

## **PROJECT INITIATION DOCUMENT (PID)**

### **Driving Change and Building Business Cases - Investigating a Business Issue from a HR Perspective**

**Students Name: Daniel Owen**

#### **INSTRUCTIONS:**

Give as much justification as possible for every question asked. This means, you must not limit yourself to just stating WHAT you believe is an appropriate response, but WHY.

ALWAYS provide an outline of the financial and cost imperatives associated with your report tasks. Imagine you must be able to SELL your project idea.

Put effort into the PID and you will benefit from this when it comes to undertaking the research. Use your skills as a "Thinking Performer" and take the "Business Partner" approach.

PID submission date detailed on the IBI Activity Schedule

|                                                                                                                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|----------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. Name                                                                                                        | Daniel Owen                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| 2. Organisation name:                                                                                          | Hywel Dda Health Board                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| 3. Type of business:<br>Nature of business and customer profile:                                               | National Health Service<br>Bank and E-Roster team supporting temporary staffing within the health board and rostering over 5000+ staff                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| 4. Number employed by organisation:                                                                            | 13000+                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| 5. Number employed within human resources (HR) department (if applicable):                                     | 101                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| 6. List the main HR functions that are undertaken by your organisation:                                        | Human Resource<br>Organisational Development<br>Resourcing and Utilisation – My Team Base<br>Workforce Planning<br>Learning and Development<br>Occupational Health                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| 7. Your job title:                                                                                             | Senior Workforce Manager: Bank & E-Roster                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| 8. How long have you been in this job?                                                                         | 3 years                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| 9. Outline main purpose of your job:                                                                           | Responsible for delivering a cost effective, safe and quality temporary staffing and E-Rostering service to the Health Board, and for implementing Temporary staffing and rostering initiatives, as required by the Health Board in making continuous improvement to the quality and cost of the services offered.<br>The post holder will lead on the day to day operational management of the Nurse Bank, overseeing the process for the procurement and placement of temporary staff across the organisation. They will also be responsible for the recruitment, performance management and development of temporary staff in the Health Board. |
| 10. List the HR responsibilities within your job:                                                              | Line Management of Bank and E-Roster Team<br>Line Management of all bank staff 1500+<br>Lead for Temporary staffing<br>Lead for Workforce Rostering Systems<br>All Wales Chair for workforce E-Rostering                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| 11. Who is the person mainly supporting your report (Sponsor)? State their job title and their relationship to | Name: Michelle James<br><br>Job title: Head of Digital                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |

|      |                                   |
|------|-----------------------------------|
| you: | Relationship to you: Line Manager |
|------|-----------------------------------|

12. Aim of report:

In no more than twenty words, state the overall aim of the report. Here you need to compile a sentence that communicates clearly what you intend the report idea to achieve.

Aim: The aim is to understand the impact and effect of Hybrid working within my teams, this will feed back into our senior strategic group for best practice.

**TOP TIP: KEEP IT SPECIFIC. IMAGINE YOU ARE A SELF-EMPLOYED CONSULTANT DETERMINING THE PARAMETERS OF YOUR report FOR WHICH YOU WILL GET PAID. A CLEARLY STATED AIM HELPS TO ACHIEVE PARAMETERS AND SERVES TO ESTABLISH THE BASIC DESIRED OUTCOME OF THE report. ONLY WHEN WE DELIVER ON THE AIM, SHOULD WE EXPECT TO GET PAID BY OUR PAYMASTER.**

13. Objectives of report:

List four objectives that are each directly related to the report aim. Here you must ensure the objectives are SMART (specific, measurable, achievable, realistic, time bound). Essentially, objectives are steps you need to take to achieve the report aim. Each objective must begin with a verb that states clearly how the objective is to be undertaken.

Objectives:

1 – Engage with the team to understand what Hybrid working means to them

2 – Understand the requirements of Hybrid working (Legislation, Governance)

3 – Create a support framework for Hybrid working staff

4 - To make recommendations on how Hybrid working can be implemented within Hywel Dda.

**TOP TIP: KEEP OBJECTIVES SIMPLE AND ADHERE TO SMART PRINCIPLES. THE OBJECTIVES ARE THE STEPS YOU WILL TAKE TO DELIVER ON THE AIM OF YOUR report. AGAIN, THESE ARE MEASURABLE PARAMETERS AND SERVE TO DEMONSTRATE A LOGICAL AND EASILY UNDERSTANDABLE APPROACH TO SUCCESSFULLY COMPLETING THE report. OBJECTIVES ARE ALWAYS AGREED AND “SIGNED OFF” BY YOUR PAYMASTER SO THAT BOTH PARTIES KNOW WHAT IS BEING CARRIED OUT AND IN THE END, PAID FOR.**

14. Give an outline of the sorts of tasks and questions you want to undertake and ask that will allow you to deliver on your objectives and ultimately achieve your aim.

