

Project Maturity Assessment

MMPB

December 2022

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Final

Borough Council of
King's Lynn &
West Norfolk



Introduction

- Methodology to identify all elements of Project and Programme Management and assess how good BCKLWN is....and wants to be.
- Methodology can be assessed externally and by audit.
- Simplified approach being proposed for assessment
- Be true where you are!! * You can be as good as you want to be!!



Criteria Assessment

- **PM Maturity Assessment covers 9 criteria:**

1. Governance & Org. Mgmt.
2. Benefits Realisation
3. Work planning & Scheduling
4. Scope management and change control
5. Risk management
6. Issue management
7. Quality management
8. Comms. & management reporting
9. Cost and financial management

PMO maturity scaling



9

Full maturity /
Formal

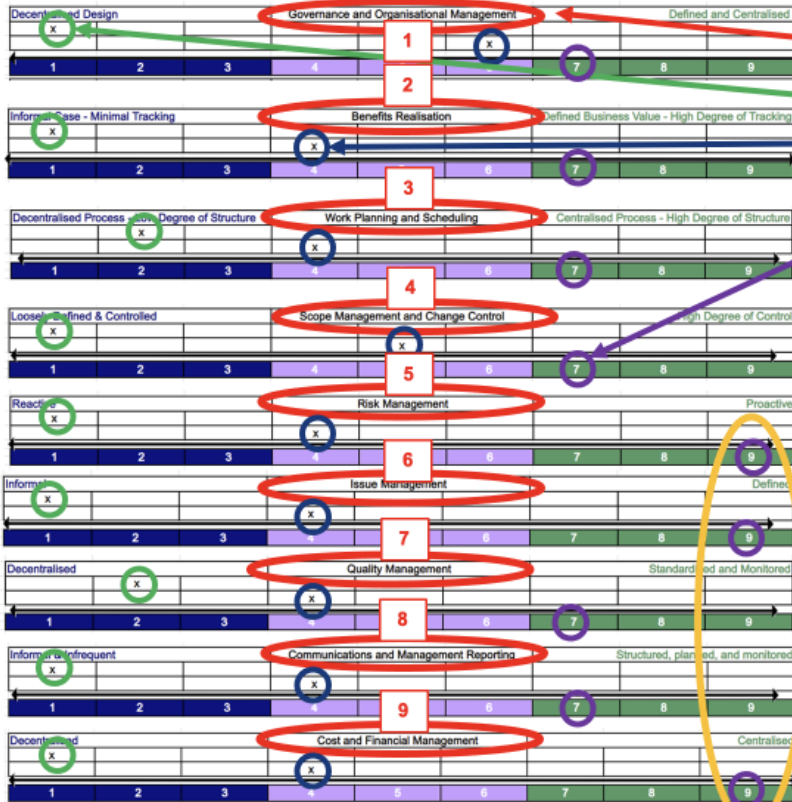
1

Low maturity /
Informal

- * **Max Score 9x9 = 81**
- * **Score @ Oct 22 = ?**
- * **Target score = 69 by?**



