

Ref	Identified problem areas to address	Specific actions	Raised by	Action applies to	Priority	R	A	C	I	Action due	Status	Progress / notes	Links to
Strategic Narrative: There is clear communication about where the Finance and Planning Directorate is headed; I understand the direction of F&P; I know how my work contributes to F&P.													
1a	Vision and Mission - The Finance and Planning Leadership team need to address why Finance and Planning were brought together and where we are heading. Create a roadmap about where the directorate is heading, what challenges we will face, how our roadmap fits in with the strategy and the impact this will have on teams	Develop a mission, vision and set of values for SPBC, SPI, E&D and Planning, as well as Directorate level	Finance and Planning	Finance and Planning	1	FPLT	Deborah	FPLF / Managers / Engagement Groups	All F&P staff	30.04.18	In progress	Deborah > FPLT > Staff - needs clear statement from Deborah However, work can be started at team/service level - what is our vision, what is our mission, what are our values? Complete work at SPBC and SPI levels then bring together for Planning - possibly an activity for the away day (links to action 9g). 23.02.18 - V/M launched at ATB end Jan. Both engagement groups now discussing how to communicate and embed. Discussion also needed with FPLF.	7f
1b		Develop a roadmap and filter into team objectives	Finance and Planning	Finance and Planning	3	FPLT	Deborah	FPLF	Teams	30.04.18	Not started	As above - need clarity of vision for F&P then build a roadmap of how to get there - filter into team objectives - launch? Again, work can be done at a lower level to define this per service Dependencies here on PSOM	
2	Identify the connections between the Finance and Planning teams so that we can work together more closely	Use examples / case studies of where Finance & Planning have worked together plus where we could work together. What could be different in future? What would good look like?	Finance and Planning	Finance and Planning	2					Ongoing	Not started	This is already happening in pockets but could be more visible Actions are low effort over long timescale	
3	More visibility from Deborah / FPLT and interaction with the team (build relationships with the teams). Improve understanding of Deborah's work and priorities and how Planning can help her to achieve those. Deborah to demonstrate an understanding of the service provision of Planning	Need to define what we mean by visibility and find opportunities Provide clarity about objectives and what Deborah is working on	Finance and Planning	Finance and Planning	1	FPLT	Deborah			31.03.18	In progress	Also, visibility of wider ULT members. Meetings currently being scheduled for FPLT members to attend local team meetings. 23.02.18 - Deborah recently attend the SPBC team meeting to good feedback.	
4	What is the impact of PSOM on the Directorate?	Add a standing item to the All Team Brief agenda to cover what has been happening and key dates/ activities for what is coming up. Where required make specific connections to the impact on Finance and Planning.	Finance	Finance and Planning	1	FPLT	Deborah			Ongoing	In progress	PSOM update added to 31 Jan ATB with Richard Calvert coming to give an update. Will add as a standing item to all future team briefs.	
Employee Voice: My thoughts and opinions are valued													
5a	Ensure that feedback is given when thoughts and opinions have been shared, close the feedback loop. Be clear about why certain decisions are made / why certain opinions aren't part of the final solution (satisfying people that their thoughts have been considered).	Training / briefings needed on best practice: *Finance & Planning Managers group *SPBC SMT	Planning	Planning	3	Linda?	FPLT			30.06.18	In progress	How can we close the loop better? May link to 8c re: comms channels in and out of the management groups 23.02.18 - The Engagement Champions will review the best practice guide that was developed last year and feedback as to whether more needs to be done.	6c
5b	People/managers need to actively show/demonstrate that ideas/opinions/thoughts are valued with their actions. Guidelines and good practice for conducting 1:1's e.g. should be two way dialogue; be clear about what will happen to feedback that has been given, when a response can be expected and to give a response even if an idea / action cannot be taken forward.	Ensure time is given in SPI and SPBC team meetings for updates about what people are working on - make use of mid-month email briefings from Heads of Service	Planning	Planning	1	Planning Leadership Team	Linda			Ongoing	In progress		
5c		Brief all Planning teams about Kanban boards and discuss how they could be used to support team meetings	Planning	Planning	1	CI Team	Heads of Service			31.03.18	In progress	Heads of Service to liaise with teams and identify when to invite CI Service to talk through the approach	
6a		Comms needed about this - would be good if current Finance reps could come and talk to us about it	Planning	Finance and Planning	1	LICC Staff Reps	Vanessa			23.02.18	Completed	Elections coming up for LICC. 23.02.18 - Staff reps attended team meetings where requested.	
6b		You said / we did feedback would be good	Planning	Finance and Planning	2	Vanessa	Vanessa	LICC Staff Reps	All F&P staff	23.02.18	Not started	23.02.18 - Given that LICC isn't a decision making group is this action required?	
