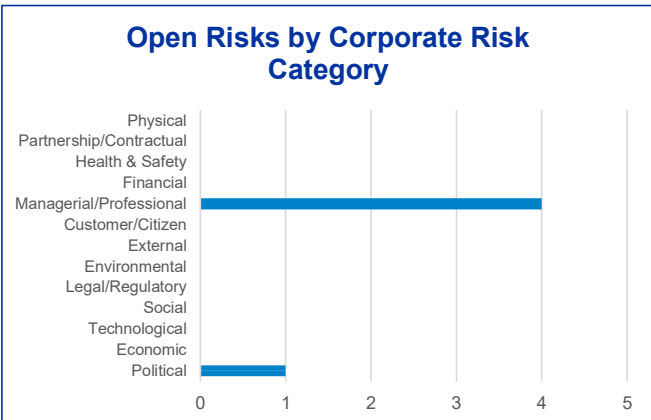
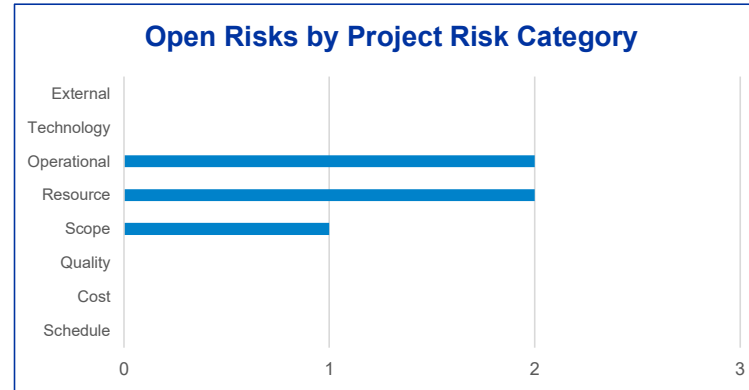
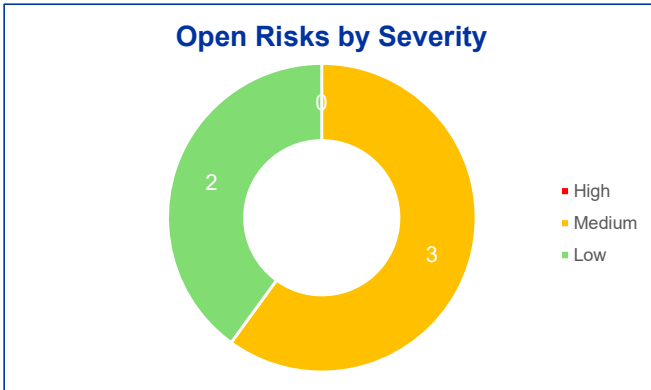
RAG	Scoring	Risk Rating
Red	12 - 25	High
Amber	4 - 10	Med
Green	1 - 3	Low

Temple  
0.3

**No. of Open Risks**  
**5**

**Escalated Risks**  
**0**

**Average Risk Rating**  
**5**





# Risk Register

## Business Support Model

RAG	Scoring	Risk Rating
Red	12 - 25	High
Amber	4 - 10	Med
Green	1 - 3	Low

Description of likelihood	Description of Impact
1 <b>Unlikely</b> - Unlikely or virtually impossible	1 <b>Minor</b> - Undesirable loss, but no threat to business case delivery
2 <b>Possible</b> - Only fairly likely to occur	2 <b>Moderate</b> - Localised impact on business case delivery
3 <b>Likely</b> - More likely to occur than not	3 <b>Major</b> - Impact on some elements of the approved business case
4 <b>Very Likely</b> - Almost certainly will occur	4 <b>Critical</b> - Widespread or highly disruptive impact on the delivery of the business case or wider portfolio
5 <b>Almost Certain</b> - Becomes 100%, move to Issue	



DD-MM-YY Who raised this risk? Who is accountable for managing this risk? Use dropdown - what category does this risk fall in to? Suggest title of the risk Description of the identified risk. What would cause the risk to occur? How would the portfolio be affected if the risk were to materialise? Use Dropdown Use Dropdown Use Dropdown Auto populates What is the agreed risk management approach? What action(s) will be taken to reduce the risk rating or close the risk? Who will be responsible for carrying out the action plan? DD-MM-YY - include the latest update on actions taken or whether the risk rating has changed due to external factors Does the risk require to be escalated to the Portfolio Risk Register? DD-MM-YY When the risk was last reviewed and updated DD-MM-YY Choose from dropdown. If the risk has become an issue, link to issue log The date the risk was closed down (filling of 0) or escalated to an issue

