

Business Process Improvement Charter

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Our commitment to Business Process Improvement

Our workplace culture has been fostered to integrate innovation with an emphasis on collaboration and recognition of the integral contribution by every staff member in delivering excellence in Financial and Business Services (FaBS).

The FaBS Business Process Improvement (BPI) team's primary function is to support and manage improvement projects on behalf of FaBS.

The BPI team will report directly to the Director, Financial and Business Services. The BPI team's activities are guided by a committee with broad representation from all levels, positions and locations within FaBS. The committee is known as the PIT Crew.

The purpose of the PIT crew is to:

- Review ideas/issues listed on the BPI Register.
- Discuss new submissions received.
- Exercise all authority in relation to project initiation, approval, implementation and closure.
- Prioritise ideas/issues for action.
- Identify the person or team responsible to resolve the issue or implement the idea.
- Discuss logical and best practice solutions to respond to the issue that was identified.
- Oversee and implement the recommended improvement ensuring an appropriate level of portfolio governance.
- Actively involve all FaBS team members in the performance improvement process.
- Assist with the communication of FaBS Performance Improvement activities, outcomes and achievements.
- Build project management capability and professionalism amongst FaBS staff and assist FaBS to improve the way it undertakes projects.

Roles and Responsibilities

The PIT Crew comprises of four roles: BPI Executive, BPI Chair, BPI team and Rotational PIT Crew Members.

The current staff configuration of the BPI structure can be found in Appendix A.

BPI Executive

The specific responsibilities of the PI Executive are to:

- Provides Senior Level Direction.
- Resolve cross-divisional issues and project "Red Flags".
- Has the final say to approve project initiation, approve scope variations, cancel a project, and complete a project.
- Provide view of strategic alignment of projects within the portfolio.
- Prioritise Resource Allocation.
- Appoint and conclude Rotational Committee Members
- Appoint Project Managers

BPI Chair

The specific responsibilities of the PI chair are to:

- Maintain and monitor a central repository of a change submissions within a Performance Improvement Register
- Maintain a repository of key project documentation templates.
- Organising and chairing the PIT Crew meetings.
- Act in the Project Support role to assist project managers in the day-to-day management of their assigned projects.

- Assist the BPI Executive in appointing Project Managers to specific BPI projects.
- Actively participate in the PIT Crew meetings to initiate, prioritise, complete and cancel projects.
- Provide feedback to the change initiator when requests are completed or cancelled
- Actively participate in the PIT Crew meetings to initiate, prioritise, complete and cancel projects.
- To be the source of expert level of knowledge of their business area
- To lead projects strongly related to the subject matter area as the Project Manager.

BPI Team

BPI Team members are staff with Project Management and System Development Skills which are permanently appointed to the PIT Crew.

The specific responsibilities of the BPI Team members are:

- Actively participate in the BPI Crew meetings to initiate, prioritise, complete and cancel projects.
- Provide Insight to the committee as to the practicality and feasibility from a project management and system implication perspective.
- To lead projects with large aspects of system development as the Project Manager.

Rotational BPI Crew Members

Rotational BPI Crew members are subject matter experts who are temporarily appointed to the PIT Crew due to their knowledge and experience in current and upcoming projects.

The specific responsibilities of the Rotational PIT Crew members are:

BPI Register

All FaBS team members to be educated and empowered to submit ideas/issues for inclusion on the Performance Improvement Register.

All submissions will be discussed at the PIT Crew Meetings and managed to be strategically aligned with the JCU Operational Plan.

Submissions will be categorised as a project, Initiative or business as usual activity based on the framework listed in Appendix B.

The framework criteria can be hard to quantify and so professional judgment will be applied as to whether it should run as a project, initiative or business as usual activity.

Projects

All submissions classified as projects will be assigned a project manager who will be required to follow a light touch PRINCE2 project methodology.

The light-touch approach is adopted to ensure greater efficiency in project management while still maintaining a consistent and effective project methodology for all PI Projects.

