



Australian Government
Department of the
Prime Minister and Cabinet

Taskforce Planning Guide

Practical tips to help PM&C officers set up and
operate an effective taskforce in the APS

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So, you've been asked to set up a taskforce...

Taskforce stage	Planning and scope	Set up	Operations	Closure and review
You are here	You've been asked to set up a taskforce, but you have zero or very few team members.	You have a skeleton crew of staff, and you are scaling up to full capacity.	You are operating as a taskforce.	You are approaching your final deliverable/s and preparing for handover.
You want to be here	<ul style="list-style-type: none"> • Scope and resources signed off by Secretary and/or Minister. • Staff and budget requested. 	<ul style="list-style-type: none"> • Team members are on-boarded, know what they're responsible for and have mutually agreed ways of working. • You know your due diligence and/or risk management actions. 	<ul style="list-style-type: none"> • Team is working away on core products and conducting successful stakeholder engagement. • Team is in a rhythm with built-in information sharing mechanisms and feedback sessions. 	<ul style="list-style-type: none"> • Final deliverable/s achieved. • Handover to BAU policy team completed. • Taskforce lessons learned discussion completed.
You need to	<ul style="list-style-type: none"> • Scope your taskforce: purpose, deliverables, timelines and stakeholders. • Secure early direction from Minister's Office using a scoping deck. • Set up a governance structure and plan your taskforce structure. • Hold initial resourcing discussions to request staff and budget (if required). <p>See pages 3 to 8 and Taskforce Planning and Scope Checklist on page 22.</p>	<ul style="list-style-type: none"> • Liaise with your host department to resolve accommodation, finance and staff onboarding requirements. • Hold a team planning session to discuss purpose, structure and ways of working discussion. • Determine what due diligence and/or risk management actions you need to take. <p>See pages 9 to 12 and Taskforce Set Up Checklist on pages 23-24.</p>	<ul style="list-style-type: none"> • Seek continual feedback from your decision-makers on the direction of your core products. • Ensure stakeholder engagement is well-planned and iterative. <p>See pages 13 to 15 and Taskforce Operations Checklist on page 25.</p>	<ul style="list-style-type: none"> • Prepare a handover to the BAU policy team. • Implement closure procedures (records management, finance, staff offboarding). • Hold a team review session to identify lessons learned. <p>See pages 16 to 17 and Taskforce Closure and Review Checklist on page 26.</p>

Your first priority is managing project and resource expectations to set up a successful taskforce

Objective: Agree your initial scope with the Minister's Office and/or the Secretary

Deliverables

Taskforce "one-pager" or scoping deck (based on time/resources) – to cover key aspects of the taskforce eg scope, governance, deliverables, timeline

Actions

Hold scoping workshop
Develop governance arrangement
Agree scope with Minister's Office/ Secretary/Executive who 'owns' your taskforce (taskforce owner)

Supporting Tools

Problem question
Issues tree
Governance and taskforce structure
Roadmap
Stakeholder plan

Tips:

- Use a "one-pager" to get consensus with key stakeholder on the key question the taskforce needs to answer and how this will be done – this gives all parties confidence about where the taskforce is headed
- Documents like Terms of Reference or a list of deliverables become clearer and more succinct if key issues are agreed through a one-pager

Objective: Ensure the taskforce is effectively staffed

Deliverables

Resourcing plan

Actions

Identify staff skills, expertise, experience needed for Taskforce
Negotiate staffing arrangements within host department eg number of staff, skills, timeframe,
Request and negotiate for staff from other agencies

Supporting Tools

Staff request letters
Budget requests
Skills matrix

Tips:

- Consider what skills, subject matter, experience mix is needed, and aim to request a core of people that meet the most critical needs
- To this end, consider making staff requests as specific as possible, and consider interviewing or a trial period (may not be possible in very short taskforces).
- Outside of consensus on scope, staffing fit and mix is one of the most important factors supporting taskforce success.

Taskforce planning and scope checklist

1 Develop a taskforce plan

- ☐ Usually summarized in a taskforce "one-pager", this can include (note examples of most items below are provided in the accompanying attachment):
 - ☐ Context on the problem you are addressing
 - ☐ Taskforce objectives and key deliverables
 - ☐ Issues tree
 - ☐ Overarching governance structure
 - ☐ High-level timeline
 - ☐ Stakeholder analysis and/or engagement plan
 - ☐ Assessment of key risks
 - ☐ Taskforce resource requirements (financial/staffing)
 - ☐ A 'fact pack' of initial research

2 Governance discussions

- ☐ Initial discussions with taskforce owner on decision-making and consultative arrangements
- ☐ Prep host department and partner agencies about future need for staff and operational support:
 - ☐ Based on the "one-pager" and initial break down of work, identify the staff needed – consider skills, subject matter expertise, level/experience
 - ☐ Prepare staff request letters, highlighting staff attributes sought (external agencies) – consider brief interviews/trial period for staff
- ☐ Prepare budget requests

3 Formalise governance arrangements

- ☐ Determine decision-making and consultative arrangements within your governance structure:
 - ☐ Taskforce owner
 - ☐ Agency senior executives
 - ☐ Key decision-making body (panel, steering committee etc.)
 - ☐ The Minister and the Minister's office