Assessment and target setting



Grading Criteria (x9) – 9x9 = 81

Score @ Oct '22 – say, 11

Score By Feb '23 – say 39

Target @ end June '23 - 69



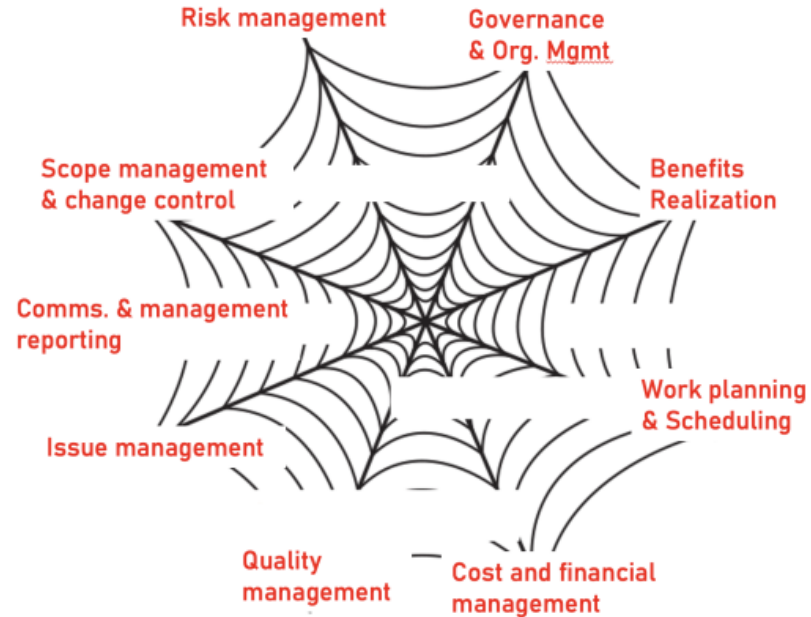
Eq. Scoring snap-shot @ Oct '22

Area	Score		
	Original	Current	Target in 6 months
Governance and Org Management	1	8	7
Benefits Realisation	1	4	7
Work Planning and Scheduling	2	4	7
Scope management and change Control	1	5	7
Risk management	1	4	9
Issue Management	1	4	9
Quality management	2	4	7
Comms and Management Reporting	1	4	7
Cost and Financial Management	1	4	9
Total	11	39	69

You can choose how 'good/perfect' you want to be.

Another organisation example

Simple Reporting



Road Map to improvement

Where are we now?

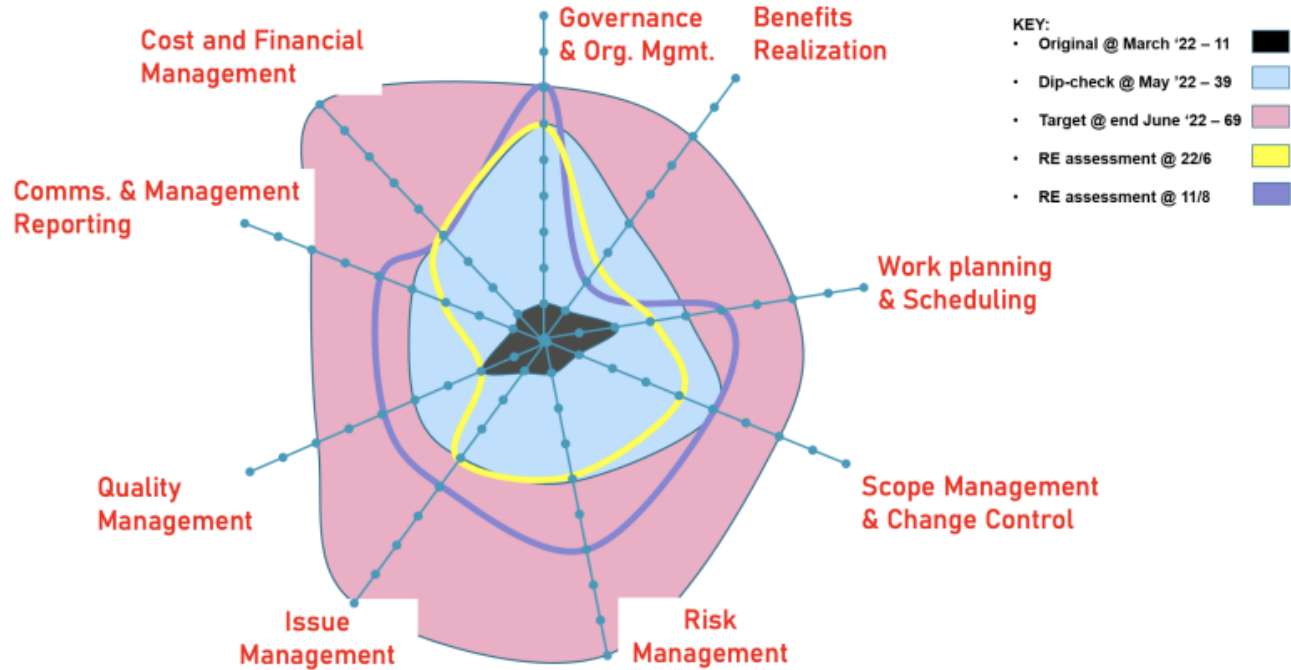


What do we need to do?



