

Benefit realisation and Portfolio Management





Transformation methodology

- Established a Programme Management Office (PMO) – by stealth.
- PMO is a balance of internal and external staff.
- Seconded key staff into a programme office and built internal capacity.
- Appointed external company, V4 Services Ltd through Catalyst process to create, manage and deliver the programme.
- Created invest to save fund to drive key projects.
- Delivered early success which built trust.

Transformation methodology

- Cash savings build up every year and repeat – costs are taken as a one-off each year.
- PCC will have saved £48m over 4 years. We are saving £13m each year, with no additional cost needed to achieve this figure.
- Savings out-weigh costs in-year so the **return on investment** climbs substantially for each year of investment.
- Decisive advances in customer service and operational performance.
- Leadership, ownership and strong governance arrangements.
- Focus on increased return on investment – 5:1 in 10/11.

Our journey

Year	2007-08	2008-09	2009-10	2010-11
Savings target	£3.5m 	£3.68m 	£6.2m 	£10.992m 
Cumulative savings		£10.68m	£24.1m	£48.43m
Invest to save	£1.6m	£3.4m	£2.4m	£2.6m
Income from trading		£0.5m	£1m	
Projects delivered	Procurement: Stationery, ICT, Travel	ICT Managed Service	Customer Services transformation	Green Shoots
	Reduced administration & support activity	Trading services	Manor Drive plc – back office into a business	Front to back office integration
	Green open spaces restructure	Agile working in Children’s services and Env Health	Asset management – sweat and consolidate	Digital mailroom
	Initial process review	Process change	Process improvement – driven by business	Flexible working

Transforming our customers' experience

Customer liaison and intelligence:
•Getting the basics right
•Complaints, R&I, FOI, DPA

Customer Services Transformation Programme:
•Migrating enquiries/services
•Self-serve

Customer Process Transformation:
•End-to-end redesign
•Wide ranging programme
•Emphasis on performance for customers

Strong, embedded culture and values

Skilled and motivated workforce

Leadership Academy:
•Tiers 1,2 & 3
•Training on leadership and change management

HR Processes linked to values

Procurement and shared services strategy/review

ICT Strategy

Property rationalisation, facilities, assets






Enabling programme:
•More self-sufficient managers, staff, members, customers, partners, regulators

Unlocking resources:
•Cash savings
•Efficiency gains
•Strong benefits realisation






Efficient, cost saving business processes

Corporate cross cutting enablers

Business cases – top 10 overview

Project	Savings	Speed of delivery	Project emoticon
<p>Manor Drive: Introduce a business model to the operation of the Resources department to enable the creation of a single back office.</p>	<p>Extracted: £900k Achieved: £888k</p>	Medium	 champion
<p>Demand Management: Reduce unregulated spend in non-business critical areas of expenditure: e.g. furniture, travel & accommodation etc.</p>	<p>Extracted and achieved: £750k</p>	Short	 spectator
<p>Adult Social Care: Delivered through reviews of residential homes, agency placements, external nursing and domiciliary care alongside improved supplier management</p>	<p>Achieved in 2009-10: £750k</p>	Medium	 champion
<p>Children's Services Co-Location: Co-location satellite offices in one central location for Children's Services through agile working.</p>	<p>Extracted and achieved: £208k</p>	Short	 champion
<p>Customer Services: Create a new capability to deliver excellent customer service, in line with the Customer Services Strategy.</p>	<p>Extracted: £1m over 5 years Achieved: £250k (year 1)</p>	Long	 champion

Business cases – top 10 overview

Project	Savings	Speed of delivery	Project emoticon
<p>Property Rationalisation: Rationalise the property portfolio so that it is fit to deliver services in line with Council objectives, now and in future.</p>	<p>Extracted: £1.307m Achieved: £197k</p>	Long	 spectator
<p>ICT Managed Service: Partner with an external supplier to provide an ICT service that is cost effective, efficient and will support the authority and its future ambitions.</p>	<p>Extracted: £550k Achieved: £150k in 2008-09 £400k expected in 2009-10</p>	Long	 champion
<p>Telephony/VOIP: Implementation of a VOIP telephony system.</p>	<p>Extracted: £258k Achieved: £129k</p>	Long	 spectator
<p>Agile Working in EPPS: Use of technology to enable smarter working for regulatory officers in the field.</p>	<p>Extracted and achieved: £119k</p>	Medium	 champion
<p>Print: Procurement of a print and reprographics solution.</p>	<p>Extracted: £150k Achieved: £100k</p>	Short	 spectator

Transformation – Internal Recognition

Council Tax Summary 2010/11:

“Our Business Transformation programme will have delivered £30.7 million cumulative gross savings between autumn 2006 and the end of 2009/10. This has helped limit this year’s rise in council tax to just 2.5 per cent – meaning a typical Band D property will face an increase of £27 from £1,069 last year to £1,096 for 2010/11.”

“Rather than being a victim of the recession, we are actually able to invest in new initiatives that will benefit all residents and local businesses for years to come.”

Councillor Marco Cereste, Leader of the Council

Transformation – external endorsement

- **Government Business Awards 2010, Procurement Category – ‘Winner’**
- **LGC Awards 2010 Efficiency and Transformational Government Category ‘Finalist’**
- **LGC Finance Efficiency Initiative 2009 – ‘Winner’**
- **SOLACE Project & Programme Management Interim Manager of the Year 2008** *for leadership and delivery of Peterborough City Council’s challenging Business Transformation Programme*
- As noted by **PWC our external auditors**, the Council’s Use of Resources score increased in 2008/09:

“The Council has clear financial plans to cope with the impact of the recession. Significant improvements have been made by the Council in its financial management arrangements. Financial planning is good. Efficiency savings have been made, helping the Council to put more money into areas that residents think are most important. The ‘Business Transformation Programme’ delivered over £10 million of savings. The Council improved its buying arrangements.”



