# Project background

A Detailed Impact Assessment may need to be completed or reviewed more than once during the work of a project or initiative. It is important the information in the assessment remains current and accurate.

This template will help you make sure that the different elements of organisational impacts have been considered for whatever process, change, solution or issue you are considering.

This is a guide only and may not be sufficient for every project situation – each assessor is responsible for ensuring they have considered the full organisational impacts for whatever they are assessing the impacts of.

When completing the template, delete the blue ‘guide text’ and replace with ‘normal’.

## Document information

### Revision history

Record the versions of this assessment and comment on why each version was updated or altered.

|  |  |  |  |
| --- | --- | --- | --- |
| Date | Version | Author | Comments |
|  |  |  |  |
|  |  |  |  |

### Recommendation

This assessment has been reviewed and is recommended for approval by:

Adjust this list to appropriate managers or subject matter experts with responsibility for the units or processes included in the assessment.

|  |  |  |
| --- | --- | --- |
|  | Project Manager | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_/ \_\_/ \_\_\_\_ |
|  | Analyst (person who undertook the Impact Assessment) | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_/ \_\_/ \_\_\_\_ |
|  | *List appropriate managers or subject matter experts who have the authority to say the assessment is accurate.* | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_/ \_\_/ \_\_\_\_ |

It is preferable to have agreement on an impact assessment, but not always possible. Where a key stakeholder disagrees with the assessment, note that they were consulted but do not agree with the outcome and the reasons for their disagreement.

### Approval

This assessment has been approved by:

|  |  |  |
| --- | --- | --- |
| Name | Role | Signature/Date |
|  | Normally the manager responsible for the unit or group would approve an impact assessment. | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_/ \_\_/ \_\_\_\_ |

## Purpose

For example: This detailed impact assessment looks at the internal and external impacts of transferring a distributed process to a service centre.

## People impacts

* When considering people impacts, the following questions may be helpful:
* How will the change impact on compliance activities (e.g. health and safety, EEO)?
* What is the impact on the Organisation’s organisational structure?
  + Will new management structures be required?
  + Will changes to existing reporting lines be required?
* How will the change impact on leadership (at all levels) within the Organisation?
  + What activities will be required to ensure this is positive?
* How will the change impact on culture within the Organisation?
  + What activities will be required to ensure this is positive?
* How will the change impact on HR requirements (i.e. recruitment costs, turnover, performance management systems)
* What is the likely cost and timing of required changes?
* Consider the impact on people and jobs:
  + How will the change impact people’s jobs?
  + What positions are impacted, and how? (e.g. reducing or increasing work, streamlining etc)
  + Will existing position descriptions change?
  + Will new or additional or less positions be required?
  + Will new skills or knowledge be required?
  + Will current behaviours and attitudes need to change?
  + Will performance measures need to change?
  + How will the staffing changes be managed? (i.e. recruitment, reassignment, etc?)
  + What are the training / skill development impacts?
  + What consultation is needed and when?
  + How will the change impact on current or future employment agreements? (e.g. hours of work, other terms and conditions)
  + When will the change(s) be required?
* What consultation with staff and unions is needed and when?
* Are there any identifiable ‘quick and easy’ wins for people?

The table below summarises the anticipated **people impacts** within business units, areas or key stakeholders:

| **Unit / stakeholder** | **Summarise the likely impacts** | **Org / role changes?** | **Training?** | **CEA / IEA changes?** | **FTE changes?** | **Est Costs/ (Savings)** | **Funding Source** |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Business Unit** | Note – these are the PEOPLE impacts for this unit… consider project or transition impacts as well as ongoing BAU impacts.  e.g. Maintaining the new management systems relating to centralisation of this process will require some training for the assigned IT support staff in the region; no substantive changes to roles or resources are expected | No | Yes | No | 0 | e.g. Cost of training  $4,500.00 | e.g. funded by current training budget. |
| **Corporate Finance** | e.g. A few assigned staff need to be involved in the design of the new system.  Communication and information will be required to ensure that corporate finance teams understand the new processes – changes will be very minor. | No | Yes – minor | No | 0 | $0 |  |
| **Marketing** |  |  |  |  |  |  |  |
| **Procurement** |  |  |  |  |  |  |  |
| **Communications unit** |  |  |  |  |  |  |  |
| **Human Resources** |  |  |  |  |  |  |  |
| **Property** |  |  |  |  |  |  |  |
| **Knowledge and Information Services** |  |  |  |  |  |  |  |
| **Operations** |  |  |  |  |  |  |  |
| **Policy unit** |  |  |  |  |  |  |  |
| **Add units and external stakeholders as appropriate** |  |  |  |  |  |  |  |

