HR and Payroll Service Plan 2023-24

Version 0.7

April 2023 – March 2024

Local Plan

Council Plan 2020-24 --- Financial Plan

Service Plans --- Housing Revenue Account Business Plan

Individual objectives through performance reviews

Each part of the council plays its part in a joined-up approach to service delivery- from this plan that sets out our staff priorities, to staff's individual performance reviews to confirm that everyone is doing their part.

Director: Mark Williams, Chief Executive
Portfolio holders: Cllr John Loudon

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Section 1 – Brief description of service and purpose(s)	
What we do and who we deliver to	The purpose of the HR Service (which includes payroll, HR and learning and development) is to develop skills, policies and practices so that people are Happy Healthy Here in an organisation that is both supportive and legal. The HR Service also provides HR advice and support to Strata Service Solutions Ltd.
How we deliver and ensure equal access	This service is delivered in-house. All of our work is underpinned by relevant equality, diversity and inclusion legislation and good practice. We work closely with UNISON to ensure our policies and practices are fair and we negotiate with UNSION to implement changes to terms and conditions of service.
How we compare	We use external endorsement from Investors in People to benchmark our processes and have achieved Platinum status. Additionally, we use key performance indicators such as sickness levels and turnover, which we regularly report to Personnel Committee and SMT+. We are regularly audited by South West Audit Partnership.
Statutory elements of the service	Payroll services, pensions administration and compliance with relevant employment law. Support for provision of mandatory training to ensure organisational legal compliance.

Section 2 – Key achievements in 2022-23		
1.	Reward Review proposals developed in liaison with Price Waterhouse Cooper and signed off. Detailed and complex impact assessment completed. Proposals consulted upon and agreed, with implementation in December 2022 backdated to April 2022. New arrangements include the Council becoming a Real Living Wage Employer.	Resilient economy Poverty Reduction Strategy
2.	Worksmart 2022+ introduced following agreement of overarching Worksmart Purpose and Principles and completion of audit by the end of 2022.	Greener East Devon
3.	Regular people data reporting to Personnel Committee and SMT+ introduced to enable greater oversight of key measures such as vacancy levels, turnover and absence	
4.	Introduction of revised Performance Excellence Review (PER) approach and incorporation of more robust workforce planning into service planning	
5.	Continued Happy Healthy Here promotion and robust absence management, despite the challenges of increased absence levels. This includes completion of the StreetScene operational hand arm vibration and audio health and safety assessments, refresh of the Mental Health First Aider network and use of some of the public health monies to support staff mental health and wellbeing	
6.	Additional HR Business Partner resource has supported service improvement within Housing, the ability to support Strata's Organisational Change Programme and enabled existing HR Business Partners to redevelop proactive relationships with their service areas (including new service links) that had been diminished due to capacity and demand pressures during the pandemic. There have been various complex employee relations cases this year which the team have	Better Homes and Communities

Section 2 – Key achievements in 2022-23	
	supported through to resolution, alongside recruitment to a number of key posts and support with organisational changes.
7.	Provision of free accredited training and sharing of training resources with Mid Devon District Council has enabled greater access to learning and development opportunities for staff, whilst remaining within the agreed corporate training budget. Enhanced safeguarding training for front line staff successfully introduced alongside a revised mandatory e-learning safeguarding module for all staff. Improved learning and development reporting capability introduced within iTrent (in place by the end of 2022), which will support managers and staff with mandatory training monitoring and performance management.
8.	Pensions Auto-enrolment successfully completed
9.	Job Evaluation (JE) panellists and panels increased for both EDDC and Strata to ensure timely evaluation of roles to support recruitment and retention. JE scores input into iTrent, which supported the Reward Review work.
10.	Successful transition to new recruitment advertising contract and ability to continue to provide support to recruitment and onboarding despite HR administrative staff changes and high demand. Development of a recruitment video to support employer brand.
11.	Review of various HR policies linked to Worksmart, Reward Review, East of England LGA Learning Review and learning from operational practice.