Initiatives

All submissions classified as an initiative will not be required to follow PRINCE2 project methodology.

However, initiatives will be consistent with the principles of PRINCE2 in that they will:

- Be justified and remain so throughout its delivery;
- Make use of lessons learned from previous experience and add learning to JCU once completed;
- Be organized simply, with clear roles and responsibilities;
- Focus on the deliverables and achieve the level of quality expected.

Business as Usual Tasks

Submissions that do not meet either the Project of Initiatives conditions are business as usual activities.

These activities are Process Owner (e.g. Finance Manager/Team Leader) responsibilities. Process owners are responsible for tracking the impacts of change, communicating the change to the relevant teams and measuring the realization of benefits.

Project Managers

The specific responsibilities of Project Managers are:

- Ensuring that a project meets its objectives and delivers the projected benefits.
- Ensuring that the project maintains its business focus and that the risks and issues are actively managed and escalated when required.
- Prepare relevant project documentation in accordance with PRINCE2 project methodology.
- Coordinate periodic project meetings with the project team
- Present Project Progress at PI Crew meetings.

Project Prioritisation Matrix

The prioritization of projects is a key task for any organization as it is not possible to fund and resource all projects to be undertaken simultaneously.

BPI Projects will follow a prioritisation process that objectively and continuously evaluates projects based on the business impact and the ease of implementation.

All Projects will be ranked from 1 to 100 with 100 being the highest based on Impact, ease of implementation and Strategic Alignment. The detailed prioritization scoring criteria is listed in appendix C.

Project Lifecycle and Phases

PI Projects apply a minimalist documentation PRINCE2 methodology to all of its projects. The lifecycle provides a guide for projects to progress through the decision points.

Starting Up a Project

There is no funding request or set timeframe for the Starting Up a Project phase. This is a period of both active thinking and reflection as to the merits of a project idea.

If the high level idea behind the project is approved by the PIT Crew to begin, a Project Manager is appointed and the project progresses to the Initiating a Project Phase.

Initiating a Project Phase

In the Initiating a Project phase, the focus is on performing the necessary research, analysis and high-level design to formulate a compelling case for change.

At the end of the initiating phase, the Project Manager must submit a Project Plan for the BPI Executive's consideration.

Managing Project Deliverable Phase

Once the project plan is approved, the Project Manager must complete the following PRINCE2 documentation to aid in the successful delivery of the project:

- Communication Strategy;
- Testing Worksheets;
- Training Plan; and
- Go Live Task List;

The Managing Project Deliverable Phase is a repeated cycle of the following key tasks until the project is completed or cancelled:

- Executing the Business Case;
- Monitoring project units of work through Project Team meetings;
- monitoring the strategic alignment of the project through PIT Crew Meetings;
- Reviewing and Refining the business case

Business case scope variations are to be presented at the PIT Crew meeting for the BPI Executive to decide if the project is to continue.

Closing a Project Phase

At the start of this phase, the change is released and the work to make sure the change is successfully adopted continues. The release may be a single event or may be staggered.

If a project is deemed by the PIT Crew to not require a Post Implementation Review, the project is closed. Typically, large, costly, strategic projects or those that have generated valuable or painful lessons justify the investment of time and effort required to undertake a formal Post Implementation Review.

Benefits Realisation Phase

In this phase the Business Owner tracks and reports via to the FaBS community the benefits realised since the project's completion.

Project Portfolio Reporting

The PI Project Portfolio Executive Report provides an opportunity to profile the portfolio, highlight project status exceptions and project dependencies and facilitate the continuous reassessment of the project.

The PI will assign an overall project status to each project and highlight projects as exceptions if they fall out of the variance rules.

The project status is determined based on the framework listed in appendix D.

At the PIT Crew meeting, Project Managers get a direct opportunity to state and argue the business case with the BPI Executive.

The BPI Executive can approve the request, send it back for more work or cancel the project outright.

Projects in the Starting Up a Project Phase or Benefits Realisation Phase are not required to submit monthly status reports.

