

LBS Leisure Insourcing – Phased Project Plan

*GANT months edited for purpose of appendices document

*Sep-21 → *June-23

PHASE 1 (Project Set-up and Planning)	Project Set-up and Planning			
PROJECT MANAGEMENT				
Confirm Project Management Team (PMT) and instigate PMT meetings/protocols				
Develop detailed Project Plan (including detailed mobilisation plan)				
Agree budget for implementation of detailed Project Plan				
Recruit required additional staff and other resources				
Allocate responsibilities and brief team members				
PHASE 2a (Mobilisation and Preparation for Transfer)				
ENGAGEMENT WITH EVERYONE ACTIVE				
Engagement with EA Directors / leadership team				
Establishment of joint Council/EA working team				
Establishment of agreed communication, information sharing and site access protocols				
ASSET MANAGEMENT				
Gather detailed plans for all facilities				
Update condition surveys for all facilities				
Review all existing repair and maintenance arrangements (including lifecycle maintenance)				
Gather available asset information (including service records and testing certificates)				
Consider options for repair and maintenance arrangements under in-house management				
Confirm budget, procurement routes and potential lead-in times for repair and maintenance				
Establish action plan for chosen repair and maintenance arrangements				

Implement plan for selected repair and maintenance arrangements				
Review all existing security arrangements (including fire alarms, CCTV, intruder alarms and keyholding)				
Consider relevant security arrangements for Council management and establish implementation plan				
Implement action plan				
STAFFING				
Update staff structure details for contract and all facilities				
Gather available HR information and increase monitoring levels				
Identify recruitment requirements for senior leisure management team				
Draw up job descriptions, person specifications and recruitment plans				
Implement recruitment plans for senior leisure management team				
Consider short term management support arrangements (until recruitment complete)				
Implement short-term management support arrangements (until recruitment complete)				
Gather detailed information of staff entitled to TUPE transfer				
Review information and work with existing contractor to resolve issues arising				
Review evidence of mandatory qualifications for all relevant staff				
Draw up action plan to manage any missing and/or expired qualifications				
Implement qualifications action plan (including delivery of training where required)				
Initial consultation with unions and issue of measures letter				
Consultation with transferring staff				
Undertake comparison of existing contractor and Council key terms and conditions				
Consider potential terms and conditions harmonisation requirements and establish action plan				
Gather and review existing contractor HR policies and procedures				
Confirm HR policies and procedures required under Council management				
Produce initial drafts of HR policies and procedures under Council management				
Finalise HR policies and procedures under Council management				
Deliver priority HR policy training to all staff				
Review current contractor uniform arrangements and consider Council's likely requirements				
Identify budget, procurement route and potential lead-in time for uniform				
Place pre-orders (as and if required)				
Confirm relevant uniform orders				

Delivery and distribution of uniform				
Create prioritised training matrix and training plan for all staff designations (including Council induction)				
Undertake high priority pre-transfer staff training				
Review existing staff rotas				
Draft staff rotas for initial period of Council management				
Confirm staff rotas for initial period of Council management				
Identify staff recruitment needs and implement recruitment plan				
HEALTH AND SAFETY MANAGEMENT				
Gather and review existing contractor health and safety policies and procedures				
Confirm H&S policies and procedures required under Council management				
Produce initial drafts of H&S policies and procedures under Council management				
Finalise H&S policies and procedures under Council management				
Deliver priority H&S policy training to all staff				
Gather evidence of existing statutory inspections				
Consider relevant inspection arrangements for Council management and establish implementation plan				
Implement action plan				
Review all existing contractor risk assessments				
Confirm risk assessments required under Council management				
Draft all required risk assessments				
Implement required training and management actions identified in risk assessments				
ICT				
Review contract terms re data and existing contractor data policies				
Negotiate appropriate changes (as and if necessary)				
Review all existing contractor ICT systems supporting leisure services				
Consider potential ICT system requirements under Council management				
Identify budget, procurement route and potential lead-in time for ICT systems				
Undertake necessary preparatory work and/or liaison with the existing contractor				
Draw up action plan for implementation of Council ICT systems				
Implement action plan				
Go live of ICT systems				

Update ICT hardware and software inventories for all facilities				
Identify potential shortfall of ICT hardware and software if existing contractor-owned equipment is removed				
Identify budget, procurement route and potential lead-in time for shortfall ICT hardware and software				
Place pre-orders (as and if required)				
Confirm relevant equipment orders				
Delivery and installation of relevant equipment				
CUSTOMER ENGAGEMENT				
Gather details of existing user groups, key users and relevant stakeholders				
Draw up customer communication plan for pre-service commencement				
Implement customer communication plan				
Review existing customer engagement and customer relationship processes				
Draw up implementation plan for required customer engagement and customer relationship processes				
Implement action plan				
SALES AND MARKETING				
Gather information on all existing membership and pricing structures				
Gather information on membership and usage terms and conditions				
Consider any alternative membership and pricing structures under Council management				
Establish action plan for implementation of Council membership and pricing structures				
Implement action plan				
Consider intended approach to branding under Council management				
Establish action plan for implementation of Council branding				
Undertake necessary preparatory work				
Implement action plan				
Install Council branding across the facilities				
Review existing marketing collateral and consider requirements under Council management				
Produce marketing collateral				
Install marketing collateral across the facilities				
Review existing social media arrangements				
Consider social media requirements under Council management and establish action plan				
Undertake necessary preparatory work				