Section 3 – Looking forward: what we will do in 2023-24 (service objectives)

This service agrees that it will undertake the work required under the Financial Sustainability Model adopted by Council in its Financial Plan in reviewing the service under the following 6 areas:

- **System Thinking**
- **Digital Transformation**
- **Customer Access**
- **Performance Management Data**
- **Asset Management**
- **Income Maximisation**

3.1 Service priorities we will deliver in 2023/24 which support the Council Plan Priorities; the Poverty Action Plan and Health & Wellbeing. (Carbon reduction activities see section 5 below)	Financial/ corporate resource	Lead Officers
Provide support and advice on Chief Officer recruitment.	Democratic Services	Jo Fellows, HR Manager
Evaluate impact of Reward Review through people data reporting, staff surveys and other analysis, reporting outcomes to Personnel Committee and SMT+ and complete review (and if required, consultation) on the Out of Hours Schemes.	Finance	Jo Fellows, HR Manager
Agree actions to support Worksmart, informed by the survey analysis and audit, reporting outcomes to Personnel Committee and SMT+. This includes supporting review of Green Travel (see below), staff wellbeing and training and any other agreed actions.	Worksmart Review Working Group, including representation from Strata, Communications, Finance, Climate Change, etc	Jo Fellows, HR Manager

3.1 Service priorities we will deliver in 2023/24 which support the Council Plan Priorities; the Poverty Action Plan and Health & Wellbeing. (Carbon reduction activities see section 5 below)	Financial/ corporate resource	Lead Officers
Further improve people data reporting including linking with the corporate PowerBI developments, to include: • attraction and recruitment data (e.g. number of applications, recruitment media impact etc) • improvements to iTrent data (e.g. post numbering) • agency worker data • embedding of learning and development reporting within iTrent to ensure used by managers and staff and for inclusion in the people data reports.	Communications Finance (agency workers)	Jo Fellows, HR Manager
Scope and commence Grow Our Own Project (see below) to maximise the use of apprenticeships, engagement with local schools and colleges and the development of career pathways, succession planning and talent management to support recruitment, retention and workforce development.	All service areas	Jo Fellows, HR Manager
Introduction of improved staff benefits offer, refreshed Star Awards and annual all-staff event.	Communications Finance	Jo Fellows, HR Manager
Evaluation of improvements to workforce planning (as part of service planning) and use of service workforce plans to inform corporate workforce priorities and learning and development plan.		Jo Fellows, HR Manager

3.1 Service priorities we will deliver in 2023/24 which support the Council Plan Priorities; the Poverty Action Plan and Health & Wellbeing. (Carbon reduction activities see section 5 below)	Financial/ corporate resource	Lead Officers
Scope and begin to implement work to improve our recruitment approach, for example: • embedding of refreshed employer brand, aligned to recruitment video, including updates to website, intranet, iTrent homepage and new staff benefits portal • systems/processes • use of CVs alongside application forms.	Communications	Jo Fellows, HR Manager
IiP reaccreditation and incorporation of learning outcomes into Service Plan as appropriate.	Communications	Jo Fellows, HR Manager
Reintroduction of MetaCompliance to support data security, policy and mandatory training compliance (work to be scoped)	Communications	Jo Fellows, HR Manager
Review leadership and management development offer (see below). To include a review of how the Behaviours Framework and PERs approach supports management capability, and to refresh/relaunch the Management Standards.		Jo Fellows, HR Manager
Staff survey refresh, aligned with new survey software.	Communications	Jo Fellows, HR Manager

3.2 Service development / project * (this will be monitored in SPAR)	Expected outcome	Resources required

Worksmart	Alignment with Council strategies and Worksmart supported by appropriate policies, practices, resources and assets.	Worksmart Review Working Group (already established with representatives from HR, Finance, Communications, Strata, Climate Change, Estates, Health & Safety)
Link to Council Plan priorities	Greener East Devon	
Milestones	**Due date**	**Lead officer**
1. Survey and audit analysis and reporting of key findings and proposed next steps to SMT+ and working group, with findings fed into working group action plan. Update to Personnel Committee.	January/February 2023	Jo Fellows, HR Manager
2. Actions progressed	Spring/Summer 2023	
3. Evaluation of first year of Worksmart, which then informs subsequent actions	Summer 2023	

