

Portfolio Management Transition Plan

*Prepared for PPsC
9th December 2024*

Background

- Since the last portfolio board we have:
 - Procured Cora systems as our chosen system provider
 - Undertaken the second round of high-risk projects review
 - Developed a specification for revised training for PM Academy – currently agreeing budget and a proposal
 - Brought further capacity into the team – embedded the team and created workstreams of activity
 - Re-invigorated our approach to stakeholder engagement and comms
- We are currently undertaking further round of reviews to agree the project procedure and the new gateways – in addition, it is proposed for an additional paper to cover project funding
- We are now in a position to move into implementation
- There is a significant level of change involved which necessitates a phased approach to delivery

To successfully embed the new portfolio management approach, we will launch our approach in two-phases

Portfolio Management will:

- Create governance and processes that work across all types of project
- Implement a single unified framework which delivers governance proportionate to the complexity of the project or programme
- Build strategic oversight of Portfolios of projects and programmes – embed accountability and responsibility for delivery
- Provide the basis of Corporate compliance and assurance of project delivery
- Reduce the level of bureaucracy involved - increase the pace of delivery

Nov ————— March ————— July

Phase 1 builds the foundations for better portfolio governance

- Launch a unified project management tool (Cora) to manage projects across the CoL
- Enable Portfolio Dashboard Reporting to Portfolio Board and PPsC
- Create a 'single source of truth' by updating project data

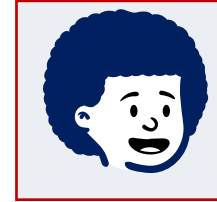
Phase 2 will embed the new project procedure with supporting capabilities and governance

- Develop the new project procedure with officer input - new Gateways
- New Project Funding Proposals
- Refine & launch project procedure, supported by training & member engagement

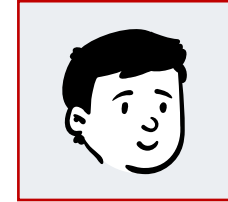
What will stakeholders see/do/feel differently? By March



Member view



Chief officer view



Project Manager View

See differently?

I receive strategic reporting on portfolios dashboards reports

I have strategic reporting on portfolios and the information by which to provide support

I have a best practice toolkit including Gantt Charts, RAID, Project which supports me in the successful delivery of my project or programme

Do Differently?

I am aware of strategic risks across Portfolios and can make informed decisions

I can start to make more strategic decisions on project delivery

I am beginning to update and refine data on Cora to build transparency

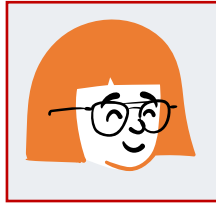
What will feel different?

I have the foundations for better governance decisions

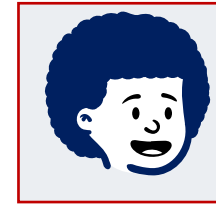
I have transparency on the status of my portfolios of projects

Reporting is no longer such a time-hungry task and I feel part of a wider Portfolio

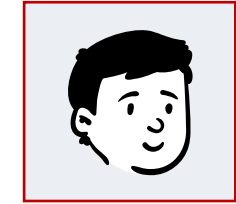
What will stakeholders see/do/feel differently? By June



Member view



Chief officer view



PM view

See differently?

I get fewer papers, at the right decision points, which have clearer proposals which balance risks and opportunities

I see the pace of delivery begin to increase
I can assess a project's financial and strategic value

There is less bureaucracy in the gateways and there are fewer of them

Do Differently?

My decisions are supported by more and better performance and benefits data on our People, Place & Planet

I am empowered to deliver and resolve issues
I can lead portfolio boards to manage the pipeline of my programmes

I prepare clearer and simpler gateway submissions that are appropriate to the size of my project

What will feel different?