CIVIL NUCLEAR CONSTABULARY



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Cheshire West
and Chester



Rutland
County Council



DARLINGTON
BOROUGH COUNCIL

City of Bradford Metropolitan District Council



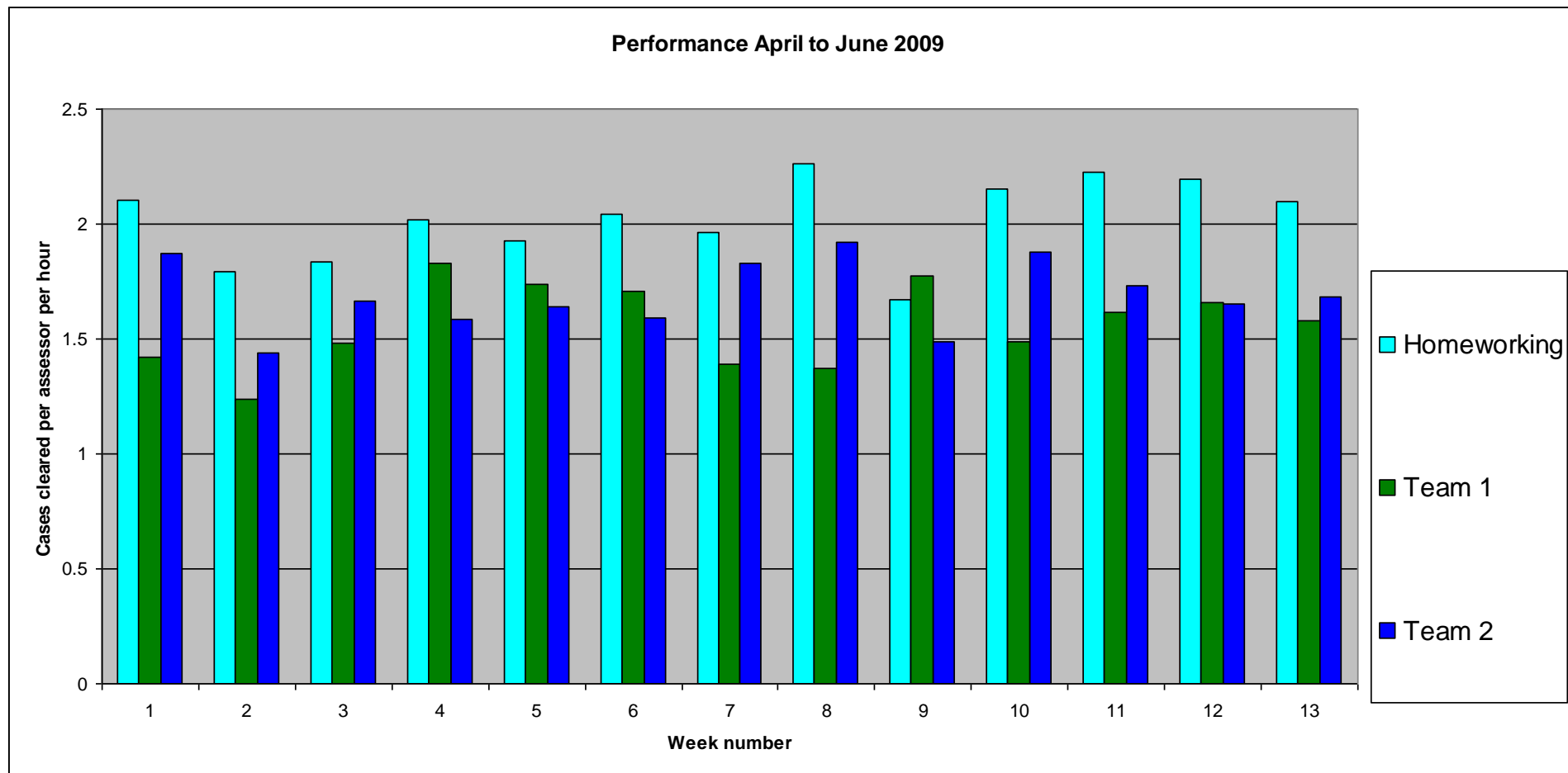
CITY OF
YORK
COUNCIL



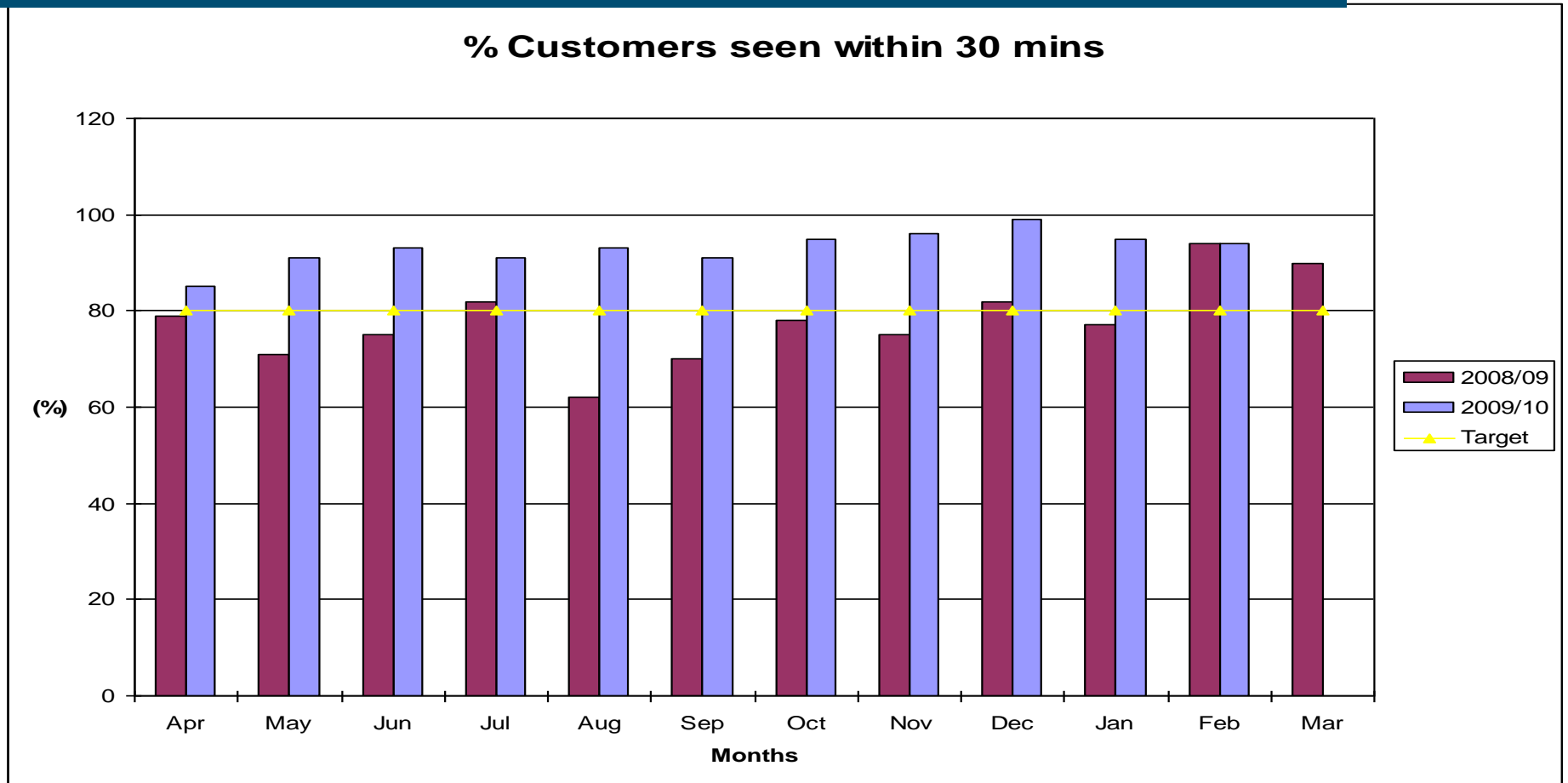
Haringey Council



Revenue and Benefits Team Performance

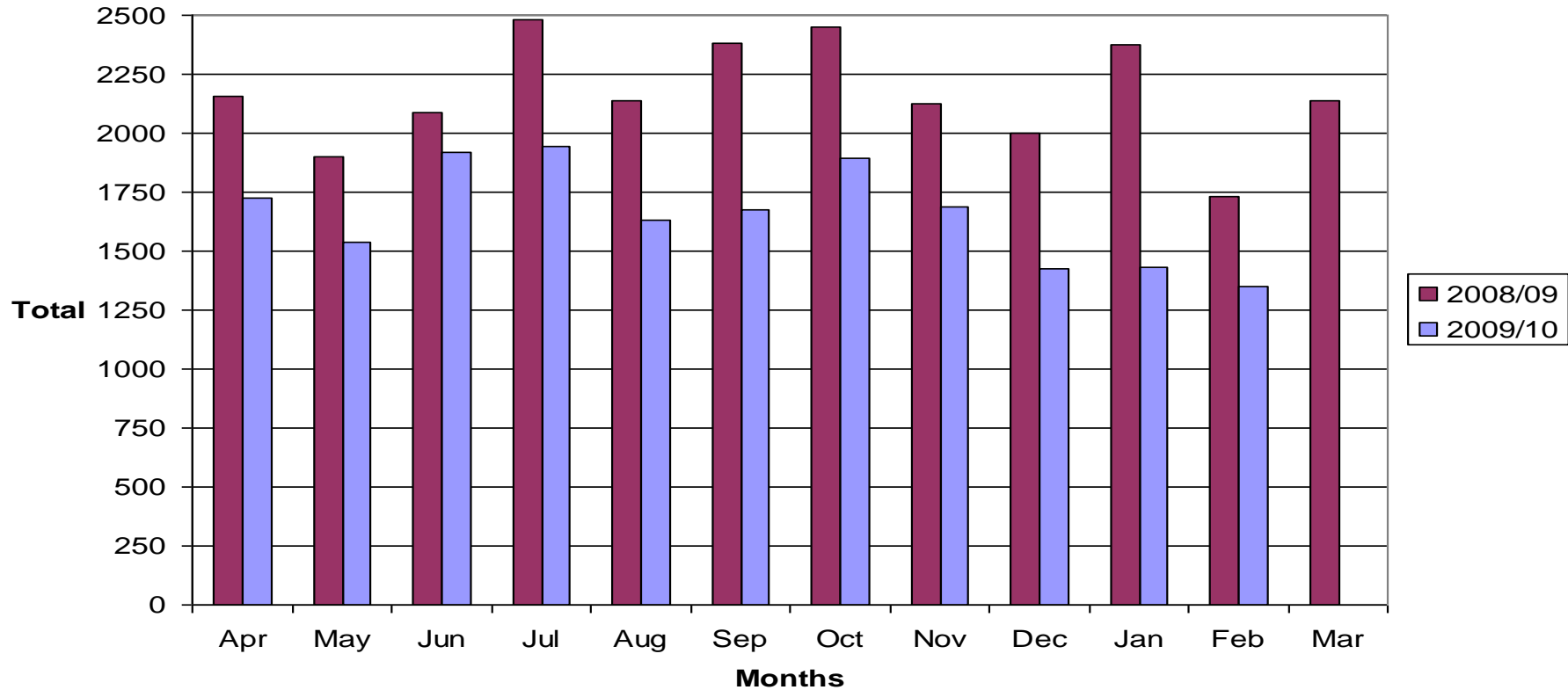


Non-Cashable - Customer Waiting Times

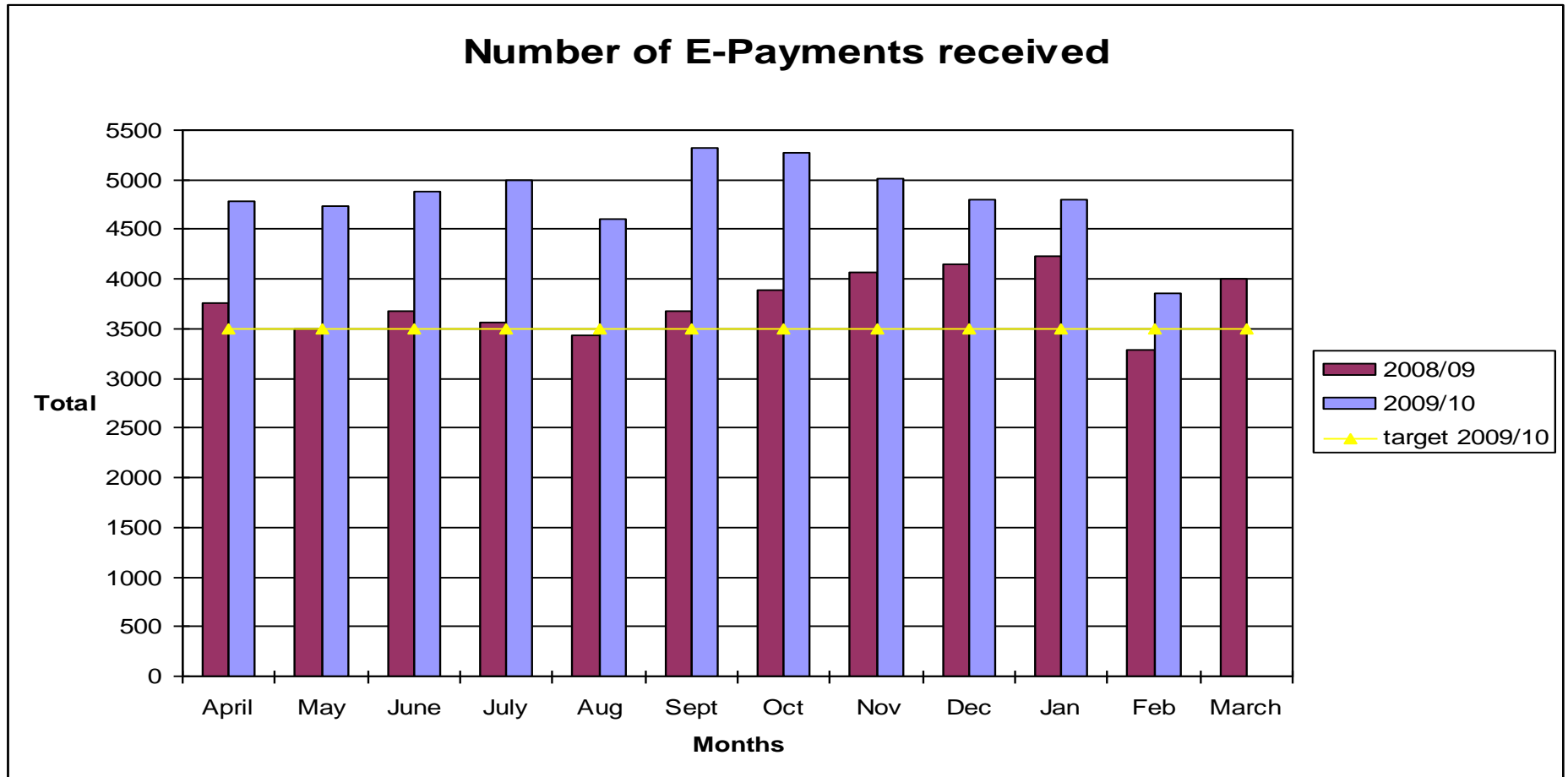


Non-cashable - Customer Services

Total Customers Seen by a Specialist Officer



Non-Cashable - Number of E-Payments



How is the portfolio managed?

- **Director's Group** – oversees the corporate programme at a macro level and ensures interaction with Sustainable Community Strategy. Chaired by Director of Resources.