Appendix A – Team Members

BPI Executive

Danella Lane – Director, Financial and Business Services

BPI Chair

Glen McGregor – Manager, Business Process Improvement

BPI Team

Petrina Jones - Manager, Financial Operations

Melanie Chappel – Advisor, Business Process Improvement

Rotational PI Crew

Suzanne Delahunty – Finance Manager, Division of Tropical Health & Medicine

Rachel Lowe – Management Accountant, Services Divisions

Leanne Ashmead – Management Accountant, Budgeting and Reporting

Emma Griffiths – Senior Finance Officer, Treasury & Corporate Services

Penny Skeritt – Procurement Officer, Strategic Procurement

Lisa Iafano – Finance Officer, Services Divisions

Maria Read – Grants Finance Officer, Division of Tropical Health & Medicine

Louise Veitch – Finance Officer, Division of Tropical Health & Medicine

Appendix B – Submission Classification Framework

Tolerance Area	Business as Usual	Initiative	Project
Resources	Single Team	Small group of people from one or two teams	Large Group of People spanning multiple teams
Time	Can be either implemented immediately once approved	Less than ten business days	More than ten business days
Costs	No External Costs.	No External Costs.	External Costs such as consulting fees and product purchases
Scope	One Deliverable	Simple and well defined. Stable dependencies	Complex, unknown and subject to change. Involves multiple dynamic dependencies.
Risks	Very Low Risk	Low Risk	Medium to High Risk
Benefits	Saves less than five hours per month. Meets the needs of a FaBS team.	Saves up to 10 hours per month. Meets the needs of the JCU Academic or Division needs.	Saves over 20 hours per month. Meets the University's External Obligations. Reduces external costs of the University.

Appendix C – Project Prioritisation Scales

Impact				
	Regulatory	Financial	Intangible	Time
9-10	Prevents Qualified Audit	Over \$50,000 per month	Leaders of the University Sector	Over 100 hours per month
7-8	Prevents Legal Action	\$20,000 - \$50,000 per month	Meet best practices of the University Sector	50-100 hours per month
5-6	Prevents Monetary Fine	\$10,000 - \$20,000 per month	Upskilled / Motivated Staff	20-50 hours per month
3-4	Prevents QAO Audit Finding	\$5,000 - \$10,000 per month	Improves Data Integrity	10-20 hours per month
0-2	Meet Supplier Terms	Under \$5,000 per month	Corrects minor annoyance	Under 10 hours per month

Ease of Implementation			
	Time	Financial	Resources
9-10	Completed within 2 Months	Cost JCU between \$0 and \$50,000	Project Team comprises less than 3 Staff
7-8	Completed between 2 and 4 Months	Cost JCU between \$50,000 and \$100,000	Project Team comprises 4 - 6 Staff
5-6	Completed between 4 to 6 Months	Cost JCU between \$100,000 and \$500,000	Project Team comprises 7-10 Staff
3-4	Completed between 6 to 12 Months	Cost JCU between \$500,000 and \$1,000,000	Project Team comprises 10-15 Staff
0-2	Completed between 12 to 24 Months	Costs JCU over \$1,000,000	Project Team comprises over 15 staff

Strategic Alignment	
23-30	University Plan / Statement of Strategic Intent
14-22	Divisional Plan
7-13	FaBS Operational Plan
0-6	Day to Day Operations

Appendix D – Project Status Framework

Status	Rules
Purple	Project is completed.
GREEN	Less than 10% Budget Variance Less than 10% Schedule Variance All Risks and Issues are mitigated
ORANGE	Between 10% and 25% Budget Variance Between 10% and 25% Schedule Variance Risks and Issues are unmitigated but they do not prevent the project from Continuing
RED	Over 25% Budget Variance Over 25% Schedule Variance Risks and Issues are unmitigated and the continuation of the project should be reconsidered
The Overall Project Status will be Highest Status of the following three areas: <ul style="list-style-type: none">• Budget;• Schedule;• Risks and Issues.	

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