You are now scaling up your team and fully scoping what your taskforce intends to deliver

Objective: Secure your staffing and administrative needs

Deliverables

On-board team members within host department

Finalise any risk management documentation

Actions

Discuss onboarding, finance and induction with host department

Determine risk management and due diligence requirements

Supporting Tools

Onboarding process

Induction process

(Host) finance requirements

Tips:

- *Have a dedicated administrative support person – ideally from the host department, as they will know the way that 'things are done' and can navigate processes quickly and smoothly*

Objective: Finalise team planning and set your taskforce up for success

Deliverables

Team clarity on taskforce objectives, ways of working and structure

Actions

Hold a team planning session to get 'on the same page' about what the Taskforce team is there to do

Discuss structure and reporting lines, as well as preferred working styles

Supporting Tools

Work plan

Team working styles template

Agile techniques

Tips:

- *A team planning session may seem like a luxury in a taskforce environment – but clarity of objectives, deliverables, roles, expectations and team rhythms can result in a faster ramp up and greater operating efficiency. It can also lower uncertainty/anxiety of staff*
- *Think of the session as a fast-tracked process for team formation!*
- *A session can be scaled up/down – the essentials can be done in an hour and iterated/evolved as needed*

Taskforce set up checklist (part 1)

1 Prepare a scoping deck

- ☐ Building upon the taskforce summary from planning
 - ☐ Create a taskforce roadmap
- ☐ The Scoping Deck can now become a taskforce plan

2 Finalise and agree taskforce plan

- ☐ Taskforce plan breaks down the key milestones (from Scoping Deck/one-pager) into work items and deadlines for the taskforce plan
- ☐ If necessary, prepare a Terms of Reference or Issues Paper
- ☐ Seek agreement of taskforce plan, ToR and/or Issues Paper from lead decision-makers

3 Plan your work

- ☐ Determine what your final products will look like
- ☐ Map your stakeholders
- ☐ Create a taskforce work plan
- ☐ Book major meetings in SES diaries (e.g. IDC's, ministerial committees, COAG official meetings)
- ☐ Determine briefing requirements for major meetings and task accordingly

4 Establish budget and accountability

- ☐ Determine budget (either through supplementary funding or from existing agency funding)
- ☐ Establish financial management processes, including cost centre and cost codes
- ☐ Develop any new delegations if required

5 Build your team

- ☐ Recruit staff (consider internal transfers, secondees from other agencies and/or contractors/consultants)
- ☐ Establish performance review process and understand individuals' goals
- ☐ Begin agile work practices

For external secondees:

- ☐ Determine conditions of employment and negotiate contracts (consider memorandums of understanding, contracts, home agencies to continue to pay their secondees)
- ☐ **Priority:** Organise security clearance and building/network access
- ☐ Ensure staff follow official agency induction processes. Refer to current processes (e.g. network access, security passes, telephone numbers, and briefings on agency policies and processes)
- ☐ Ensure staff are aware of available facilities (kitchens, bathrooms, breakout areas, change rooms, bike storage, parking, lunch options)

Taskforce set up checklist (part 2)

6 Bring aboard consultants (if needed)

- ☐ Determine the process to be used to engage consultants (e.g. open source, select source, direct source or panel)
- ☐ Determine the delegate with the authority to approve the procurement
- ☐ Contact agency's corporate services area to assist with the selection, gazettal process and developing the contract

7 Finalise taskforce accommodation

- ☐ Determine where the taskforce will be located and arrange accommodation facilities such as workstations
- ☐ Organise car parking for SES officers
- ☐ Consider occupational health and safety issues associated with work area
- ☐ Organise document storage and disposal (e.g. appropriate filing cabinets and classified waste bins/shredders)

8 Confirm IT requirements

- ☐ Organise mobile technology (phones, laptops, surface pros or iPads)
- ☐ Organise photocopier/printer access
- ☐ Consider central email inbox
- ☐ Group distribution list

9 Address ministerial correspondence

- ☐ Determine how ministerial correspondence will be managed by the taskforce
- ☐ Confirm standard words, templates and titles

10 Determine records management

- ☐ Establish a compliant records management system, either leveraging an existing team shared site/drive or establishing a new one
- ☐ Determine protocols for filing structure and file names
- ☐ Determine protocols for Ministerial and executive submissions and correspondence
- ☐ Establish taskforce templates (e.g. meeting agendas)

11 Other business processes

- ☐ Set up regular taskforce meetings; taskforce email list (for internal whole-of-taskforce communications); and contact taskforce inbox (if relevant)
- ☐ Collate list of staff contact details
- ☐ Set up internal leave calendar
- ☐ Consider any necessary training and how it will be funded (e.g. PDMS, ShareHub, Procurement, Security).
- ☐ Provide access to credit cards or cab charge vouchers
- ☐ Facilitate introductions to senior leadership (FASs, Deputy Secretaries)
- ☐ Notify agency of taskforce existence and role (eg newsletter, presentation)
- ☐ Organise inclusion in group/divisional stand ups,