- **Governance Board** – Manages all the Councils projects and programmes. Decides which projects should go ahead and which shouldn't. Manages the Gateway process. Chaired by Head of Delivery.
- **Savings and Innovations Board** – Manages the delivery of the transformation projects. 'Calls in' projects where they are in difficulty, red or amber. Co-ordinates intervention and can cease projects. Chaired by Head of Customer Services.
- **Programme team** – reports to Savings Board and supports the delivery of all programmes including capital, business as usual and transformation. Led by Senior Programme Manager.

All the above groups are supported by one team and one system – Verto.

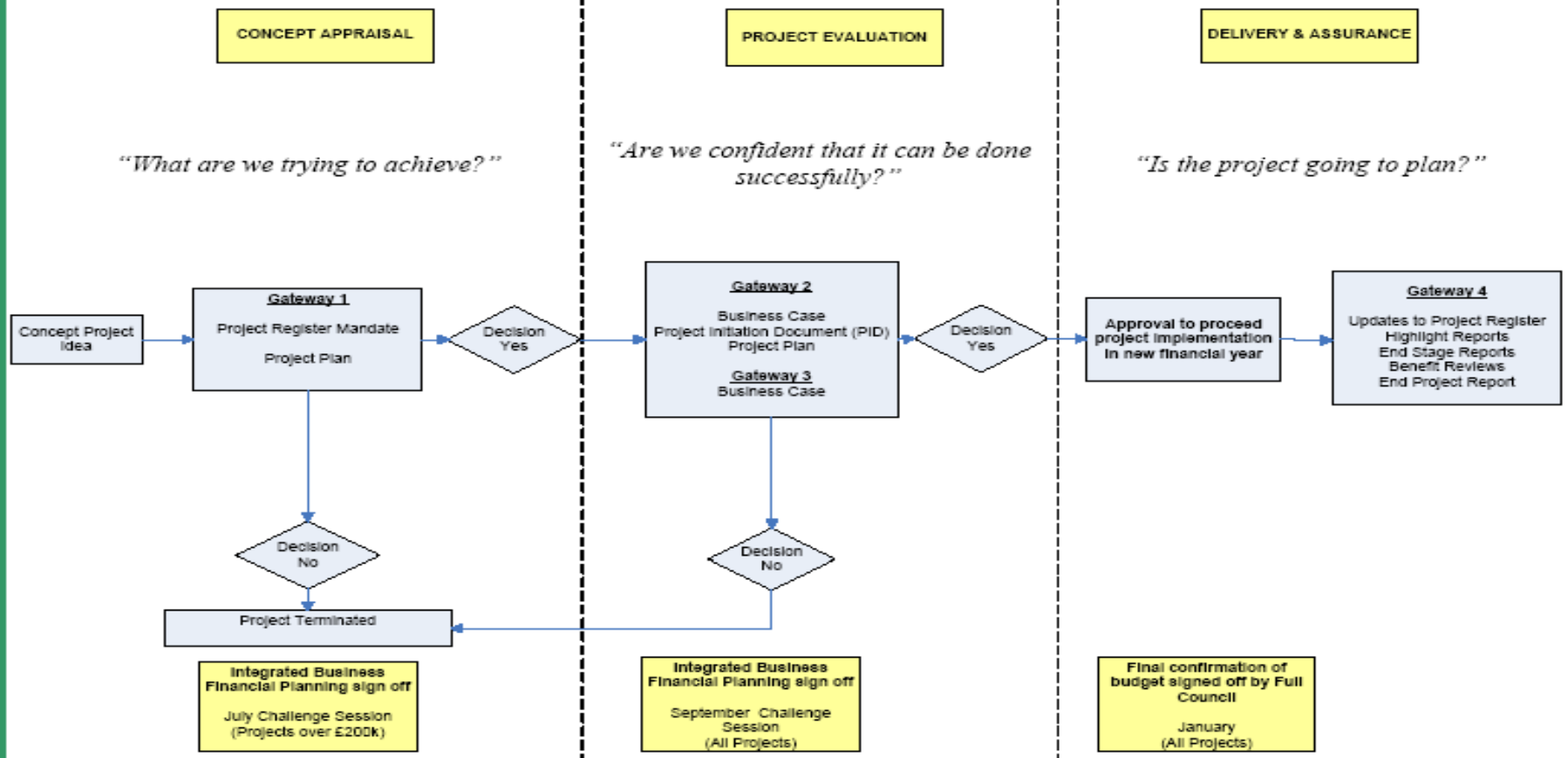
Peterborough Gateway Process

- Assurance of delivering strategic ambitions and alignment of investment to outcomes within the Sustainable Community Strategy
- Assurance that project delivery will take place and not require additional funding
- Provide an audit trail of project activity
- Improve risk and issue management
- Embed programme and project management methodology into all projects
- Improve the success of delivering project outcomes and realising benefits.
- Streamline processes, ensuring consistency and clarity of expectations
- Ensure documentation and information within it is scaled appropriately to the size and complexity of a project
- Focus on stopping projects at appropriate times.

