

TRANSFORMING OUR PROFESSIONAL SERVICES



UCL

STRENGTHENING PLANNING SERVICES TO DELIVER INTEGRATED PLANS, DATA AND INSIGHT FOR BETTER DECISIONS, SUCCESSFUL MAJOR PROJECTS AND A CONTINUOUS IMPROVEMENT CULTURE

The Service Leadership Team consists of Tom Rowson (Director of Planning), Helen Fisher (Faculty Manager, Bartlett), Loren Moyse (Director of Operations, Life Sciences). All figures in this paper are as per v 1.0 of TOPS SOC (30062017).

UCL established the Planning Team in April 2015. As one of the central professional services, we are committed to providing a high performing service for the UCL community, to embedding a mature planning culture across UCL and ensuring that UCL has integrated plans to support the delivery of UCL 2034.

Planning Services includes core planning, data and insight, project management and other activities, and how those activities are carried out by (a) the planning team, (b) central PS divisions and (c) departmental/faculty professional services teams.

1. We have heard from a large number of colleagues regarding the issues they are facing. These include:

- A need for better tools and capabilities in bringing together academic input and specialist knowledge when creating divisional, departmental, faculty and VP office plans (we use this list in this document, but acknowledge that it is not an exhaustive of all the stakeholder groups involved in planning process). The process can sometimes be stressful for individuals to complete
- Decision-making is often not based on reliable data, and in some cases, limited data is used to determine planning decisions
- Information governance is inadequate, with ownership of information often being unclear
- There is no defined way to deliver projects for faculties leading to, for example, inconsistent practices across UCL and a lack of learning from previous similar projects
- There is significant risk of “change overload”, as there is no clear view of overlaps/dependencies across departmental/faculty/VP office portfolios
- Continuous improvement currently happens only in silos, and does not generally follow best practice frameworks, meaning that faculties/professional services are not properly supported in developing a high performance professional services culture
- There is a frustration that there is no single UCL “activity calendar” that provides a departments and divisions with a holistic view of centrally coordinated operational and project work.

2. Overview of the principles and emerging ideas

The key principles and emerging ideas are:

- We could strengthen the central strategic planning capability – including support for more integrated professional services planning as part of the delivery of TOPS, and more business-partner style support for Faculties
- We could establish a central pool of specialised project and change resources for major projects
- We could develop an adaptable methodology for projects and programmes for use across UCL

- We could establish a small, central continuous improvement team to support professional services across UCL to embed a continuous improvement culture and practical improvements after TOPS has finished
- We could develop an integrated approach to data management such that there are “single sources of the truth” that are trusted for decision-making
- We could provide structured support to academic departments in both managing projects and accessing and interpreting data.

3. What could potentially change?

In practice, the emerging ideas could mean:

- We could strengthen the central strategic planning capability to facilitate, manage and run strategic planning activities (both cyclical and continual)
- We could establish a project delivery approach for multi-faceted projects (i.e. not for IT or construction projects, which already follow a project delivery approach) to support better project outcomes
- **Great careers:** We could create a ‘projects and change’ Community of Practice to bring together staff working in shared professional areas to share best practice, develop the practice area and establish career pathways
- We could establish a continuous improvement team that ensures that UCL can continue to deliver improvements after TOPS has finished. This office will deliver best practice frameworks, tools, and guidance in delivering excellent customer service
- We could create an information governance model whereby Planning Services oversee information that are stewarded by specialist professional services
- This framework could be supported by the implementation of data management toolkit so that there is a “single source of truth”.

4. What would not change?

There are a number of areas which are not covered by the emerging ideas and would not change. Although not exhaustive, these include:

- Responsibility for developing departments/divisions plan will continue to reside with the management teams within those departments/divisions, with approval from the relevant faculty
- The Planning Working Group, which will continue its regular meetings
- The reporting lines of existing project managers and team – the central Planning Team we will look to work more closely with those teams in future.

5. The benefits and investment we are making

The following table details the benefits we are aiming to achieve within the planning service, as well as the investments we need to make in order to realise these benefits (a detailed list of quantifiable and qualitative benefits are included in the business case):

Benefits	Costs
<ul style="list-style-type: none"> • Increased satisfaction with the Planning Service • Improved satisfaction for staff in analysis and project/change management roles • Better data and insight for managers, leading to better decisions • More consistent approach to project management, leading to better project outcomes. 	<ul style="list-style-type: none"> • Expand scope of MI capabilities, building in Tableau

6. What are the outstanding questions we would welcome feedback on?

1. How will Planning Services support delivery of wider elements of TOPS? E.g. data to track of customer satisfaction, professional services performance, programme assurance and benefits realisation
 2. How will TOPS change the requirements for planning from institutional leaders?
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Disclaimer:

These documents contain emerging ideas for how UCL professional services could be delivered in a more effective way in the future. At present, no formal change proposals are being put forward by UCL and so engagement remains at an informal stage. Where a preferred option is mentioned, this pertains to PA Consulting recommendations and does not constitute a formal proposal for change by UCL.