1 Governance & Org. Mgmt. 	
<i>Action taken</i>	<ul style="list-style-type: none">• Set up Oct '21 and now reset (June 22).• <u>ToR</u> agreed for Board & workstreams & Cost & Plan Group• Reviewed June '22• Now live (August) - monitor effectiveness.
<i>Blockages</i>	<ul style="list-style-type: none">• Resource shortages• PMO generated organogram with R&Rs clearly defined• PMO not currently at required head-count• Working relationships/integration an issue on a no. of fronts
<i>Resolution</i>	<ul style="list-style-type: none">• Embrace new governance• Review operation in Nov'22• Resolve resource challenges above by Autumn 22.• Use PMG to foster better working together plus workshop

Mapping your progress



Another organisation example



Project Resourcing

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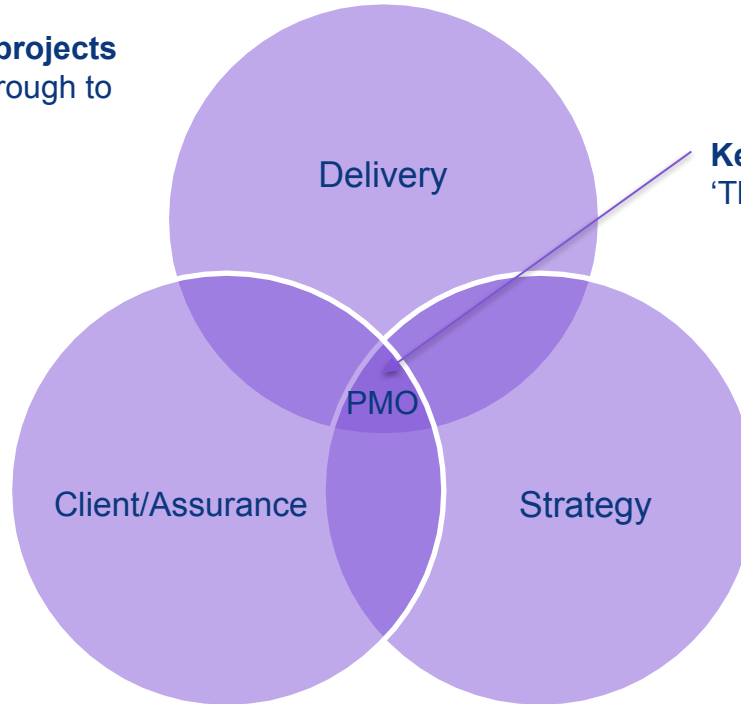
Project and Programmes

- ❖ Too many meetings/boards etc
 - ❖ Mixed approached to delivery
 - ❖ Limited full project skills and experience
 - ❖ Lack of standardization and consistency
 - ❖ Some resourcing capacity/duplication
-
- ✓ Some project elements there but not fully implemented
 - ✓ Willingness to change
 - ✓ Potentially good assurance model to challenge process
 - ✓ Role of Project Accountant can greatly improve project confidence



Proposed Operating Model (WIP in draft)

Delivers (principally) all projects
From client/project brief through to handover/project closure



Key to all things Projects and Programmes
'The engine room'

Programme and Project Development
Chairs the project development group
Develops strategic case/Master planning

Provides Assurance and Client function

Chairs OMPB
Assurance 'Champion'
Chairs Gateway Process
Principal Client (but others can be client)

May involve – consultation on changes to JD's

Next Steps for PM Maturity and Resourcing

- Undertake Project Maturity Assessment alongside Audit Project Review
- Prepare the Improvement Plan,
 - identify Project Champions for each principal project activity, eg risk, PID
- Review final resourcing and training/development needs based on the improved project and programme management.



Project Highlight Reporting

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Issues

- Different reporting to different forums on projects.
- Inconsistent information and not readily available.
- Some 'projects' not reported and 'lost'.
- Current Project Maturity Assessment and early views are that reporting is 'informal and infrequent' and not of a consistent standard.