Gateway Process

PCC Project Gateway Process

Projects must pass all Gateways to proceed to implementation



Portfolio and Project Management – “Before”

People

- lack of responsibility/ownership from some project managers
- Lack of compliance with the programme management system
- Absence of budget approvals

Processes

- Multiple documents containing project data
- Requirement for double data entry by Programme Office
- Absence of “live” data with delays in data entry
- Increased risk of inaccurate and old data
- Not all projects captured – missing information
- Audit trail was often complicated/difficult to understand
- Significant proportion of time spent on compilation of project reports

Technologies

- Limited project register via intranet, with restricted search facility

Portfolio and Project Management – “Now” new web system “Verto” by TMI Systems

People

- Increased accountability of project managers
- Greater sharing of knowledge

Processes

- Easy to use system - complete programme overview with detailed project information – for all Council projects.
- Access to live information
- All project documentation now on the system
- The new gateway process is built in, with governance rating
- In-built approval system

Technologies

- A new programme management and project register solution developed with Business Partner
- Web-based system enables flexible/agile working and use with trading partners

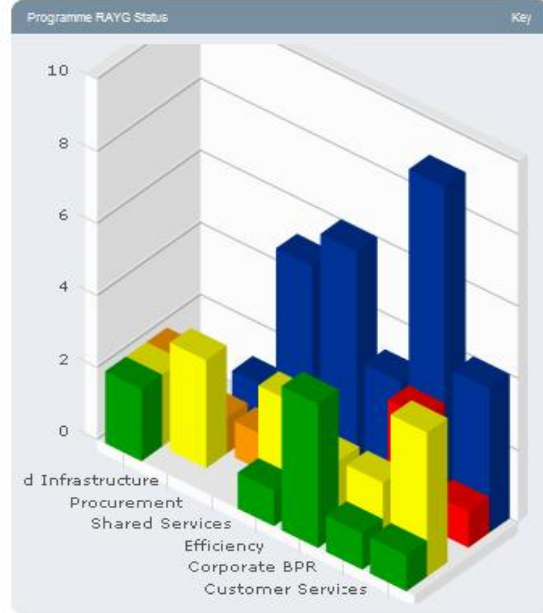
How does the system work?

- Information flow from:
 - Business Cases
 - Projects
 - Monthly Update Reports
 - Benefits Profiles
 - Benefit Reviews
- All feed through to the Overview screen allowing a snap-shot of progress to be viewed
- The permissions assigned to each user determine the view of the system they get
- Screenshots of system operation

Home screen



My Verto | Mandates | Business Cases | Projects | >> | Configure | Messages | Your Profile | Sign Out | Help



My Projects Edit

Status	Code	Name
●	PR000190a	Agile Working - revs and bens
●	PR000190b	Debt Recovery
●	PR000208	Centralisation of Property, Facilities Management, Repairs and Maintenance & Security

Programme Overview Edit | Key | Help

	Project Status					Projects	Extracted	Expected Savings				Achieved Savings
	Red	Orange	Yellow	Green	Blue			Low	Medium	High	Maximum	
Adult Social Care	-	2	2	2	-	6	0	-	354	37	776	0
Customer Services	-	1	3	-	1	5	400	-	162	208	1,309	458
Corporate BPR	-	1	-	-	5	6	0	0	-	307	1,533	123
Efficiency	-	-	3	1	6	10	446	0	1,550	46	2,813	546
Shared Services	-	1	2	4	3	10	1,618	110	639	160	1,975	1,311
Procurement	3	-	2	1	9	15	2,238	50	1,159	142	2,623	1,320
Growth and Infrastructure	1	-	4	1	4	10	627	208	2,944	44	5,335	874
Totals	4	5	16	9	28	62	5,329	368	6,808	943	16,364	4,632

Programme overview screen

Overview ▾

Programmes ▶

Projects ▶

Reports ▶

Messages (17) | Your Profile | Sign Out | Help

Programmes

Filter | Groups | Key | Help

	Project Status					Projects	Extracted	Expected Savings				Achieved Savings
								Low	Medium	High	Maximum	
Adult Social Care	2	-	2	1	2	7	750	-	649	29	1,226	0
Customer Services	-	3	3	4	1	11	1,070	-	280	208	1,506	354
Corporate BPR	-	1	1	-	5	7	1,285	0	-	307	1,533	123
Efficiency	-	1	2	3	9	15	1,711	400	1,670	156	3,963	1,821
Shared Services	-	1	8	1	4	14	1,693	210	642	180	2,180	1,554
Procurement	2	5	1	-	13	21	2,674	50	1,417	143	3,061	1,697
Growth and Infrastructure	1	-	3	3	4	11	1,752	208	3,214	64	5,885	1,388
Totals	5	11	20	12	38	86	10,935	868	7,872	1,087	19,354	6,937

Navigation

Help

- ▶ Project Register Overview
- ▶ Mandates
- ▶ Business Cases
- ▶ Projects
- ▶ Programmes
- ▶ Administration

Project register status



Messages (17) | Your Profile | Sign Out | Help

Overview ▾

Programmes ▶

Projects ▶

Reports ▶

Gateway Process

Filter | Key | Help

Governance	Projects	Gateway			Project Status				
		1	2 & 3	4	2	7	17	56	3
High	85	11	17	57	2	7	17	56	3
Medium	58	2	4	52	1	2	13	21	20
Low	63	8	6	49	3	3	3	39	14
None	41	-	6	35	3	6	5	6	5
Totals	247	21	33	193	9	18	38	122	42

Navigation

Help


- ▶ Business Transformation Overview
- ▶ Mandates
- ▶ Business Cases
- ▶ Projects
- ▶ Programmes
- ▶ Administration