Questions relevant to objective one: What does Hybrid working mean to my team

Tasks relevant to objective one: Undertake a survey to understand the needs and wants of my team in relation to Hybrid working

Questions relevant to objective two: What Legislation and Governance is needed to ensure safe Hybrid working

Tasks relevant to objective two: Research Hybrid working mythology's – Research Health and Safety requirements of working from home and lone working

Questions relevant to objective three: Understand the supporting framework needed for Hybrid working

Tasks relevant to objective three: Create a clear support mechanism for staff working from home

Questions relevant to objective four: Recommend best practice for Hybrid working

Tasks relevant to objective four: Provide my findings within the presentation and poster to the senior management team.

**TOP TIP! THE MORE TIME YOU TAKE EARLY ON IN YOUR REPORT TO WORK OUT WHAT YOU ARE GOING TO ASK AND WHAT YOU HAVE TO DO, THE MORE TIME YOU WILL SAVE LATER ON.**

15. What is the business case for considering undertaking the report? Here you need to justify how achieving the report aim will advantage and benefit the business and its stakeholders. For example, savings, gaining intelligence of competitors, promoting innovation, and return on investment.

I have been tasked with moving to a Hybrid working solution, this is to reduce estate reliance on Admin and Clerical staff within the health board to improve services for clinical teams.

A change of base will be taking place by the end of 2022, due to this a smaller footprint will be provided for my teams.

The initial outlay of costs for a new building will be saved in long term by the reuse of our current accommodation by clinical teams, this is line with our Healthier Midd and West wales plan ([Healthier mid and west Wales - Hywel Dda University Health Board \(nhs.wales\)](#)) The strategic goal is to move Unscheduled Care and Scheduled care to one site, supporting the rest of the health board through an improved community support network.

The re-use of our current building will be part of this improvement moving community physio/ diabetes and other services closer to the population of the health board. This along with joining other HR function into a single base will provide better working practices.

An initial investment of hardware is needed for staff to work from home, over the long term this investment will be repaid with staff not using additional electric and fuel within the current sites.

This plan has been sighted by Exec director level and has been signed off, the next stage is now for my team to implement this.

16. Identify the risks associated with the report and how these could be overcome.

Risk 1 – Staff engagement – Mitigation understand the needs and wants of the team in relation to Hybrid working

Risk 2 – Costings – Mitigation – workforce plan to understand the costings needed for my team to undertake Hybrid working

Risk 3 – Home Working/Lone Worker – Create a framework to support staff working from home

Risk 4 – Technology – Mitigation – Understand the impact of technology's (Digital and Mobile) to ensure best practice and business continuity

Risk 5 – Data Governance – Mitigation – Understand the best practices available to manage highly confidential information at home

Risk 6 – Workload management – Mitigation – Understand how to best manage team workloads when working from home

17. List the resources you will need to make your report a success. State why such resources are needed. These may include, people, time, cash, technology, data. Identify any constraints that you may encounter and explain how you would overcome these.

Service Support Desk IT – Procurement of laptops/monitors and IT systems to support

Procurement – Sourcing of Desks and Chairs

Staff - Engagement with staff throughout the process

Time – 1hr a week for update meetings/ 1hr a week team meetings

Finance – Link in to understand the requirements and ensure no overspend

Workforce Team – Understanding and support to mitigate risks of Hybrid working

18. State what method you intend to use to collect your primary data. For example, questionnaire, interviews, telephone surveys, focus groups etc. Outline why a particular research method was chosen over alternatives.

The information was passed to the teams via a team meeting to notify them of the upcoming changes.

I have decided to undertake a survey from staff to get a better understanding of their wants and needs in relation to Hybrid working.

This allows staff to submit the information anonymously this is to allow staff to give open and honest feedback on the plans and hybrid working, it also give them the ability to tell their story as to what Hybrid working means to them.

19. State HOW you plan to collect primary data and justify the appropriateness of your chosen research method. Consider whether or not you will be given or denied access to personnel and why.

Survey monkey will be used to collect the information, trends will be noted and fed back to the team to discuss appropriate solutions. This is to provide openness and provide a solutions orientated and engaged team.

20. State from WHOM you plan to collect primary data and detail any challenges you anticipate. Outline how you plan to approach people to take part in your research and why you have chosen such individuals. State why individuals may agree to take part in your report or indeed, refuse.

I will be collecting the data from my teams, this will be discussed in team meetings and 1-2-1's to encourage feedback. I will plan some protected time for staff to try and improve engagement of the survey to get the best data possible.

There is a possibility that some staff might chose to not engage in the report, they will be allowed to do this if they chose, if they chose not to their needs and wants might be missed so I will also allow staff to provide this feedback in 1-2-1's or team meetings if they wish.

21. State from where you plan to collect secondary data. This means providing an early list of alphabetised websites and a bibliography that details (using Harvard method) the books, journals, research and magazines that you intend to use.

Website addresses:

**Approximately 10**

[Hybrid Work Solutions for a Hybrid Workplace | Microsoft Flexibility](#)

[Hybrid working in 2022: An ultimate guide for HR leaders - Sage Advice United Kingdom](#)

[Writing a hybrid working policy: a guide for HR - Personnel Today](#)

[Planning for hybrid working | CIPD](#)

[Flexible Working Toolkit for HR professionals \(cipd.co.uk\)](#)

[Developing effective virtual teams | CIPD](#)

[Making Virtual Teams Work: Ten Basic Principles \(hbr.org\)](#)

[Working in a Virtual Team - Career Development From MindTools.com](#)

Books (on topic area and associated subjects):

**Approximately 10**

Hughes, M. and Hughes, M. (2010) *Managing change : a critical perspective*. 2nd ed. London: Chartered Institute of Personnel and Development.