Proposal is to create standard project reporting which links to other corporate reporting, eg Risk and performance



Proposals

- To introduce standard monthly reporting on ‘recognised’ projects
- To consider a more comprehensive Project Highlight Report (examples as handouts) – Likely for ‘major’ projects.
- Interim arrangements with Town Deal using simplified powerpoint slides (as following slides). Can also be used for ‘other ‘lost’ projects’?

The governance on where these reports go and are considered is being reviewed.



Major Project Reporting

Based around the circulated template for each of the (current) 22 projects:

- Can adapt to current reporting eg Financial from Project Accountant
 - Set around RAG status
 - Identification of approvals process like Gateway Reviews
 - Higher level risks (and issues) identified
 - Allows for decisions to be sought (or for noting)
 - Can be incorporated into information on Mod Gov each month
-
- Project Managers would be responsible for completing and taking through Governance from Project Team/Project Boards/Programme Board (and OMPB). PMs would sign off with Project Sponsor at appropriate stage.



Interim arrangements for TDB and smaller projects


Project Highlight report

Project no.:
Project title here

Completed by: ...[signature here]... [Name], Project Manager

Approved by: ...[signature here]... [Name], Project Sponsor

Period covered: ???

XXX Project		Highlight report	
Key achievements – Month 2022		Project Metrics	
<ul style="list-style-type: none"> A B C 		Spend	G
		Delivery	G
		Risks	G
		Overall status	
		G	
Key Milestones in the next period		Key risks/Key issues/Scope Changes	
<ul style="list-style-type: none"> A B C 		<ol style="list-style-type: none"> A B C 	
Spend – budget variance RAG status <ul style="list-style-type: none"> 2% overspend Less than 5% or any underspend Exactly on budget 		Project milestone Delivery RAG status <ul style="list-style-type: none"> 8 weeks or over 1 week – 7 weeks over 1 week or under 	
Key Risks and Issues RAG status <ul style="list-style-type: none"> Needs immediate attention Needs attention before next project review Can be managed 		Page 1 	

XXX Project

Highlight report

Financial progress as at November 2022

Comms / Engagement update

[Insert snip of a graph(s) here showing budget vs actual vs profile etc, as required]

- A
- B
- C

Key Decisions required at ??? meeting

- A
- B
- C

XXX Project		Highlight report	
Project timeline			
[Gantt chart]			
Page 3 		Borough Council of King's Lynn & West Norfolk 	



Next Steps

- To develop the major project highlight report ready for use in early 2023.
- To take account of comments and integrate into other council processes.
- To develop associated activities alongside as part of the project management suite of documents eg Change Control and Gateway Reviews.

Any questions or suggestions?



END



Major Projects Highlight Reports (1)

- Draft

Major Projects Highlight Report – Draft for consideration and adaptation for BCKLWN

Project Name:		Project Manager:		Project Tier:		Reporting Month:		Capital/ Internal Order Code:		Client Officer:		Lead Designer:	
										Project Sponsor:		Cost Consultant:	
										End User:		Contractor on Site:	

Management Summary

This Report	1. Overall Status	2. Risks	3. Issues	4. Financials	5. Timelines	6. Resources
Lead Report	R					
Lead Report	A					

Project Definition

RBIA Stage: [e.g. RBIA Stage 5: Construction]

Objectives:

Scope:

Approved Documents

	OBG (Risk 5 Approval)	Client Brief (Risk 1 Indicator)	Resource Brief (Risk 1 Indicator)	IPD (Risk 1 Indicator)	IPD Update (Risk 2 Indicator)	IPD Update (Risk 3 Indicator)	IPD Update (Risk 4 Indicator)	Forward Plan	Final IPD (Risk 4 Indicator)
Status:	✓	[Tick or /Crossed]	[Tick or /Crossed]	[Tick or /Crossed]	[Tick or /Crossed]	[Tick or /Crossed]	[Tick or /Crossed]	[Tick or /Crossed]	[Tick or /Crossed]
Date Approved:	[Date]	[Date]	[Date]	[Date]	[Date]	[Date]	[Date]	[Date]	[Date]
Approved by:	[Party or Forum]	[Party or Forum]	[Party or Forum]	[Party or Forum]	[Party or Forum]	[Party or Forum]	[Party or Forum]	[Party or Forum]	[Party or Forum]

Latest approved document [baseline] [document name]

Key (decisions) (updates) required this period

- * ...
- * ...
- * ...
- * ...
- * ...