Project status screen


Overview ▶
Programmes ▼
Projects ▶
Reports ▶

Programmes	Projects	Extracted	Expected Savings				Achieved Savings	Groups Help
			Low	Medium	High	Maximum		
Adult Social Care	7	750	-	649	29	1,226	0	Timeline
■ PR000168 Adult Social Care - Overarching Programme								View
■ PR000168a Adult Social Care - Resource Allocation Strategy Re-engineering								View
■ PR000168b Adult Social Care - Residential Care Review (including interim/respice care)								View
■ PR000168c Adult Social Care - Nursing Care								View
■ PR000168d Adult Social Care - Domiciliary Care								View
■ PR000168e Adult Social Care - Agency Staff								View
■ PR000168f Adult Social Care - Market Development								View
Customer Services	11	1,070	-	280	208	1,506	354	Timeline
Corporate BPR	7	1,285	0	-	307	1,533	123	Timeline
Efficiency	15	1,711	400	1,670	156	3,963	1,821	Timeline
Shared Services	14	1,693	210	642	180	2,180	1,554	Timeline
Procurement	21	2,674	50	1,417	143	3,061	1,697	Timeline
Growth and Infrastructure	11	1,752	208	3,214	64	5,885	1,388	Timeline
Totals	86	10,935	888	7,372	1,087	19,354	6,937	

Project Status Help



Your projects screen













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CITY COUNCIL

Overview ▶ Programmes ▶ **Projects** ▼ Reports ▶

Messages (28) | Your Profile | Sign Out | Help

Your Projects

Filter | Add | Key | Help

Status	Code	Name	Role
	PR000540	A1073 Traffic Mitigation Scheme	View
	PR000556	Access & Greenspace Linkage	View
	PR000542	Accessibility in Action	View
	● PR000198	Ad-hoc Business Transformation	View
	● PR000148	Adoption and Fostering	View
	● PR000168e	Adult Social Care - Agency Staff	View
	● PR000168d	Adult Social Care - Domiciliary Care	View
	● PR000168f	Adult Social Care - Market Development	View
	● PR000168c	Adult Social Care - Nursing Care	View
	● PR000168	Adult Social Care - Overarching Programme	View


Search

Project Name Project Code


▶ Search
▶ Clear

Project Status

[Help](#)



◀ Previous 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 Next ▶



Verto
© TMI Systems Ltd.