McCalman, J., Paton, R. and Siebert, S. (2016) *Change management : a guide to effective implementation*. Fourth edition. London: SAGE.

Cameron, E. and Green, M. (2020) *Making sense of change management : a complete guide to the models, tools and techniques of organizational change*. Fifth edition. London ;: Kogan Page.

Zozzaro, P. (2021) 'How to Thrive in the Virtual Workplace: Simple and Effective Tips for Successful, Productive, and Empowered Remote Work', *Booklist*. Chicago: American Library Association

Jacobs, B. (2021) 'Remote Work Revolution: Succeeding from Anywhere.(Book review)', *Booklist*. Chicago: American Library Association

Stredwick, J., Ellis, S. and Stredwick, J. (2005) *Flexible working*. 2nd ed. London: Chartered Institute of Personnel and Development.

*Work well from home : how to run a successful home office*. 1st ed. (2005). London, [England: Bloomsbury.

Books (on research methodology):

**Approximately 3**

Clardy, A.B. (1997) *Studying your workforce applied research methods and tools for the training and development practitioner*. Thousand Oaks, Calif. ;: SAGE.

Creswell, J.W. and Creswell, J.D. (2018) *Research design: qualitative, quantitative and mixed methods approaches*. 5th edition. Los Angeles: SAGE.

Anderson, V. (2013) *Research methods in human resource management*. 3rd edition. London: Chartered Institute of Personnel and Development.

Peer reviewed research papers:  
**Approximately 10**

Alipour, J.-V., Fadinger, H. and Schymik, J. (2021) 'My home is my castle – The benefits of working from home during a pandemic crisis', *Journal of public economics*, 196, p. 104373–. doi:10.1016/j.jpubeco.2021.104373.

Bellmann, L. and Hübler, O. (2021) 'Working from home, job satisfaction and work–life balance – robust or heterogeneous links?', *International journal of manpower*, 42(3), pp. 424–441. doi:10.1108/IJM-10-2019-0458.

Williamson, S., Colley, L. and Foley, M. (2022) 'Public servants working from home: Exploring managers' changing allowance decisions in a COVID-19 context', *The economic and labour relations review: ELRR*, 33(1), pp. 37–55. doi:10.1177/10353046211055526.

Appel-Meulenbroek, R. *et al.* (2022) 'How to attract employees back to the office? A stated choice study on hybrid working preferences', *Journal of environmental psychology*, 81. doi:10.1016/j.jenvp.2022.101784.

Alfano, V. (2021) 'Work ethics, stay-at-home measures and COVID-19 diffusion: How is the pandemic affected by the way people perceive work?', *The European journal of health economics*, 23(5), pp. 893–901. doi:10.1007/s10198-021-01402-0.

Empson, L. (2021) 'Researching the Post-Pandemic Professional Service Firm: Challenging our Assumptions', *Journal of management studies*, 58(5), pp. 1383–1388. doi:10.1111/joms.12697.

Gifford, J. (2022) 'Remote working: unprecedented increase and a developing research agenda', *Human resource development international*, 25(2), pp. 105–113. doi:10.1080/13678868.2022.2049108.

22. Design a time plan for the lifetime of the report. Begin by breaking down all tasks that need to be undertaken and assess the duration of time you need to devote to each task. Be sure to show tasks in a logical sequence. Be further sure that you plan well enough to enable you submit your report on the deadline date. Include any meetings that you plan to have with your report supervisor at UWTSD. Be realistic and make your report manageable, account for holidays and other “off-days”.

| <b>Task</b>                       | <b>Date to be completed</b> |
|-----------------------------------|-----------------------------|
| Business Case for Hybrid Working  | May 2022                    |
| Introduce Home Working Test Pilot | June 2022                   |
| Team Meeting                      | 16/05/2022                  |
| Survey Monkey                     | June 2022                   |
| Analysing Data                    | June 2022                   |
| Trend Feedback                    | July 2022                   |
| Team Meeting                      | 18/07/2022                  |
| Delivery of equipment             | End of July 2022            |
| Team support process              | July 2022                   |
| Team Risk Assessments             | July 2022                   |
| Moving to the new building        | August 22                   |
| Hybrid working to be implemented  | August 22                   |
| Monthly review of current process | September 22 onwards        |

23. Make a list of questions here that you wish to ask your supervisor about your report. Such questions could be about: meeting dates and venues; any forthcoming events that you may have interfere with you completing your report; relevant books, journals, websites, research papers; research methodology; etc etc.

Can you confirm the task schedule is suitable for the priority of this work?

Would you like the detail around the survey insights?

Do you foresee any other priorities that might impact this work?

Do you have any questions about the trends?

When would you like me to present this report?

Is there any other research you would like me to include?

The risks and mitigations, are there any that have been missed?