

30.10.12 Attending Planning Meetings

1.0 Process Summary

1.1 Process Owner

The Process Owner has overall responsibility for a process. They're accountable for the process operating efficiently and effectively.

Head of Pre Award

1.2 Process Champion

The Process Champions are responsible for ensuring the process documents are up-to-date, accurate and shared with Process Participants.



1.3 Purpose / Scope of the Process

Purpose / Scope of the Process

Insert a brief overview of what is the purpose of the process, what it does and what it doesn't cover.

The purpose of this process is to ensure that the correct process is followed when attending planning meetings and all the right information is collected.

Process Start Point

Insert description of what triggers the starts of the process.

The process is triggered by receiving an invite to the planning meeting from the Competition Manager.

Process End Point

Insert description of what triggers the starts of the process.

The process ends when all the correct information has been collected on the Planning Meeting Template and it has been added to the Competition and Content Sharepoint.

1.4 Link to Process Model -



2.0 Standard Operating Procedure

Step No.	Main Operating Steps	Procedure and Guidance	Responsible	Consulted	IT-Systems	Documents (see section 3 for links)
1.	Complete Planning Meeting Template	Procedure - Fill in as much of Content's Planning Meeting Template as you can - Get the information from Authorisation Gateway - Get information from the Competition Brief Guidance and Troubleshooting - The Competition Brief may not be available but check with the Competition Manager	Technical Content Designer		Authorisation Gateway	Competition Brief Planning Meeting Template
2.	Attend Planning Meeting	Procedure - Fill in as much of Content's Planning Meeting Template - Check details against Authorisation Gateway Guidance and Troubleshooting - Ask the Competition Manager when the brief will be available	Technical Content Designer	Competition Manager Innovation Lead Project Finance and Funding Assurance Pre Award Team	Authorisation Gateway Meeting	
3.	Update Planning Template	Procedure - Check Planning Meeting Template against Authorisation Gateway and wait for Competition Brief Template to be sent by the Competition Manager. Guidance and Troubleshooting - If you haven't received the Competition Brief Template, chase the Competition Manager for it.	Technical Content Designer		Authorisation Gateway	Planning Meeting Template
4.	Save in Competition Sharepoint Folder	Procedure Once planning meeting template is complete save in the Planning Meeting Templates folder in Competitions sharepoint site Guidance and Troubleshooting	Technical Content Designer			Planning Meeting Template

For information and support on Business Process Management and Documentation contact the Process Team.

3.0 Supporting Information

3.1 Related Training Materials

What training material is available to support this process

3.2 Related Policies / Guidance

What Policies and Guidance inform this process.

No dictionary entries given.

3.3 Participants

Departments, Teams and Roles with the process.

Competition Manager

The Competition Managers in the Competitions Team within Pre-Award are responsible for the operational delivery of competitions through to the funding decision being made and communicated.

Department: Business Operations Department

Team: Competitions Team

Customer Relationship Lead

Head of Pre Award

Innovation Lead

The Innovation Lead role is the business/technical lead, they have overall responsibility for a Competition or Project.

Project Finance and Funding Assurance Pre Award Team

The Funding Assurance team is responsible for ensuring our funding programmes and projects are compliant, in both pre and post award.

Department: Business Operations Department

3.4 IT Systems

IT Systems and Applications used within the process.

Authorisation Gateway

The Authorisation Gateway is a Salesforce application with manages the approval of spending and the competition setup workflow.

IT System Owner: Salesforce Product Manager

Meeting

3.5 Documents

Documents used within the process.

Competition Brief

The Competition Brief is a key competition document which includes the scope of the competition, the questions asked to applicant and the public content. This document is translated into IFS so that applicants can apply for the competition.

Document Owner: Competitions Manager

IT System: Microsoft Word

Planning Meeting Template

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