Phil James
Logged in since: 11:40:00
Your session will timeout in: 00:14:46

Version: 2.1.01

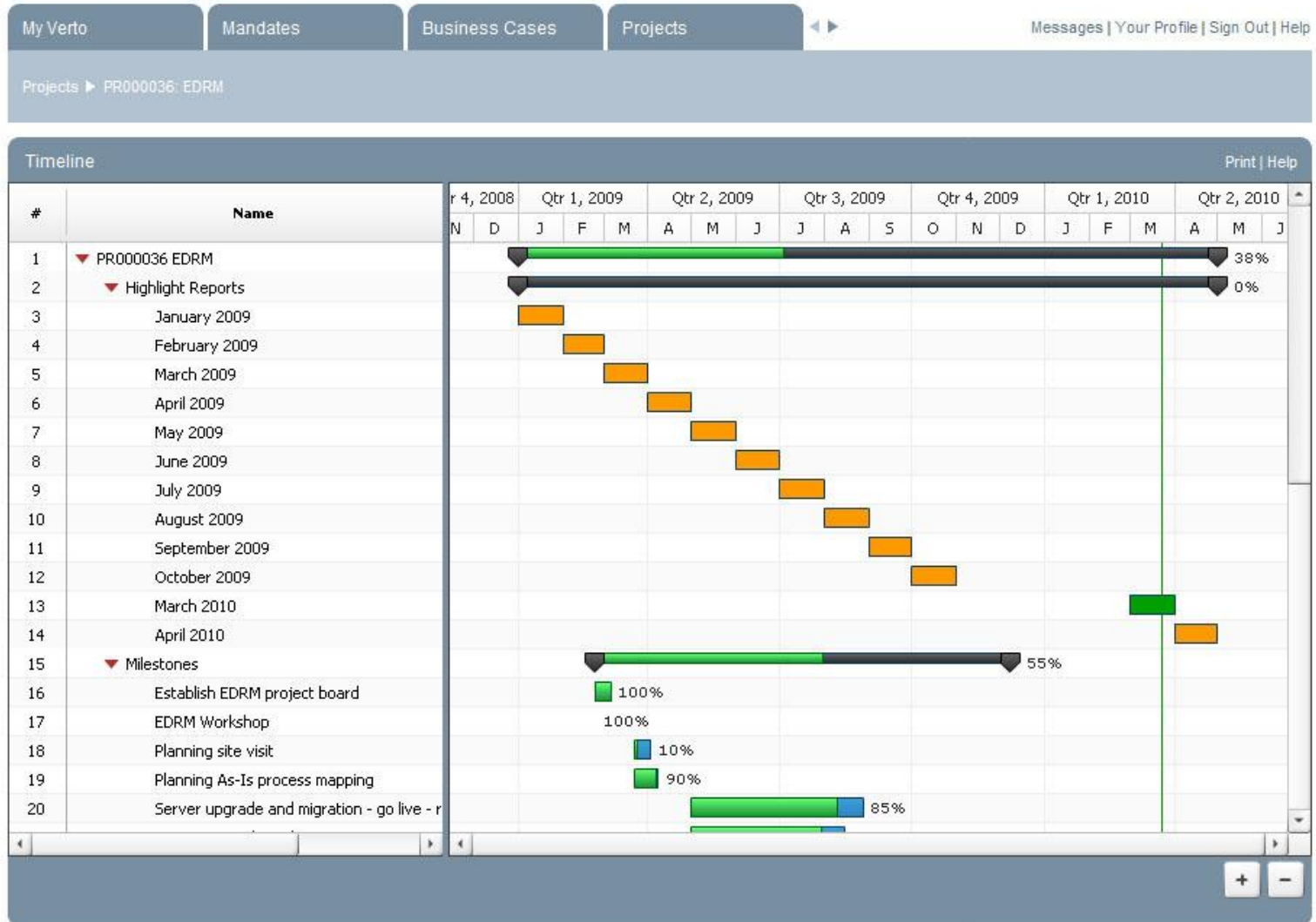
Reports screen

Business Transformation Programme Overview

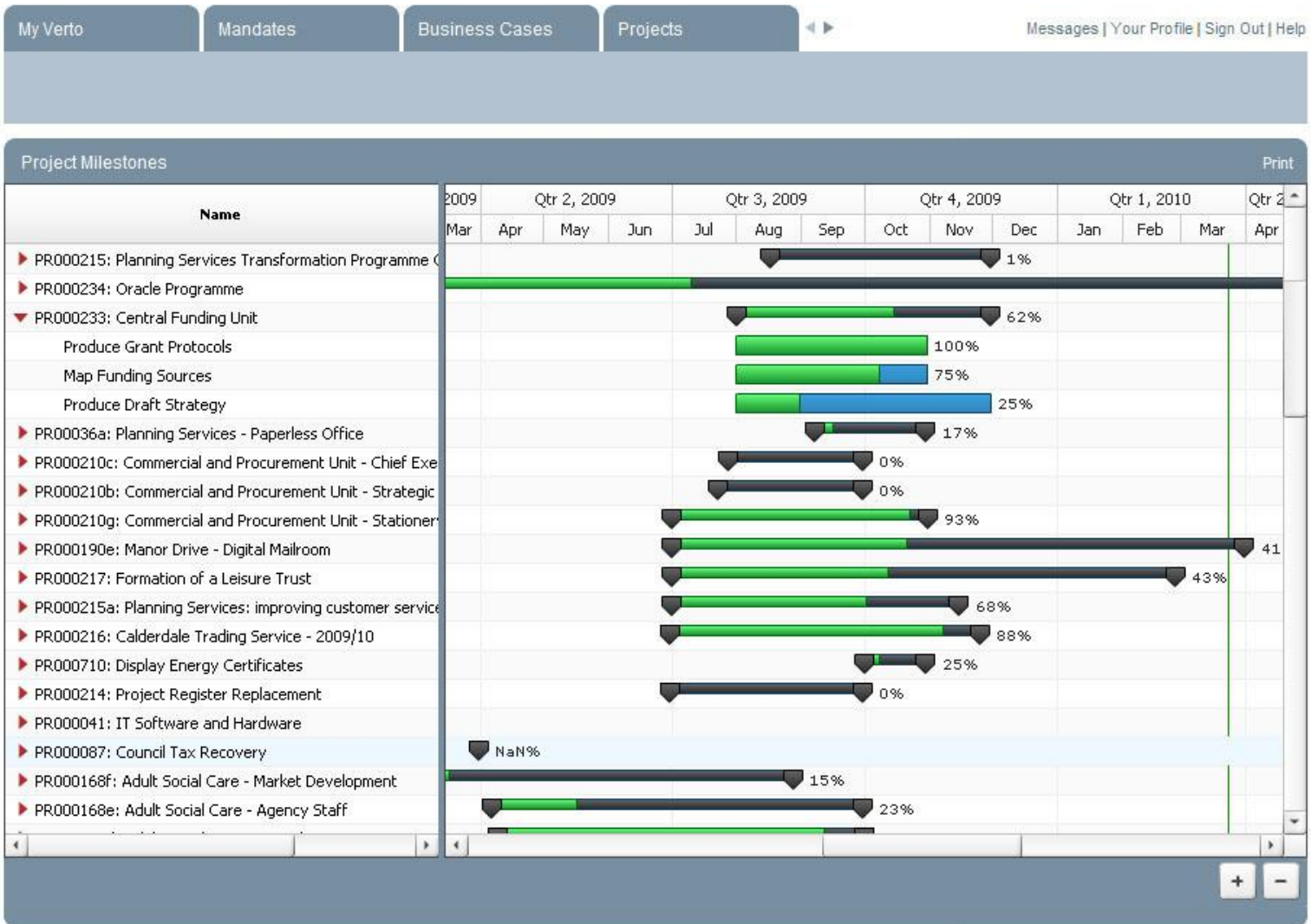
Projects by Programme

Growth and Infrastructure	Procurement	Shared Services	Efficiency	Corporate BPR	Customer Services
City Services JV (PR00019z) On Target	Commercial and Procurement Unit - No Status C... (PR000210h)	Luton Borough Council - Partnership... (PR000150) On Target	Centralisation of Marketing Phase 2 (PR000199) On Target	Planning Services: Section 106 (PR000215b) Experiencing Obstacles	Customer Services - Contact Centre (PR000144k) No Status
Localities (PR000191) On Target	Commercial and Procurement Unit - No Status E... (PR000210f)	ICT Managed Service (PR000145) Experiencing Obstacles	Project Register Replacement (PR000214) On Target	EDRM (PR000036) At Risk	Customer Services Transformation Tr... (PR000144h) On Target
Agile Working - revs and bens (PR000190a) On Target	Commercial and Procurement Unit - C... (PR000210f) Experiencing Obstacles	Website redevelopment programme (PR000196) Experiencing Obstacles	Formation of a Leisure Trust (PR000217) On Target	Scoping of BPR in Children's Servic... (PR000188) Completed	Customer Services - Digital Mallroo... (PR000144j) On Target
Capital Programme (PR000147) Experiencing Obstacles	Calderdale Trading Service 09/10 - ... (PR000216b) Experiencing Obstacles	Manor Drive plc (Single Back Office... (PR000190) Experiencing Obstacles	Centralisation of Property, Facilit... (PR000208) Experiencing Obstacles	AP Process Improvement (PR000166) Completed	Customer Services Transformation Tr... (PR000144d) On Target
Agile Working - EPPS (PR000167) Experiencing Obstacles	Commercial and Procurement Unit - At Risk S... (PR000210e)	E-Payments (PR000171) Experiencing Obstacles	Children's Services Transformation ... (PR000225) Experiencing Obstacles	BPR in Transport & Engineering (PR000176) Completed	Customer Services Transformation Tr... (PR000144e) On Target
Agile Working Overview (PR000224) Experiencing Obstacles	Commercial and Procurement Unit - At Risk C... (PR000210a)	Debt Recovery (PR000190b) Experiencing Obstacles	Library Management System Migration (PR000203) At Risk	BPR Training Programme (PR000189) Completed	Customer Services Transformation Tr... (PR000144b) Experiencing Obstacles
Rationalisation of property (PR000023) Compromised	Commercial and Procurement Unit (PR000210) At Risk	Oracle Programme (PR000234) Experiencing Obstacles	Transport Efficiency phase 2 (PR000126) Completed	EDRM Middleware (PR000213) Completed	Customer Services Transformation Tr... (PR000144c) Experiencing Obstacles
Planning Services Review (PR000128) Completed	Secure Cash Collection and Key Hold... (PR000211) At Risk	Calderdale Trading Service 09/10 - ... (PR000216a) Experiencing Obstacles	Legal Services (PR000172) Completed	Projects In Programme : 7	Customer Services Transformation (PR000144) Experiencing Obstacles
Housing and Neighbourhoods (PR000182) Completed	Telephony phase 2 (PR000124) Compromised	Waste 2020 (PR000183b) At Risk	Supporting People (PR000173) Completed		Planning Services Transformation Pr... (PR000215) Experiencing Obstacles
Co-location of children's Services (PR000152) Completed	Virtualisation (PR000062) Compromised	Calderdale Trading Service - 2009/1... (PR000216) At Risk	Library Services Re-Structure (PR000174) Completed		Customer Services Transformation Tr... (PR000144a) At Risk