Risk ID.	Date Raised	Risk Author	Risk Owner	Corporate Risk Category	Title (Short heading)	Risk Description ("There is a risk that...")	Risk Cause ("This is due to...")	Risk Impact ("This may result in...")	Project Risk Type	Likelihood	Impact	Score (Rating)	Risk Management (dropdown)	Risk Action Plan	Actionee	Latest Update (Please include dd/mm/yy: ahead of update)	Portfolio Risk (auto.)	Last Review Date	Target Risk Closure Date	Movement since last review	Issue ID	Date Closed or Date Escalated to Issue
R001	11-Jun-25	James Andrew	Transformation Board	Managerial/Professional	Consistent Budget Owner(s)	Changes to ELT/CLT structures will result in changes to the Business Support budget owner(s).	Retirement, organisational re-design, changes to the Council Plan	A consistent direction, drive and oversight to reduce the Business Support function	Resource	1	2	2	Tolerate	The preferred option identified in the Business Case removes ambiguity in terms of designated budget holder for corporate Business Support, therefore this risk is closed, pending Business Case approval.	Transformation Board	18/11/25 - Risk recommended for closure	No	18-Nov-25	30-Dec-25	Decrease		
R002	29-Jul-25	Stuart MacMillan	Project Board	Managerial/Professional	Staff wellbeing	Staff become unsettled / concerned about the scope of the project or its proposals	Lack of communication or clarity on the scope of the project and how it can benefit organisation	Staff becoming unsettled with the project proposals	Operational	2	2	4	Treat	1. Regular communication via Viva Engage, this would include learning events when proposals are developed 2. Providing a point of contact for staff to ask questions. Engagement with Managers and TUs 3. Clarity on scope of the project, perhaps a one pager that can be shared	Transformation Coordinator	18/11/25 - Engagement with staff and services is ongoing	No	18-Nov-25	30-Dec-26	No Change		
R003	29-Jul-25	Stuart MacMillan	Project Board	Managerial/Professional	Accuracy of data	Proposals being developed which do not reflect current ways of working and not based on sound evidence	Data being collated is not accurate or has not been entered correctly, in the case of the task analysis	Proposals do not achieve their desired objectives or miss out crucial aspects which could affect impact	Scope	1	3	3	Tolerate	1. Provide clear guidance on task analysis exercise 2. Request that staff sign off the task analysis 3. Present findings to staff and leaders for verification and checking - is this an accurate picture	Transformation Coordinator	18/11/25 - An additional round of 1 to 1s with Service Leads is planned to discuss task analysis and agreed roles in scope.	No	18-Nov-25	26-Feb-25	Decrease		
R004	01-Aug-25	Stuart MacMillan	Transformation Board	Managerial/Professional	Chief Officer Support/Buy-in	Project objectives are not fully achieved	A lack of leadership and senior officer support to help drive the project, its proposals and outcomes forward	Proposals not being fully implemented and the benefits from the project not being achieved	Resource	2	3	6	Treat	1. Seek a new project sponsor who will help drive project forward 2. Regular updates to CLT and Transformation Board	Transformation Board	18/11/25 - Clear roles and responsibilities have been proposed in the draft Business Case for approval	No	18-Nov-25	30-Dec-25	Decrease		
R005	11-Nov-25	Louise Reid	Assistant Director - Transformation	Political	Elected Member buy in and approval	Cabinet does not approve the changes necessary to the organisational structure to facilitate delivery of the new Business Support Model	Lack of political buy-in	Proposals not being implemented and benefits not being achieved	Operational	2	5	10	Treat	Portfolio Holder engagement throughout Business Case development phase, updates provided to Cabinet on project development and update provided to Council on potential benefits of the proposal. Trade Union and staff engagement.	Assistant Director - Transformation	18/11/25 - Organisational change proposal due to be presented to Cabinet in January 2026	No	18-Nov-25	30-Jan-26	New		