1. Overall Status (high-level summary)

[Overall Status currently RAG due to]

[Cover the key reasons why the overall status is currently RAG. This is a general summary intended to be more high-level than commentary on individual project indicators. The first three bullet points are extracted for programme and portfolio reporting.]

2.1 Key Risks (all red and increasing amber)

Risk ID	Risk Title	Description	RAG Status	Risk Category	Mitigation	Dated Comments

2.2 Key Issues (all red and increasing amber)

Issue ID	Issue Title	Description	RAG Status	Issue Type	Resolution Plan	Dated Comments

Note: further detail on Project Risks and Issues can be found in the Risks and Issues Log

3. Financial Summary

Total Approved Budget	Total Projected Spend	MAR (over/pend)	Total Actuals to Date	Total Remaining Budget	Total Approved Contingency	Total Remaining Contingency	2132 Projected Spend	2132 Planned Spend to 2399	2132 Actuals to Date

Current Month:

--	--	--	--	--	--	--	--	--	--

Lead Month:

--	--	--	--	--	--	--	--	--	--

3.1 Financial Commentary

[Financials currently RAG due to]

4. Timelines – High Level Milestones

Brief completed High Level Milestone Table.
Note: Post the milestone table as an image, not as a table!

4.1 Timelines Commentary

[Timelines currently RAG due to]

5. Resources Commentary

[Resources currently RAG due to]

1

21/12/2022

Key (Budget Variance RAG Status)

R	5% over/pend
A	Less than 5% over/pend or any under/pend
G	Exactly on budget

Key (Project Milestones RAG Status)

R	8 weeks or over
A	1 week - 7 weeks
G	1 week or under

Key (Risks and Issues RAG Status)

R	RAG Score 12 - 25
A	RAG Score 8 - 10
G	RAG Score 1 - 6

Major Projects Highlight Reports (2)

- Draft

Project Contingency and Change Control					
Change Ref	Description	Cost	Programme	Other	Status

Other Matters	
Item	Comment
General stage progress	
Procurement progress	
Proposed form of contract (e.g. JCT, NEC, Traditional, D&B)	
Proposed route to market (e.g. DPS, HPCS, LCP)	
Legal progress	
Legal instruction form issued? [actual / projected date]	
Surveys	
Statutory updates	
Health and safety	
ICT, FF&E update	
Stakeholder engagement (comms)	
Local schemes / dependencies	

Project Financials [Insert the 'Project Summary' from your Cash Flow including the PM Fees table. Paste as 'Picture'.]

Draft



Project Highlight report

Project no.:

Project title here

Completed by: ...[signature here]... [Name], Project Manager

Approved by: ...[signature here]... [Name], Project Sponsor

Period covered: ???



Key achievements – Month 2022		Project Metrics		Overall status
<ul style="list-style-type: none"> • A • B • C 	Spend	G	G	
	Delivery	G		
	Risks	G		
Key Milestones in the next period		Key risks/Key issues/Scope Changes		
<ul style="list-style-type: none"> • A • B • C 		<ol style="list-style-type: none"> 1. A 2. B 3. C 		

Spend – budget variance RAG status	
R	5% overspend
A	Less than 5% or any underspend
G	Exactly on budget

Project milestone Delivery RAG status	
R	8 weeks or over
A	1 week – 7 weeks over
G	1 week or under

Key Risks and Issues RAG status	
R	Needs immediate attention
A	Needs attention before next project review
G	Can be managed

Financial progress as at November 2022

[Insert snip of a graph(s) here showing budget vs actual vs profile etc, as required]

Comms / Engagement update

- A
- B
- C

Key Decisions required at ??? meeting

- A
- B
- C



Project timeline

[Gantt chart]