I am able to steer and shape projects and programmes. I can focus on the bigger picture

I feel more in control of my portfolio's success
I am confident in my project team's delivery capabilities

I am equipped with the tools and capabilities to manage my projects

Workstreams

Cora Implementation	Lead: Gideon Botha Team: Michael Kyle, Matt Edwards, Scott	<ul style="list-style-type: none">• Update base project data for migration to Cora• Gather & collate user requirements from workshops• Cora Training (Train the Trainers approach)• Management of go-live
Training (PM Academy)	Lead : Marco Tosato	<ul style="list-style-type: none">• Liaise with PM Academy for training and external change management support• Update training resources on the intranet
Stakeholder Engagement & Comms	Lead: Catherine Hopkins	<ul style="list-style-type: none">• Design and coordinate change management interventions• Stakeholder engagement, comms for launch of portfolio mgmt.• Update comms resources on the intranet
Benefits Reporting & Measures	Team: Kate Anderson, Laura Green	<ul style="list-style-type: none">• Design of benefits realisation and impact reporting to input into Cora• Review and design of gateway submissions and business cases
Project Procedure Changes	Lead: Matthew Miles Team: Matthew Whiddett	<ul style="list-style-type: none">• Project procedure document• Scenarios for gateways• Update PM guidance for gateway submissions
Operational Readiness & Governance	Lead: Head of EPMO Team: Lara Opebiyi, Sharifa Daley	<ul style="list-style-type: none">• Launch departmental portfolio boards and establish reporting cycle• Enable reporting of projects and portfolios• Review readiness to transition to new gateways (project by project basis)• Hands-on support to project managers

Key Milestones

Milestone	Date
Reporting workshops with Members	December 2024
Reporting workshop with Chief Officers	21 st January 2025
Informal engagement with members on new project procedure complete	14 th February 2025
Strategic dashboards available for Portfolio Board and PPsC	25 th March 2025
Project Procedure approved at Portfolio Board	25 th March 2025
Project Procedure approved through PPsC, Finance and CoCo	TBC - May
Go-Live for New Gateways	End of July
Review of gateway implementation complete	September 2025

The date for the approval of the project procedure has been extended as a result of the need for further engagement and to develop a set of scenarios of projects– the intention is to engage members on the substantive changes informally in February prior to the pre-election period

Forward Plan for Members and PPsC

Key activity	Dates
Reporting Workshops with Members	3 rd December, 10 th December and 11 th December 2024
Informal engagement on the new project procedure	3 rd February – 14 th February 2025
Approval of new project procedure	May 2025

Scheduling of PPsC will be agreed in advance and aligned with the scheduling of Portfolio Board, Projects and Procurement sub-Committee, the Chamberlain's Project Assurance Board (and the proposed Transformation Delivery Board)

Next Steps

1. Member workshops on reporting - Early December
 - Demonstration of Cora
 - Member expectations on strategic dashboard reporting
2. Further build upon existing requirements and data gathering for Cora
 - Base project data and licence requirements – ongoing to go-live
 - Gather requirements in preparation for Cora workshops – November/December
 - Requirements workshops with Cora – January
3. (Re)launch stakeholder engagement
 - Produce stakeholder engagement plan for implementation phase – by 15th November
 - Launch intranet site – 22nd November
 - Establish Engagement forums - – by end of November
 - Reconfigure current working group – by end of November
4. Complete Project Procedure
 - Informal reviews with Members on the new Project Procedure – new year prior to election period Business Case Documentation
 - As Is / To Be Scenarios
5. Develop proposals for project funding governance and approve with the new project procedure

Supporting Slides

Stakeholder engagement and Communications

We have agreed the following principles to guide successful stakeholder engagement

Project objectives and approach should be easily accessible and enable CoL staff to learn more

We will create an intranet project landing page showing project deliverables, key launch dates, & project lead contact info
The landing page would be expanded with demonstrations of and guidance on project procedure and tools as they are developed

The project should seek and visibly action feedback from each stakeholder group

We will create a questions submissions box to be hosted on the intranet project page
We will conduct monthly 'you said, we did' feedback sessions to resolve received questions and share outcomes from requirements workshops

Senior officers and members owning change portfolios should have a clear view of project progress and planned launches

We will establish a monthly 'Director's Update' email update to be shared with all identified Portfolio/Sub-Portfolio execs (officers) and key members

Frontline staff should be active change agents and should not feel 'done to'

We will establish a fortnightly change champion forum to engage with key users and provide a space for two-way feedback

The project should be aligned with and have the same look and feel of comms for other projects in CCPD

ERP project comms will aim to use the same templates and forums
The project will establish a series of 'Lunch & Learn' sessions focused (on benefits mindset) with the capability development team

The project has 4 key stakeholder groups with distinct engagement needs



Key Members

Who are they? Chairs of committees receiving Cora reporting &/or engaged in the new project procedure