## Technology impacts

* Consider the impact on technology:
* What information technology (including systems, software and equipment) will be impacted? Make sure you consider ORGANISATION and key partnering agencies.
* What communications technology (including equipment and systems) will be impacted?
* Ensure all technology impacts are costed and that funding (or savings) sources are identified.

| Impact | Est Costs/ (Savings) | Funding Source |
| --- | --- | --- |
| e.g. new xxx will need to be developed and implemented. | e.g. $75,000 | PROGRAMME budget |
| e.g. changes to the xyz office system will be required to allow interface for exchange of data | e.g. $45,000 | PROGRAMME budget |
| e.g. ongoing licence fees for existing system will cease | e.g. ($50,000)pa | ITC operating budget |

## Operational / process impacts

* What operational policies or procedures are likely to be impacted by the change?
* What are the impacts on internal controls?
* What processes and workflows are likely to be impacted by the change?

The table below sets out the operational and process impacts on each unit / key stakeholder:

| Unit / stakeholder | Summarise the likely operational and/or process impacts | Est Costs/ (Savings) | Funding Source |
| --- | --- | --- | --- |
| **Business Unit** | e.g. minor updates to the user guide will be required – only the database will be different, no process changes within ITC anticipated. (1 x manual writer for 5 days) | e.g. $5,000 | ITC operating budget |
| **Corporate Finance** | What are the financial impacts?  Will ongoing operational or capital budgets need to be reviewed?  Will delegations need to be reviewed?  Will procurement processes need to be reviewed?  Will budgets need to be transferred between business units? |  |  |
| **Marketing** |  |  |  |
| **Procurement** |  |  |  |
| **Communications** |  |  |  |
| **HR** |  |  |  |
| **Property** |  |  |  |
| **Operations** |  |  |  |
| **Policy Unit** |  |  |  |
| **Add units and external stakeholders as appropriate** |  |  |  |

## Property, plant, furniture and equipment impacts

The following table sets out the property, plant and equipment impacts anticipated for each unit or stakeholder:

* Will there need to be changes to current use of space or configurations?
* Are changes to plant or equipment required?
* When will the change need to occur (i.e. at once, or over time)?
* Will different furniture or outlay, quantity or type of office space be required?
* Are there any special requirements that the property, plant and/or equipment must meet?
* Will there be an impact on the vehicle fleet?

| Unit / stakeholder | Summarise the likely operational and/or process impacts | Est Costs/ (Savings) | Source |
| --- | --- | --- | --- |
| **Corporate Finance** |  | $0 |  |
| **Marketing** |  |  |  |
| **Procurement** |  |  |  |
| **Communications unit** |  |  |  |
| **Human Resources** |  |  |  |
| **Property** |  |  |  |
| **Knowledge and Information Services** |  |  |  |
| **Operations** |  |  |  |
| **Policy Unit** |  |  |  |
| **Add units and external stakeholders as appropriate** |  |  |  |

## Other impacts

### Sustainability / climate change strategy

* What will be the impact on the organisation’s sustainability or climate change strategies?

### Policy impacts

* Are there any policy impacts?
* What will be the impact on existing legislation and/or regulations?
* If in doubt about this, talk to the appropriate Policy Team

### Legal impacts

* Are there any legal ramifications for the Organisation?

### Marketing or sales impacts

* Are there any legal ramifications for sales and/or marketing strategies?

### User/customer impacts

* What will be the impact on the public or professional groups who use our services?
* What consultation is needed and when?
* What level of support will be needed for those using our services to understand the changes?

### Safety impacts

* What will be the impact on safety for our staff or our customers?

### Security impacts

What will be the impact on security for our business, our staff or our customers?