



Business Committee of the General Council

Learning the Lessons from People and Money

Suggested Issues for consideration by the University Court and Senior Leadership Team

Following its discussion of the PA Consulting report on the implementation of People and Money, the Business Committee of the General Council suggests the following six clusters of issues for consideration by the University Court and Senior Leadership Team as they continue to reflect on the lessons to be learned for the governance and management of the remaining stages of the project and their implications for other strategic change programmes already in train or in prospect. The list is based not only on the Committee's discussion of the PA report but on insights gained through the work of the Business Committee's Standing Committees in their various meetings with staff and students of the University.

We recognize that many if not all the issues we list will have already been identified by Court and/or the Senior Leadership Team. Nonetheless we hope it is helpful to single them out as a contribution to ongoing work. In putting them forward, the Business Committee wishes to emphasise that its intention is constructive; its focus is on the future, rather than the past; and that, while fully recognizing that the General Council is not part of the executive leadership of the University, it and other members of the General Council wish only to help ensure the successful completion of People and Money and other change projects of importance to the University.

Our observations reflect the General Council's statutory responsibility, as part of the governance of Edinburgh University, to take into consideration "all questions affecting the wellbeing and prosperity of the University, and to make representations from time to time on such questions to the University Court, who shall consider the same and return to the Council their deliverance thereon." (Section 6 of the Universities (Scotland) Act 1858.) We look forward to receiving the considered response of Court to the issues we highlight below.

- 1) **Governance by Court** - the PA Consulting report stresses several times that Court and its sub-committees were "involved in all key budgetary and programme approvals/decisions throughout the People and Money Programme, albeit at a level removed from the detail behind these decisions." Whilst it is clear from the report that there were deficiencies below the level of Court in project governance and decision making, it would be helpful in trying to rebuild staff and external stakeholder trust and confidence to know:

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- a. whether Court will be issuing its own response to the PA Report?
 - b. how will the lessons learned from experience to date be implemented in relation to Court's oversight of the "substantial outstanding and ongoing work" the PA Consulting report says still needs to be done to make People and Money deliver the benefits that were expected of it?
 - c. how will the lessons learned from People and Money affect the way Court exercises oversight of other major change management programmes, either already underway or in prospect?
- 2) **Rebuilding Confidence and Trust** - the extent of distrust and the adverse human impact of the flawed implementation of People and Money confirmed by the PA Consulting report is a major challenge to the collective leadership of the University - Court, Senate, the Senior Leadership Team (led by the Principal), and General Council. Sustained efforts by all parties will be needed if this challenge is to be overcome successfully. We welcome the steps already announced by the Principal and Senior Leadership Team to foster greater visibility and transparency and look forward to seeing positive impact from those actions.

We hope that Court will also espouse and contribute to promoting this effort. The Business Committee is fortunate to have three fully engaged Assessors on the Court and we are most grateful for their oral reports to each Business Committee, although their reports are restricted to open items only, whereas reports to Court on People and Money and other major change projects have been closed agenda items.

While we understand that some matters must remain confidential, we do not believe the high level of confidentiality surrounding many reports presented to Court and the long delays which have been experienced before the minutes or papers appear on the University website are conducive to rebuilding trust and confidence.

This leads us to ask if Court will require and monitor the impact of a full programme of regular engagement at all levels and publish regular feedback on progress in rebuilding confidence and trust throughout the University?

- 3) **Further work required to make People and Money fit for purpose** – We note that the PA report does not address the key issue of whether the Oracle system used for People and Money was suitable for a highly devolved institution like Edinburgh University. The Report says there have been other reviews and feedback exercises during the project which have been provided to Court. Did these address this issue of suitability?

Given the present situation and the insights that the PA Consulting Report has provided, does Court itself intend to seek further external independent advice to assist its ongoing governance of the remaining stages of the People and Money project?

Regarding the next phase of work on People and Money, we look forward to seeing the roadmap referred to in the PA report and which the Senior Leadership Team in its

response said would be available in February. Relevant to the development of this, we hope this will clarify:

- a. What the scope and the strategy for the next phase of work will be. (For example, will the primary focus continue to be on system implementation or will the focus revert to the original aim of organisational transformation?)
- b. Based on the outcome of a) above, what further modifications or systems changes still need to be made?
- c. How long will these take? Clear timescales and outputs by which to chart the progress being made will greatly help to restore confidence.
- d. How much additional expenditure is likely to be involved before the system will fully deliver what is required of it?
- e. The PA Report recommends undertaking the next phase with a suitably qualified external partner. We note the reference to an 'external adviser' in the Senior Leadership Team's response to the report and would welcome clarification of who this is and the extent of their role.

- 4) **Strategy and Planning** – Looking ahead, how does Court now plan to regulate the number of major change projects which are undertaken at any one time and the interaction between them? This is particularly important in a complex and highly diversified organisation like Edinburgh University.

In relation to approved priority projects, the PA Report indicated that the following are crucial to their successful delivery:

- sufficient, realistic resourcing from inception to final delivery.
- careful planning with realistic timetabling of key milestones.
- user-focused communication to ensure understanding and buy-in to projects through emphasis on end-user benefits, not just greater central management control.
- clear mechanisms for staff feedback and constructive comment to be taken into account as the project specification is developed.
- respectful, timely and sufficient training and support for staff prior to, during and post implementation.
- realistic and timely reporting to Court of programme progress, issues and risk management.

What actions is Court taking to ensure that these requirements are met in future?

- 5) **University Initiatives Programme Board.** Like many others, we are keen to know more about how this new Board (referred to in the Senior Leadership Team's response to the PA report) will operate. For example:

- What are its terms of reference?
- Who will determine the membership - will this be purely internal or include independent members? Will the relevant skill sets for managing change and programme implementation be part of the process for determining its membership?
- What will be its reporting arrangements?

- How will Court exercise governance and ensure the Board's transparency?

6) **Communications and Engagement** - we welcome the Senior Leadership Team's recognition in its response to the PA report that the development of an integrated communication and engagement plan as part of a clear road map for the remaining phases of the implementation of People and Money is essential. We are concerned that both internal and external communications should be covered by this engagement plan.

The negative internal and external impact of the implementation of People and Money has generated adverse publicity outside as well as inside the University. The University's external communications can unfortunately often appear defensive and reactive. A proactive stance will be necessary if the damage done to the University's reputation is to be repaired.

General Council alumni in particular are a key part of the University's external stakeholders – almost 10% of the population of Edinburgh, for example, are General Council members. What measures will be taken to inform – including helping the General Council office to inform - General Council members and others of developments, so that they do not rely solely for information on negative stories in the media and social media?

Internally, as the Senior Leadership Team has acknowledged, there needs to be increased emphasis on greater openness, more explanation and more evident listening and responding to feedback. Visibility of, and accessibility to, the University's Senior Leadership will be vital in this process. How does Court intend to monitor the progress of (and, no doubt, the further challenges that) this process of greater engagement will reveal?

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