3.2 Service development / project * (this will be monitored in SPAR)	**Expected outcome**	**Resources required**

Grow our own	Clear career pathways Growth in use of apprenticeships, T levels and work experience linked to pathways Increased school/college engagement as a talent pool All the above leads to recruitment and retention improvements	HR Service areas (opportunities identified through 22/23 workforce planning exercise)
Link to Council Plan priorities	Resilient economy	

Milestones	**Due date**	**Lead officer**
1. Finalise East Devon secondary school careers programme support offer for 22/23 academic year	January 2023	Jo Fellows, HR Manager
2. Detailed project scoping informed by service area workforce planning outcomes	March 2023	Jo Fellows, HR Manager

3.2 Service development / project * (this will be monitored in SPAR)	**Expected outcome**	**Resources required**
Leadership and management development	Clear management career pathway aligned with development opportunities Potential to utilise apprenticeship levy and therefore service budgetary savings Supports recruitment, retention and management capability	HR Service areas (opportunities identified through 22/23 workforce planning exercise)
Link to Council Plan priorities		

Milestones	Due date	Lead officer
1. Detailed project scoping informed by service area workforce planning outcomes	May 2023	Jo Fellows, HR Manager

3.3 Service measure/indicator	How often – monthly, quarterly, bi-annually, annually	For whom? Cabinet, Overview and Scrutiny	Responsible Officer for production of management information	Retain this measure (yes/no) or new
Key people data eg headcount, absence, vacancies, turnover etc	Every Personnel Ctte (approx. every other month)	SMT+ and Personnel Ctte	Jo Fellows, HR Manager	Yes
Annual people data report on a range of workforce issues such as workforce composition, learning and development etc	Annually (summer)			Yes

The above people data reporting was agreed by Personnel Committee on 30th November 2021

Section 4 – Workforce Planning key findings and actions (see appendix for detailed Workforce Plan)

Major demands impacting on the workforce have been identified as:	Continued high demand for HR advice and support as a result of recruitment and retention issues, staff wellbeing concerns (including cost of living and workload anxieties and higher than usual absence rates) and the need to ensure high performance.
	Continued high demand for HR to deliver proactive measures to support the workforce such as the Reward Review, 'grow our own', recruitment approach, Worksmart etc.

	Need to support the Council's Climate Change Strategy through Worksmart, particularly Green Travel Plan.
	Potential future legislative changes to be reflected in HR/payroll policy and practice.
	Need to continue to develop workforce knowledge and skills as identified through workforce planning.
	Ability of managers to effectively address workforce issues – is there a need to increase management accountability alongside developing capability?
Major issues impacting on workforce supply have been identified as:	Age profile of team requires a robust succession planning approach.
	High level of knowledge and expertise across the team, but concerns about whether we share that sufficiently between team members.
	Small team which limits ability for robust contingency arrangements (e.g. payroll) and ability to resource all of the Council's workforce priorities alongside business as usual (even despite an increase in team members this year).
	Worksmart arrangements within the team appear to be working effectively but we need to continue to keep this under review to ensure all team members feel supported and part of the team.
Priority workforce actions that have been agreed by the Service Management Team in liaison with their HR Business Partner are:	Succession plan for HR and Payroll.
	Build learning opportunities into our team meetings and via Teams site, so that we share our knowledge and skills.
	Keep Worksmart Team Agreement under review.
	Use leadership and management development project to build management capability and accountability across the Council.

	Continue to monitor progress of service plan priorities alongside business as usual at team meetings and through PERs and 1:1s.
Review	Reviewed at the team meeting once a quarter (alongside the Service Plan review).