Project timeline screen



Project milestones



Risks screen

- Overview ▶
- Programmes ▶
- Projects ▶
- Reports ▶


Projects ▶ PR000003: Reduce Energy Costs

Current Risks Add | Save | All Risks | Help

Non Delivery Edit | Remove | Hide

Active	Yes
Risk Type	Economic/Financial/Market
Description	Risk of non delivery
Mitigating Action	none
Owner(s)	Bill Jones
Likelihood and Impact	

Staff Edit | Remove | Hide

Active	Yes
Risk Type	Organisational/Management/Human Factors
Description	Risk of key staff leaving
Owner(s)	Tom Smith
Likelihood and Impact	

Project Details Help

- ▶ Overview
- ▶ Cashable Benefits (1)
- ▶ Dependent Projects
- ▶ Documents
- ▶ General Information
- ▶ Issues (1)
- ▶ Milestones (4)
- ▶ National Indicators
- ▶ Notes
- ▶ Non Cashable Benefits
- ▶ Project Members
- ▶ Risks (2)
- ▶ Savings
- ▶ Spend
- ▶ Strategic Objectives
- ▶ Timeline

Navigation

- ▶ Benefit Profiles
- ▶ Benefit Reviews
- ▶ Change Requests
- ▶ Update Reports

Verto – next steps

- Develop resource management function including:
 - Log and track hours against milestones
 - View resources at multiple levels
e.g. programme, project, department, individual etc.

Resources by user



Projects Resources Administration Reports Messages (1) | Your Profile | Sign Out | Help

Resources Print | Caption35

Name	Start Date	End Date	Qtr 3, 2008		Qtr 4, 2008			Qtr 1, 2009			Qtr 2, 2009			Qtr 3, 2009			Qtr 4, 2009			Qtr 1, 2010			Qtr 2, 2010		
			A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J
▼ Transport & Engineering																									
Jonathan Lennox	01/07/2009	04/01/2010																							
▼ Operations																									
Barry Fagg	31/08/2009	30/11/2009																							
▼ Strategic Growth and Develo																									
Kieron McQuade	27/04/2009	02/11/2009																							
Adrian Chapman	09/02/2009	30/04/2009																							
▼ Strategic Finance																									
Jo Hall	02/02/2009	31/03/2010																							
Leigh Wright	04/02/2009	30/10/2009																							
Danny Hurst	11/05/2009	31/12/2009																							
Nick Hutchins	09/02/2009	31/03/2009																							
▼ ICT																									
Elaine Alexander	23/03/2009	01/10/2009																							
Scott Morton	01/04/2009	21/08/2009																							
Mark Gregson	01/01/2009	27/02/2009																							
Peter Dickman	01/01/2009	07/09/2009																							
▼ Business Transformation																									
Ross Mardell	31/08/2009	30/09/2009																							
Ian Stockley	01/05/2009	19/02/2010																							
Tim Slorick	02/06/2009	18/09/2009																							

Verto – next steps

- New bid management functionality
 - Manage all council bid applications, grants and awards
 - Create a central repository, documents, best practice, lessons learnt etc.

Verto – next steps

- Verto system available commercially end of 2009 from Peterborough's development partner TMI Systems
- Recently taken on by Cheshire, Rutland, Middlesbrough and Nottinghamshire
- Other agencies include CNC Police; Devon Fire and Rescue Service
- Verto is a web based, hosted system which can typically go live within 1-2 weeks

Collaboration and Information sharing

- Need to share programme experiences and lessons learnt as transformation & change management programmes evolve
- Idea to build a library of business cases to exchange between member agencies
- Prototype website; www.infobank.org.uk



Welcome to Info Bank, a powerful Business Transformation Repository developed for Peterborough City Council that enables users to view and share business cases and projects together.

There are already over 60 downloadable business cases and a forum to support idea creation, discussion and information sharing amongst business transformation teams. Many transformation managers have spoken of the need for an "ideas bank" and user forum to support their transformation activity and this facility is now available. In order to use the forum you must have a valid .gov.uk email address. Please [click here](#) to register.



VIEW PETERBOROUGH CITY COUNCIL CASE STUDIES...



Business Cases



Business Cases provide a detailed record of a Business Transformation project including costs, benefits and ROI.



Forum



The forum allows registered users to post topics, request information and share best practice amongst business transformation teams.



Latest News & Events



Saving the Day

After months of acrimony over budget settlement increases, the Welsh Assembly has given a £60m boost to help councils make efficiency savings

[Home](#)[News & Events](#)[Business Cases](#)[Forum](#)

Business Cases provide a detailed record of a Business Transformation project including costs, benefits and ROI.

Searching Business Cases

The top 10 business cases for benefit realisation are listed below. A keyword search facility is also available, providing results across all available business cases. Simply type the word or phrase into the search box above.

Customer Services Transformation

The Customer Services Transformation Programme will create a new capability to deliver excellent customer service, in line with the Customer Services strategy.

Contributor: Peterborough City Council

Date Added: 25/02/2009 08:34:18

[Download PDF](#)[Contact Contributor](#)[Export](#)

Manor Drive plc (Single Back Office)

The aim of this project is to introduce a business model to the operation of the Resources department. This model will create a different operating environment, moving away from

Latest News & Events



Successful EDRM and Information Management: Developing cost-efficient strategies to improve producti

The information management needs of public sector organisations are complex, time-sensitive, and ever increasing. Improving productivity and opportunities for cost-reduction are critical amidst demands for greater efficiency.

Newcastle-upon-Tyne
30th July 2009

Forum



The forum allows registered users to post topics, request information and share best practice amongst business transformation teams.



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