6c	Staff to attend the Finance and Planning LICC. This is a good opportunity to hear directly from Deborah and from other members of the F&P leadership team. VC to send ToR and link to old meeting notes to group.	Greater visibility needed of the different groups within Finance and Planning (i.e. LICC, FPLT, FPLF, FPMG etc.) including: *The purpose of the group *The 'hierarchy' of the groups i.e. how do they relate to each other *Who sits on each group *What are the comms channels in and out of the group (and throughout F&P generally) *Published agendas, notes, minutes, actions etc. coming out of each meeting (or a clear route for this information to be communicated)	Finance and Planning	Finance and Planning	2		FPLT			30.04.18	Not started	Also links to Intranet / SharePoint review - 7e	7e 12
Communication / Teamwork: I feel well informed about operation updates in Finance and Planning; A spirit of teamwork and cooperation exists across F&P; Outside of my team I know what other teams do													
7a		Create a clear service offer for each team and add to intranet	Finance and Planning	Finance and Planning	1	FPLF	Linda	Teams		30.04.18	In progress	Linda, Tom, Jo & Aloma started work on this. 23.02.18 - A first draft has been produced and teams are now reviewing.	
7b		More team updates at All Team Brief	Finance and Planning	Finance and Planning	3	Antonia	FPLT	Teams		Ongoing	In progress	Longer term action - rolling programme for ATB agenda	
7c		Continue with 'meet the team' blog posts	Finance	Finance and Planning	1	Antonia	FPLF	Teams		Ongoing	In progress		
7d	Need to do more to get to know each other (and what we do) both in Planning and the wider Directorate e.g. speed networking / team marketstalls.	Introduce name cards on desks plus up-to-date accessible seating plans and structure charts	Planning	Planning	1	Nicola?	Linda			28.02.18	Not started	Links to 7e re: updating Intranet <i>Nicola for seating plan & structure charts??? Who will send comms about this to all Planning staff?</i>	7e

7e		Full review of Planning Intranet pages needed and a shared homepage for Finance and Planning is required.	Planning	Finance and Planning	3	Vanessa	Linda	Engagement Groups		31.03.18	In progress	Longer term action BUT this may be a dependency for several other actions (i.e. how information is shared and published). 23.08.18 - Planning have reviewed content and sent changes to VC to update pages. A shared homepage has been set up. Engagement Groups to discuss content/style.
7f		Away day for Planning	Planning	Planning	2	Planning Leadership Team	Linda	Planning Comms & Engagement Group		30.04.18	In progress	Planning started for an away day - possibly in April
9	In Planning share operational updates across the whole of Planning rather than just in the immediate teams e.g. starters/leavers/movers	Process in place i.e. Nicola to communicate this type of information	Planning	Planning	1	Nicola	Linda			Ongoing	Incorporated in BAU processes	<i>Are all managers aware of the process to channel this type of info through Nicola?</i>
Communication: The Finance and Planning directorate is open and transparent in its communications with staff												
10	FPLT to articulate what the mechanisms are for responding to the survey.	Communicated through All Team Brief	Planning	Finance and Planning	1	FPLT	Deborah			31.03.18	In progress	Deborah to update at ATB 31.01.18. 23.08.18 - Planning C&EG asked what other groups are discussing this. FPLT to respond.
Communication: The FF blog was in the top 5 regarding how people usually find out what is happening in F&P but dropped out of the top 5 with regards to how people would prefer to find out what is happening. Do you still want the blog? What should it be for? What do you like/dislike about it?												
11	Be clear about what the blog is for and categorise content effectively. Rename the blog. Should be for celebrating success. If not for work updates be clear about where these can be found.	Decision needed as to whether the blog is used for Planning as well as Finance - if both then Planning should be consulted on its design. If its retained for Finance use only then an alternative method for Directorate updates may need to be considered	Planning	Planning	1	Linda	Linda	Planning Comms & Engagement Group		28.02.18	Not started	
		Feedback from group about the blog: *Its purpose needs to be clear *Needs to be easier to navigate as its hard to see from the links what may or may not be of interest to you - doesn't categorise well *Can't be the only way to find information *Hard to find the blog if not going through the email or a saved link *We need a sense about what is going to change and how	Planning	Finance and Planning	3	Antonia	Vanessa	Engagement Groups		30.04.18	Not started	Dependent on outcome of above action
Communication: How can we improve communications within Finance and Planning?												
12	Be clear about what communication channels are available and what they should be used for. No need to remove any channels; staff to use channels relevant to them.	Produce a communications channel matrix which outlines: •The comms channels in Finance and Planning •What each channel should be used for •The pros and cons of using each channel •Best suited for messaging that is..... •Less suited for messaging that is.....	Finance	Finance and Planning	1	Vanessa	Vanessa	Engagement Groups	All F&P staff	30.04.18	Not started	Also clarify where staff can access information about Higher Education updates.
Involvement												
13	Continue with the staff Volunteering Programme	Work with the Student Union to identify volunteering opportunities. Arrange two group opportunities per year. Continue to link in with Graduation, Open Days and Clearning.	Finance	Finance and Planning	1	Antonia	Vanessa	Engagement Groups	All F&P staff	Ongoing	Incorporated in BAU processes	