Section 5 – Carbon and resource use

5.1 Short term objective	Expected outcome	Resources required
Continue to utilise hybrid working in line with the team's Worksmart Agreement	Reduced commuting and business travel	None
Link to climate plan action plan		
Milestones	**Due date**	**Lead officer**
1. Review Worksmart Team Agreement at next team meeting	December 2022	Jo Fellows, HR Manager
5.2 Long term objective	**Expected outcome**	**Resources required**
Provide HR and Payroll advice and support to the development of the Council's Green Travel Plan, linked to Worksmart (milestones as per Worksmart project timeline at section 3 above)	Reduced commuting and business travel	Worksmart Review Working Group
Include review of face to face interviews in the recruitment approach review (section 2 above)	Reduced commuting and business travel	HR

Section 6 – Risks

New/emerging risks consider with your team any new and emerging risks to be reported to the Management Information Officer.

Any current risks that are emerging as high risk should also be reported to the Management Information Officer.
See current risk register. The ability to progress Service Plan priorities alongside business as usual, particularly operational demands, within existing team capacity remains a challenge and is likely to be a significant risk. The HR Manager will continue to monitor progress through PERs, 1:1s and team meetings and report any delays to SMT+/Personnel Committee as appropriate. Team members and HR Manager to continue to manage expectations and keep managers informed of timelines.

Section 7 – Digital / Data Transformation

Digital and data are essential building blocks of a successful organisation. Digital transformation will enable teams to work in a more streamlined and efficient way, reducing duplicated work and automating manual processes, in support of our service plans. Digital refers to a technology-enabled way of working that uses modern tools, technology and capability. Data refers to digital information about people, things and systems.
Aims: Digital transformation will make accessing and delivering our services to the customer far quicker and simpler. To deliver a better service for our customers we require fast and efficient digital services, high quality data and skilled staff.

7.1 Current and ongoing digital/data projects

Name of project
iTrent learning and development enhancements
Impact on service (low/med/high)
Med – should reduce pressure on HR team to provide reports, as managers and staff will be able to do this themselves
Names of key members of staff/project leaders involved in the project (including Strata and third parties – include organisation name)
Terry Wilson, Ann Woodland, Strata
Project objective/desired outcome/goals - how does this project support the council's digital/financial sustainability strategy?

Managers and employee access to learning and development activity data in iTrent and enable some reporting on PERs completion, as part of people data
Description of project, system/software used, current progress, difficulties and showstoppers currently affecting the project
iTrent
Project start date (if applicable)
Autumn 22
Project end date (if applicable)
December 22

Name of project
iTrent annual leave changes
Impact on service (low/med/high)
High – if not completed we will not be able to implement the agreed annual leave changes that have been approved as part of the Reward Review
Names of key members of staff/project leaders involved in the project (including Strata and third parties – include organisation name)
Terry Wilson, Strata
Project objective/desired outcome/goals - how does this project support the council's digital/financial sustainability strategy?
To reflect the annual leave changes in iTrent
Description of project, system/software used, current progress, difficulties and showstoppers currently affecting the project
iTrent
Project start date (if applicable)

November 22

Project end date (if applicable)
December 22

7.2 Potential future digital/data transformation projects
Proposed name of project
HR Management System (HRMS) soft market testing (working with Strata, Teignbridge and Exeter)
Impact on service (low/med/high)
High – a change in system will require significant resource
Impact on council (low/med/high)
High – a change in system will impact on all staff
Key member/s of staff that you can commit to the project (EDDC only)
Jo Fellows, HR Manager; Terry Wilson, Senior Payroll Officer; Plus other team members will be involved in seeing the demos from suppliers
Project objective/desired outcome/goals - how does this project support the council's digital/financial sustainability strategy?
Benchmark against current iTrent system and inform decision about whether to re-procure
Description of project, system/software used, transformational action/training needed for project to succeed
Soft testing of HRMS market to understand more about other supplier system capabilities, which would then inform future decisions about whether or not to undertake a full procurement exercise. This soft testing has already been agreed with Andrew Woodhouse, David Sercombe (Strata), Baan Al-Khafaji (Exeter City HR) and Tim Slater (Teignbridge HR). Ideally we would also like to work with Strata, Teignbridge and Exeter to explore opportunities to review and potentially share e-learning systems as well, but this is outside the current scope.