Implement action plan				
Go live on new social media accounts				
Review existing website arrangements				
Consider website requirements under Council management and establish action plan				
Undertake necessary preparatory work				
Implement action plan				
Go live on new website(s)				
OPERATIONS				
Gather and review existing contractor NOPs and EAPs				
Gather and review existing contractor operational procedures				
Confirm operational procedures required under Council management				
Produce initial drafts of operational procedures under Council management				
Finalise operational procedures under Council management				
Deliver priority operational procedure training to all staff				
Implement operational policies and procedures				
Confirm all existing licence arrangements at the facilities				
Consider licence requirements under Council management and establish action plan				
Implement action plan				
Gather details of all existing suppliers at the facilities				
Consider likely requirements under Council management and establish action plan				
Identify budget, procurement route and potential lead-in time for required suppliers				
Undertake necessary preparatory arrangements				
Implement action plan				
FINANCIAL MANAGEMENT				
Gather available financial information and increase monitoring levels				
Establish ongoing monitoring of balance of debt between existing contractor and Council				
Commence financial negotiation with existing contractor				
Complete financial negotiation with existing contractor				
Create draft budget for implementation plan				
Monitor management of implementation plan budget				

Create budget projections for post-handover period				
Brief relevant senior managers of leisure service				
Establish financial performance monitoring systems				
Implement financial performance monitoring systems				
Review existing sales and purchase ledger arrangements				
Consider and confirm sales and purchase ledger arrangements under Council management				
Prepare sales and purchase ledger arrangements				
Implement sales and purchase ledger arrangements				
Gather information regarding all existing direct debit collection arrangements				
Undertake any necessary early discussions with existing contractor				
Agree terms of bulk DD transfer with existing contractor				
Implement bulk DD transfer				
Establish cash collection and cash handling arrangements (as and if necessary) for the facilities				
Implement cash collection and cash handling arrangements				
Consider existing payroll arrangements and likely requirements under Council management				
Draw up action plan for establishment of Council payroll arrangements				
Implement payroll action plan				
Review all existing insurance arrangements				
Determine likely needs under Council management and draw up implementation plan				
Implement insurance action plan				
Ensure relevant insurance policies on display in the facilities				
Gather and review existing contractor finance policies and procedures				
Confirm finance policies and procedures required under Council management				
Produce initial drafts of finance policies and procedures under Council management				
Finalise finance policies and procedures under Council management				
Deliver priority finance policy training to all staff				
Implement finance policies and procedures				
PHASE 2b (Strategic Outcomes Planning)				
SOPG Step 1: Outcomes				
Review all existing strategy and policy documents (Council and other key stakeholders)				

Initial consultation/workshop with key Council personnel				
Gather and review existing research re community needs and priorities, including consultation feedback				
Development of matrix of local strategic outcomes vs SPA contributions				
Mapping of key SPA contributions to each local strategic outcome				
Workshop with client team				
SOPG Step 2: Insight				
Review existing research and information				
Consider additional research/consultation requirements and establish action plan				
Implement action plan				
Summarise gathered information and confirm current status / needs analysis				
Develop long-list of priority areas				
Workshop with client team				
SOPG Step 3: Interventions				
Analysis of site options				
Latent demand modelling				
FPM modelling (if required)				
Finalisation of facility mix options				
Design work				
Capital cost estimates				
Business planning				
Financial modelling				
Development of business cases				
Analysis of service development options				
Options analysis				
Development of recommendations for way forward				
SOPG Step 3: Commitment				
Presentation of recommendations to senior officers and members				
Confirmation of agreed strategic outcomes and next steps				
PHASE 3 (Service Activation and Bedding-In)				

ASSET MANAGEMENT				
Implement repair and maintenance arrangements				
Implement security arrangements				
Undertake mid-year asset management audit/review				
STAFFING				
Implement terms and conditions harmonisation action plan				
Implement HR policies and procedures				
Undertake high priority post-transfer staff training				
Undertake additional post-transfer training				
Implement concerted staff communications and engagement plan				
HEALTH AND SAFETY MANAGEMENT				
Implement H&S policies and procedures				
Implement required training and management actions identified in risk assessments				
Prepare and implement review of risk assessments				
Undertake mid-year health and safety management audit/review				
ICT				
Implement all relevant ICT systems				
Implement mid-year ICT review				
CUSTOMER ENGAGEMENT				
Implement customer engagement and relations policies, procedures and systems				
Implement mid-year customer engagement review				
SALES AND MARKETING				
Implement all sales and marketing action policies, procedures and systems				
Implement mid-year sales and marketing review				
OPERATIONS				
Implement all operational policies, procedures and systems				
Implement mid-year sales and marketing review				
FINANCIAL MANAGEMENT				
Implement all financial management policies, procedures and systems				
Implement mid-year financial management review				

PHASE 4 (Service Development and Enhancement)				
SERVICE DEVELOPMENT AND ENHANCEMENT				
Review findings of SOPG work (Phase 2b)				
Review other opportunities for service development and enhancement				
Draw up prioritised action plan for service development and enhancement				
Implement action plan				
PHASE 5 (Service Evaluation)				
SERVICE EVALUATION				
Undertake formal evaluation of inhouse leisure service				
Present findings to senior members/officers				