What do they need? For the new procedure and tool to provide the means to better steer and shape CoL's portfolio

What do we need from them? Feedback on reporting (once launched), support, signoff and buy in to new process

Key communication channels: Monthly Director's update (inc. launch announcements), benefits map walkthrough



Portfolio/ Sub-Portfolio Executives (Process Customers)

Who are they? Senior Officers who own portfolios & sub-portfolio (internal and entity officers)

What do they need? Better visibility and control of the shape and performance of the projects they own

What do we need from them? Support in transition to Cora and new procedure, engagement in departmental portfolio boards

Key communication channels: Monthly Director's update,, launch event & Lunch & Learns



Guiding Coalition (Process Users & SMEs)

Who are they? Officers who work closely with projects/ able to advise on alignment with enabling functions (e.g., Audit, IT, HR)

What do they need? A smarter, simpler, approach and tool for portfolio management that works for them

What do we need from them? Consultation on design of project procedure & Cora requirements

Key communication channels: Monthly Director's update guiding coalition forum (fortnightly), launch event & Lunch & Learns



Users & Change Champions (PMs & Project Sponsors/SROs)

Who are they? People who sponsor or manage project delivery (including Project and Programme managers)

What do they need? A tool and procedure that enables them to deliver & provide visibility of their projects

What do we need from them? Update and build project data, feedback on Cora functionality & procedure, UAT (SuperUsers only)

Key communication channels: SuperUsers forum (including feedback Q&As), launch events & Lunch & Learns

We will use existing and new comms channels to reach our stakeholders

Comms Channels

Name	Owner	Freq.	Type & Tone	Audience	Used For
Town Clerk Monthly email	Lorraine McLennan	Monthly	Email bulletin- formal	All- targeted to Key Political Members & Portfolio/ Sub-Portfolio Executives	Launch announcements, notification of events
Intranet landing page	Matthew Miles	Continuous	Intranet- core project materials	Everyone- targeted to Key Political Members & Portfolio/ Sub-Portfolio Executives	Basic info on project objectives and key dates
Kitchen & Toilet Posters	Lorraine McLennan	Ad hoc	Informal event announcements	Everyone- targeted to Users & SuperUsers	Announcement of Lunch & Learns, training/ launch events
Viva Connections updates	Lorraine McLennan	weekly	Polished updates with interactive elements	internal officers- targeted to Users & SuperUsers	Announcement of lunch & learns, training/ launch events, New procedure intro Cora demo (post launch)
Chamberlain's weekly email	Lorraine McLennan	weekly	TBC	CCPD only	Project progress updates, event announcements
All-staff call- chamberlains	Lorraine McLennan	monthly	Teams meeting- is this recorded?	CCPD only	Cora demo, outcomes reports
Monthly Director's update	TBC	Monthly	email	Portfolio/ Sub-Portfolio Executives Key Political Members	Project updates, Launch & event announcements
Ad-Hoc User Surveys	Catherine Hopkins	As needed	Short (c. 3 question) MS forms	Users & Change Champions Portfolio/ Sub-Portfolio Executives	Cora user temp check and feedback Process baselining and feedback

We will use existing and new comms channels to reach our stakeholders

Engagement forums

Name	Owner	Freq.	Type & Tone	Audience	Used For
Transformation board	TBC	monthly	Formal updates	????	Proposed project updates, escalation of risks, agreement of plan and deliverables
PPSC	John Cater & Randall Anderson	Monthly	Formal updates and officer engagement	Key Members	Progress update 1x in Dec, 2x informal workshop for benefit map and for roadshow presentation
PPSC workshops	John Cater & Randall Anderson	Monthly	Informal working group for member engagement	Key Members	Member engagement for draft process (scenarios)
Working group-guiding coalition	Matthew Miles	fortnightly	1x month	Guiding coalition	Reviewing proposed Cora design and project procedure documents
Change Champions forum	Catherine Hopkins	fortnightly	Meeting, visiting members of project team	Change Champions only, broadened to user forum at key points in project plan	Review draft project materials and requirements, Q&A- 'you said, we did' (filmed for sharing with broader users)
Lunch & Learns	Capability team (TBC)	Monthly (from March)	Meeting, learning from project teams	Users & Superusers	Developing benefits mindset and understanding of benefits drivers in CoL in preparation for procedure launch