Is your service currently able to commit a staff resource to this project? - please specify details
Limited capacity to support this. The team would be involved in the demos. Any future decisions about re-procurement or implementation of a new HRMS supplier would have significant resource implications for the HR and Payroll Team and would need to be considered as part of the decision making.

Proposed name of project
People data reporting improvements
Impact on service (low/med/high)
High – is likely to require resource allocation from within the HR team
Impact on council (low/med/high)
Medium – ability to provide more automated and real time information to managers and members
Key member/s of staff that you can commit to the project (EDDC only)
TBC once scope and timing of the work is discussed further. It is likely to require input from the Senior Payroll Officer, Payroll Officer and HR Officer
Project objective/desired outcome/goals - how does this project support the council's digital/financial sustainability strategy?
Greater automation of people data reporting enabling real time updating of reports and the ability to report on a greater number of workforce factors.
Description of project, system/software used, transformational action/training needed for project to succeed
To utilise PowerBI and data analyst expertise to support improvements to the current people data reporting. This is likely to include the need for PowerBI training for relevant HR staff
Is your service currently able to commit a staff resource to this project? - please specify details

TBC once scope and timing of the work is discussed further. It is likely to require input from the Senior Payroll Officer, Payroll Officer and HR Officer

Proposed name of project	
Metacompliance reintroduction	
Impact on service (low/med/high)	
tbc	
Impact on council (low/med/high)	
Medium	
Key member/s of staff that you can commit to the project (EDDC only)	
TBC once scope and timing of the work is discussed further.	
Project objective/desired outcome/goals - how does this project support the council's digital/financial sustainability strategy?	
Supports data security and compliance with mandatory training and organisation policy	
Description of project, system/software used, transformational action/training needed for project to succeed	
MetaCompliance	
Is your service currently able to commit a staff resource to this project? - please specify details	
TBC once scope and timing of the work is discussed further	

Proposed name of project
Staff surveys
Impact on service (low/med/high)
Tbc
Impact on council (low/med/high)
tbc
Key member/s of staff that you can commit to the project (EDDC only)
TBC once scope and timing of the work is discussed further
Project objective/desired outcome/goals - how does this project support the council's digital/financial sustainability strategy?
Improved ability to undertake and analyse staff surveys
Description of project, system/software used, transformational action/training needed for project to succeed
Commonplace
Is your service currently able to commit a staff resource to this project? - please specify details
TBC once scope and timing of the work is discussed further

Proposed name of project
Review of document storage arrangements
Impact on service (low/med/high)
High – is likely to require resource allocation from within the HR team
Impact on council (low/med/high)
Medium
Key member/s of staff that you can commit to the project (EDDC only)
TBC once scope and timing of the work is discussed further
Project objective/desired outcome/goals - how does this project support the council's digital/financial sustainability strategy?
HR currently use Civica to store personnel files but with the introduction of Teams and the potential to use iTrent capability there is a question about whether we should revise our approach to improve effectiveness. We feel this needs a corporate approach rather than HR making this decision independently.
Description of project, system/software used, transformational action/training needed for project to succeed
Civica, MS Teams/Sharepoint, iTrent
Is your service currently able to commit a staff resource to this project? - please specify details
TBC once scope, timing and agreement of the work is discussed further

Proposed name of project	
iTrent recruitment module improvements	
Impact on service (low/med/high)	
High – will require resource allocation from within the HR team	
Impact on council (low/med/high)	
High – impacting on all appointing managers and candidates/new recruits	
Key member/s of staff that you can commit to the project (EDDC only)	
TBC once scope, timing and agreement of the work is discussed further	
Project objective/desired outcome/goals - how does this project support the council's digital/financial sustainability strategy?	
There are opportunities to improve the iTrent recruitment module to enable greater self-service by appointing managers and candidates (eg booking interview slots, etc), which could release some HR team capacity. However this requires further exploration (which we would like to do as part of the recruitment approach review outlined at section 2).	
Description of project, system/software used, transformational action/training needed for project to succeed	
iTrent	
Is your service currently able to commit a staff resource to this project? - please specify details	
TBC once scope, timing and agreement of the work is discussed further	