Now it's time to focus on preparing your core products and working with your stakeholders to deliver policy outcomes

Objective: Your team is maintaining regular stand-ups and progress meetings to head-off early bottlenecks

Deliverables

Effective team rhythm

Actions

Regular team communication and reflection

Supporting Tools

Work plan
Agile techniques

Tips:

- *Having a project manager (or other similar role) to support taskforce rhythm and keep things on track is a key factor in smooth taskforce operations*

Objective: You are maintaining regular positive contact with key stakeholders

Deliverables

Stakeholders are fully across what you intend to recommend

Actions

Iterative internal and external engagement
Hosting regular meetings/roundtables

Supporting Tools

Stakeholder engagement mapping

Tips:

- *Engaging with key decision making stakeholders early, and allowing them to iterate the deliverables with you provides guidance and ensures that there are 'no surprises'*

Objective: Your team's 'solution' has been cultivated into a clear narrative and engaging final products

Deliverables

Core products

Actions

Drafting sessions
Governance group regularly considers drafts of products

Supporting Tools

Storyboarding
Visual techniques
Feedback tracker

Tips:

- *A focus on products as persuasive, easy to digest and fit for audience will provide a better platform for key decision makers/stakeholders to understand and engage more deeply with the subject matter*

Taskforce operations checklist

1 Develop final product(s)

- ☐ Determine leads for each product
- ☐ Decide clearance and decision-making requirements for each product
- ☐ Maintain a feedback tracker for each product
- ☐ Construct final product(s), making use of:
 - ☐ Narrative and storytelling
 - ☐ Visual communication methods
 - ☐ Evidence-based analysis and insight
 - ☐ Stakeholder feedback
- ☐ Ensure the product aligns with the agreed taskforce scope

2 Maintain high-functioning team

- ☐ Regular stand-ups and progress reports
- ☐ Adapting team dynamics and staffing allocation according to product priorities (e.g. moving from research to writing to presentation)
- ☐ Maintain clear points of contact for development plans and leave proposals
- ☐ Produce regular SES briefs (e.g. situation reports) as required

3 Continue stakeholder engagement

- ☐ Stakeholder engagement could include:
 - ☐ Interviews (academics, eminent people)
 - ☐ Meetings (departmental, Commonwealth, states and territories, industry groups, key industry players)
 - ☐ Roundtables
 - ☐ Submissions (public, private, expert)
- ☐ Keep consistent records of engagement activities
- ☐ Establish processes for feeding insights into product development

The taskforce wraps up as final products are prepared for Ministers and implementation teams

Objective: You have a shared understanding with the implementation team of the policy's next steps

Deliverables

Handover process

Actions

Discussion with policy /
implementation team

Regular governance
group consideration of
drafts

Supporting Tools

Handover pack

Successful records
management

Tips:

- A sound stakeholder engagement process (for internal government and external stakeholders) throughout the life of the taskforce is crucial to a smooth 'landing' for the policy – externally this will mean there are 'no surprises' and internally this should mean there are clear roles and responsibilities for policy & implementation

Objective: You close down your taskforce promptly, meeting all records management and process requirements

Deliverables

Closure procedures

Actions

Discussion with host
Human Resources area

Supporting Tools

Offboarding process

Tips:

- Setting up a simple and clear records management process early will reduce pain 'later' and provide clarity for other accountability processes, should they arise

Objective: Your team and host department has 'learned lessons' to improve performance next time

Deliverables

Team review

Actions

Lessons learned session,
or project retrospective

Supporting Tools

Agile techniques ('retro')

Tips:

- Run a lessons learnt processes as the taskforce is closing up and have someone write the outcomes up – consider whether these learnings can be held somewhere eg projects/taskforces area in the agency

Taskforce closure and review checklist

1 Provide a handover pack

- ☐ Provide a handover pack to an ongoing officer within the relevant policy area of the agency. This may include:
 - ☐ Key actions and decisions of taskforce
 - ☐ Key documents produced by the taskforce (reports, submissions, briefs, correspondence, standard words etc.)
 - ☐ Outstanding issues
 - ☐ Contacts
 - ☐ Record of documents to transfer
 - ☐ Information for Senate Estimates and the Annual Report (deliverables and KPIs, budget and expenditure, staffing levels, duration of the taskforce and any consultants engaged, list of meetings and ministerial or executive submissions)

2 Conduct a lessons learned process

- ☐ A lessons learned process includes:
 - ☐ Seek feedback from taskforce staff and external stakeholders
 - ☐ Document feedback and share with senior leadership

3 Terminate finance arrangements

- ☐ Pay all outstanding invoices
- ☐ Where costs will continue to accrue, advise nominated policy contact officer or the agency's financial management area

4 Finalise records management

- ☐ Ensure all records have been filed in accordance with the agency's records management policies
- ☐ Ensure all briefs and correspondence have been appropriately actioned and filed on the agency's parliamentary workflow system
- ☐ Close finished files or transfer active files to the relevant policy contact officer

5 Exit procedures

- ☐ Advise the agency's corporate services area of staff who will be leaving the agency. Refer staff to current agency exit processes